

CLACKAMAS COUNTY SUSTAINABLE TOURISM ASSESSMENT & ACTION PLAN 2019-2022

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ACRONYMS

ADR.....	Average Daily Rate
BLM.....	Bureau of Land Management
CCAA.....	Clackamas County Arts Alliance
CCTCA.....	Clackamas County Tourism & Cultural Affairs
CITES.....	Convention on International Trade in Endangered Species
DSC.....	Destination Stewardship Committee
DMO.....	Destination Management Organization
GSTC.....	Global Sustainable Tourism Council
GSTC-D.....	Global Sustainable Tourism Council Destination Criteria and Indicators
GW.....	The George Washington University
IITS.....	International Institute of Tourism Studies
NGO.....	Non-Governmental Organization
NPS.....	National Park Service
NWTS.....	National Water Trail System
ODOT.....	Oregon Department of Transportation
OMHT.....	Oregon's Mt. Hood Territory
ORLA.....	Oregon Restaurant and Lodging Association
OTTA.....	Oregon Travel and Tourism Alliance
PGE.....	Portland General Electric
RDMO.....	Regional Destination Management Organization
TDC.....	Tourism Development Council
TRT.....	Transient Room Tax
USDA.....	United States Department of Agriculture
USFS.....	United States Forest Service
WES.....	Water Environment Services
WSC.....	Watershed Council

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The views and recommendations expressed within this report are those of the authors and participants of the various focus groups, meetings, and workshops.



EXECUTIVE SUMMARY

Clackamas County, branded as Oregon's Mt. Hood Territory (OMHT), is a region rich in natural beauty, culture, and history. Its majestic peaks, rolling hills, lush forests, peaceful alpine lakes, and rushing rivers make this county an ideal hub for outdoor recreation and adventure. A picturesque countryside dotted with farms and wineries offers stellar culinary delights that include wine, craft beers, and farm-to-table dining. These diverse experiences make OMHT a year-round bucket list destination for many travelers.

Tourism in OMHT has grown steadily over the past eight years, creating jobs and other economic benefits for the community. Between 2010 and 2018, visitor spending increased by 35%¹, which in turn drove increases in investment, earnings (i.e., wages, salaries, earned benefits, and proprietor income), and local tax revenue.

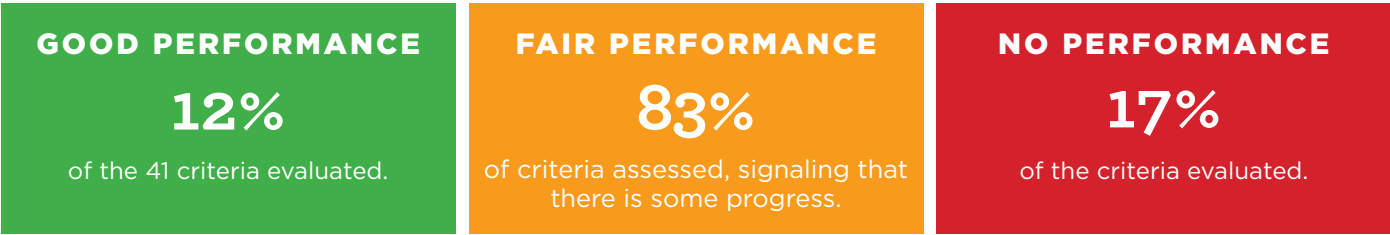
Clackamas County Tourism & Cultural Affairs (CCTCA)—the tourism organization that is playing a central role in marketing and promoting the county—recognizes that the growth in tourism requires improved destination management and monitoring in order to avoid negative impacts such as overcrowding, pollution, and homogenization of the tourism product. While sustainable tourism has always been a core value of CCTCA, the organization prioritized sustainability by adding it to the Clackamas County Tourism Master Plan and including a destination baseline assessment goal in the 2017-2022 Strategic Priorities. The CCTCA envisioned using the baseline assessment as a starting point for work with stakeholders to evaluate and improve the sustainability of the tourism industry.

The CCTCA contracted The George Washington University International Institute of Tourism Studies (GW IITS) to conduct a rapid destination assessment using the internationally recognized Global Sustainable Tourism Council Destination Criteria and Indicators (GSTC-D). This assessment provides tourism officials and community leaders in Clackamas County a comprehensive snapshot of the destination's current level of performance on the GSTC-D. It identifies risks and good practices and collectively established priorities and actions for sustainable tourism.

The 2019 destination assessment process brought together more than 100 key stakeholders from the public sector, industry, and the non-profit (NGO) community to collectively assess OMHT's performance as a tourism destination using criteria that cover the four main pillars of tourism sustainability: destination policy and planning, community involvement and benefits, management of cultural and natural assets, and environmental issues.

¹ Dean Runyan Associates, Oregon Travel Impacts: Statewide Estimates 1992 - 2018p, http://www.deanrunyan.com/doc_library/ORImp.pdf

The destination assessment reveals that Clackamas County is making good progress on many issues related to tourism sustainability. The destination achieved:



The real value of this destination assessment is in using the results to inform policies, priorities, and local action.

The destination assessment process also gathered insights from 1,219 residents of Clackamas County about their perceptions of the impacts of tourism, both positive and negative. Resident support of the tourism industry is critical to ensuring positive visitor experiences and an economically and socially viable industry that generates revenue and is well integrated into the fabric of the community. The findings of the online resident survey indicate that Clackamas County residents seem satisfied with tourism overall, its benefits for the community, the resulting economic contributions, and its impact on local cultural heritage. Key findings are outlined below:



It is particularly noteworthy that residents felt neutral about their level of involvement in and influence on tourism planning and development. Clackamas County can benefit from better informing residents about how they can participate in tourism development and growth. This is one of the action areas prioritized by stakeholders.

Visitor feedback was also integrated into the destination assessment process. The project team analyzed a total of 330 online visitor reviews posted on TripAdvisor for 29 main attractions and sites across all of OMHT’s product pillars: outdoor recreation (mountain), agritourism (rural), and cultural/heritage tourism (urban). The objective of the social media listening pilot project was to better understand how tourism sites and attractions are meeting the needs and expectations of visitors, and to flag emergent issues that destination managers may need to address. Main takeaways from the social media listening are as follows:

- **Outdoor Recreation** received generally positive ratings for amenities, environment, and overall experience; overcrowding at some attractions and sites was an area of concern.
- **Agritourism** received generally positive ratings for amenities, environment, and overall experience; accessibility and parking were flagged as areas of potential concern.
- **Cultural/Heritage** received generally positive ratings for amenities, environment, and overall experience; no areas of concern were flagged.

Stakeholders took seriously the results of the destination assessment, resident survey, and social media listening study. They prioritized five issues to focus on over the next two to three years, and developed an action plan that outlines initial ideas to address these priorities. The priorities outlined below are considered crucial for improving tourism sustainability in the short and medium terms.

Priority 1: Improve tourism awareness and education

Action: Organize a tourism job fair that will help to educate high school and college students about the wide spectrum of career paths in tourism, and connect tourism businesses to a wider pool of prospective employees.

Priority 2: Enhance visitor satisfaction

Action: Implement a quality assurance program that establishes a destination-level visitor satisfaction monitoring system and provides ongoing training opportunities that address quality assurance issues.

Priority 3: Reduce impacts on the visitor and resident experience from overcrowding occurring at some attractions and sites

Action: Create a platform that provides information about the current conditions and status of capacity (e.g., parking) at major attractions, and redirects residents and visitors to lesser visited sites when major attractions are at full capacity.

Priority 4: Promote sustainability standards for tourism enterprises

Action: Tailor the existing Leaders in Sustainability program (managed by the county's Sustainability Program) to more explicitly address sustainability issues associated with tourism enterprises.

Priority 5: Increase low-impact transportation options that reflect clean, efficient, zero-carbon approaches and reduce dependency on single-occupancy vehicles

Action: Contribute to the development of an integrated strategy that builds on existing efforts and initiatives, addresses seasonal peaks and growing traffic congestion in and around key tourism hubs as well as health and sustainability impacts, and enhances the livability of the community.

While CCTCA plays a central role in tourism marketing and destination development, many other groups from local and state government, the private sector, and the NGO community contribute to managing various aspects of tourism. Because no single organization bears sole responsibility for the management of tourism as a whole, it will take a coordinated effort and sharing of responsibilities to tackle the priorities outlined above and embed sustainability into the DNA of OMHT. In this context, it is recommended that the CCTCA help to establish a multi-sector Destination Stewardship Committee (DSC) for OMHT. The DSC will be charged with facilitating the ongoing dialogue and collaboration needed to realize the priority initiatives outlined in the 2019 Clackamas County Sustainable Tourism Assessment and Action Plan. The DSC should be composed of leaders and leading organizations from the public sector, industry, and the NGO community. While the CCTCA will serve as the initial convener, other organizations in the destination should share responsibility for managing the DSC over time. Many destinations that have gone through similar GSTC destination assessments, including Jackson Hole, Wyoming, and Vail, Colorado, have used DSCs to successfully facilitate multi-sector coordination and share responsibility for the management of the destination.

This is the first assessment of its kind for Clackamas County. It is recommended that the destination replicate the assessment process in a few years in order to track changes in performance and resulting impacts occurring over time. Several benefits can accrue from ongoing destination sustainability monitoring:

- **Brand Building:** the GSTC-D standard is internationally recognized and can enhance the OMHT brand.
- **Competitive Advantage:** OMHT is among a distinguished group of more than 30 destinations worldwide that are considered early adopters of the GSTC standard. Other GSTC early adopter destinations like Jackson Hole, Wyoming, and Vail, Colorado, are using sustainability to differentiate themselves in the crowded international marketplace. OMHT can take a similar path. Vail's journey has led it to become the first sustainable mountain resort destination in the world and the first destination in the United States to receive the Certified Sustainable Destination designation from GSTC-Accredited Green Destinations.
- **Collaboration and Partnerships:** work on destination sustainability requires persistent multi-sector dialogue and collaboration which helps to break through the fragmentation among stakeholder groups that is specific to the tourism industry.

This destination assessment and action plan serves as Clackamas County's first major step toward a more sustainable future for tourism. However, sustainability is a journey and cannot be achieved overnight. It will take the dedicated commitment and coordinated efforts of all key stakeholder groups—public sector, industry, NGOs, and the community at large—for sustainability to be realized and maintained for years to come.





INTRODUCTION

CCTCA plays a central role in inspiring more people to visit OMHT, stay longer, and spend more. CCTCA's efforts are improving the economic performance of the tourism sector. Over the past eight years tourism has grown steadily, creating more jobs and generating increased earnings and tax revenue. CCTCA's marketing and destination development initiatives are funded by the County's 6% transient room tax (TRT), which has provided a stable and growing revenue source, allowing CCTCA to do more for tourism generally.

CCTCA has also been supporting a wide range of destination development initiatives that have enhanced visitor experience, including:

- **Diversification** of the tourism product to include urban, rural, and mountain experiences, distributing tourism benefits throughout the county;
- **Investment** of nearly \$500,000 a year in community partnerships, tourism development, and heritage capital improvements projects through its grants programs; and
- **Assistance** to businesses through online promotion, opportunities to participate in destination marketing, and industry specific trainings.

CCTCA contracted the GW IITS to conduct a destination assessment that will measure destination sustainability and make it actionable. Destination sustainability involves balancing the expectations of visitors with the needs of industry, community, and the natural environment. The GSTC-D was used as the yardstick to measure sustainability performance.

The overarching objective of the destination assessment is to assess Clackamas County's current and future capacity to sustain tourism over the long term. The GSTC-D assessment was holistic and participatory, and designed to meet the following main objectives:

1. Assess the current performance of Clackamas County against the internationally recognized GSTC Destination Criteria and Indicators;
2. Establish a common understanding among stakeholders of the risks and opportunities associated with the sustainability of Clackamas County as a tourism destination; and
3. Develop a collective action plan that addresses priority issues.

The GSTC-D (see Annex A) covers the four main categories of destination sustainability:

1. Sustainable destination management and governance
2. Economic benefits to the local host community
3. Protection of cultural heritage, community, and visitor well-being
4. Environment protection and conservation

The destination assessment process also incorporated feedback from visitors and the community at large. This was achieved through an online resident survey that gleaned insights about the community's perceptions of the impacts of tourism, good and bad, and a social media pilot study that analyzed visitor feedback about key OMHT tourism attractions and sites.

This report presents Clackamas County's Sustainable Tourism Assessment and Action Plan 2019-2022



OVERVIEW OF TOURISM IN CLACKAMAS COUNTY

A. Geography and Tourism Statistics

Clackamas County falls within three of seven tourism regions established by Travel Oregon: Willamette Valley, Portland Region, and Mt. Hood/Gorge (see Figure 1). The county covers approximately 1,883 square miles, and has a population of about 408,000.² The county provides a diverse range of tourism attractions and experiences across three CCTCA product pillars: outdoor recreation, agritourism, and cultural heritage.

Figure 1: Map of Tourism Regions of Oregon



Source: Dean Runyan 2017

² https://en.wikipedia.org/wiki/Clackamas_County,_Oregon

Highlights of the positive economic impact of tourism in Clackamas County are captured in the following statistics for 2018, drawn from studies conducted by Dean Runyan and Associates and Smith Travel Research:

- Visitors to OMHT spent \$622 million, a 1.7% increase from 2017.
- Tourism supported 6,530 industry jobs.
- The average daily rate (ADR) at hotels in Clackamas County during fiscal year 2018-19 was \$114.36, a 0.7% increase from the previous fiscal year (Smith Travel Research). Growth has been driven by increases in ADR, since no new lodging properties have been developed in OMHT for several years. The rise of Airbnb and similar online marketplace companies, known as “intermediaries,” has negatively impacted the number of room nights attributed to traditional lodging entities, and some local hosts do not contribute to the TRT (OMHT Business Plan FY 2018-19).
- Tourism generated \$189.3 million in total earnings (wages and salaries earned by employees and proprietors paid by visitors in Clackamas County).
- The TRT—a voter-approved lodging tax paid by visitors who stay overnight within the county at hotels, motels, campgrounds, bed and breakfasts, and short-term vacation rentals—is the primary source of funding for the CCTCA and has experienced a nine-year growth streak; the total amount collected in FY 2018-19 was \$4,712,066—a 1.95% increase over the previous year.

Keeping a pulse on residents’ perceptions of tourism is critical for ensuring long-term support of the TRT. The online resident survey conducted as part of the destination assessment process indicates that residents seem satisfied with tourism overall, its benefits for the community, the resulting economic contributions, and its positive impact on local cultural heritage protection.

B. Destination Management and Governance

Clackamas County has a clear governance system for tourism. CCTCA is the destination marketing organization (DMO) for Clackamas County. CCTCA is organized into four areas of service delivery: leadership/administration; marketing and promotion; destination development; and community and government relations/advocacy. The destination development and community and government relations teams are instrumental in coordinating efforts at a destination level. CCTCA collaborates with 13 communities; numerous city, state, and federal agencies; and a number of associations to coordinate and manage tourism.

Some coordination with the private sector and other key stakeholder groups occurs during planning and implementation of CCTCA’s activities and initiatives, but there is room for improvement. This is especially important in light of the growing number of local DMOs serving specific cities or areas within Clackamas County. All stakeholder agencies should work toward closer alignment of efforts to support the regional tourism goals and strategies established for Clackamas County.

While CCTCA plays a central role in tourism marketing and destination development, many other groups—including local and state governments, the private sector, and the NGO community—all contribute to managing various aspects of tourism. Because no single organization bears sole responsibility for the management of tourism as a whole, CCTCA bears responsibility for facilitating multi-sector coordination and establishing viable mechanisms for sharing responsibility for the management of the destination. This report outlines initial recommendations for the establishment of a multi-sector Destination Stewardship Council, or DSC, that may help to fill critical gaps in shared destination management.

CCTCA is overseen by the Tourism Development Council (TDC), a nine-member board composed of business and community leaders who volunteer their time to represent the tourism industry and guide tourism policies

and priorities. This governance structure ensures that community, public sector, and private sector interests are represented in the DMO.

TDC members are appointed by the Board of County Commissioners to three-year terms. The TDC directs CCTCA's work and the investment of TRT revenue, and the council's efforts are guided by the Tourism Master Plan and five-year Strategic Plan. A memorandum of understanding between the County Commission and the TDC clarifies the group's roles and responsibilities.

CCTCA's accomplishments are published annually in a business plan. The most recent business plan published is for fiscal year 2018–2019. Following are some of the most recent achievements stemming from fiscal year 2017–2018:

- Creation of a new website for MtHoodTerritory.com
- Development of the “Species” advertising campaign
- Execution of an integrated heritage-focused promotion of the 175th Commemoration of the Oregon Trail
- Completion of a comprehensive Water Tourism Strategic Plan
- Development of the OMHT Tap Trail and Wine Trail as part of the Explorer Trails theme
- Implementation of the first-ever media/storytelling training for agritourism partners
- Administration of a \$260,000 grant for visitor-related projects and events
- Creation of the Trailhead Ambassador Program through partnerships with the Mt. Hood-Gorge Region and the U.S. Forest Service (USFS)
- Award of a “bronze” level recognition from the League of American Cyclists, as cycling continues to be an important priority in tourism efforts
- Clackamas River Tourism Studio

Tourism priority highlights for FY 2018–2019 include:

- Creating and implementing a sustainable tourism strategic plan to ensure sustainability values are incorporated and embraced by all tourism stakeholders
- Working with community stakeholders to implement recommendations from the Water Tourism Strategic Plan by incentivising investment through the grant program
- Leveraging the Oregon Trail 175th Commemoration into long-term theme-based experiences that showcase the heritage and culture of Clackamas County
- Enhancing visitor experience on trails by promoting meaningful, safe, and sustainable trail use
- Building capacity among tourism partners for web technology, social media management, storytelling, and presentation skills
- Providing opportunities for external partner trainings such as the Oregon Restaurant and Lodging Association Guest Service Gold
- Engaging with the redevelopment of Summit Ski Area and the surrounding area at Government Camp

C. Residents' Perceptions of Tourism

Local residents play a key role in the tourism ecosystem of every destination. Resident support of the tourism industry is critical to ensuring positive visitor experiences and an economically and socially viable sector that generates revenue and is well integrated into the fabric of the community. The GSTC-D addresses this issue by assessing whether the “aspirations, concerns, and satisfaction with destination management are regularly monitored, recorded and publicly reported in a timely manner.”

As part of the destination assessment process, the GW team conducted an online resident survey designed to capture insights about resident attitudes toward tourism. The survey questions probed resident satisfaction in three areas: satisfaction with tourism in Clackamas County, the benefits of tourism to the community, and the benefits of tourism to the residents themselves. The survey ran from December 31, 2018, to February 13, 2019, and collected 1,219 responses with a 97% completion rate.

The typical respondent was likely to be female, between the ages of 30 and 64, a full-time resident for more than 10 years, and employed or retired. The majority of respondents (57.15%) were employed or self-employed full time, which meant they were working 40 or more hours per week. Retirees comprised the second-largest group of respondents (22.78%), followed by part-time workers employed for less than 39 hours per week (12.75%).

The findings indicate that Clackamas County residents seem satisfied with tourism overall, its benefits for the community, the resulting economic contributions, and its impact on local cultural heritage. Key findings are outlined below:

- 60% of respondents stated that they are either satisfied or very satisfied with tourism in the area.
- 85% of respondents believe that tourism is improving the economy.
- 60% of respondents said that tourism is improving cultural heritage in the area.
- 40% of respondents felt that tourism is helping to maintain the environment, while 29% felt that tourism leads to environmental damage.

Residents felt neutral about their level of involvement in and influence on tourism planning and development. Clackamas County can benefit from better informing residents about how they can participate in tourism development and growth. This is one of the action areas prioritized by stakeholders.

See the separate report, “What Locals are Saying about Tourism in Clackamas County: Results of 2019 Resident Survey” for full results of the resident survey.

D. Tourism Products & Attractions

OMHT's rich cultural history, diverse natural heritage, and year-round attractions have positioned it as a popular destination within Oregon and the Pacific Northwest. "Any time of the year, everywhere you look, Clackamas County never ceases to amaze. Rich in history, food straight from the farm, and recreational possibilities, each day offers a new experience, whether you're outdoors or indoors."³ The CCTCA has three main product pillars: outdoor recreation, agritourism, and cultural heritage.

To better understand OMHT visitor perceptions about attractions and sites where memories are being created, the GW team conducted an analysis of online visitor reviews posted on TripAdvisor, the travel industry's largest website. The GW team, in collaboration with CCTCA, selected a representative sample of 29 attractions across the county's three tourism pillars (see Table 1). To ensure relevance, all selected attractions had to meet the following criteria:

- 1. Geographic relevance:** All selected attractions are located (at least partially) within Clackamas County.
- 2. Review volume:** Outdoor recreation and cultural/heritage attractions have at least 25 reviews, and agritourism attractions have at least 20 reviews.
- 3. Representative variety:** TripAdvisor lists far more outdoor attractions than cultural/heritage and agritourism attractions. To ensure that all three pillars were equally represented and to avoid skewing the results, the team included reviews from Mt. Hood National Forest and Mt. Hood itself but excluded reviews for four eligible outdoor sites within Mt. Hood National Forest: Salmon River Trail, Trillium Lake, Mirror Lake Trail, and Summit Ski Area.

As shown in Table 2, attraction reviews were analyzed according to three themes: amenities, environment, and experience.

Table 1: Attractions Analyzed in Clackamas County, by Pillar

OUTDOOR RECREATION	AGRITOURISM	CULTURAL/HERITAGE
<ul style="list-style-type: none"> • Bagby Hot Springs • George Rogers Park • Jonsrud Viewpoint • Milo McIver State Park • Mount Talbert Nature Park • Mt. Hood • Mt. Hood National Forest • Mt. Hood Ski Bowl • Timberline Lodge Ski Area • Tryon Creek Natural Area • Wildwood Recreation Site • Willamette Falls 	<ul style="list-style-type: none"> • Alpacas at Marquam Hill Ranch • Lake Oswego Farmers Market • Milwaukie Farmers Market • Oregon City Farmers Market • Oswego Hills Winery • St. Josef's Winery • Swan Island Dahlias • Wooden Shoe Tulip Farm 	<ul style="list-style-type: none"> • Bob's Red Mill Tour • End of the Oregon Trail Interpretive Center • McLoughlin House • Mt. Hood Cultural Center and Museum • Museum of the Oregon Territory • Oregon City Municipal Elevator • Timberline Lodge • Willamette Shore Trolley • World of Speed

³ <https://www.mthoodterritory.com/>

Table 2: Categories and Themes of Attractions Analyzed in Clackamas County, by Pillar

	OUTDOOR RECREATION	AGRITOURISM	CULTURAL/HERITAGE
AMENITIES	<ul style="list-style-type: none"> • Access/Infrastructure • Camping • Facilities • Food & Beverage • Hotels/Lodging • Information/Interpretation • Resources/Maps 	<ul style="list-style-type: none"> • Access/Infrastructure • Additional local goods and services • Facilities • Food & Beverage • Information/Interpretation 	<ul style="list-style-type: none"> • Access/Infrastructure • Facilities • Information/Interpretation
ENVIRONMENT	<ul style="list-style-type: none"> • Health and Safety • Overcrowding/Use Level • Scenery • Trash • Weather/Seasonality • Wildlife 	<ul style="list-style-type: none"> • Health and Safety • Overcrowding/Use Level • Scenery • Trash • Weather/Seasonality 	<ul style="list-style-type: none"> • Health and Safety • Overcrowding/Use Level • Scenery • Weather/Seasonality
EXPERIENCE	<ul style="list-style-type: none"> • Accurate Promotion • Activity Difficulty • Customer Service • Emotion • Interaction with other Customers/Hikers • Value and Price 	<ul style="list-style-type: none"> • Accurate Promotion • Customer Service • Emotion • Interaction with other Customers • Value and Price 	<ul style="list-style-type: none"> • Accurate Promotion • Customer Service • Emotion • Interaction with other Customers • Uniqueness • Value and Price

All OMHT attractions assessed received an overall rating of 4 (Very Good) or above. The average rating of the 29 attractions was 4.58, falling between “Very Good” and “Excellent.”

Key takeaways from outdoor recreation attractions:

- Scenery received overwhelmingly positive reviews
- Infrastructure and seasonality received mixed reviews
- Overcrowding may be an issue

Key takeaways from agritourism attractions:

- Visitors typically had an engaging and worthwhile experience
- Opportunity to buy local goods and services was well received
- Access, infrastructure, and overcrowding received mixed reviews

Key takeaways from Cultural/Heritage Attractions:

- There were no negative reviews for any of the themes
- Emotional response received an overwhelming number of positive reviews
- Visitors were also very satisfied with information/interpretation

Overcrowding at specific attractions and sites was the main issue identified from the social media listening pilot study; stakeholders chose to prioritize this concern for action over the next few years.

See the separate report “What Visitors Are Saying about Tourism Attractions in Clackamas County: Results of 2019 Analysis of Social Media Reviews” for full results of the social media listening study.



ASSESSMENT METHODOLOGY

This Sustainable Tourism Assessment and Action Plan report for Clackamas County was developed based on the information obtained from stakeholder consultations and desktop research findings, with feedback given by GSTC and key destination stakeholders.

The methodology for the Sustainable Tourism Assessment consists of four main phases of work.

The first phase provided a preliminary understanding of the sustainability challenges faced by the destination. Using GSTC-D stakeholder and policy-mapping tools, the GW team worked with the CCTCA team to identify key stakeholders and documents needed to verify application of the GSTC-D indicators.

Since the destination did not have visitor survey data, social media listening was used to gather insights about visitor experiences at key attractions and sites. The GW team analyzed more than 300 online reviews for 29 attractions and sites, using comments posted on TripAdvisor, which is considered the travel industry's largest website. Several in-depth one-on-one interviews with visitors provided additional information and insights into the different aspects of visitor profiles, motivation, and behavior. This approach to desktop research augmented the supply-side, destination-level document review with demand-side insights from visitors.

The team also conducted an online resident survey to capture perceptions and insights regarding tourism's impact on Clackamas County. A total of 1,219 residents completed the survey.

The second phase of work involved stakeholder consultations. A total of 106 local stakeholders and experts helped the GW team validate information gathered during the situation analysis and fill in the information gaps. Over a five-day period (January 27–31, 2019), the team conducted targeted informational interviews, site visits, and focus group meetings with key leaders in the community, including representatives from the public and private sector, the NGO community, and the community at large in order to gather any missing evidence and documentation needed for the GSTC-D indicators.

During phase three, the team presented their initial findings to the Board of County Commissioners. All stakeholders who participated in the on-site focus groups and individual meetings were invited to a workshop during which the results of the destination assessment were validated, issues prioritized, and practical actions

and initiatives identified. Twenty-six participants helped to develop action plans for priority initiatives. The action plans included a list of actions, tasks, timelines, and resources needed to advance progress toward a more sustainable and competitive tourism sector.

Last, in order to obtain broader stakeholder input, the team used phase four to send an online priority-setting survey to all stakeholders unable to attend the validation and action planning workshop. Twenty responses to the survey were received; respondents provided feedback on top priorities and voted for their top project out of the five selected during the validation and action planning workshop.





SUMMARY OF KEY FINDINGS

A. 2019 Sustainable Tourism Assessment Results

To determine the level of compliance with each of the GSTC Destination Criteria and Indicators, the GW team analyzed the results of the assessment according to the evaluation system shown in Table 3. Documentation and evidence of performance were gathered through desktop research and stakeholder consultations.

Table 3: GSTC Performance Levels and Associated Color Scheme

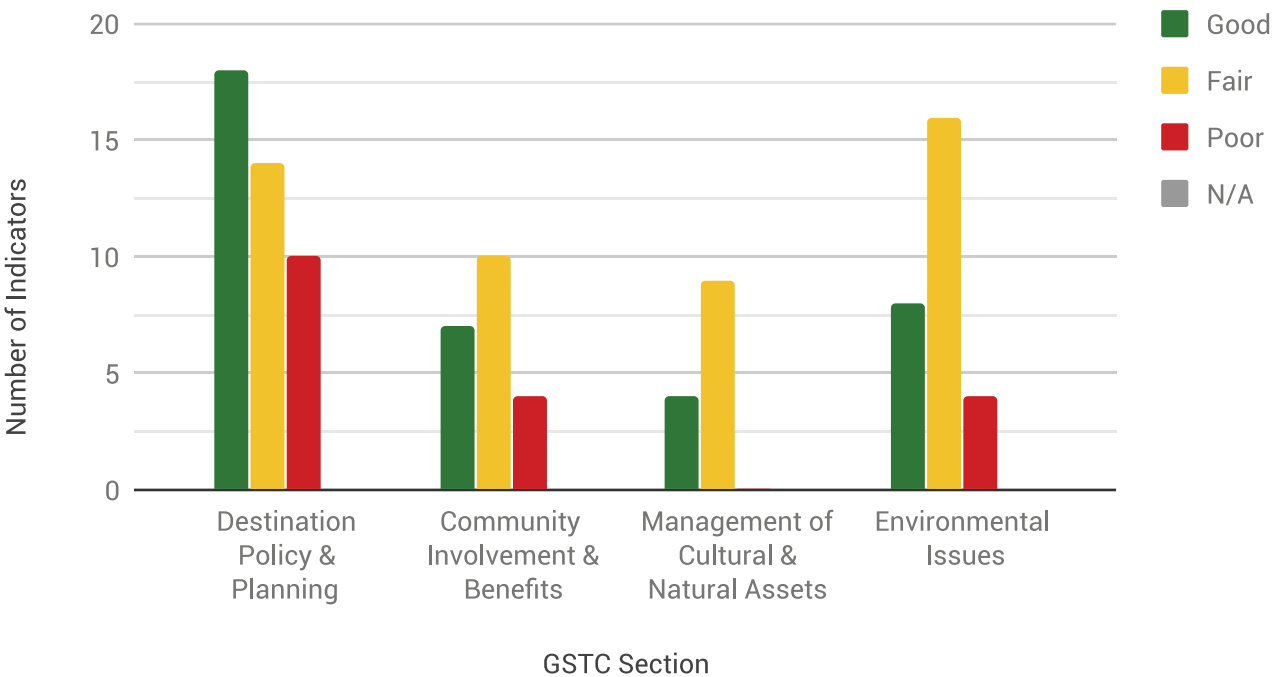
COLOR	Green Score: 2 points (Good Performance)	Yellow Score: 1 point (Middle of the Road)	Red Score: 0 (Areas of Risk)	N/A
DESCRIPTION	Documentation of policy and evidence of implementation exists	Documentation of policy exists or evidence of implementation exists	No documentation of policy or evidence of implementation exists	The indicator is not applicable to the destination

Figure 2 summarizes the total number of indicators ranked by the various levels of performance. Of the 105 indicators analyzed:

- 37 (35%) were rated “green” or good performance
- 49 (47%) were rated “yellow” or middle-of-the-road/fair performance
- 18 (17%) were rated “red” or areas of risk
- One (less than 1%) was rated “N/A”

Figure 2: GSTC Destination Sustainability Performance by Category

GSTC Destination Sustainability Performance by Category



These results indicate that Clackamas County has the best performance in Pillar A, Destination Management. There is considerable room for improvement of performance across all pillars that are dominated by ratings associated to fair performance or areas of risk.



Full results of the analysis of each indicator, including stakeholder and assessor comments for each of the GSTC Destination Criteria and Indicators, can be found in the Completed Assessment Matrix (see Annex C). Figure 3 presents a higher level snapshot of the 2019 sustainable tourism assessment results. It summarizes performance at the criteria level.

Figure 3: Destination Sustainability Snapshot 2019



The results of the assessment indicate that while, overall, Clackamas County is making good progress around sustainability-related issues, the region is facing certain risks that will require attention. The destination achieved:

- **Good performance (green) ratings on 12% of the 41 criteria evaluated;**
- **Fair performance (yellow) ratings on 83% of criteria assessed, signaling that there is considerable room for improvement; and**
- **No performance (red) ratings on 17% of the criteria.**

Based on the snapshot and areas in need of improvement, local stakeholders prioritized issues they believed were crucial to the sustainable development of tourism in Clackamas County. Four of the criteria for which there is no current performance have been prioritized for local action: visitor satisfaction monitoring; sustainability standard for tourism enterprises; tourism awareness and education; and local community opinion of tourism and its impacts. Priority initiatives that address the first three areas of risk are outlined in Action Plan. The resident survey conducted as part of the destination process addresses the latter criteria.

B. Priorities

Table 4 shows the twelve key sustainability topics prioritized by local tourism and community leaders during the Action Plan Development Workshop held in Clackamas County in February 2019.

Participants were split into small groups based on the four GSTC pillars of sustainability and were asked to identify the three highest-priority areas in need of improvement for their respective section. All prioritized topics were rated red or yellow and are critical for the sustainability of the destination in the short and medium term. The corresponding GSTC-D Criteria for each topic is listed in parentheses after the title.

Table 4: Top 3 Priorities for Each Pillar of Destination Sustainability

Destination Policy and Planning	Community Involvement and Benefits	Management of Cultural and Natural Assets	Environmental Issues
1. Visitor Satisfaction (A10): Monitoring and reporting on visitor satisfaction	1. Economic Monitoring (B1): Monitoring of the direct and indirect economic contribution of tourism to the destination	1. Visitor Management (C2): Visitor management systems for tourism attractions and sites that measure, preserve, protect, and enhance the natural and cultural assets	1. Greenhouse Gas Emissions (D4): Program to measure, monitor, minimize, and publicly report greenhouse gas emissions and system to mitigate emissions
2. Sustainability Standards (A11): Sustainable tourism certification or environmental management system adopted by tourism enterprises	2. Public Participation (B3): Public participation in destination planning and decision-making	2. Cultural Heritage Protection (C4): Laws governing the proper sale, trade, display, or gifting of historical and archaeological artifacts	2. Wastewater (D9): The destination has clear and enforced guidelines in place for the siting, maintenance and testing of discharge from septic tanks and wastewater treatment systems, and ensures wastes are properly treated and reused or released safely with minimal adverse effects to the local population and the environment.
3. Crisis Management (A13): Destination crisis and emergency management plan includes residents, visitors, and enterprises	3. Tourism Awareness & Education (B6): Programs to teach communities about the importance and benefits of sustainable tourism	3. Site Interpretation (C5): Accurate interpretive information provided at natural and cultural sites—culturally appropriate, developed with community collaboration, and communicated in languages pertinent to visitors	3. Low-Impact Transportation (D12): System to increase use of low-impact transportation and make tourism sites more accessible to active transportation

These twelve priority issues are further detailed in Tables 5–8. Each table is organized by sustainability pillar and includes objectives that describe the specific changes envisioned and project ideas that can address issues. Workshop participants voted to prioritize five of these issues for inclusion in the action plan.



Section A: Destination Policy and Planning

Table 5: Destination Policy and Planning Priorities and Project Ideas

Priority Issues by Criteria	Vision for Change	Project Ideas
Visitor Satisfaction (A10)	OMHT is perceived as a year-round 5-star destination	Visitor Satisfaction Monitoring System <ul style="list-style-type: none"> Develop standardized county-wide system for collecting and reporting on visitor satisfaction data Encourage tourism businesses and tourism attraction managers to participate in the program
		Social Media Listening <ul style="list-style-type: none"> Assessment of social media reviews with report out
		Quality Assurance <ul style="list-style-type: none"> Develop a system for responding to findings from visitor monitoring system and social media listening Organize training on specific quality assurance issues identified as areas of concern from the monitoring system
Sustainability Standards (A11)	Tourism providers are county certified as sustainable enterprises	Create sustainability standards program building on existing county program <ul style="list-style-type: none"> Incorporate tourism-appropriate criteria in the existing county sustainability standard Create incentives for partners to participate in the program Advertise businesses that achieve the standard, using a designated logo
Crisis and Emergency Management (A13)	A network to relay information to visitors and residents in crisis and emergency situations	Integrate tourism into the county plan/network, including all stakeholders (i.e., citizen activist groups, NGOs, businesses, friends groups) <ul style="list-style-type: none"> Incorporate the county into statewide emergency communications network Address how to get information to visitors (i.e., create a website to track and disseminate data) Share & promote information resources through OMHT website, social media, and print Ensure correct messaging

Section B: Community Involvement and Benefits

Table 6: Community Involvement and Benefits Priorities and Project Ideas

Priority Issues by Criteria	Vision for Change	Project Ideas
Economic Monitoring (B1)	Collect and share more widely quality data on economic impacts of tourism	Initiate wider, deeper data collection at the county level <ul style="list-style-type: none"> Break data out by demographics Share data widely (i.e., via OMHT website)
Public Participation (B3)	Solicit more community involvement in tourism development	Schedule annual community listening sessions <ul style="list-style-type: none"> Hold throughout the county Local community DMO would lead these sessions
Tourism Awareness and Education (B6)	Clarify the role tourism plays in our economic system, through engagement with schools (K-12 and higher education) and collaboration with public and private sectors	Youth tourism public relations program <ul style="list-style-type: none"> Educate K-12 and community college students about special assets in the community Engage students in developing tourism promotion ideas for the county (e.g., poster contest)
		Treasure hunt <ul style="list-style-type: none"> Collaborate with schools to integrate the treasure hunt as a class project Students “find” and explore tourism spots throughout the county; they would accumulate stamps on a digital “passport” Develop Heritage Trail App for the treasure hunt
		Tourism job fair <ul style="list-style-type: none"> Work with high schools, community college, and tourism businesses to organize a first-ever job fair to be held annually during Tourism Week Potential hosting partner: AntFarm Youth Services
		Linking tourism businesses with education community <ul style="list-style-type: none"> Set up a communication platform for tourism businesses and the education community that ensures ongoing dialogue on workforce development needs and provides the education community with insights need to more proactively help to fill capacity building and professional development needs (i.e., annual forums, internship program, and field trips)
		Local ambassadors program <ul style="list-style-type: none"> Have local residents and businesses use storytelling to share the value of tourism so it is not solely being shared from the DMO level

Section C: Management of Cultural and Natural Assets

Table 7: Management of Cultural and Natural Assets Priorities and Project Ideas

Priority Issues by Criteria	Vision for Change	Project Ideas
Visitor Management (C2)	Promote stewardship through education and involvement to better manage and preserve special places	Signage <ul style="list-style-type: none"> Improve and develop ethical and behavioral management signage, especially on bike and river trails in rural areas
		Stewardship pledge <ul style="list-style-type: none"> Create and integrate a visitor stewardship pledge in marketing and promotional materials Promote sustainable initiatives in vacation destinations (i.e., Government Camp)
Cultural Heritage Protection (C4)	Enhanced protection of cultural heritage assets	<ul style="list-style-type: none"> Improve law enforcement (USFS) Collaborate with local Native American tribes
Site Interpretation (C5)	Create a system to foster connections to cultural, historical, and environmental information that communities are unable to make themselves; develop assets to make that information accessible to all visitors	Cultural heritage advisory group <ul style="list-style-type: none"> Create a standing culture and heritage advisory group that includes under-represented communities and specialized knowledge groups
		Capacity building of frontline staff <ul style="list-style-type: none"> Enhance training opportunities for frontline staff (i.e., guides) including interpretation and/or industry-specific workshops



Section D: Environmental Issues

Table 8: Environmental Issues Priorities and Project Ideas

Priority Issues by Criteria	Vision for Change	Project Ideas
Greenhouse Gas Emissions (D4)	Leadership in clean energy; tourism taking the lead in clean energy promotion and use	Transfer to electric transportation <ul style="list-style-type: none"> Electrify tourism-related transportation (Mt. Hood Express buses, charging stations, etc.)
		Program to develop a “low-carbon supply chain” <ul style="list-style-type: none"> Work with tourism businesses to buy green Food waste reduction and potential energy reduction
		Create multimodal trail network <ul style="list-style-type: none"> Connect and fund multimodal trail network in E. Clackamas Cty (Spring Water, Cazadero, Tickle Creek, etc.)
		Clean energy campaign for tourism businesses
Wastewater (D9)	Use conservation-based approaches to cope with population growth upstream, along with gray infrastructure	Conservation initiative <ul style="list-style-type: none"> Gray-water reuse programs Tourism wastewater reduction incentives
Low-Impact Transportation (D12)	Easy access to low-impact transportation to all destinations within Clackamas County and continual increase in types of low-impact transportation	<ul style="list-style-type: none"> Promote low-impact transportation Promote the Mt. Hood Express and other public transit options with increased transit capacity based on seasonal fluctuation/variation Mt. Hood Express app that shows when main attractions and sites are at capacity, including parking





ACTION PLAN

Stakeholders short-listed five of the twelve issues prioritized as most urgent to address:

1. **Monitor** visitor satisfaction at a destination level
2. **Promote** sustainability standards for tourism enterprises
3. **Improve** tourism awareness and education
4. **Reduce** overcrowding at some key attractions and sites
5. **Increase** low-impact transportation options

Workshop participants developed projects to address these top priorities. These projects serve as the **starting point** of a destination-level action plan for addressing the top-priority issues.

While CCTCA will help to convene stakeholders to initiate collective action on destination sustainability issues, the responsibility for implementation of the action plan is shared among the many tourism stakeholder groups.

Table 9 outlines the proposed projects and their objectives.

Table 9: Overview of Priority Projects

PROJECT 1: Stage a Tourism Job Fair	PROJECT 2: Implement a Visitor Satisfaction and Quality Assurance Program	PROJECT 3: Improve Visitor Management at Attractions and Sites	PROJECT 4: Establish a Sustainability Standard for Tourism Enterprises	PROJECT 5: Develop an Integrated Strategy for Low-Impact Transportation
<p>Enhance awareness of the importance of tourism and career paths in tourism among youth.</p> <p>Connect tourism businesses to a wider pool of potential employees.</p>	<p>Create a system for local businesses and tourism attraction managers to collect visitor satisfaction insights from guests.</p> <p>Organize capacity building and technical assistance opportunities to help tourism businesses and managers of attractions address service quality issues identified from visitor satisfaction monitoring activities.</p>	<p>Create a platform that streams live information about the current conditions and status of capacity (e.g., parking) at major attractions.</p> <p>Redirect residents and visitors to lesser visited sites when major attractions are at full capacity.</p>	<p>Work with the county's Sustainability Office to tailor their existing Sustainability Leaders program to include tourism businesses.</p> <p>Promote widespread participation of tourism businesses in the tailored Sustainability Leaders program.</p>	<p>Develop and implement an integrated strategy for low-impact transportation that builds on existing efforts and initiatives, addresses seasonal peaks and growing traffic congestion in and around key tourism hubs, and enhances livability of the community.</p>



A. Stage a Tourism Job Fair

The long-term health of Clackamas County tourism depends on cultivating an ever-expanding local talent pool of tourism professionals at all levels who can support this steadily growing industry.

While job fairs have traditionally connected job seekers with employers across the hotel, restaurant, and hospitality sectors, CCTCA and its partners should consider going beyond the objectives of traditional job fairs by including activities that raise awareness of tourism’s role in and contributions to the community and the many career paths available within the industry. Furthermore, the event can offer career and resume counseling, as well as opportunities to meet with college admission and financial aid representatives on-site. Representatives from local colleges and other community stakeholders can provide guidance on overcoming some of the most common barriers to employment. Over time, this initiative will help to establish important linkages between industry, academic institutions, and the wider community.

Objective:

- 1. Educate high school and college students about the wide spectrum of career paths in tourism.

Expected Results:

- Foster broad interest among youth to pursue career paths in tourism.
- Connect tourism businesses to a wider pool of potential employees.

Indicators of Success:

- Increase in volunteer and internship positions
- Number of successful job matches (full- and part-time positions)

Table 10: Action Plan for Staging Tourism Job Fair

Main Activities	Timeline	Needed Resources	Partners
Convene leaders of tourism businesses from key sectors of tourism (i.e., hospitality, heritage, recreation, agritourism, tour operators, restaurants, etc.) to develop the concept of the job fair further.	6-9 months	Organizing committee	Tourism businesses such as museums and other heritage sites, recreation, hospitality, agritourism, tour operators, restaurants, etc. Key schools and the community college
Work with high schools and community college to stage tourism job fair.	12 months	Venue Advertising dollars Materials from partners (collateral) Sponsors for refreshments	Media partner High schools and college Key partners from industry CCTCA

B. Implement a Visitor Satisfaction and Quality Assurance System

At a tourism destination level, quality assurance involves the consistent delivery of products and guest services according to standards which ultimately ensure visitor satisfaction. It includes all tourism-related accommodation, restaurants, tour guides, tour operators, and other tourism-related service providers. Quality assurance is often a big part of a destination's brand promise, and can help it stand out in the competitive marketplace.

Currently, Clackamas County does not have a destination-level quality assurance system. This priority initiative aims to take the initial steps needed to build one. It will start with establishing a system for monitoring visitor satisfaction, and use insights from that system to identify areas of improvement for local tourism businesses. Training will be provided to help businesses implement good practices in the deficient areas.

Over time, in collaboration with the main industry associations, CCTCA could consider establishing basic quality and safety standards for accommodation, activities, services, and transport providers and a third-party verification system. This system would take time to build, but offers an opportunity to point visitors to an official mark of quality.

Objectives:

1. Create a standardized destination-level visitor satisfaction monitoring system in close collaboration with tourism businesses and managers of tourism attractions.
2. Report on visitor satisfaction findings annually.
3. Organize capacity building and technical assistance opportunities to help tourism businesses and managers of tourism attractions address quality assurance issues identified from visitor satisfaction monitoring activities.

Expected Results:

- Measurable increases in online star ratings of tourism businesses in OMHT.
- High partner participation in collection of visitor feedback.
- High percentage of tourism businesses going through quality assurance training and/or obtaining technical assistance to address specific priority issues.
- Identified funding sources for visitor-facing projects and enhancements that help tourism businesses to enhance the quality of service delivery.

Table 11: Action Plan for Implementing Visitor Satisfaction and Quality Assurance System

Main Activities	Timeline	Needed Resources	Partners
Objective 1			
Research other visitor satisfaction monitoring systems/models in order to identify an approach that best fits local needs.	3 months	Funding Ad Staffing From CCTCA	<ul style="list-style-type: none"> • CCTCA Educational Partners
Work with tourism businesses and managers of tourism attractions and sites to determine the most valuable information to gather.	3-6 months	Funding from CCTCA and staffing	<ul style="list-style-type: none"> • Regional DMO • Local DMOs • Visitor centers • Associations • Tourism businesses and attraction managers

Develop and pilot test visitor satisfaction survey and accompanying system.	6-12 months	Technical expertise on survey methodology Funding from CCTCA and staffing	<ul style="list-style-type: none"> Regional DMO Local DMOs Visitor centers Specific tourism businesses and attraction managers
Objective 2			
Utilize GW methodology annually to continue assessing social media reviews with report out	Once a year	Human and financial support from CCTCA	<ul style="list-style-type: none"> CCTCA College students and/or interns
Objective 3			
Organize quality assurance capacity building opportunities to respond to findings from visitor satisfaction monitoring activities	Trainings offered once a year	Expert trainers in areas that need improvement Human and financial support from CCTCA	<ul style="list-style-type: none"> CCTCA Local DMOs Associations, Tourism businesses and managers of attractions and sites



C. Improve Visitor Management at Attractions and Sites

The Social Media Listening

The steady growth of tourism in Clackamas County results in too many visitors and residents at times at some attractions and sites. The results of the social media monitoring project undertaken as part of this destination assessment confirmed that overcrowding negatively impacts the visitor experience in Clackamas County. Many visitors flagged overcrowding as an issue at specific popular places.

Managing these increasing visitor flows is critical to the continued health and growth of local tourism. Following are key recommendations for managing visitor flows:

- Monitor in order to recognize the tipping point: monitor popular attractions and visitor flows; establish carrying capacity limits and identify trends; monitor social media to determine if the attraction or site is on travelers' and residents' hot lists.
- Communicate proactively: encourage visitors and residents to travel smarter by planning ahead and experiencing places in new ways such as visiting during non-peak periods and seeking out hidden gems, in order to protect the places they visit.
- Develop an integrated plan: make tourism a part of comprehensive urban and regional plans in order to address more complex issues such as infrastructure and transportation solutions.
- Remain flexible and adaptable: if redirecting visitors does not relieve overcrowding, consider other strategies such as a timed reservation system or parking fees.

The proposed pilot initiative aims to address overcrowding occurring at some Clackamas County destinations by monitoring parking spaces at popular attractions and sites and redirecting visitors to lesser visited places when popular places are at capacity. This initiative will build on the existing Trailhead Ambassador Program and provides a starting point for managing the increasing visitor flows.

Objectives:

1. Provide up-to-date information to residents and visitors about the current conditions and status of capacity (i.e., parking) at major attractions and sites.
2. Redirect residents and visitors to lesser visited sites when major attractions and sites are at full capacity.
3. Enhance communication efforts at the site-level that convey the importance of maintaining healthy natural ecosystems for the local economy and tourism.

Expected Results:

- Mobile app and website page that provides live information about key tourism attractions and sites. The app will provide the following information: safety, alternate transportation, alternate places to go, information about how to be good stewards, visitor code of conduct.
- Network of webcams (initially using existing webcams that other agencies may have).
- Trailhead Ambassador Program is expanded to address priority visitor management issues .
- Signage is installed at attractions that promote use of the website and mobile app.

Indicators of Success:

- Improved visitor experience as a result of improved management of visitor flows at over crowded attractions and sites.
- Mobile app creation with a significant number of users.

Table 12: Action Plan for Improving Visitor Management at Attractions and Sites

Main Activities	Timeline	Needed Resources	Partners
Research existing data collection and communications infrastructure/ channels, including existing webcams and assets.	3 months	CCTCA manages it Trailhead ambassadors provide human capacity	<ul style="list-style-type: none"> • ODOT • BLM • CCTCA • Sites that will have webcams • USFS • Managers of tourism attractions and sites • Law enforcement
Present plan to key stakeholders.	6 months	Venue	
Secure sponsorships from the business community.	9 months	Sponsorship for cameras (Columbia Bank) CCTCA grants Partner funding and buy-in	
Install webcams and pilot test system.	12 months	Technical assistance	
<p>Launch website and app, promote program, and install signage about website and app at key attractions and sites.</p> <p>Launch communications campaign that conveys the importance of maintaining natural ecosystems for tourism and the local economy.</p>	24 months	Financial support and physical materials for signage Promotional plan	

Further development of this project concept will involve deeper discussions among stakeholders about several important considerations that could present potential roadblocks. These considerations include:

- Recruiting well-qualified staff that can manage this project
- Covering costs associated with designing and hosting the online platform as well as installing and maintaining cameras and other equipment
- Securing adequate partner funding and buy-in
- Addressing liability and privacy concerns, including considering how attraction managers and law enforcement can use information gathered from cameras to ensure safety and compliance

D. Establish a Sustainability Standard for Tourism Enterprises

Tourism businesses play an important role in destination sustainability. Promoting sustainability practices ensures that tourism businesses contribute to maintaining a healthy workforce, community, and environment.

Voluntary certification programs can provide guidelines that help tourism businesses understand their current sustainability and responsibility status and how to improve it. The existing Clackamas County Leaders in Sustainability program offers a great foundation on which to build a standard that is specific to tourism businesses and meets GSTC Criteria and Indicators for hotels and tour operators. This starting point makes this proposed initiative a quick win.

Destinations committed to enhancing their sustainability performance often integrate sustainability standards into their quality assurance system, thereby making it an integral part of their brand promise to visitors. New Zealand's Qualmark is a good example of this. In time, Clackamas County could consider a similar trajectory.

Objectives:

1. Establish county sustainability standards for tourism businesses.
2. Analyze existing sustainability programs, including but not limited to the Clackamas County Leaders in Sustainability program and GSTC-D Criteria and Indicators for hotels and tour operators, to determine lessons learned from these voluntary good operating practices programs.
3. Develop a standard and program that builds on what exists in Clackamas County.
4. Monitor impacts of the voluntary sustainable tourism enterprise program, and communicate on an ongoing basis the importance of maintaining healthy communities and natural ecosystems.

Expected Results:

- Industry-endorsed sustainability standard for tourism businesses.
- Growing number of tourism businesses are adopting the sustainability standard and seeking certification.

Indicators of Success:

- Increase in the number of businesses signed up to participate in the program.
- Increase in the use of tourism good practices.
- Increase in the number of businesses that are enacting sustainable operating practices.

Table 13: Action Plan for Establishing a Sustainability Standard for Tourism Enterprises

Main Activities	Timeline	Needed Resources	Partners
Create a Steering Committee/Board.	3-6 months	Human	<ul style="list-style-type: none">• Business owners• CCTCA• Clackamas County sustainability team• Accommodation providers• Educational institutions• Restaurants• Attractions and other tourism businesses
Research existing standards and voluntary good practices programs.			
Define a standard and pilot test.	6-12 months		
Widespread rollout of standard among tourism businesses.	12-18 months		
Ongoing promotion of the good practices program, and the importance of maintaining healthy communities and natural ecosystems.	12 months and beyond		

E. Develop an Integrated Strategy for Low-Impact Transportation

This project concept will need further development by a wider group of stakeholders that are actively working on key aspects of transportation options. The ideas captured here represent a starting point for addressing this complex issue, which is being partially addressed by many actors and existing efforts.

Objectives:

1. Develop and implement an integrated strategy for low-impact transportation that builds on existing efforts and initiatives, and addresses seasonal peaks and growing traffic congestion in key tourism hubs.
2. Create rideshare and other low-impact transportation opportunities.
3. Increase access options to all destinations within OMHT.
4. Promote low-impact transportation.

Expected Results:

- Public-private partnership success in transportation.
- Increased enjoyment of Clackamas County destinations.
- Increased economic benefits.
- Increased livability and opening up of local transportation routes.

Indicators of Success:

- Increase in the number of shared transportation options.
- Increase in the use of public and shared transportation options.
- Increase the use of electric vehicles or low carbon fuels.
- Less traffic congestion in heavily transited areas.

Table 14: Action Plan for Developing an Integrated Strategy for Low-Impact Transportation

Main Activities	Timeline	Needed Resources	Partners
Identify and convene partners for concept planning.	3 months	Human Financial – sponsors and grants	<ul style="list-style-type: none"> • ODOT • FORTH • PGE • Local employers and businesses • Private transit services • Tourism stakeholders including managers of attractions • Partners in the bike/walk space • State Parks • Federal partners (BLM, USFS) • County Parks • Mt. Hood Express
Build on existing and create new rideshare opportunities <ul style="list-style-type: none"> • Rideshare apps • Car-to-go/Zipcar • Electric rideshare • Electrify America • Tram/gondola from summit to Timberline Lodge 	3-6 months and beyond depending on the complexity of low-impact transportation type		
Create incentives to participate in low-impact transportation.	3-6 months		
Secure funding for initiatives. Coordinate efforts closely with the county's Office of Sustainability in order to identify grant programs for tourism businesses.	9 months		
Promote low-impact transportation options.	Immediately		





CATALYZING MULTI-SECTOR LOCAL ACTION

The establishment of a multi-sector Destination Stewardship Council, or DSC, that is focused on further developing the priority initiatives and guiding their implementation could provide a structured path for sharing responsibility for destination sustainability in Clackamas County. The overarching purpose of the DSC will be to facilitate the ongoing dialogue and collaboration needed for shared management of the destination.

The DSC should be composed of leaders and leading organizations from the public sector, industry, local DMOs, and the NGO community. While the CCTCA will serve as the initial convener, other organizations in the destination should share responsibility for managing the DSC over time. Many destinations that have gone through similar GSTC destination assessments, including Jackson Hole, Wyoming, and Vail, Colorado, have used DSCs to successfully facilitate multi-sector coordination and share responsibility for the management of the destination.

This is the first assessment of its kind for Clackamas County. GW recommends that the DSC replicate the assessment process in 2 to 3 years in order to track changes in performance and resulting impacts. Ongoing destination sustainability monitoring can yield several benefits:

- **Brand Building:** the GSTC-D standard is internationally recognized and can enhance the OMHT brand.
- **Competitive Advantage:** HT is among a distinguished group of more than 30 destinations worldwide that are considered early adopters of the GSTC standard. Other GSTC early adopter destinations like Jackson Hole, Wyoming, and Vail, Colorado, are using sustainability to differentiate themselves in the crowded international marketplace. OMHT can take a similar path.
- **Collaboration and Partnerships:** work on destination sustainability requires persistent multi-sector dialogue and collaboration, which helps to unify the fragmented stakeholder groups that are common in the tourism sector.

Sustainability is a journey and cannot be achieved overnight. Vail, Colorado, is an exemplary destination that can serve as inspiration for Clackamas County. Vail has become the first sustainable mountain resort destination in the world and the first destination in the United States to receive the Certified Sustainable Destination designation from GSTC-accredited Green Destinations. While Vail's journey culminated with an international certification, many other destinations have made important commitments to sustainability without pursuing certification. About 30 destinations, including Jackson Hole, Wyoming, have used the GSTC destination assessment process to understand their current performance on sustainability and are actively working to improve it without seeking certification.

The Vail Sustainable Destination Project began when the Environment Committee of the 2015 FIS Alpine World Ski Championships was tasked to deliver an innovative legacy project. The stakeholders set a bold goal—to be recognized globally as a leading sustainable destination.

Vail's initial steps consisted of several initiatives similar to those prioritized by Clackamas County as a result of this 2019 destination assessment. These key elements are outlined below:

- 1. Vail developed a destination standard, called Mountain IDEAL, that is aligned with the global GSTC standard.** The destination then carried out a baseline destination assessment using its new destination standard as the guiding framework. Tourism stakeholders also developed an action agenda designed to improve destination sustainability and prepare the destination for international certification over an 18- to 24-month period.

Clackamas County has undergone a destination assessment using the GSTC-D standard. This report presents the results of the baseline destination assessment and an action plan for addressing issues prioritized by stakeholders.

- 2. Vail developed a GSTC-recognized destination-level sustainability standard and certification program for tourism enterprises.** To date, the Actively Green sustainable business training and certification program has certified more than 100 businesses and provided training to more than 60% of businesses in Vail. This program is coordinated by Walking Mountains Science Center, a local NGO that has played a critical role in Vail's journey.

The Actively Green program supports the larger destination certification project and provides local businesses and employees avenues to participate in making Vail a sustainable destination.

One of the initiatives that Clackamas County stakeholders prioritized is the launch of a voluntary sustainability certification program for tourism businesses. This proposed initiative is considered a quick win since the county has an existing Sustainability Leaders program that can be easily tailored to meet the needs of tourism businesses.

- 3. Vail established two key destination coordination and management mechanisms:**
 - A. A Destination Stewardship Council that includes stakeholders from the public sector, industry, and the NGO community. The DSC helps to secure broad participation and buy-in from tourism and community leaders.
 - B. An Executive Committee including the three major destination management stakeholder groups—Town of Vail, U.S. Forest Service, and executives of the major privately held resorts.

These groups oversee Vail's destination-level efforts to improve its sustainability performance and maintain its Mountain IDEAL standard. They also serve as the main stewards of Vail's tourism enterprise and destination standards and all efforts aimed to promote their adoption.

The recommended DSC described in this section of the report will function much like to Vail's DSC and Executive Committee. Many of the other destinations that have conducted GSTC-D assessments have established DSCs to guide collective actions around priorities identified in the destination assessment.



CONCLUSION

The Clackamas County Sustainable Tourism Assessment and Action Plan 2019–2022 represents the destination’s commitment to moving tourism toward a sustainable future. The assessment results indicate that while Clackamas County is making good progress overall around sustainability-related issues, the region faces certain risks that will require attention.

The real value of this destination assessment is in using its results to inform priorities, policies, and local action. The Action Plan developed by stakeholders outlines agreed-upon priorities and several priority initiatives for the next one to three years. The priorities and projects address many of the areas of risk identified and focus on improving tourism awareness and education, establishing a visitor satisfaction and quality assurance program, reducing overcrowding at some attractions and sites, promoting a sustainability standard for tourism enterprises, and developing an integrated strategy for low-impact transportation.

We encourage the CCTCA to establish a permanent mechanism, such as the proposed DSC, that will foster multi-sector dialogue and local action. While the CCTCA will continue to play a key role in facilitating ongoing dialogue, encouraging collaboration among stakeholders, and leading initiatives that are aligned to their mandate, the DSC will share responsibility for implementing priority initiatives with local DMOs, the public sector, industry, and NGOs. Furthermore, we encourage the DSC to promote priority actions needed to guarantee destination sustainability.

Sustainability is a journey and cannot be achieved overnight. It will take the dedicated commitment and coordinated efforts of all key stakeholder groups—public sector, industry, NGOs, and the community at large—for sustainability to be realized and maintained for years to come.

We applaud Clackamas County for taking this first major step on its path toward a more sustainable future for its tourism sector.

ANNEXES

A. The Global Sustainable Council's Criteria for Destinations (GSTC-D)

B. Summary of Stakeholders Consulted

C. Completed Assessment Matrix

A. The Global Sustainable Tourism Council's Criteria for Destinations (GSTC-D)

Included in this section are the destination criteria and indicators provided by GSTC that were used for the 2019 Sustainable Tourism Assessment of Clackamas County.

Section A: Sustainable Tourism Theme: Destination Policy and Planning		
A.1 Sustainable Tourism Strategy		
The destination has established and is implementing a multi-year destination strategy that is publicly available, is suited to its scale; that considers environmental, economic, social, cultural, quality, health, and safety, and aesthetic issues; and was developed with public participation.	A.1.a	A multi-year tourism plan or strategy that includes a focus on sustainability and sustainable tourism and includes environmental, economic, social, cultural heritage, quality, health and safety issues
	A.1.b	Multi-year tourism plan or strategy that is up-to-date and publicly available
	A.1.c	Multi-year tourism plan or strategy that was developed with public participation
	A.1.d	Political commitment to implement the multi-year tourism plan or strategy and evidence of implementation
A.2 Tourism Organization		
The destination has an effective organization, department, group, or committee responsible for a coordinated approach to sustainable tourism, with involvement by the private sector and public sector. This group is suited to the size and scale of the destination, and has defined responsibilities, oversight, and implementation capability for the management of environmental, economic, social, and cultural issues. This group's activities are appropriately funded.	A.2.a	An organization has responsibility for a coordinated approach to the management of sustainable tourism
	A.2.b	The private sector and public sector are involved in the organization and coordination of tourism
	A.2.c	The tourism organization is suited to the size and scale of the destination
	A.2.d	Individuals within the tourism organization have assigned responsibility for sustainable tourism
	A.2.e	The tourism organization is appropriately funded
A.3: Monitoring		
The destination has a system to monitor, publicly report, and respond to environmental, economic, social, cultural, tourism, and human rights issues. The monitoring system is reviewed and evaluated periodically.	A.3.a	Active monitoring and public reporting of environmental, economic, social, cultural, tourism, and human rights issues
	A.3.b	Monitoring system is reviewed and evaluated periodically
	A.3.c	Tourism impact mitigation procedures funded and active
A.4 Tourism Seasonality Management		
The destination dedicates resources to mitigate seasonal variability of tourism where appropriate, working to balance the needs of the local economy, community, cultures and environment, to identify year-round tourism opportunities.	A.4.a	Specific strategy for marketing off-season events and attracting year-round visitors
A.5 Climate Change Adaptation		
The destination has a system to identify risks and opportunities associated with climate change. This system encourages climate	A.5.a	Current system for climate change adaptation and risk assessment

change adaptation strategies for development, siting, design, and management of facilities. The system contributes to the sustainability and resilience of the destination and to public education on climate for both residents and tourists.	A.5.b	Laws or policies to mitigate climate change and encourage technologies to mitigate climate change
	A.5.c	Program to educate and raise awareness among the public, tourism enterprises, and visitors about climate change
A.6 Inventory of Tourism Assets and Attractions		
The destination has an up-to-date, publicly available inventory and assessment of its tourism assets and attractions, including natural and cultural sites.	A.6.a	Current inventory and classification of tourism assets and attractions including natural and cultural sites
A.7 Planning Regulations		
The destination has planning guidelines, regulations and/or policies that require environmental, economic, and social impact assessment and integrate sustainable land use, design, construction, and demolition. The guidelines, regulations and/or policies are designed to protect natural and cultural resources, were created with local inputs from the public and a thorough review process, are publicly communicated, and are enforced.	A.7.a	Planning or zoning guidelines, regulations and/or policies that protect natural and cultural resources
	A.7.b	Guidelines, regulations, and/or policies that address sustainable land use, design, construction, and demolition
	A.7.c	Planning guidelines, regulations, and/or policies were created with local inputs from the public and a thorough review process
	A.7.d	Planning guidelines, regulations, and/or policies are publicly communicated and are enforced
A.8 Access for All		
Where appropriate, sites and facilities, including those of natural and cultural importance, are accessible to all, including persons with disabilities and others who have specific access requirements. Where such sites and facilities are not immediately accessible, access is afforded through the design and implementation of solutions that take into account both the integrity of the site and such reasonable accommodations for persons with access requirements as can be achieved.	A.8.a	Policies supporting access to tourist sites and facilities, including those of natural and cultural importance, for individuals with disabilities and others who have specific access requirements, where appropriate
	A.8.b	Accessibility solutions are designed to take into account the integrity of the site while making reasonable accommodation for people with disabilities
A.9 Property Acquisitions		
Laws and regulations regarding property acquisitions exist, are enforced, comply with communal and indigenous rights, ensure public consultation, and do not authorize resettlement without prior informed consent and/or reasonable compensation.	A.9.a	Policy or legislation, including enforcement provisions, exist
	A.9.b	Policy or legislation that considers indigenous rights, ensures public consultation and authorizes resettlement only when there is informed consent and / or reasonable compensation
A.10 Visitor Satisfaction		
The destination has a system to monitor and publicly report visitor satisfaction, and, if necessary, to take action to improve visitor satisfaction.	A.10.a	Collection and public reporting of data on visitor satisfaction
	A.10.b	System to take action to improve visitor satisfaction based on monitoring information
A.11 Sustainability Standards		
The destination has a system to promote sustainability standards for enterprises consistent with the GSTC Criteria. The destination makes publicly available a list of	A.11.a	Industry-supported sustainable tourism certification or environmental management system

sustainability certified or verified enterprises.	A.11.b	Sustainable tourism certification or environmental management system recognized by the GSTC
	A.11.c	Monitoring of tourism business participation in tourism certification or environmental management system
	A.11.d	Publicly available list of sustainably certified or verified enterprises
A.12 Safety and Security		
The destination has a system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards.	A.12.a	On-going compulsory inspections of fire, food hygiene, and electricity safety for tourism properties
	A.12.b	Safety precautions such as first aid stations at beaches/tourist attraction sites
	A.12.c	System to prevent and respond to crime
	A.12.d	Taxi licensing system with clear pricing and an organized taxi dispatch system at points of visitor entry
	A.12.e	Public reporting of safety and security
A.13 Crisis and Emergency Management		
The destination has a crisis and emergency response plan that is appropriate to the destination. Key elements are communicated to residents, visitors, and enterprises. The plan establishes procedures and provides resources and training for staff, visitors, and residents, and is updated on a regular basis.	A.13.a	Publicly available crisis and emergency response plan that considers the tourism sector
	A.13.b	Financial and human capital to implement the crisis and emergency response plan
	A.13.c	Crisis and emergency response plan developed with input from the tourism private sector and includes communication procedures for during and after a crisis or emergency
	A.13.d	Crisis and emergency response plan provides resources and training for staff, visitors, and residents
	A.13.e	Crisis and emergency response plan is updated on a regular basis
A.14 Promotion		
Promotion is accurate with regard to the destination and its products, services, and sustainability claims. The promotional messages treat local communities and tourists authentically and respectfully.	A.14.a	Destination promotional messages that represent local communities and visitors authentically and respectfully
	A.14.b	Destination promotional messages that are accurate in their description of products and services

Section B: Community Involvement and Benefits		
B.1 Economic Monitoring		
The direct and indirect economic contribution of tourism to the destination's economy is monitored and publicly reported at least annually. To the extent feasible, this should include visitor expenditure, revenue per available room, employment and investment data.	B.1.a	Regular monitoring and reporting of visitor expenditure data, revenue per available room, employment and investment data
	B.1.b	Regular monitoring and reporting at least annually of direct and indirect contributions of tourism
	B.1.c	Collection and public reporting at least annually of tourism-related employment data, disaggregated by gender and age group
B.2 Local Career Opportunities		

The destination's enterprises provide equal employment, training opportunities, occupational safety, and fair wages for all.	B.2.a	Legislation or policies supporting equal opportunities in employment for all, including women, youth, disabled people, minorities, and other vulnerable populations
	B.2.b	Training programs that provide equal access to all, including women, youth, disabled people, minorities, and other vulnerable populations
	B.2.c	Legislation or policies supporting occupational safety for all
	B.2.d	Legislation or policies supporting fair wages for all, including women, youth, disabled people, minorities, and other vulnerable populations
B.3 Public Participation		
The destination has a system that encourages public participation in destination planning and decision making on an ongoing basis.	B.3.a	System for involving public, private, and community stakeholders in destination management planning and decision making
	B.3.b	Public meeting(s) to discuss destination management issues each year
B.4 Local Community Opinion		
Local communities' aspirations, concerns, and satisfaction with destination management are regularly monitored, recorded and publicly reported in a timely manner.	B.4.a	Regular collection, monitoring, recording, and public reporting of data on resident aspirations, concerns, and satisfaction with destination management
	B.4.b	Collection, monitoring, recording, and public recording of data occurs in a timely manner
B.5 Local Access		
The destination monitors, protects, and when necessary rehabilitates or restores local community access to natural and cultural sites.	B.5.a	Programs to monitor, protect, and rehabilitate or restore public access by locals and domestic visitors to natural and cultural sites
	B.5.b	Monitoring of behaviour and characteristics of local, domestic and foreign visitors to tourist sites and attractions
B.6 Tourism Awareness and Education		
The destination provides regular programs to affected communities to enhance their understanding of the opportunities and challenges of tourism, and the importance of sustainability.	B.6.a	Program to raise awareness of tourism's role and potential contribution held in communities, schools, and higher education institutions
B.7 Preventing Exploitation		
The destination has laws and established practices to prevent commercial, sexual, or any other form of exploitation and harassment of anyone, particularly of children, adolescents, women, and minorities. The laws and established practices are publicly communicated.	B.7.a	Laws and a program to prevent commercial, sexual, or any other form of exploitation, discrimination or harassment of residents or visitors
	B.7.b	Laws and program are publicly communicated
B.8 Support for the Community		
The destination has a system to enable and encourage enterprises, visitors, and the public to contribute to community and sustainability initiatives.	B.8.a	Programs for enterprises, visitors, and the public to contribute donations to community and biodiversity conservation initiatives and/or infrastructure development

B.9 Supporting Local Entrepreneurs and Fair Trade		
The destination has a system that supports local and small and medium-sized enterprises, and promotes and develops local sustainable products and fair trade principles that are based on the area's nature and culture. These may include food and beverages, crafts, performance arts, agricultural products, etc.	B.9.a	Program to support and build capacity of local and small- and medium sized enterprises
	B.9.b	Program encourages enterprises to purchase goods and services locally
	B.9.c	Program to promote and develop local sustainable products based on local nature and culture
	B.9.d	Program to include local artisans, farmers, and suppliers in the tourism value chain

Section C: Management of Cultural and Natural Assets		
C.1 Attraction Protection		
The destination has a policy and system to evaluate, rehabilitate, and conserve natural and cultural sites, including built heritage (historic and archaeological) and rural and urban scenic views.	C.1.a	Management system to protect natural and cultural sites, including built
	C.1.b	Management system to monitor, measure, and mitigate tourism impacts on sites and attractions
C.2 Visitor Management		
The destination has a visitor management system for attraction sites that includes measures to preserve, protect, and enhance natural and cultural assets.	C.2.a	Administrative mechanism responsible for implementing visitor management plans and operations
C.3 Visitor Behavior		
The destination has published and provided guidelines for proper visitor behavior at sensitive sites. Such guidelines are designed to minimize adverse impacts on sensitive sites and strengthen positive visitor behaviors.	C.3.a	Cultural and environmental guidelines for visitor behaviour in sensitive sites
	C.3.b	Code of practice for tour guides and tour operators
C.4 Cultural Heritage Protection		
The destination has laws governing the proper sale, trade, display, or gifting of historical and archaeological artefacts.	C.4.a	Laws or regulations to protect historical and archaeological artefacts including those located under water, and evidence of their enforcement
	C.4.b	Program to protect and celebrate intangible cultural heritage (e.g., includes song, music, drama, skills and crafts)
C.5 Site Interpretation		
Accurate interpretive information is provided at natural and cultural sites. The information is culturally appropriate, developed with community collaboration, and communicated in languages pertinent to visitors.	C.5.a	Interpretive information available to visitors in tourist offices and at natural and cultural sites
	C.5.b	Interpretive information is culturally appropriate
	C.5.c	Interpretive information is developed with community collaboration
	C.5.d	Interpretive information is available in languages pertinent to visitors
	C.5.e	Tour guide training in the use of interpretive information
C.6 Intellectual Property		

The destination has a system to contribute to the protection and preservation of intellectual property rights of communities and individuals.	C.6.a	Laws, regulations or programs to protect intellectual property rights of local individuals and communities
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D: Environmental Issues		
D.1 Environmental Risks		
The destination has identified environmental risks and has a system in place to address them.	D.1.a	Sustainability assessment of the destination within the last five years, identifying environmental risks
	D.1.b	System in place to address identified risks
D.2 Protection of Sensitive Environments		
The destination has a system to monitor the environmental impact of tourism, conserve habitats, species, and ecosystems, and prevent the introduction of invasive species.	D.2.a	Maintained and updated inventory of sensitive and threatened wildlife and habitats
	D.2.b	Management system to monitor impacts and to protect ecosystems, sensitive environments, and species
	D.2.c	System prevents the introduction of invasive species
D.3 Wildlife Protection		
The destination has a system to ensure compliance with local, national, and international laws and standards for the harvest or capture, display, and sale of wildlife (including plants and animals).	D.3.a	Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)
	D.3.b	Regulations and standards for controlling harvesting or capture, display, sale, of plants and animals
D.4 Greenhouse Gas Emissions		
The destination has a system to encourage enterprises to measure, monitor, minimize, publicly report, and mitigate their greenhouse gas emissions from all aspects of their operation (including emissions from service providers).	D.4.a	Program to assist enterprises to measure, monitor, minimize, and publicly report greenhouse gas emissions
	D.4.b	System to assist enterprises to mitigate greenhouse gas emissions
D.5 Energy Conservation		
The destination has a system to encourage enterprises to measure, monitor, reduce, and publicly report energy consumption, and reduce reliance on fossil fuels.	D.5.a	Program to promote energy conservation and measure, monitor, reduce, and publicly report energy consumption
	D.5.b	Policies and incentives to reduce reliance on fossil fuels, improve energy efficiency, and encourage the adoption and use of renewable energy technologies
D.6 Water Management		
The destination has a system to encourage enterprises to measure, monitor, reduce, and publicly report water usage.	D.6.a	Program to assist enterprises to measure, monitor, reduce, and publicly report water usage
D.7 Water Security		
The destination has a system to monitor its water resources to ensure that use by enterprises is compatible with the water requirements of the destination community.	D.7.a	Management system to ensure that water use by enterprises and water requirements of the destination community are balanced and compatible
D.8 Water Quality		
The destination has a system to monitor drinking and recreational water quality using quality standards. The monitoring results are publicly available, and the destination has a	D.8.a	Management system to monitor and publicly report on drinking and recreational water quality
	D.8.b	Monitoring results are publicly available

system to respond in a timely manner to water quality issues.	D.8.c	System to respond in a timely manner to water quality issues
D.9 Wastewater		
The destination has clear and enforced guidelines in place for the siting, maintenance and testing of discharge from septic tanks and wastewater treatment systems, and ensures wastes are properly treated and reused or released safely with minimal adverse effects to the local population and the environment.	D.9.a	Regulations for the siting, maintenance, and testing of discharge from septic tanks and wastewater treatment systems, and evidence of their enforcement
	D.9.b	Regulations to ensure the size and type of waste water treatment is adequate for the location, and evidence of their enforcement
	D.9.c	Program to assist enterprises to effectively treat and reuse wastewater
	D.9.d	Program to ensure proper treatment of wastes and safe reuse or release with minimal adverse effects to local population and environment
D.10 Solid Waste Reduction		
The destination has a system to encourage enterprises to reduce, reuse, and recycle solid waste. Any residual solid waste that is not reused or recycled is disposed of safely and sustainably.	D.10.a	Waste collection system that maintains public records on the amount of waste generated
	D.10.b	Solid waste management plan that is implemented, and has quantitative goals to minimize, and ensure safe sustainable disposal of waste that is not reused or recycled
	D.10.c	Program to assist enterprises to reduce, reuse, and recycle waste
	D.10.d	Program to reduce the use of bottled water by enterprises and visitors
D.11 Light and Noise Pollution		
The destination has guidelines and regulations to minimize light and noise pollution. The destination encourages enterprises to follow these guidelines and regulations.	D.11.a	Guidelines and regulations to minimize noise and light pollution
	D.11.b	Program to encourage enterprises to follow guidelines and regulations to minimize noise and light pollution
D.12 Low-impact Transportation		
The destination has a system to increase the use of low-impact transportation, including public transportation and active transportation (e.g., walking and cycling).	D.12.a	Program to increase the use of low-impact transportation
	D.12.b	Program to make sites of visitor interest more accessible to active transportation (e.g., walking and cycling)

B. Summary of Stakeholders Consulted

The following stakeholders attended the Clackamas County Sustainable Tourism Assessment focus group workshops and interviews during the onsite assessment from January 7-11, 2019 and/or participated in the validation and action planning workshop on March 4, 2019. In total, about 93 stakeholders across 73 different organizations participated in the focus group workshops, 18 participated in individual meetings, and 26 participated in the validation and action planning workshop. Many stakeholders participated in more than one meeting or workshop.

Name	Position	Organization	Focus Group Sandy	Focus Group Red Soils	Focus Group Monarch	Individual Meeting	Action Plan Workshop
Aaron Lierseemann	Development Specialist	CCTCA	✓				
Amanda Lowthian	Regional Coordinator	RDMO Portland	✓				✓
Andrew Grossman	Destination Development Specialist	Travel Oregon		✓			
Annie Bailey Austin	Communications & Public Relations Lead	CCTCA		✓	✓	✓	✓
Asako Yamamuro	Executive Director & Coordinator	Molalla River Watch		✓			
Barb Iverson	Owner / Board Member	Wooden Shoe Tulip Farm / TDC		✓	✓	✓	
Ben Comfort	Sustainability coordinator	Mt. Hood SkiBowl			✓		
Beth Dehn	Coordinator / Commission Staff	Oregon Heritage Commission	✓				
Brent Balog	Community Liaison & Outreach Coordinator	Clackamas Workforce Partnership			✓		
Brent Dahl	Board Member	Friends of Timberline	✓				✓
Brent Dodrill	President	Estacada Area Chamber of Commerce	✓				
Brett Wesson	Sustainability Manager	Timberline Lodge	✓			✓	
Calvin Lesuer	Economic Development & Tourism Coordinator	City of Canby		✓			
Carol Ross	Past President	OTTA	✓				
Carrie Crook	Operations - Clean & Safe and Tourism Program	Downtown Oregon City Association		✓			
Cheryl McGinnis		Clackamas River Basin Council			✓		✓
Chris Storey	Assistant Director	WES Clackamas County				✓	
Christie DeSautis	Former Administrator	City of Molalla		✓			
Christina Richartz	Estacada Community Center	Estacada Community	✓				

		Center					
Dan Chandler	Assistant County Administrator	Clackamas County				✓	
Dan Davis	Outdoor Recreation Planner	BLM	✓				✓
Daniel Gering	Marketing Technologist	CCTCA		✓		✓	
Daniel Stearns		North Willamette Tax Services			✓		
Danielle Cowan	Director	CCTCA			✓	✓	✓
David Harrelson	Tribal Staff	Grand Ronde Tribal Historic Preservation Office				✓	
David Penirlb							✓
David Snider	Economic Development Manager	City of Sandy	✓				✓
Dennis Corwin	President	OTTA	✓				
Eben Polk	Sustainability Supervisor	Clackamas County		✓		✓	✓
Elaine Keavney	Board Member	Trailkeepers of Oregon	✓				
Elizabeth Klein	Council President	City of Molalla		✓			
Eric Underwood		PGE		✓			
Erica Stock	Development Director	Mazamas			✓		
Gail Yazzolino	Executive Director	End of the Oregon Trail Center			✓		
Gordon Root	Principal Developer	Tumwater Vineyard and Tasting Room			✓		
Harry Dalgaard III	Regional Cooperative Tourism Program Manager	Travel Oregon			✓		
Ithaca Janzen	Marketing Assistant	CCTCA	✓			✓	✓
Jamie Stickel	Director	Economic Development Dept. of City of Canby					
Jan Wallinder	Owner	Forest Edge Vineyards			✓		
Janice Nilson	Administrative Analyst	CCTCA		✓			

Jarrold Lyman	Communications Specialist Senior	CCTCA		✓			
Jeannie Pancal	Development Specialist	CCTCA		✓	✓		✓
Jeannine Breshears	Marketing & Programs Manager	CCTCA			✓	✓	
Jeffrey Davies	Manager	Ecotours of Oregon			✓		
Jenna Barganski	Museum Manager	Clackamas County Historical Society	✓				
Jennifer Burns	Heritage Coordinator	Clackamas County Heritage Council		✓			
Jennifer Cameron	Owner	Alpacas at Marquam Hill Ranch			✓		
Jennifer Goldman	Owner	Philip Foster Farm	✓				✓
Jenny Slepain	Sustainability and Management Analyst	City of Lake Oswego		✓			
Jeri McMahan	Grant Program Administrator	Villages of Mt. Hood Admin					
Jim Austin	Community Relations Lead	CCTCA	✓		✓		✓
Jody Carson	Chair / Member	TDC / Willamette Falls Heritage Area Coalition			✓	✓	✓
Joel Swartzmiller	Owner	Oregon River Experiences	✓				
John LaMotte	City Councilor	Lake Oswego			✓		
John Tullis	Director of Public Affairs	Timberline Lodge	✓				✓
Justy Papst	Owner	Justy's Produce and Flowers			✓		
Karen Buehrig	Transportation Planning Supervisor	Clackamas County				✓	
Kathleen Walker		NWTS	✓				
Kathy Thurow	Owner	Drizzlewood Farm			✓		✓
Katie Schoen	Vice President	Lawrence Public Relations	✓				
Ken Humbertson	County Commissioner	Clackamas County				✓	
Kevin Yell	Chair	CCAA		✓			

Laurie Bothwell		Clackamas County Fair			✓		
Linda Neace	City Council	Gladstone City Hall		✓			
Lisa Davidson	Executive Director of Connections with Business and Industry	Clackamas Community College		✓			✓
Liz Harmanon	Executive Director	DOCA		✓			
Lizzie Keenan	Regional Program Specialist	CCTCA	✓	✓	✓		✓
Lloyd Musser	Mt. Hood Museum Curator	Government Camp Marketing Council	✓				
Lori Bell	Economic Development Coordinator	Economic Development Department of Oregon City		✓			
Luke Spencer	Owner	Clackamas River Outfitters			✓		
Mariluz Stearns	Chair	Canby Chamber Tourism Committee			✓		
Marjorie Stewart		US Civil Service	✓				✓
Mark Engler	Recreation Program Manager	USFS		✓			
Mark Ottenad	Public & Government Affairs Director	Wilsonville		✓			
Matt Johnson	Account Executive	BPN				✓	
Matt Lorenzen	Economic Development Manager	Economic Development Department of Estacada		✓			
Matthew Regg	Administrator	Rivers of Life Center		✓			
Michael Karnosh	Tribal Staff	Grand Ronde Ceded Lands Program				✓	
Mike Watters		Friends of McLean Park and House			✓		
Molly Johnson	Marketing Specialist	CCTCA		✓			
Nancy Bush	Director, Disaster Management	Clackamas County				✓	
Nick Olheiser	VP/Commercial Relationship Banking Officer	Columbia Bank		✓			✓

Nunpa	Executive Director	AntFarm	✓				
Patrick Keavney		Trailkeepers of Oregon	✓				
Paul Moredock	Associate Vice President	Clackamas County Community College		✓			
Rachel Drake	Wilderness Trails Lead	USFS		✓			
Rachel LaMedica	Partnership Coordinator	USDA / USFS				✓	
Rhea Ledda	Teacher	Oregon City High School			✓		✓
Rob Campbell	Director	Clackamas Small Business Development Center	✓				
Roger Beebe	Vice Chair	TDC		✓			
Ron Lauzon	Owner	Fly Fishing & Guide Schools of Oregon			✓		
Sam Dicke	Business & Economic Development Manager	Clackamas County		✓			
Sam Drevo	Board Member	TDC					✓
Samara Phelps	Development Lead	CCTCA	✓	✓	✓		✓
Sarah Eckman	Disaster Management	Clackamas County				✓	
Siobhan Taylor	Executive Director	Willamette Falls Heritage Area Coalition			✓		
Stephanie Hern	Coordinator	Happy Valley		✓			
Steve Campbell	Community Relations Director	Happy Valley		✓			
Steve Wise	Executive Director	Sandy River Watershed					✓
Suzanne Carlbery	Member	Christopher Bridge			✓		
Suzi Council	Council Outreach Manager	Clackamas River Basin WSC	✓				
Tanley Spencer	Owner	Clackamas River Outfitters			✓		
Tara Clifford	Office Coordinator	Molalla Chamber of Commerce		✓			
Teresa Christopherson		Mt. Hood Transportation Alliance		✓			

Tori Middelstadt	Regional Coordinator	RDMO Willamette Valley	✓				
Tyler Nizer		Clackamas County Fair			✓		

C. Completed Assessment Matrix

A: Sustainable Tourism Theme: Destination Policy and Planning				
A.1 Sustainable Tourism Strategy - Average Score: 1.4				
The destination has established and is implementing a multi-year destination strategy that is publicly available, is suited to its scale; that considers environmental, economic, social, cultural, quality, health, and safety, and aesthetic issues; and was developed with public participation.	A.1. a	A multi-year tourism plan or strategy that includes a focus on sustainability and sustainable tourism and includes environmental, economic, social, cultural heritage, quality, health and safety issues	1 = document or evidence exists	<p>The Strategic Priorities developed by the Tourism Development Council and approved by the Clackamas Board of County Commissioners encompass clear goals for destination sustainability and sustainable tourism, and addresses environmental, economic, cultural heritage, and social issues (e.g., inclusion, equality and diversity). Quality issues and health and safety issues are not incorporated. However, the Destination Development priorities outlined in the OMHT FY 2018–2019 Business Plan include specific actions that address quality and safety issues on trails. Excerpt from the business plan: “Enhance visitor experience on trails throughout the county by promoting meaningful, safe and sustainable trail use.”</p> <p>Documentation: Clackamas County Tourism and Cultural Affairs Tourism Master Plan and 2017–2022 Strategic Priorities: https://www.mthoodterritory.com/document-center Oregon’s Mt. Hood Territory FY 2018–2019 Business Plan: https://www.mthoodterritory.com/document-center</p>
	A.1. b	Multi-year tourism plan or strategy that is up-to-date and publicly available	2 = document and evidence exists	<p>The strategic plan is up-to-date and available online.</p> <p>Documentation: Tourism Master Plan and 2017–2022 Strategic Priorities: https://www.mthoodterritory.com/document-center</p>
	A.1. c	Multi-year tourism plan or strategy that was developed with public participation	2 = document and evidence exists	<p>The OMHT FY 2018–2019 Business Plan describes the participatory planning process utilized to develop the Master Plan: “Listening sessions were held throughout the county. Stakeholders, partners and the public were encouraged to share what their vision is for Tourism and ideas they have to improve tourism in the county. The Master Plan was revised to include the value of sustainability to Tourism’s work, and was approved by the Board of County Commissioners.”</p> <p>Documentation: Oregon’s Mt. Hood Territory FY 2018–2019 Business Plan: https://www.mthoodterritory.com/document-center</p>
	A.1. d	Political commitment to implement the multi-year tourism plan or strategy and evidence of implementation	2 = document and evidence exists	<p>The OMHT FY 2018–2019 Business Plan includes a summary of Master Plan implementation achievements. Political commitment is demonstrated by the Board of County Commissioners’ approval of the Master Plan and 5-year Strategic Priorities. The Board of County Commissioners also appoints qualified industry and community leaders to serve on the nine-member Clackamas County Tourism Development Council that oversees the DMO.</p> <p>Documentation:</p>

				Oregon's Mt. Hood Territory FY 2018–2019 Business Plan: https://www.mthoodterritory.com/document-center Board of County Commissioners records
A.2 Tourism Organization - Average Score 2				
The destination has an effective organization, department, group, or committee responsible for a coordinated approach to sustainable tourism, with involvement by the private sector and public sector. This group is suited to the size and scale of the destination, and has defined responsibilities, oversight, and implementation capability for the management of environmental, economic, social, and cultural issues. This group's activities are appropriately funded.	A.2. a	An organization has responsibility for a coordinated approach to the management of sustainable tourism	2 = document and evidence exists	The county DMO is known as the Clackamas County Tourism & Cultural Affairs (CCTCA). The DMO is organized into four areas of service delivery to implement the strategies outlined in the Tourism Master Plan: Leadership/Administration; Marketing and Promotion; Destination Development; and Community & Government Relations/Advocacy. The Destination Development and Community & Government Relations teams play an instrumental role in coordinating management efforts at a destination level. Efforts to coordinate management of tourism are occurring. There is room for improvement in this area, especially given the growing number of local destination management organizations that serve specific cities or areas within Clackamas County. This is an area that will need closer attention in the near term.
	A.2. b	The private sector and public sector are involved in the organization and coordination of tourism	2 = document and evidence exists	The Tourism Development Council that oversees the CCTCA is composed of leaders from all key sectors of the tourism industry in Clackamas County. This governance structure ensures that private sector tourism interests are involved in the DMO. There is some coordination with the private sector and other key stakeholder groups during planning and implementation of DMO activities and initiatives, but there is room to enhance coordination of destination management.
	A.2. c	The tourism organization is suited to the size and scale of the destination	2 = document and evidence exists	CCTCA is the county DMO and there are several local DMOs serving specific cities or areas within Clackamas County.
	A.2. d	Individuals within the tourism organization have assigned responsibility for sustainable tourism	2 = document and evidence exists	CCTCA has a team responsible for Destination Development which includes staff assigned to sustainability.

	A.2. e	The tourism organization is appropriately funded	2 = document and evidence exists	<p>CCTCA is funded through a voter-approved 6% lodging tax paid by visitors who stay overnight at hotels, motels, campgrounds, bed and breakfasts, and short-term vacation rentals. The term "Transient Room Tax" (TRT) has been in place since 1993 (see County Code 8.02.160 Tax Revenue Sharing). Per the Clackamas County TRT ordinance, 98% of net tax receipts go to the Tourism Development Council to support CCTCA's programs. The remaining 2% goes to the Clackamas County Finance Department to manage the tax program. Before funds are distributed to either CCTCA or the Finance Department, about \$500,000 goes to the County Fair to support operations and programming—the exact amount increases each year with the local CPI. This distribution scheme was established when voters approved the TRT (the original fair budget was \$250,000).</p> <p>More Background:</p> <p>Oregon transient lodging taxes include state TRT (1.8%) and any TRT imposed by cities or counties. The taxes are cumulative. Clackamas County's TRT is 6%, and many cities impose their own TRT. The standard local TRT is 6%. So, a visitor paying \$100/night for a Lake Oswego hotel room will pay 13.8% total TRT (1.8% state, 6% county, 6% local), or \$13.80/night. The lodging property will remit 1.8% to the Oregon Department of Revenue to support Oregon Tourism Commission programs, 6% to the Clackamas County Finance Department for CCTCA's program, and 6% to the City of Lake Oswego Finance Department.</p> <p>Cities and counties use their TRT revenues for an array of programs. Generally, state law mandates that 70% of TRT revenues must be used for tourism development and marketing purposes unless another distribution ratio predates the "70/30" ratio legislation. The remaining 30% can be used by local jurisdictions as general funds to support other programs and services and they see fit.</p>
A.3: Monitoring - Average Score: 0.33				
The destination has a system to monitor, publicly report, and respond to environmental, economic, social, cultural, tourism, and human rights issues. The monitoring system is reviewed and evaluated periodically.	A.3. a	Active monitoring and public reporting of environmental, economic, social, cultural, tourism, and human rights issues	1 = document or evidence exists	<p>Several different organizations are involved in monitoring and reporting on these issues, but there is no unified system per se. Reporting could be coordinated. These key organizations currently monitor issues relevant to tourism:</p> <ul style="list-style-type: none"> - tourism overall and related economic issues: CCTCA - cultural issues: Clackamas County Arts Alliance (sister organization of CCTCA) - environmental issues: public land managers such as the U.S. Forest Service and the Bureau of Land Management, as well as state and county departments including the Department of Environmental Quality, Water Environmental Services, Sustainable Clackamas County, and Clackamas County Public Health. - human rights: unknown at this time

	A.3. b	Monitoring system is reviewed and evaluated periodically	0 = no documents exist	CCTCA carries out periodic review and evaluation of the monitoring system for economic impacts of tourism. There is no evidence on hand regarding periodic review and evaluation of the monitoring system by other key organizations listed in A.3.a. Documentation: None found
	A.3. c	Tourism impact mitigation procedures funded and active	0 = no documents exist	Documentation: None found
A.4 Tourism Seasonality Management - Average Score: 1				
The destination dedicates resources to mitigate seasonal variability of tourism where appropriate, working to balance the needs of the local economy, community, cultures and environment, to identify year-round tourism opportunities.	A.4. a	Specific strategy for marketing off-season events and attracting year-round visitors	1 = document or evidence exists	There is no stand-alone strategy for marketing OMHT during the off season; however, the OMHT FY 2018–2019 Business Plan does outline (on page 12) priority actions related to creating themed experiences that address seasonality through unique agritourism offerings. Furthermore, the Marketing and PR team at CCTCA reports that their advertising spend, website content, email channels, and public relations are all geared to support year-round visitation. The CCTCA also promotes less-visited natural areas and trails through the “Hidden Gems” program, in order to address overcrowding at other attractions. CCTCA’s team recently added new photos to their image bank that better represent Clackamas County during different seasons (particularly Spring and Fall). Documentation: Oregon’s Mt. Hood Territory FY 2018–2019 Business Plan: https://www.mthoodterritory.com/document-center CCTCA marketing plans
A.5 Climate Change Adaptation - Average Score: 0.33				
The destination has a system to identify risks and opportunities associated with climate change. This system encourages climate change adaptation strategies for development, siting, design, and management of facilities. The system contributes to the sustainability and resilience of the destination and to public education on climate for both residents and tourists.	A.5. a	Current system for climate change adaptation and risk assessment	0 = no documents exist	The Board of County Commissioners supported the establishment of a Climate Change Exchange Committee that started meeting in 2018. Tourism is in the group. While the county remains committed to addressing climate change, its strategy and efforts are mainly focused on mitigation. Furthermore, two cities—Lake Oswego and Milwaukie—have climate change plans (per a focus group held on January 30, 2019, at Red Soils Campus). Documentation: None found

	A.5. b	Laws or policies to mitigate climate change and encourage technologies to mitigate climate change	1 = document or evidence exists	<p>Laws and policies exist at the state and county level. The county also provides a citizens' resource guide called "What Can You Do?" that covers building and construction, farmers markets and food, energy use, indoor air quality, landscaping, local economies, smart shopping, transportation, waste reduction and recycling.</p> <p>Documentation: Oregon Global Warming Commission Biennial Report to Legislature 2017 Resolution Reaffirming Sustainable Clackamas (Resolution no. 2017-85): https://dochub.clackamas.us/documents/drupal/91b4db53-8131-4aa7-99ba-86eebbc40a50 Clackamas County Sustainability Policies & Procedures: https://www.clackamas.us/sustainability/sustainabilitypolicy.html Sustainable Clackamas County website: https://www.clackamas.us/sustainability/ Clackamas County Sustainability Policies & Procedures: https://www.clackamas.us/sustainability/sustainabilitypolicy.html Clackamas County press releases: https://clackamas.us/news/2018-10-25/clackamas-county-renews-focus-on-climate-change-initiatives</p>
	A.5. c	Program to educate and raise awareness among the public, tourism enterprises, and visitors about climate change	0 = no documents exist	Documentation: None found
A.6 Inventory of Tourism Assets and Attractions - Average Score: 2				
The destination has an up-to-date, publicly available inventory and assessment of its tourism assets and attractions, including natural and cultural sites.	A.6. a	Current inventory and classification of tourism assets and attractions including natural and cultural sites	2 = document and evidence exists	<p>CCTCA maintains a CRM database of sites and attractions that is used to populate its website. The full database has much more information on these assets and attractions; key fields include name of attraction, address, city, zip, and partner category (dining, lodging, arts, heritage, etc.). In addition, the Clackamas County Arts Alliance recently conducted an inventory and mapped some heritage sites (not including museums) to create the Heritage Attraction Overview Database. It is important to note that the Clackamas County Arts Alliance boundaries differ from those used by Clackamas County and CCTCA.</p> <p>Documentation: CCTCA CRM database (internal only) Heritage Attraction Overview Database (Jan 2013): https://www.mthoodterritory.com/document-center</p>
A.7 Planning Regulations - Average Score: 1.75				
The destination has planning guidelines, regulations and/or policies that require environmental, economic, and social impact assessment and integrate sustainable land use, design, construction, and demolition. The	A.7. a	Planning or zoning guidelines, regulations and/or policies that protect natural and cultural resources	2 = document and evidence exists	<p>Clackamas County has comprehensive zoning development ordinances for land use planning and development standards that cover residential uses, exclusive farm use zones, etc. Furthermore, each city in the county has their own set of land use and zoning regulations.</p> <p>Documentation: Clackamas County Zoning Development Ordinance: https://www.clackamas.us/planning/zdo.html</p>

guidelines, regulations and/or policies are designed to protect natural and cultural resources, were created with local inputs from the public and a thorough review process, are publicly communicated, and are enforced.				County land use districts, zones, and standards: §316 (Rural Residential), §317 (Mountain Recreational Resort and Hoodland Residential), §401 (Exclusive Farm Use District), §406 (Timber District), §407 (AG/Forest District), §515 (Rural Tourist Commercial), §700–711 (Special Districts) §806 (Home Occupations to Host Events), §813 (Recreational Vehicle Camping Facilities), §815 (Produce Stands), §823 (Bed & Breakfast Residences and Inns), §833 (Guest Houses), §839 (Accessory Dwelling Units), §840 (Farmers' Markets), §843 (Accessory Historic Dwellings). §1002 (Protection of Natural Features), §1004 (Historic Protection), §1006 (Utilities, Street Lights, Water Supply, Sewage Disposal, Surface Water Management and Erosion Control), §1011 (Open Spaces and Parks) Other general process and review ordinances: §1102, §1103, §1105, §1107 (Development and Review Processes) §1202–1206 (Criteria for Discretionary Permits).
	A.7. b	Guidelines, regulations, and/or policies that address sustainable land use, design, construction, and demolition	2 = document and evidence exists	Documentation: See details provided in A.7.a.
	A.7. c	Planning guidelines, regulations, and/or policies were created with local inputs from the public and a thorough review process	2 = document and evidence exists	Documentation:
	A.7. d	Planning guidelines, regulations, and/or policies are publicly communicated and are enforced	1 = document or evidence exists	All regulations are online. From stakeholder feedback, many policy enforcement mechanisms seem to be complaint-driven and how consistently they are enforced is unknown. Documentation: Clackamas County Zoning and Development Ordinance website: https://www.clackamas.us/planning/zdo.html
A.8 Access for All - Average Score: 1				
Where appropriate, sites and facilities, including those of natural and cultural importance, are accessible to all, including persons with disabilities and others who have specific access requirements. Where such sites and facilities are not immediately	A.8. a	Policies supporting access to tourist sites and facilities, including those of natural and cultural importance, for individuals with disabilities and others who have specific access requirements, where appropriate	1 = document or evidence exists	Federal and state laws and guidelines apply to all businesses, sites, and attractions. Heritage attractions and sites have spotty accessibility for persons with disabilities. The same applies to outdoor recreation and agritourism attractions and sites. Vacation rentals are generally not ADA compliant. New tourism facilities and infrastructure are more likely to be ADA compliant. Accommodation providers such as Timberline are ADA compliant or can make reasonable accommodation. Documentation: Americans with Disabilities Act (ADA)

accessible, access is afforded through the design and implementation of solutions that take into account both the integrity of the site and such reasonable accommodations for persons with access requirements as can be achieved.				Or. Rev. Stat. §659A, Unlawful Discrimination in Employment, Public Accommodations and Real Property Transactions
	A.8. b	Accessibility solutions are designed to take into account the integrity of the site while making reasonable accommodation for people with disabilities	1 = document or evidence exists	There are strict rules for what accommodation is allowed in historic buildings. Documentation: None found
A.9 Property Acquisitions - Average Score: 2				
Laws and regulations regarding property acquisitions exist, are enforced, comply with communal and indigenous rights, ensure public consultation, and do not authorize resettlement without prior informed consent and/or reasonable compensation.	A.9. a	Policy or legislation, including enforcement provisions, exist	2 = document and evidence exists	Documentation: Clackamas County Code Chapter 8.03 Secondhand Dealers: https://www.clackamas.us/code
	A.9. b	Policy or legislation that considers indigenous rights, ensures public consultation and authorizes resettlement only when there is informed consent and / or reasonable compensation	2 = document and evidence exists	FPIC is a standard protected by international human rights law. It states that "all peoples have the right to self-determination" and "all peoples have the right to freely pursue their economic, social, and cultural development." Free Prior and Informed Consent is protected under the International Labour Organization Convention (ILO) 169 and the UN Declaration on the Rights of Indigenous Peoples, where it is specifically mentioned five times (Articles 10,11,19,28, 29). The duty to consult is further reflected in Articles 19 and 32. ILO 169 Article 6 also requires that consultation with Indigenous Peoples be carried out through institutions that are representative of Indigenous communities, and specifies that Indigenous people should control the process by which representatives are determined.
A.10 Visitor Satisfaction - Average Score: 0.5				
The destination has a system to monitor and publicly report visitor satisfaction, and, if necessary, to take action to improve visitor satisfaction.	A.1 0.a	Collection and public reporting of data on visitor satisfaction	1 = document or evidence exists	While there is no ongoing county-wide system that collects and reports visitor satisfaction, a visitor intercept survey was conducted in 2018 and continues into 2019. Results will be published in 2019.
	A.1 0.b	System to take action to improve visitor satisfaction based on monitoring information	0 = no documents exist	Documentation: None found
A.11 Sustainability Standards - Average Score: 0				

The destination has a system to promote sustainability standards for enterprises consistent with the GSTC Criteria. The destination makes publicly available a list of sustainability certified or verified enterprises.	A.1 1.a	Industry-supported sustainable tourism certification or environmental management system	0 = no documents exist	While there is no tourism-specific certification or environmental management system available, Sustainable Clackamas County does have a Leaders in Sustainability certification program. This program provides technical assistance to businesses aiming to put themselves on a more sustainable path. The program usually has about 50 concurrent participants. There are no tourism enterprises currently in the program. A list of all certified businesses are maintained on the county website. Sustainable Clackamas County expressed openness to collaborating with the tourism industry to enlist more tourism businesses and perhaps developing an annex to address industry-specific criteria and indicators that may be missing in the current system. They have done similarly for other industries in the county.
	A.1 1.b	Sustainable tourism certification or environmental management system recognized by the GSTC	N/A = not applicable in destination	N/A
	A.1 1.c	Monitoring of tourism business participation in tourism certification or environmental management system	0 = no documents exist	Documentation: None found
	A.1 1.d	Publicly available list of sustainably certified or verified enterprises	0 = no documents exist	Documentation: None found
A.12 Safety and Security - Average Score: 1				
The destination has a system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards.	A.1 2.a	On-going compulsory inspections of fire, food hygiene, and electricity safety for tourism properties	2 = document and evidence exists	<p>Clackamas County Public Health regulates (licenses, inspects) businesses that involve food preparation, restaurants, hotels and public pools and spas. Many of the policies and guidelines are dictated by state statute. Licensed businesses, services, parks, and camps are inspected by county staff, and inspection reports are posted online.</p> <p>Documentation: Food Handler Certification: https://www.clackamas.us/publichealth/foodhandler.html Pools and Lodging: https://www.clackamas.us/publichealth/swimmingpools.html Restaurants, Mobile Food Trucks and Vending Machines: https://www.clackamas.us/publichealth/foodfacilities.html Water Quality: https://www.clackamas.us/publichealth/drinkingwater.html Emergency Medical Services: https://www.clackamas.us/publichealth/ems.html</p>

				<p>Emergency Preparedness: https://www.clackamas.us/publichealth/emergencypreparedness.html Environmental health staff inspection reports of licensed businesses: https://healthspace.com/Clients/Oregon/Clackamas/Web.nsf/home.xsp.</p>
A.1 2.b	Safety precautions such as first aid stations at beaches/tourist attraction sites	0 = no documents exist		<p>The Mt. Hood/Gorge Regional DMO, administered by CCTCA, recently launched a Trailhead Ambassadors Program that addresses some safety issues associated with visitors on trails. Program volunteers have first aid kits and can call for assistance as needed if residents or visitors are injured on trails.</p> <p>Clackamas County Sheriff's Office (CCSO) has for years organized an annual regional Search and Rescue Conference (Northwest SARCon). CCSO coordinates search and rescue missions in the Mt. Hood National Forest and other unincorporated areas of the county. CCSO has a swift water rescue team, a full-response dive/rescue team, and a Marine Unit.</p> <p>Safety and security was a recurring theme throughout meetings with stakeholders. Stakeholders noted that safety precautions are limited.</p> <p>Documentation: None found</p>
A.1 2.c	System to prevent and respond to crime	1 = document or evidence exists		<p>The U.S. Forest Service has one law enforcement officer in each of four districts: Barlow Ranger District, Clackamas River Ranger District, Hood River Ranger District, and Zigzag Ranger District. They work in concert with the county's law enforcement personnel. USFS has a partnership with Portland Mountain Rescue. The county sheriff has jurisdiction only over unincorporated areas. Cities within the county all have police departments that respond to crime. Stakeholders noted that the county is vast and law enforcement personnel are stretched, which often results in long response times.</p> <p>CCSO maintains a Crime Prevention webpage with resources on human rights (e.g., domestic violence, child and senior abuse) and on Neighborhood Watch programs. CCSO contracts with the cities of Happy Valley, Wilsonville, and Estacada to provide municipal police services. The cities of Canby, Milwaukie, and Oregon City each maintain city-specific crime prevention pages.</p> <p>Documentation: Clackamas County Sheriff's Office Crime Prevention webpage: https://www.clackamas.us/sheriff/crimeprev.html City of Milwaukie Crime Prevention Page: https://www.milwaukieoregon.gov/police/crime-prevention-information City of Canby Crime Prevention Tips: http://www.canbypolice.com/resources/crime_prevention.html Oregon City Crime Prevention: https://www.orcity.org/police/crime-prevention</p>

	A.1 2.d	Taxi licensing system with clear pricing and an organized taxi dispatch system at points of visitor entry	1 = document or evidence exists	<p>Taxis generally have meters. Giddy-up taxi for Mt. Hood are licensed. Peer-to-peer ridesharing companies such as Lyft and Uber are active throughout the county and have online systems that specify pricing. Any of these transportation options is readily available at the airport.</p> <p>Documentation: None found</p>
	A.1 2.e	Public reporting of safety and security	1 = document or evidence exists	<p>While CCSO does produce crime reports, stakeholders commented that it is difficult to find good data for tourism-related reporting on safety and security.</p> <p>Documentation: Clackamas County Sheriff 2013 Crime Report: https://www.clackamas.us/sheriff/crimereports.html.</p>
A.13 Crisis and Emergency Management - Average Score 1				
The destination has a crisis and emergency response plan that is appropriate to the destination. Key elements are communicated to residents, visitors, and enterprises. The plan establishes procedures and provides resources and training for staff, visitors, and residents, and is updated on a regular basis.	A.1 3.a	Publicly available crisis and emergency response plan that considers the tourism sector	1 = document or evidence exists	<p>CCTCA is coordinating with the county Disaster Management Department to create a disaster/crisis communication plan. IPAWS is an integrated system for public alerts and warnings. A reverse 911 system exists. Messages go to all land lines in the area automatically, but only to registered cell phones—visitors probably will not receive messages.</p> <p>Clackamas County does have disaster management plans and resource materials covering a range of disaster/emergency management scenarios. These plans are not tourism specific. The main issue experienced in the area is flooding, which primarily impacts residents.</p> <p>Tourism has not historically had a seat in the Emergency Operations Center, however Clackamas County is considering adding CCTCA to the main committee, especially since CCTCA has the capacity to reach tourism businesses. The new system does have some limitations, including not being able to reach visitors in areas that do not have cell phone coverage in and around the Clackamas River and at remote tourist attractions and sites.</p> <p>Documentation: A Legal Framework: The Americans with Disabilities Act and Emergency Planning: https://dochub.clackamas.us/documents/drupal/cfa1142b-a23d-4b3c-93de-40c6a0f658db Clackamas County Emergency Operations Plan: https://www.clackamas.us/dm/eop.html County Code 6.03 Emergency Regulations: https://dochub.clackamas.us/documents/drupal/5e976f74-eea5-4935-bfa8-99ecf0cbd228 County Natural Hazard Mitigation Plan: https://www.clackamas.us/dm/naturalhazard.html County Wildfire Protection Plan: https://www.clackamas.us/dm/ccwpp.html Draft Clackamas County Disaster Shelter Plan 2016: https://dochub.clackamas.us/documents/drupal/5f83682a-8b26-4530-ab1b-7ca4cba5b6c0</p>

				<p>Mt. Hood Coordination Plan: https://dochub.clackamas.us/documents/drupal/5efe6178-5955-409b-91b9-434f7ca8d798 (in the process of being updated)</p>
A.1 3.b	Financial and human capital to implement the crisis and emergency response plan	1 = document or evidence exists		<p>A Joint Incident Committee (JIC) is established to respond to emergencies, such as fires, that may arise. The JIC is convened by the state and brings together agencies and partners relevant to the specific emergency.</p> <p>Fire Defense Board: conducts exercises to include tourism areas.</p> <p>Portland General Electric: Emergency operation plan with annexes related to electric plans. Law Enforcement has a seat in the Emergency Operations Center.</p> <p>Public Health: Dam owners, have emergency action plans, they call 911 dispatch who in turn notifies the county. The county is required to conduct one exercise every five years. Sheltering of visitors during emergencies could be an issue.</p> <p>Strategic priorities and an action plan for destination sustainability will be completed by the end of the first quarter in 2019.</p> <p>The Department of Environmental Quality tracks earthquakes, floods, fires, and toxic spills and monitors pesticides. The department is underfunded. Members of the focus group reported that while there are systems, they are not well funded, enforced, or socialized.</p>
A.1 3.c	Crisis and emergency response plan developed with input from the tourism private sector and includes communication procedures for during and after a crisis or emergency	0 = no documents exist		<p>Tourism has not traditionally participated in emergency and disaster planning.</p> <p>Documentation: None found</p>
A.1 3.d	Crisis and emergency response plan provides resources and training for staff, visitors, and residents	1 = document or evidence exists		<p>The Disaster Management website provides some resources for disaster preparedness. There is a plan that provides resources and training to staff and residents, but does not include visitors.</p> <p>Documentation: Clackamas County Disaster Management website: https://www.clackamas.us/dm</p>
A.1 3.e	Crisis and emergency response plan is updated on a regular basis	2 = document and evidence exists		<p>The county emergency response plan is updated annually.</p> <p>Documentation: Clackamas County Disaster Management website: https://www.clackamas.us/dm</p>
A.14 Promotion - Average Score: 2				

Promotion is accurate with regard to the destination and its products, services, and sustainability claims. The promotional messages treat local communities and tourists authentically and respectfully.	A.1 4.a	Destination promotional messages that represent local communities and visitors authentically and respectfully	2 = document and evidence exists	<p>The CCTCA social media plan includes strategies for each social media platform and new strategies are specifically identified in each update. For example, the Instagram strategy uses “Stories” to highlight partners, attractions, and events. The Stories feed at the top of CCTCA’s profile page which has images and links to each of the stories representing the diverse set of attractions in the county. The CCTCA’s Marketing team is focusing on creating diversity in their marketing, as it was previously recognized as a challenge. The team is also using new tactics that enable tourism businesses to tell their own story. This team also offers training in storytelling so that businesses can learn to communicate more effectively with the media. The marketing team offers a tourism technology summit that provides educational programming aimed at helping tourism entrepreneurs tell their story online. The team provides direct assistance with marketing for businesses who do not have a large enough budget for in-house social media help.</p> <p>Documentation: Social Media Strategy 2016–17 and Beyond</p>
	A.1 4.b	Destination promotional messages that are accurate in their description of products and services	2 = document and evidence exists	<p>There are concerns regarding the lack of diversity (people) projected on all marketing platforms. While CCTCA does well overall in their promotional messages, there is room for more diverse representation in images on some marketing platforms.</p> <p>Documentation: Facebook: @Mt.HoodTerritory Instagram: https://www.instagram.com/mthoodterritory/</p>

B: Community Involvement and Benefits				
B.1 Economic Monitoring - Average Score: 1.25				
The direct and indirect economic contribution of tourism to the destination’s economy is monitored and publicly reported at least annually. To the extent feasible, this should include visitor expenditure, revenue per available room, employment and investment data.	B.1. a	Regular monitoring and reporting of visitor expenditure data, revenue per available room, employment and investment data	2 = document and evidence exists	<p>Oregon Tourism Commission publishes reports on visitor spending, earnings, employment, tax revenue, and overnight visitor volume for all counties in Oregon, with individual sections for each county. This report is prepared for the Oregon Tourism Commission by Dean Runyan Associates. Furthermore, Smith Travel Research helps track revenue per available room for Clackamas County.</p> <p>Documentation: Oregon Travel Impacts: Statewide Estimates, 1992–2018p (June 2018)</p>
	B.1. b	Regular monitoring and reporting at least annually of direct and indirect contributions of tourism	2 = document and evidence exists	<p>Dean Runyan economic impact numbers are reported annually in the business plan.</p> <p>Documentation: Oregon’s Mt. Hood Territory FY 2018–2019 Business Plan: https://www.mthoodterritory.com/document-center</p>
	B.1. c	Collection and public reporting at least annually of tourism-related employment data, disaggregated by	1 = document or evidence exists	<p>Oregon Tourism Commission reports on tourism-related employment data for Clackamas County. Data are not disaggregated by gender and age group.</p> <p>Documentation:</p>

		gender and age group		Oregon Travel Impacts: Statewide Estimates, 1992–2018p (June 2018)
B.2 Local Career Opportunities - Average Score: 1.25				
The destination's enterprises provide equal employment, training opportunities, occupational safety, and fair wages for all.	B.2. a	Legislation or policies supporting equal opportunities in employment for all, including women, youth, disabled people, minorities, and other vulnerable populations	2 = document and evidence exists	<p>Clackamas County has an Equity, Diversity, and Inclusion Council, and equal opportunity legislation exists at the state level.</p> <p>Documentation: Equity, Diversity, and Inclusion Council: https://www.clackamas.us/diversity Oregon State Equal Opportunity Employment page: https://www.oregon.gov/employ/Pages/Equal-Opportunity.aspx Or. Rev. Stat. §659A, Unlawful Discrimination in Employment, Public Accommodations and Real Property Transactions</p>
	B.2. b	Training programs that provide equal access to all, including women, youth, disabled people, minorities, and other vulnerable populations	1 = document or evidence exists	<p>CCTCA's Strategic Priorities 2017–2022 (p. 16) document tools, resources, trainings, and summits offered to local tourism organizations and businesses, as well as agritourism and customer service training. These programs are offered to all, including women, youth, minorities and other vulnerable populations.</p> <p>Documentation: Tourism Master Plan and 2017–2022 Strategic Priorities: https://www.mthoodterritory.com/document-center</p>
	B.2. c	Legislation or policies supporting occupational safety for all	1 = document or evidence exists	<p>The Oregon Safe Employment Act and federal OSHA regulations govern occupational safety.</p> <p>Documentation: Or. Rev. Stat. §654, Occupational Safety and Health Occupational Safety & Health Act of 1970: https://www.osha.gov/law-regs.html</p>
	B.2. d	Legislation or policies supporting fair wages for all, including women, youth, disabled people, minorities, and other vulnerable populations	1 = document or evidence exists	<p>Statewide equal opportunity employment policies exist.</p> <p>Documentation: Oregon State Equal Opportunity Employment page: https://www.oregon.gov/employ/Pages/Equal-Opportunity.aspx Or. Rev. Stat. §659A, Unlawful Discrimination in Employment, Public Accommodations and Real Property Transactions</p>
B.3 Public Participation - Average Score: 1				
The destination has a system that encourages public participation in destination planning and decision making on an ongoing basis.	B.3. a	System for involving public, private, and community stakeholders in destination management planning and decision making	1 = document or evidence exists	<p>All Tourism Development Council meetings are open to the public. CCTCA has a Community and Government Relations coordinator, and staff regularly participates in community forums. The private sector is involved in the implementation of CCTCA activities and initiatives, and is well represented in the governance structure of the CCTCA. Community stakeholders and the public are less involved in destination planning, management, and decision-making by community stakeholders and the public. CCTCA's Strategic Priorities 2017–2022, on p. 18, articulate its desire for increased community participation and strengthening of partnerships with key stakeholder groups. The resident survey and focus groups provide evidence that public engagement needs improvement.</p>

				Documentation: Tourism Master Plan and 2017–2022 Strategic Priorities: https://www.mthoodterritory.com/document-center Tourism Development Council public meeting records
	B.3. b	Public meeting(s) to discuss destination management issues each year	1 = document or evidence exists	Destination management issues are generally dealt with at the stakeholder level by site or attraction managers. These are not always public processes.
B.4 Local Community Opinion - Average Score: 0				
Local communities' aspirations, concerns, and satisfaction with destination management are regularly monitored, recorded and publicly reported in a timely manner.	B.4. a	Regular collection, monitoring, recording, and public reporting of data on resident aspirations, concerns, and satisfaction with destination management	0 = no documents exist	Clackamas County's first resident survey was conducted through this destination assessment. Documentation: In progress
	B.4. b	Collection, monitoring, recording, and public recording of data occurs in a timely manner	0 = no documents exist	Clackamas County's first resident survey was conducted through this destination assessment. Documentation: In progress
B.5 Local Access - Average Score: 1				
The destination monitors, protects, and when necessary rehabilitates or restores local community access to natural and cultural sites.	B.5. a	Programs to monitor, protect, and rehabilitate or restore public access by locals and domestic visitors to natural and cultural sites	1 = document or evidence exists	Residents of Clackamas County are recruited to become volunteers in the Trailhead Ambassador program which is a partnership with the U.S. Forest Service, Oregon State Parks, Friends of the Columbia Gorge, and Mt. Hood. This program aims to help provide services that the government is no longer able to provide due to reduced resources. Volunteers are charged with providing visitors with important information, tracking visitors, and being an extra set of eyes on-site. Grand Ronde Tribe representatives say the U.S. Forest Service ensures Tribal members have access to Mt. Hood National Forest by giving the Tribe a large number of passes for free use. Additionally, the Tribe is given special access/use permission for traditional ceremonies and other cultural programs.
	B.5. b	Monitoring of behaviour and characteristics of local, domestic and foreign visitors to tourist sites and attractions	1 = document or evidence exists	Visitor intercept surveys are conducted, but this activity is not regularly scheduled. Results from two different studies will be published in 2019. Documentation: In progress
B.6 Tourism Awareness and Education - Average Score: 0				
The destination provides regular programs to affected communities to enhance their understanding of the opportunities and challenges of tourism, and the importance of sustainability.	B.6. a	Program to raise awareness of tourism's role and potential contribution held in communities, schools, and higher education institutions	0 = no documents exist	Currently, CCTCA organizes Tourism 101 meetings that target businesses and other key stakeholders but not youth or the community at large. The consensus from focus groups is that there are programs for workforce development and training, but that CCTCA needs to raise awareness of the importance of tourism's role in the local economy. Documentation: None found
B.7 Preventing Exploitation - Average Score: 1.5				

The destination has laws and established practices to prevent commercial, sexual, or any other form of exploitation and harassment of anyone, particularly of children, adolescents, women, and minorities. The laws and established practices are publicly communicated.	B.7. a	Laws and a program to prevent commercial, sexual, or any other form of exploitation, discrimination or harassment of residents or visitors	2 = document and evidence exists	<p>Anti-trafficking and anti-abuse agencies and abuse rescue and recovery agencies exist. The county's Small Grants Program awards grants to nonprofits serving vulnerable populations.</p> <p>Documentation: Oregon Department of Justice Human Trafficking Resource page: https://www.doj.state.or.us/crime-victims/victims-resources/other-resources/exploitation-and-sex-trafficking/ Clackamas County Sex Trafficking Multidisciplinary Team (MDT): https://www.clackamas.us/sheriff/cat.html Inter-Agency Child Exploitation Prevention Team (INTERCEPT): https://www.clackamas.us/sheriff/intercept.html Clackamas County Family Justice Center "A Safe Place": https://www.asafeplacefcj.org/</p>
	B.7. b	Laws and program are publicly communicated	1 = document or evidence exists	Laws are available online, but it's not clear how much laws and programs are publicly communicated. There is some signage in some public restrooms providing resources to report or escape human trafficking.
B.8 Support for the Community - Average Score: 1				
The destination has a system to enable and encourage enterprises, visitors, and the public to contribute to community and sustainability initiatives.	B.8. a	Programs for enterprises, visitors, and the public to contribute donations to community and biodiversity conservation initiatives and/or infrastructure development	1 = document or evidence exists	<p>The Travel Oregon Forever Fund lets tourism businesses give their guests an opportunity to give back to projects that make Oregon a better place to live and travel.</p> <p>Timberline Lodge Conservation Fund allows guests of the lodge to give back by supporting projects run by Friends of Timberline and the National Forest Foundation.</p> <p>Documentation: Travel Oregon Forever Fund: http://industry.traveloregon.com/industry-resources/sustainable-tourism-development/travel-oregon-forever-fund/</p>
B.9 Supporting Local Entrepreneurs and Fair Trade - Average Score: 1.75				

<p>The destination has a system that supports local and small and medium-sized enterprises, and promotes and develops local sustainable products and fair trade principles that are based on the area's nature and culture. These may include food and beverages, crafts, performance arts, agricultural products, etc.</p>	B.9. a	Program to support and build capacity of local and small- and medium sized enterprises	2 = document and evidence exists	<p>Guest Service Gold is a program lead by Travel Oregon, in partnership with the Oregon Restaurant & Lodging Association, and the American Hotel & Lodging Educational Institute. This program created a customized customer service training/certificate program for tourism/hospitality partners in the state. CCTCA is partnering with regional DMO partners to hold trainings and offer scholarships.</p> <p>Each year in March, CCTCA organizes a Tourism Tech Symposium that is offered to all its tourism partners—mainly small tourism enterprises. This half-day training covers an array of topics including SEO optimization, successfully managing social media accounts, monitoring and engaging on customer review platforms, etc.</p> <p>OMHT's YouTube Channel features three sessions under the Tourism Tech Symposium. https://www.youtube.com/watch?v=DuiANjmcalg&list=PLYMZnK5k1dmeQgi4HYXO_kmRM0SPjtKLC</p> <p>Clackamas Community College has a Small Business Development Center (SBDC) that offers various SBD resources The Oregon Regional Accelerator & Innovation Network (RAIN) also provides an SBDC.</p> <p>Documentation: Guest Service Gold: https://www.oregonrla.org/guestservicegold.html Clackamas County SBDC: https://www.clackamas.edu/academics/skills-development-training/connections-with-business-and-industry-(c-bi)/small-business-development-center Oregon RAIN: https://www.oregonrain.org/</p>
	B.9. b	Program encourages enterprises to purchase goods and services locally	1 = document or evidence exists	<p>There are many programs at the county and state level that work in concert to encourage tourism enterprises to purchase goods locally. Examples include the "Buy Local" campaigns spearheaded by Chambers of Commerce and main street associations. There are also regularly scheduled Farmers Markets throughout the county.</p>
	B.9. c	Program to promote and develop local sustainable products based on local nature and culture	2 = document and evidence exists	<p>The CCTCA's Master Plan outlines strategies for supporting development of sustainable tourism products and experiences in three main areas: outdoor recreation (natural areas), cultural tourism, and agritourism. Refer to Strategic Priorities 2017–2022, p. 13, Goal #6, which focuses on sustainable tourism products. A more recent assessment was conducted in 2018 to identify opportunities for developing water-based recreational activities as part of the outdoor/recreation strategy. Strategy development does consider the environmental impacts of these activities in a general sense.</p> <p>The CCTCA also has three main grant programs that can help develop local sustainable tourism experiences based on nature and culture. These are the Community Partnership Program Grants, Tourism Development Grants, and Heritage Capital Improvement Grants. Grant recipients cannot be private companies.</p> <p>Documentation:</p>

				Tourism Master Plan and 2017–2022 Strategic Priorities: https://www.mthoodterritory.com/document-center
	B.9. d	Program to include local artisans, farmers, and suppliers in the tourism value chain	2 = document and evidence exists	The CCTCA's sister organization, the Clackamas County Arts Alliance, is working to ensure artisans are more prominently included in tourism. CCTCA has also developed and is implementing an Agritourism Master Plan for Clackamas County. Every year, CCTCA hosts an Agritourism Summit that helps farmers involved in agritourism expand their professional development and business network.

C: Management of Cultural and Natural Assets				
C.1 Attraction Protection - Average Score 1.5				
The destination has a policy and system to evaluate, rehabilitate, and conserve natural and cultural sites, including built heritage (historic and archaeological) and rural and urban scenic views.	C.1. a	Management system to protect natural and cultural sites, including built heritage and rural and urban scenic views.	2 = document and evidence exists	<p>There is considerable land surface area under some form of protection in Clackamas County. Protection of natural and cultural sites is managed by a dynamic constellation of federal land management agencies (such as the U.S. Forest Service and Bureau of Land Management), state agencies (such as the State Historic Preservation Office and Oregon Parks and Recreation Department), and county organizations. Clackamas County manages county parks through various departments such as the County Parks and Business and Community Services Departments. The county has also established a North Clackamas Parks and Recreation District that has its own management structure. At the local level, there are a host of organizations that manage protection of local cultural sites (such as Canby Heritage and Landmark Commission).</p> <p>Documentation: National Park Service Act Antiquities Act National Historic Preservation Act Clackamas County ZDO §704 (River and Stream Conservation Area) North Clackamas Parks and Recreation District Master Plan</p>
	C.1. b	Management system to monitor, measure, and mitigate tourism impacts on sites and attractions	1 = document or evidence exists	<p>The U.S. Forest Service conducts and reports on periodic visitor use surveys.</p> <p>While there is no specific system county-wide, some attractions/destinations have parking pass programs for their specific parking lots, which provides some statistics on visitor use. Other sources of information include Oregon City pedestrian counters and USFS infrared trail counters.</p> <p>Documentation: National Visitor Use Monitoring Program: https://www.fs.fed.us/recreation/programs/nvum/</p>
C.2 Visitor Management - Average Score: 1				

The destination has a visitor management system for attraction sites that includes measures to preserve, protect, and enhance natural and cultural assets.	C.2. a	Administrative mechanism responsible for implementing visitor management plans and operations	1 = document or evidence exists	There is no county-level plan, but there is some movement among heritage sites to work together at the county level to coordinate hours of visitation. There are resources available through tourism grants to help implement this work. Part of the Oregon Mt. Hood Territory region does benefit from the Trailhead Ambassadors Program, where volunteers are placed at busy trailheads in the summer to provide helpful trail information and "Leave No Trace" training. Ambassadors serve as a mechanism for visitor management on trails.
C.3 Visitor Behavior - Average Score: 1				
The destination has published and provided guidelines for proper visitor behavior at sensitive sites. Such guidelines are designed to minimize adverse impacts on sensitive sites and strengthen positive visitor behaviors.	C.3. a	Cultural and environmental guidelines for visitor behaviour in sensitive sites	1 = document or evidence exists	USFS and BLM have guidelines at the national level, but there is nothing county specific. The January 30, 2019, focus group produced several ideas including creating a tourist pledge, embracing "leave no trace," and using the National Trust "This Place Matters" campaign (https://savingplaces.org/this-place-matters).
	C.3. b	Code of practice for tour guides and tour operators	1 = document or evidence exists	There is no county code, but all tour guides and outfitters in Oregon must obtain a license from the Oregon State Marine Board even if they are not a marine guide. Documentation: Oregon State Marine Board: https://www.oregon.gov/OSMB/Pages/Guides-Charter.aspx
C.4 Cultural Heritage Protection - Average Score: 1				
The destination has laws governing the proper sale, trade, display, or gifting of historical and archaeological artefacts.	C.4. a	Laws or regulations to protect historical and archaeological artefacts including those located under water, and evidence of their enforcement	1 = document or evidence exists	Federal, state, and local level laws and regulations exist. Documentation: National Environmental Policy Act (NEPA): https://ceq.doe.gov/nepa-practice/justice.html Native American Graves Protection and Repatriation Act (NAGPRA) of 1990: https://www.usbr.gov/nagpra/ State Historic Preservation Office (SHPO) Clackamas County ZDO §1004 (Historic Protection): https://dochub.clackamas.us/documents/drupal/205e84b4-04d9-4149-bfa2-271088a70683

	C.4. b	Program to protect and celebrate intangible cultural heritage (e.g., includes song, music, drama, skills and crafts)	1 = document or evidence exists	<p>The University of Oregon Folklife Network conducts statewide research to document living cultural heritages and supports public programs to share heritage traditions. The Oregon Cultural Trust funds arts, heritage, and humanities nonprofits throughout the state.</p> <p>The Grand Ronde Tribal Council has a cultural department/historic preservation team that is focused on education rather than tourism. Their Tribal Cultural Landscapes (TCL) has established methodologies for protecting physical and intangible cultural sites and practices across their homelands, including Clackamas County.</p> <p>Documentation: Oregon Heritage Commission: https://www.oregon.gov/oprd/HCD/OHC/Pages/commission.aspx Oregon Folklife Network: : https://ofn.uoregon.edu/ Oregon Cultural Trust: https://culturaltrust.org/ Grand Ronde Tribal Cultural Landscapes documents</p>
C.5 Site Interpretation - Average Score: 1.2				
Accurate interpretive information is provided at natural and cultural sites. The information is culturally appropriate, developed with community collaboration, and communicated in languages pertinent to visitors.	C.5. a	Interpretive information available to visitors in tourist offices and at natural and cultural sites	2 = document and evidence exists	<p>There are visitor centers throughout the county, some of which CCTCA helps to fund. There are also individual attractions that have interpretation. All sites visited had some type of interpretation (signage, brochures, etc.).</p> <p>Documentation: CCTCA visitor centers Interpretive brochures and signage at sites throughout Clackamas County</p>
	C.5. b	Interpretive information is culturally appropriate	1 = document or evidence exists	A January 30, 2019, focus group raised this as a good opportunity to work with Tribes. Interpretation is currently provided on a case-by-case basis. It is important to increase awareness to address this need.
	C.5. c	Interpretive information is developed with community collaboration	1 = document or evidence exists	Some Tribes are consulted in protection of cultural heritage, but focus group participants felt this could improve at both the county and regional level.
	C.5. d	Interpretive information is available in languages pertinent to visitors	1 = document or evidence exists	<p>Some brochures were found in English and Spanish. Timberline has brochures in five languages. There was a past focus on "China Ready," but it did not materialize; group tours from China provide their own interpreters.</p> <p>Documentation: Interpretive brochures from some sites throughout Clackamas County</p>
	C.5. e	Tour guide training in the use of interpretive information	1 = document or evidence exists	CCTCA leads quarterly educational familiarization tours (FAMs) for front-line staff in the area and from Portland.
C.6 Intellectual Property - Average Score: 2				

The destination has a system to contribute to the protection and preservation of intellectual property rights of communities and individuals.	C.6. a	Laws, regulations or programs to protect intellectual property rights of local individuals and communities	2 = document and evidence exists	Intellectual property rights are protected by the U.S. Patent and Trademark Office and associated laws and regulations. Furthermore, good marketing practices associated with photography and filming are widespread: policies exist for licensing photographs, photography and photographers on social platforms are monitored, museums have policies on photos, release forms are required for children and adults whose photos will appear in promoted posts, residents are notified of filming, and there are social media guidelines for photo sharing. Documentation: Copyright Act, 17 U.S.C. CCTCA social media accounts and marketing materials
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D: Environmental Issues				
D.1 Environmental Risks - Average Score: 1				
The destination has identified environmental risks and has a system in place to address them.	D.1. a	Sustainability assessment of the destination within the last five years, identifying environmental risks	1 = document or evidence exists	A sustainability assessment of the destination is currently being undertaken by the George Washington University. Documentation: In progress
	D.1. b	System in place to address identified risks	1 = document or evidence exists	There is no system in place, but strategic priorities and an action plan for destination sustainability will be completed by the end of the first quarter in 2019. Documentation: In progress
D.2 Protection of Sensitive Environments - Average Score: 1				
The destination has a system to monitor the environmental impact of tourism, conserve habitats, species, and ecosystems, and prevent the introduction of invasive species.	D.2. a	Maintained and updated inventory of sensitive and threatened wildlife and habitats	1 = document or evidence exists	The U.S. Forest Service and Bureau of Land Management maintain inventories of sensitive and threatened wildlife and habitats. Documentation: USFS Invasive Species Program: https://www.fs.fed.us/invasivespecies/
	D.2. b	Management system to monitor impacts and to protect ecosystems, sensitive environments, and species	1 = document or evidence exists	There are some systems in place at the national and state level under the Oregon State Marine Board (OSMB), Oregon Department of Fish and Wildlife (ODFW), and the National Audubon Society. At the local level the Trailhead Ambassadors Program, while it does not monitor impacts, aids in protecting the environment by providing information to hikers and visitors (for example, by directing hikers to less crowded trails). Since 2003, the county Dump Stoppers Program has partnered with land managers and property owners to clean up illegal dumpsites on forest lands, removing over 100,000 pounds of waste a year.
	D.2. c	System prevents the introduction of invasive species	1 = document or evidence exists	ODFW conducts inspections of all watercraft entering the state to check for destructive invasive species. The program is funded through mandatory Aquatic Invasive Species Permits purchased by boat owners. Documentation: Aquatic Invasive Species Permit webpage: https://myodfw.com/articles/buying-aquatic-invasive-s

				pecies-prevention-permit
D.3 Wildlife Protection - Average Score: 1.5				
The destination has a system to ensure compliance with local, national, and international laws and standards for the harvest or capture, display, and sale of wildlife (including plants and animals).	D.3. a	Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)	2 = document and evidence exists	The U.S. ratified CITES in 1974 (https://www.cites.org/eng/disc/parties/chronolo.php) .
	D.3. b	Regulations and standards for controlling harvesting or capture, display, sale, of plants and animals	1 = document or evidence exists	Harvesting of plants and animals on public land is regulated by the Endangered Species Act and other state and federal regulations, and many activities require permits.
D.4 Greenhouse Gas Emissions - Average Score: 0				
The destination has a system to encourage enterprises to measure, monitor, minimize, publicly report, and mitigate their greenhouse gas emissions from all aspects of their operation (including emissions from service providers).	D.4. a	Program to assist enterprises to measure, monitor, minimize, and publicly report greenhouse gas emissions	0 = no documents exist	There is no evidence that such a program exists. However, Sustainable Clackamas County does provide guidance to residents on how to calculate greenhouse gas emissions at the household level as well as ideas for reducing their household footprint Documentation: Sustainable Clackamas County: https://www.clackamas.us/sustainability
	D.4. b	System to assist enterprises to mitigate greenhouse gas emissions	0 = no documents exist	Documentation: None found
D.5 Energy Conservation - Average Score: 1.5				
The destination has a system to encourage enterprises to measure, monitor, reduce, and publicly report energy consumption, and reduce reliance on fossil fuels.	D.5. a	Program to promote energy conservation and measure, monitor, reduce, and publicly report energy consumption	1 = document or evidence exists	The Clackamas County Leaders in Sustainability certification program for businesses encompasses energy conservation. This program offers businesses assistance in adopting good practices in energy conservation. There is no public reporting required under this program. Documentation: Leaders in Sustainability guide: http://tinyurl.com/sustainablepracticesguide
	D.5. b	Policies and incentives to reduce reliance on fossil fuels, improve energy efficiency, and encourage the adoption and use of renewable energy technologies	2 = document and evidence exists	Many incentives and resources are available through the Energy Trust of Oregon and Portland General Electric (PGE). There is a 4% rebate issued for solar and energy conservation products and technical assistance for solar and energy conservation. There is room to improve and increase awareness of these programs. Documentation: Energy Trust of Oregon energy conservation programs: https://www.energytrust.org/wp-content/uploads/2016/11/2005_Annual_Report_p0.pdf PGE programs encouraging the use of renewable energy technology: https://www.pge.com/en_US/residential/solar-and-vehicles/green-energy-incentives/incentives-overview/incentives-overview.page
D.6 Water Management - Average Score: 1				

The destination has a system to encourage enterprises to measure, monitor, reduce, and publicly report water usage.	D.6. a	Program to assist enterprises to measure, monitor, reduce, and publicly report water usage	1 = document or evidence exists	<p>The Clackamas County Leaders in Sustainability program does cover water conservation. This program offers technical assistance to businesses interested in adopting good practices.</p> <p>Clackamas Soil and Water Conservation District (SWCD) provides a wealth of resources online about water conservation for businesses, including technical and financial (grants/loans) assistance.</p> <p>Water Environment Services confirmed that the SWCD program is well defined; however, stakeholder feedback indicated that the SWCD programs are not funded, enforced, or socialized.</p> <p>Documentation: Leaders in Sustainability guide: http://tinyurl.com/sustainablepracticesguide Clackamas Soil and Water Conservation District (SWCD) website: https://conservationdistrict.org/</p>
D.7 Water Security - Average Score: 1				
The destination has a system to monitor its water resources to ensure that use by enterprises is compatible with the water requirements of the destination community.	D.7. a	Management system to ensure that water use by enterprises and water requirements of the destination community are balanced and compatible	1 = document or evidence exists	<p>A water rights system exists allowing authorities to trigger water restrictions during droughts. If the Office of Emergency Management declares a drought, water is allocated first to fish and wildlife, then human consumption, and finally businesses. The first sector restricted is agriculture, because that sector uses the most water.</p> <p>Clackamas River Water Providers partner with Water Environmental Services to provide programs to monitor and zone the Clackamas River water and local waterways. Stakeholder feedback indicated this is not happening and that there is a weak management system. There is a lack of accountability to the county from the districts.</p> <p>Documentation: https://www.clackamasproviders.org/</p>
D.8 Water Quality - Average Score: 1.67				
The destination has a system to monitor drinking and recreational water quality using quality standards. The monitoring results are publicly available, and the destination has a system to respond in a timely manner to water quality issues.	D.8. a	Management system to monitor and publicly report on drinking and recreational water quality	2 = document and evidence exists	<p>Clackamas Water Environment Services explained the stream water management system includes collection of quality samples of stream headwaters. A state regulatory program identifies areas of exposure. Streambed reservation is conducted through plant restoration to increase water filtration. Their annual report found online. At the federal level, USGS monitors rural areas such as Government Camp. The Clackamas River Water District and the Clackamas River Basin Council provide regular water testing, monitoring, and reporting, including quality alerts, public notices, water monitoring & testing, and sanitary hazard analysis. Drinking water quality in the area is good. Recreational water quality is inconsistently monitored and reported by the municipality.</p> <p>Documentation: USGS National Water Information System:</p>

				https://waterdata.usgs.gov/or/nwis/current/?type=flo w Clackamas County Drinking Water Program: https://www.clackamas.us/publichealth/drinkingwater.html
	D.8. b	Monitoring results are publicly available	2 = document and evidence exists	The Department of Environmental Quality makes water quality data available online at the state level. All communities are represented, but data reporting is city centric. Documentation: DEQ Water Quality Data: https://www.oregon.gov/deq/wq/Pages/default.aspx Interactive Water Quality map: https://hdcgdx2.deq.state.or.us/HVR291/?viewer=OWQI_2017?configBase=http://deq14.deq.state.or.us/Geocortex/Essentials/REST/sites/OWQI_2014__2/viewers/OWQI/virtualdirectory/Resources/Config/Default&viewer=OWQI_2017?configBase=http://deq14.deq.state.or.us/Geocortex/Essentials/REST/sites/OWQI_2014__2/viewers/OWQI/virtualdirectory/Resources/Config/Default
	D.8. c	System to respond in a timely manner to water quality issues	1 = document or evidence exists	Documentation: See D.8.a (Drinking Water Program - alerts). A system is in place but it is over capacity.
D.9 Wastewater - Average Score: 1				
The destination has clear and enforced guidelines in place for the siting, maintenance and testing of discharge from septic tanks and wastewater treatment systems, and ensures wastes are properly treated and reused or released safely with minimal adverse effects to the local population and the environment.	D.9. a	Regulations for the siting, maintenance, and testing of discharge from septic tanks and wastewater treatment systems, and evidence of their enforcement	1 = document or evidence exists	Wastewater discharge is regulated by the county and by local wastewater districts. County septic and on-site soils and permit program regulate and implement codes to maintain septic tanks. There are many sewer and water providers, however many areas are not included in an integrated wastewater system. Soil scientists examine sites and there is an annual inspection and report. Approximately 15 to 20 local companies provide septic system installation and maintenance services. There are four wastewater treatment plants in the area, serving approximately 180,000 people. Documentation: https://www.clackamas.us/septic
	D.9. b	Regulations to ensure the size and type of waste water treatment is adequate for the location, and evidence of their enforcement	1 = document or evidence exists	Wastewater discharge regulations exist. Documentation: Oregon Department of Environmental Quality Code U.S. Clean Water Act
	D.9. c	Program to assist enterprises to effectively treat and reuse wastewater	0 = no documents exist	There is a system only for restaurants. Documentation: None found

	D.9.d	Program to ensure proper treatment of wastes and safe reuse or release with minimal adverse effects to local population and environment	2 = document and evidence exists	<p>Clackamas Water Environment Services facilities treat wastewater for unincorporated areas of the county. Cities within the county have their own water treatment facilities. Rural areas use septic systems regulated by the Septic and Onsite Wastewater Division of the Department of Transportation and Development. Septic systems must be tested annually; service provider reports ensure compliance. The Clackamas County Leaders in Sustainability program does cover stormwater management but does not address safe reuse of wastewater.</p> <p>Documentation: https://www.clackamas.us/septic</p>
D.10 Solid Waste Reduction - Average Score: 1.5				
The destination has a system to encourage enterprises to reduce, reuse, and recycle solid waste. Any residual solid waste that is not reused or recycled is disposed of safely and sustainably.	D.10.a	Waste collection system that maintains public records on the amount of waste generated	1 = document or evidence exists	<p>State and county solid waste management documents are online participants in the Red Soils focus group said the local and regional government covers this well through the County Sustainability & Solid Waste Program. Participants in the Monarch focus group said the U.S. Forest Service provides waste collection records, and that the information is publicly available.</p> <p>Documentation: Clackamas Resources, Conservation, and Solid Waste Recycling website: https://www.clackamas.us/recycling</p>
	D.10.b	Solid waste management plan that is implemented, and has quantitative goals to minimize, and ensure safe sustainable disposal of waste that is not reused or recycled	2 = document and evidence exists	<p>The county's solid waste management plan is included in the Sustainability Policy and Procedures. Participants in the Sandy and Monarch focus groups stated that plans and goals are location dependent. Municipalities are running fairly well, but some recreation areas and Government Camp are having issues (for example, absent or insufficient trash receptacles, no signs/education for visitors, infrequent trash collection). There are non-profits in this space, such as the Ant Farm, but this need is acute.</p> <p>Documentation: Sustainability Policy and Procedures: https://www.clackamas.us/sustainability/sustainabilitypolicy.html</p>
	D.10.c	Program to assist enterprises to reduce, reuse, and recycle waste	2 = document and evidence exists	<p>The Leaders in Sustainability certification program does cover recycling. There is a Green businesses label for those certified. Only about 40 or 50 businesses are currently certified, and a very small number of them are tourism-centric. Grants are used as an incentive to participation in the green certification program. Sustainable Clackamas County expressed willingness to work with CCTCA to get tourism businesses more involved, as well as to eventually create a tourism-centric annex to the program.</p> <p>Documentation: Sustainability Policy and Procedures: https://www.clackamas.us/sustainability/sustainabilitypolicy.html Oregon Bottle Bill: https://www.oregon.gov/olcc/docs/bottle_bill/bottle_bill_faq.pdf</p>

	D.1 0.d	Program to reduce the use of bottled water by enterprises and visitors	1 = document or evidence exists	The county is starting a program around bottled water and is planning more promotion of durable dishware. Documentation: In progress
D.11 Light and Noise Pollution - Average Score: 1				
The destination has guidelines and regulations to minimize light and noise pollution. The destination encourages enterprises to follow these guidelines and regulations.	D.1 1.a	Guidelines and regulations to minimize noise and light pollution	2 = document and evidence exists	Noise control and light pollution ordinances exist. Documentation: Clackamas County Public Protection Code §6.05, Noise Control Or. Rev. Stat. §455.573 (Building Code)
	D.1 1.b	Program to encourage enterprises to follow guidelines and regulations to minimize noise and light pollution	0 = no documents exist	Documentation: None found
D.12 Low-impact Transportation - Average Score: 1				
The destination has a system to increase the use of low-impact transportation, including public transportation and active transportation (e.g., walking and cycling).	D.1 2.a	Program to increase the use of low-impact transportation	1 = document or evidence exists	<p>While there are some activities promoting low-impact transportation, there is not yet a program specifically addressing it. CCTCA has a transportation page on their website, but could better direct people toward low-impact transport. The Mt. Hood Express bus service from Sandy to Timberline Lodge includes stops in the villages along the way, and is actively promoted. Clackamas County also has a Pedestrian and Bicycle Plan. The Travel Oregon Mt. Hood Visitor Survey revealed that only 6% of respondents took a bus or shuttle while in the county (p. 22).</p> <p>The Department of Transportation and Development conducted research on how to increase usage of public transportation. Projects are prioritized using the Transit Development Plan by working with TriMet to provide bus, light rail, and commuter rail connecting Portland to metro areas. They have a long-range work plan and have had conversations between CCTCA and the Parks Department.</p> <p>The Mt. Hood Express was implemented ten years ago through a public/private partnership.</p> <p>Clackamas County has six different transit providers. Focus group participants advised there is a need for more active transportation infrastructure planning, and suggested coordination between TriMet, county social services, the Department of Transportation and Development, and local transit planners. Stakeholder advice planning is good, but not delivery of services. Barriers include infrastructure and the size of the county.</p> <p>Documentation: CCTCA transportation webpage: https://www.mthoodterritory.com/transportation Mt. Hood Express: http://www.mthoodexpress.com/ Clackamas County 2012 Pedestrian and Bicycle Plan</p>

	D.1 2.b	Program to make sites of visitor interest more accessible to active transportation (e.g., walking and cycling)	1 = document or evidence exists	<p>The Department of Transportation and Development advised that the Metro regional government and rural areas have access to funds to construct new facilities. They are currently conducting a feasibility study in Lake Oswego to construct a bike/pedestrian bridge over the Willamette River. The Springwater Corridor Trail provides a bike and pedestrian route connecting Portland to Boring, and the Cazadero Trail connects Portland to Barton and Estacada, and will eventually extend to Boring. Bike campsites are common. There are efforts to promote new bike and pedestrian routes to work/school; new routes are prioritized based on road/child safety, especially on high-traffic school routes. Sustainable Clackamas County said more walkable/bikeable routes are needed, as some areas are not safe.</p> <p>Documentation: Clackamas County Capital Improvement Plan</p>
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WHAT LOCALS ARE SAYING ABOUT TOURISM IN CLACKAMAS COUNTY:

Results Of 2019
Resident Survey



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INTRODUCTION

Local residents play a key role in the tourism ecosystem of every destination. Resident support of the tourism industry is critical to ensuring positive visitor experiences and an economically and socially viable sector that generates revenue and is well integrated into the fabric of the community.

The destination criteria established by the Global Sustainable Tourism Council (GSTC) address this issue by assessing whether the “aspirations, concerns, and satisfaction with destination management are regularly monitored, recorded and publicly reported in a timely manner.” By conducting resident surveys, destination managers can monitor insights about resident attitudes toward tourism.

Clackamas County Tourism & Cultural Affairs (CCTCA) partnered with the George Washington University (GW) International Institute of Tourism Studies to conduct a sustainable tourism assessment of Clackamas County. The assessment included an online resident survey to capture insights about resident attitudes toward tourism. This report provides an overview and analysis of the survey results.



The GW International Institute of Tourism Studies team designed an online resident survey, which was vetted and approved by CCTCA, to better understand resident perceptions of the impacts of tourism, both positive and negative.

The survey questions were designed to provide insights into resident satisfaction in three areas: satisfaction with tourism in Clackamas County, the benefits of tourism to the community, and the benefits of tourism to the residents themselves. To ensure respondents understood the purpose of the survey, the World Tourism Organization definition of “tourism” was provided at the start: “For the purpose of this survey, tourism comprises the activities of persons traveling to and staying in places outside their usual environment for more than one consecutive day for leisure, business and other purposes.” Questions specifically addressed resident involvement in tourism planning and concerns about tourism development, as well as tourism’s impact on cultural heritage, the natural environment, the economy, and resident quality of life. Demographic questions captured information on age, gender, residency status, employment status, and ZIP code (which was used to ensure all respondents were residents of Clackamas County). A final, open-ended question collected additional feedback related to tourism in Clackamas County.

CCTCA publicized and distributed the resident survey through Clackamas County Public and Government Affairs communication channels, NextDoor Community pages, a press release with local news coverage, and numerous community groups that assisted in distributing the survey to residents.

Participation was voluntary and respondents were not required to answer all questions. To increase participation, respondents were incentivized with an automatic entry to win one of three prize packages, each valued at over \$200.

The survey was open from December 31, 2018, to February 13, 2019, and collected 1,219 responses with a 97% completion rate. The average time spent taking the survey was four minutes.



DEMOGRAPHICS

The typical respondent was likely to be female, between the ages of 30 and 64, a full-time resident for more than 10 years, and employed or retired.

Age: The minimum age for participation in the resident survey was 18. The age ranges were 18-29, 30-44, 45-64, and 65+. Figure 1 and Table 1 show that respondents' age ranges followed a modest bell-shaped curve, with the highest percentage of respondents (45.53%) falling into the 45-64 range. The survey was open from December 31, 2018, to February 13, 2019, and collected 1,219 responses with a 97% completion rate. The average time spent taking the survey was four minutes.

Figure 1: Respondent Age Range

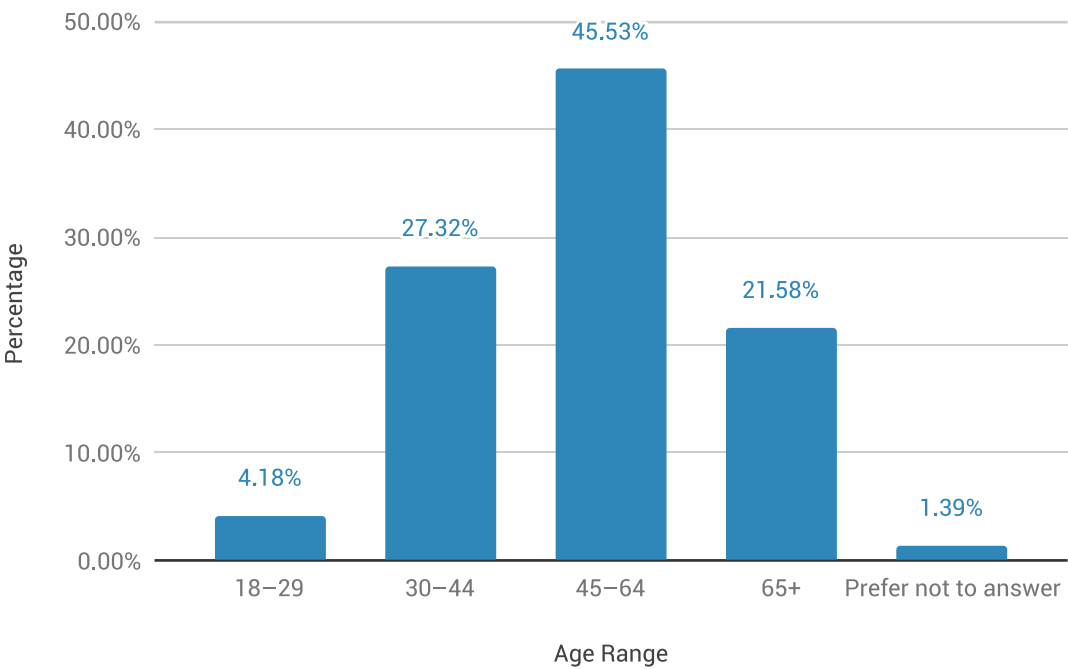


Table 1: Respondent Age Range

AGE RANGE	NUMBER	PERCENTAGE
18-29	51	4.18%
30-44	333	27.32%
45-64	555	45.53%
65+	263	21.58%
Prefer not to answer	17	1.39%
TOTAL	1,219	100%

Gender: As shown in Figure 2 and Table 2, there were more female respondents (71.62%). A few respondents (2.21%) preferred not to disclose their gender.

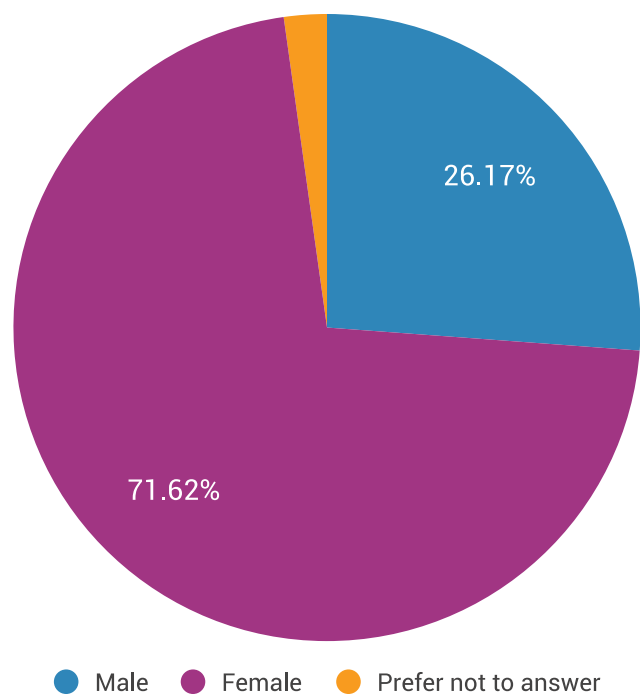


Table 2: Respondent Gender

AGE RANGE	NUMBER	PERCENTAGE
Male	319	26.17%
Female	873	71.62%
Prefer not to answer	27	2.21%
TOTAL	1,219	100%

Employment: Table 3 shows that the majority of respondents (57.15%) were employed or self-employed full time, which meant they were working 40 or more hours per week. Retirees comprised the second-largest group of respondents (22.78%), followed by part-time workers employed for less than 39 hours per week (12.75%). The remaining five employment categories each accounted for less than 4% of the total respondent pool. Three respondents did not answer this question, reducing the total number of respondents for this question to 1,216.

Table 3: Respondent Employment Status

STATUS	NUMBER	PERCENTAGE
Employed or self-employed full time (40 or more hours per week)	695	57.15%
Employed part time (up to 39 hours per week)	155	12.75%
Unemployed and currently looking for work	18	1.48%
Unemployed and not currently look- ing for work	9	0.74%
Student	10	0.82%
Retired	277	22.78%
Homemaker	44	3.62%
Unable to work	8	0.66%
TOTAL	1,216	100%



ZIP code: Respondents' ZIP codes were collected to determine the specific area of Clackamas County in which they resided. The United States Postal Service website was used to confirm ZIP code locations. As seen in Table 4, some ZIP codes were combined because they cover the same area.

Table 4: Top Five Locations Represented in Responses

AREA	ZIP CODE	PERCENTAGE
Oregon City	97045	22.84%
West Linn	97068	11.54%
Happy Valley	97015/97086	8.39%
Lake Oswego	97034/97035	8.06%
Oak Grove	97267/97268	7.98%

Nine respondents used the comment field to provide ZIP codes that were not included in the survey options: 97080 (1), 97062 (2), 97089 (4), 97002 (1), and 97086 (1). Only portions of these ZIP codes fall within the boundaries of Clackamas County, but all nine of these respondents are county residents.

Preliminary results of the resident survey were presented to Clackamas County stakeholders during various one-on-one interviews, focus groups, and discussions with CCTCA. After these discussions, it was determined that further breakdown and analysis of the data by region would add significant value to this report. CCTCA grouped the ZIP codes into three regions—urban (blue), valley (red), and mountain (yellow)—and responses were tallied for each ZIP code (see Table 5). Population statistics are from the United States Census Bureau and the American Community Survey 5-Year Estimates. Only 1,204 of the 1,219 respondents answered this question.

Table 5: ZIP Codes of Respondents, by Region

AREA	ZIP CODE	2018 POPULATION	NO. OF RESPONDENTS	PERCENTAGE OF REGION THAT RESPONDED	PERCENTAGE OF RESPONDENTS
Oregon City	97045	54,861	275	0.50%	22.84%
West Linn	97068	29,722	139	0.47%	11.54%
Happy Valley	97015/97086	51,813	101	0.19%	8.39%
Lake Oswego	97034/97035	44,354	97	0.22%	8.06%
Oak Grove	97267/97268	32,201	96	0.30%	7.98%
Milwaukie	97222/97269	35,965	95	0.26%	7.98%
Gladstone	97027	12,484	26	0.21%	2.16%
Colton	97017	3,392	9	0.27%	0.75%

¹ Oregon Zip Codes by Population, Oregon Demographics by Cubit, https://www.oregon-demographics.com/zip_codes_by_population

Mulino	97042	3,394	8	0.24%	0.66%
Marylhurst	97036	No data available	1	N/A	0.08%
Canby	97013	23,625	71	0.30%	5.90%
Wilsonville	97070	24,125	56	0.23%	4.65%
Molalla	97038	16,050	39	0.24%	3.24%
Beavercreek	97004	3,875	17	0.44%	1.41%
Sandy	97055	18,317	62	0.34%	5.15%
Estacada	97023	10,344	40	0.39%	3.32%
Boring	97009/97089	21,453	26	0.12%	2.16%
Rhododendron	97049	1,502	15	1.00%	1.25%
Eagle Creek	97022	3,698	14	0.38%	1.16%
Welches	97067	2,355	11	0.47%	0.91%
Brightwood	97011	607	4	0.66%	0.33%
Government Camp	97028	85	2	2.35%	0.17%





TOURISM SATISFACTION

Survey participants were asked to respond to the prompt “Overall, I am very satisfied with tourism in Clackamas County...” for each season of the year using a five-point scale: strongly disagree, disagree, neutral, agree, and strongly agree. Figure 3 and Table 6 show overall satisfaction as well as breakdown by season. While fewer than 12% of respondents chose “strongly disagree” or “disagree” in any season, residents were most satisfied with summer tourism—with 69.76% agreeing or strongly agreeing with the prompt. Residents were less satisfied with tourism in the winter, with just over half (51.97%) agreeing or strongly agreeing with the prompt, a difference of about 18 percentage points from summer satisfaction rates.

Figure 3: Satisfaction with Tourism in Clackamas County

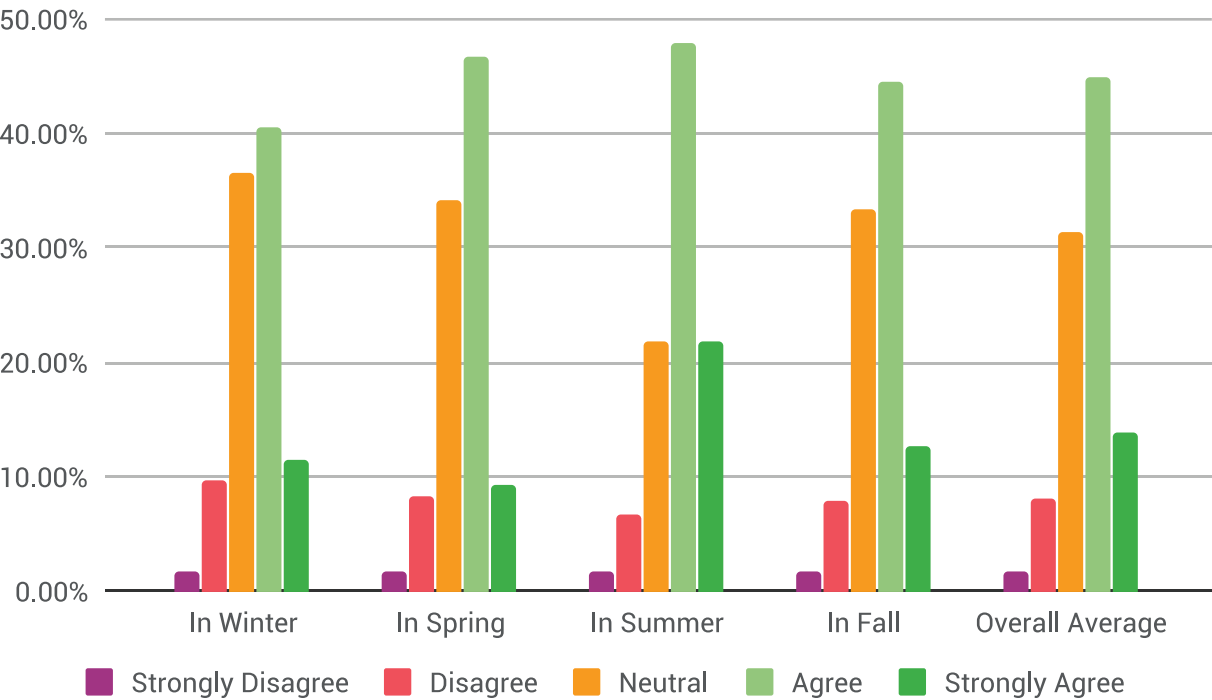


Table 6: Satisfaction with Tourism in Clackamas County

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Winter	1.81%	9.61%	36.62%	40.48%	11.49%
Spring	1.73%	8.22%	34.13%	46.71%	9.21%
Summer	1.73%	6.66%	21.86%	47.90%	21.86%
Fall	1.73%	7.38%	33.28%	44.48%	12.69%
Overall Average	1.75%	8.08%	31.47%	44.89%	13.81%



A. Tourism Satisfaction by Region

The following figures and tables show the seasonal differences in tourism satisfaction for urban, valley, and mountain regions.

Figure 4: Regional Satisfaction with Tourism in Winter

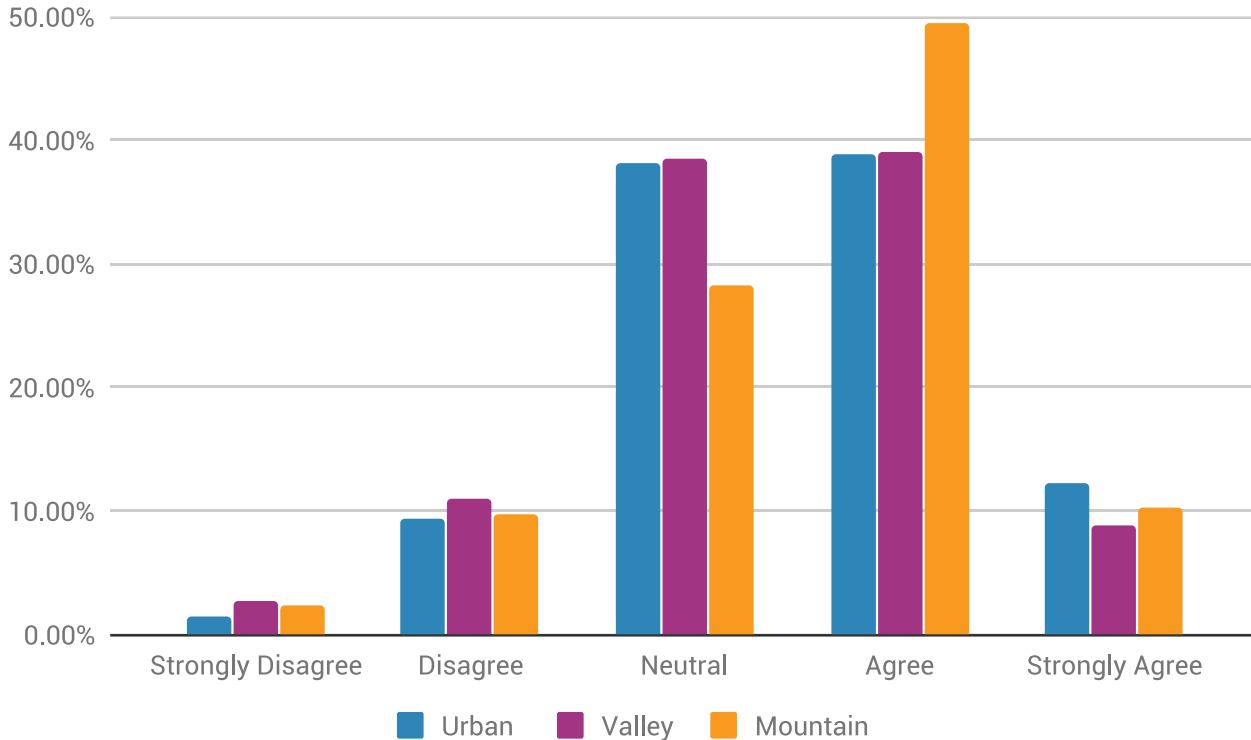


Table 7: Regional Satisfaction with Tourism in Winter

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	1.50%	9.33%	38.13%	38.84%	12.16%
Valley	2.75%	10.99%	38.46%	39.01%	8.79%
Mountain	2.30%	9.77%	28.16%	49.43%	10.34%

In the mountain region, 59.77% of residents agree or strongly agree that they are satisfied with winter tourism, compared to just 51.00% of urbanites and 47.80% of valley residents. Urban and valley residents tended to feel more neutral toward tourism in the winter. These results may be due to the more numerous winter activities and attractions in the mountain region compared to the other two regions.

Figure 5: Regional Satisfaction with Tourism in Spring

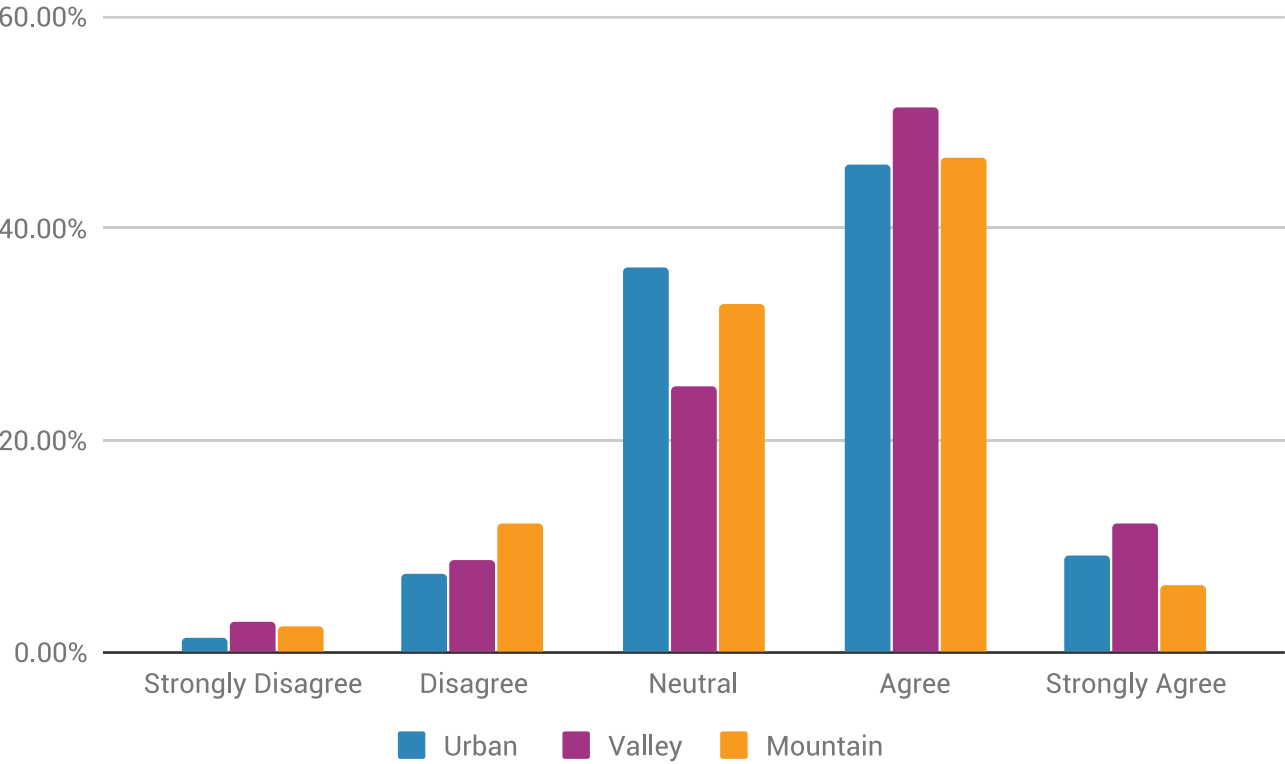


Table 8: Regional Satisfaction with Tourism in Spring

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	1.42%	7.34%	36.21%	45.92%	9.11%
Valley	2.73%	8.74%	25.14%	51.37%	12.02%
Mountain	2.30%	12.07%	32.76%	46.55%	6.32%

Valley respondents were most satisfied with spring tourism, with 63.39% expressing positive sentiments compared to 55.03% of urbanites and 52.87% of mountain residents. Urbanites were the most neutral, and mountain residents had the highest percentage of negative sentiments (almost 15%). These results may be due to the abundance of springtime agritourism offerings in the valley region compared to urban and mountain areas.

Figure 6: Regional Satisfaction with Tourism in Summer

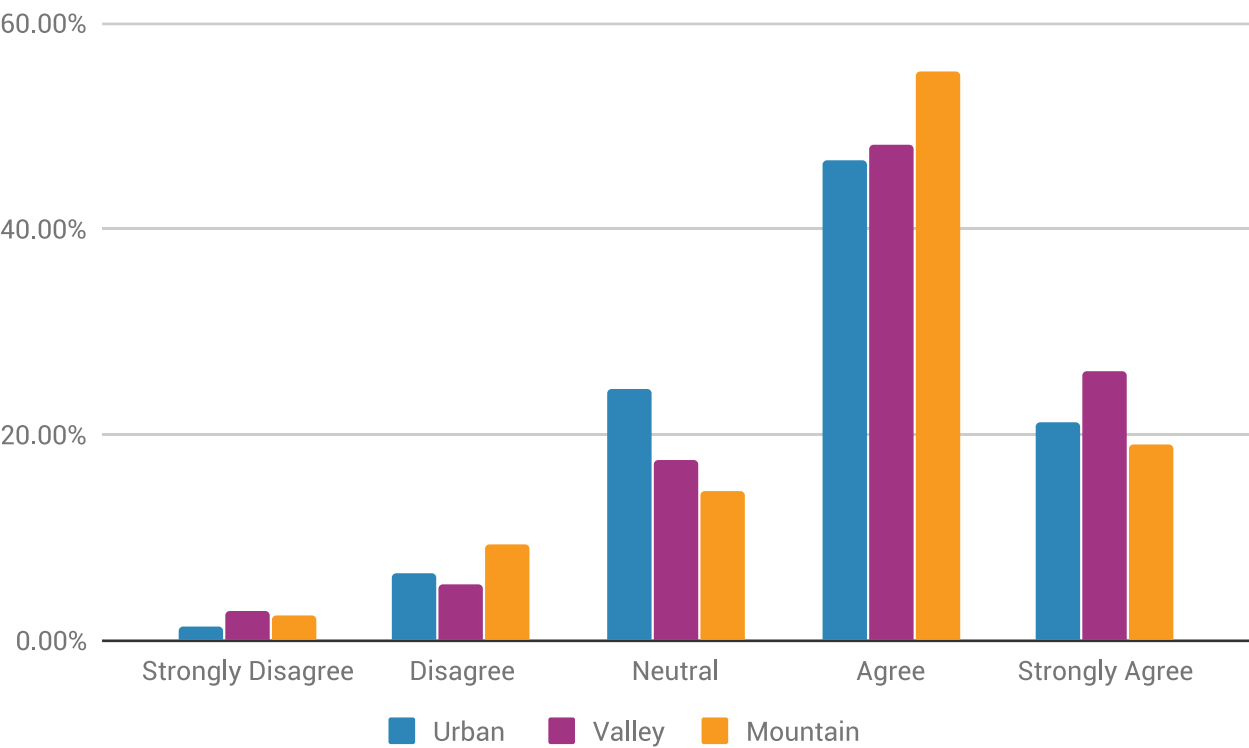


Table 9: Regional Satisfaction with Tourism in Summer

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	1.42%	6.51%	24.38%	46.63%	21.07%
Valley	2.73%	5.46%	17.49%	48.09%	26.23%
Mountain	2.30%	9.20%	14.37%	55.17%	18.97%

Respondents from all regions were generally satisfied with tourism in the summer. Mountain and valley respondents both expressed about 74% positive sentiments toward summer tourism, versus 67.70% of urbanites. Although the mountain region expressed high positive sentiments, this region also has the most respondents who are dissatisfied with summer tourism, with 11.50% disagreeing with the prompt compared to approximately 8% each from the valley and urban areas.

Figure 7: Regional Satisfaction with Tourism in Fall

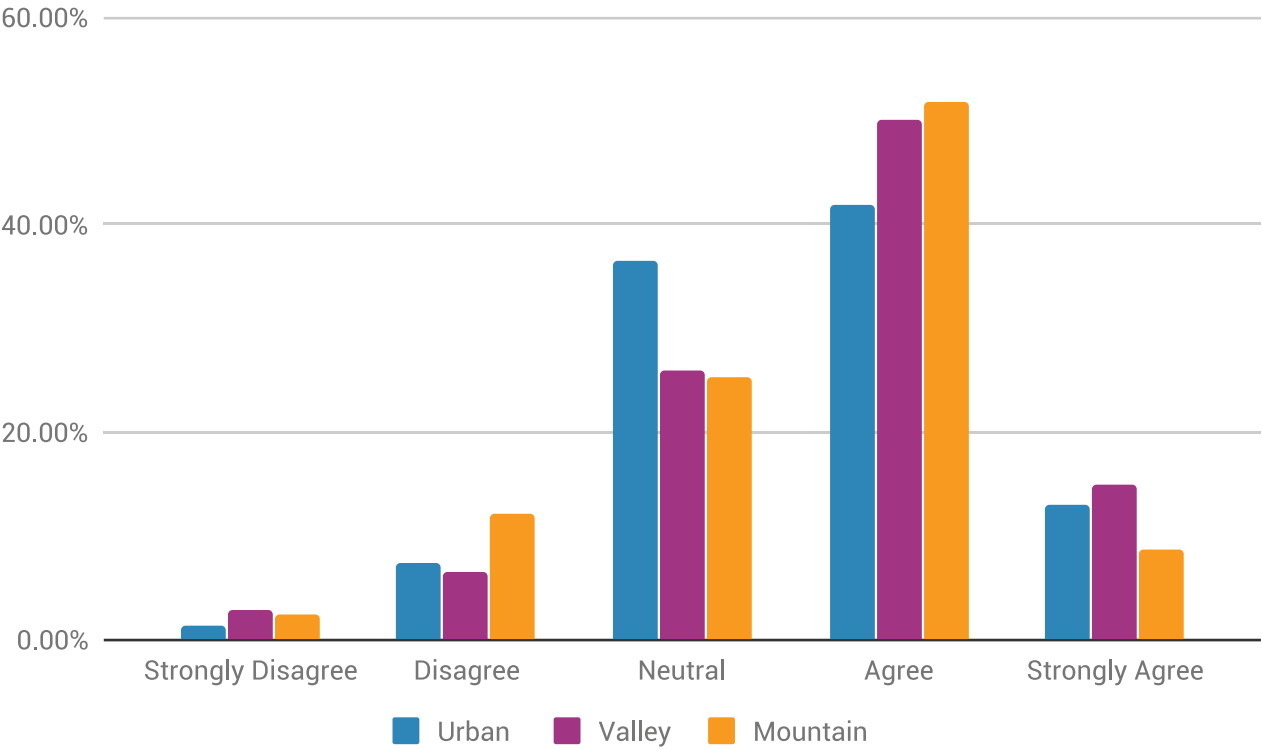


Table 10: Regional Satisfaction with Tourism in Fall

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	1.42%	6.51%	24.38%	46.63%	21.07%
Valley	2.73%	5.46%	17.49%	48.09%	26.23%
Mountain	2.30%	9.20%	14.37%	55.17%	18.97%

For the fall season, valley respondents were most satisfied, with about 64.84% of respondents having positive sentiments toward tourism, compared to only 60.34% of mountain respondents and 54.80% of urbanites.

Mountain respondents were the most negative (over 14% were unsatisfied). These results are similar to the spring season and, again, may be due to the abundant agritourism offerings in the valley region during the fall. Overall, urbanites were more likely to be neutral to tourism, except in winter. This may be due to less dependence on tourism in the urban economy compared to mountain and valley areas.

Responses in the comments section—Question 11 of the resident survey—shed light on the challenges related to seasonality in Clackamas County. One respondent stated it “would be great to have our tourism areas fully open throughout the year.” Another wrote, “Tourism is great for restaurants and other related businesses but it is very seasonal.” Other respondents asked whether more winter options were planned for the area in order to drive visitation throughout the year. See the Annex for a full list of comments.





TOURISM BENEFITS: Community vs. Self

Respondents were asked to consider the degree to which tourism provided benefits for the Clackamas County community, as well as for individuals (see Figure 8 and Table 11). When considering the community as a whole, the majority of respondents (91.70%) agreed or strongly agreed that tourism provided benefits. However, when considering benefits to individuals, only 51.85% agreed or strongly agreed that tourism generated positive impacts. A significant percent of respondents (32.92%) were unsure whether they benefited from tourism or not.

One respondent said that tourism is “healthy because it causes us to keep and improve destinations. Places like Willamette Falls being developed into a destination actually improves the site for all of us locally.”

Another respondent saw tourism as a means to “improve the economy and quality of life” and create a proud, vibrant community with “better shopping and dining options.” However, some respondents expressed their dissatisfaction and concern over the lack of individual benefits resulting from tourism: “Our natural sites are being taken from us including free camping on the Clackamas and Molalla Rivers.” Another respondent noted, “While the community certainly appreciates tourism \$\$\$ spent in the county, Clackamas County doesn’t seem interested in mitigating their effect on residents. ie traffic, park crowding. From a natural resources standpoint I really don’t think the Clackamas needs more people recreating in it.”

Figure 8: Overall Belief in Tourism Benefits

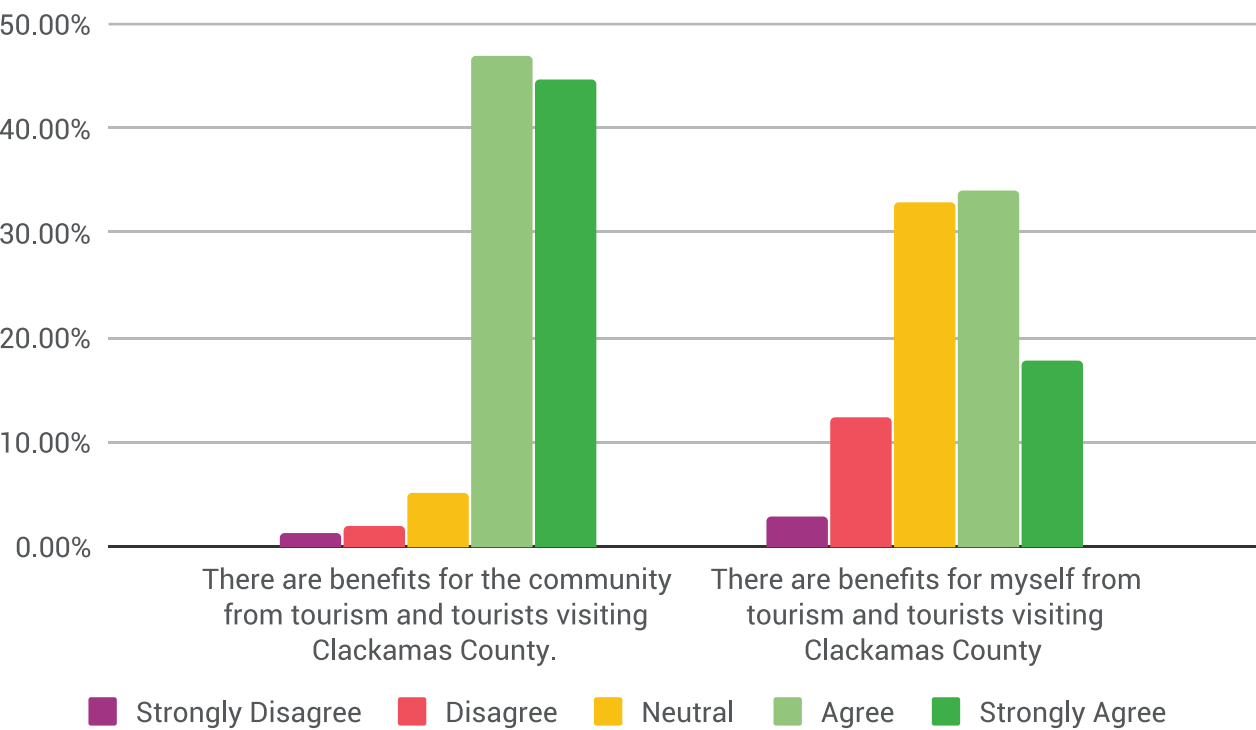


Table 11: Overall Belief in Tourism Benefits

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
There are benefits for the community from tourism and tourists visiting Clackamas County.	1.31%	1.89%	5.09%	47.00%	44.70%
There are benefits for myself from tourism and tourists visiting Clackamas County.	2.88%	12.35%	32.92%	34.07%	17.08%

A. Regional Analysis of Tourism Benefits: Community vs. Self

While most respondents agreed that tourism was beneficial to the community—at least 90% across all regions—the mountain region was the most positive regarding the benefits tourism provides to the community.

Figure 9: Belief in Community Benefits from Tourism, by Region

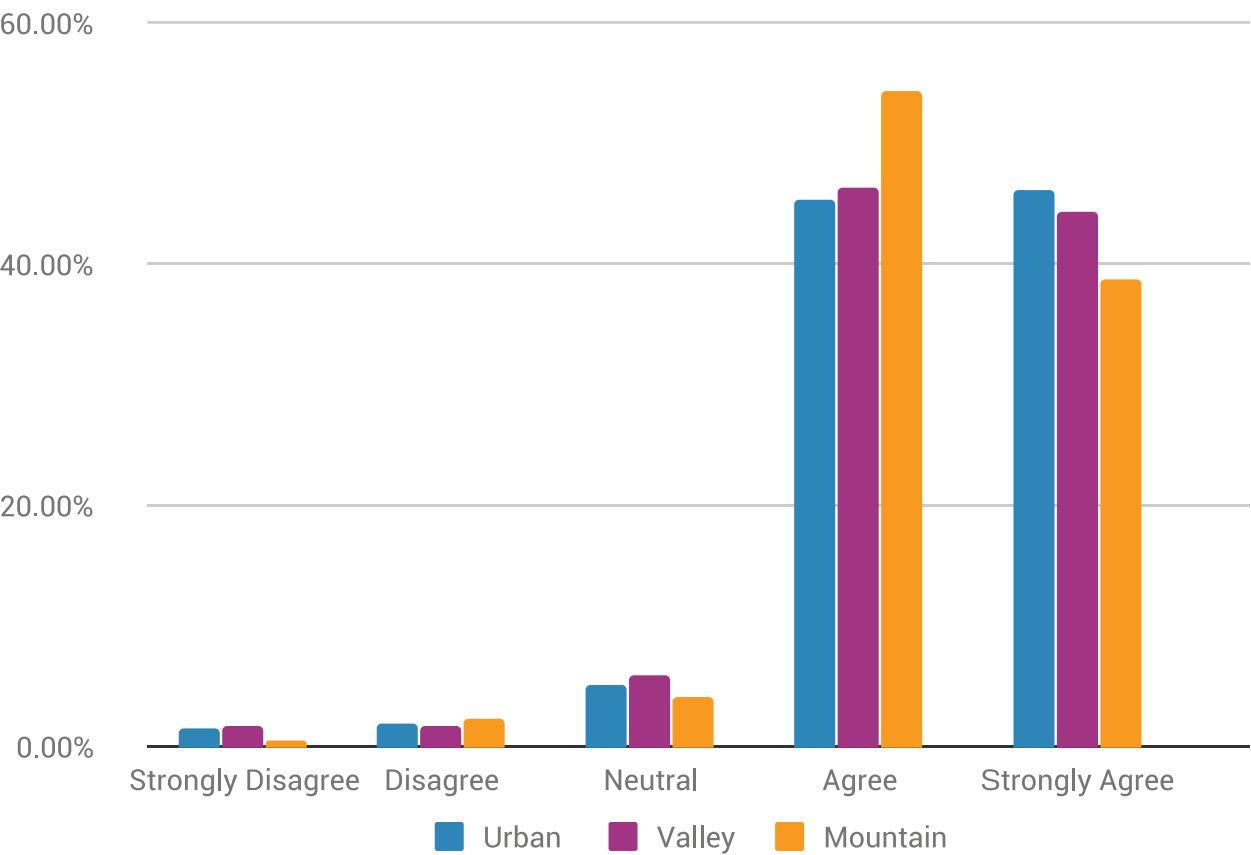


Table 12: Belief in Community Benefits from Tourism, by Region

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	1.42%	1.89%	5.20%	45.39%	46.10%
Valley	1.64%	1.64%	6.01%	46.45%	44.26%
Mountain	0.58%	2.31%	4.05%	54.34%	38.73%

The responses about the individual benefits of tourism tell a different story. Respondents across all three regions felt much more indifferent on this subject, with approximately one-third of each group reporting neutral reactions. The urban and valley regions had similar positive and negative feelings about individual benefits; in both regions, about 52% agreed that tourism was personally beneficial and about 14% disagreed. In the mountain region, only 48% agreed and over 20% disagreed.

Figure 10: Belief in Personal Benefits from Tourism, by Region

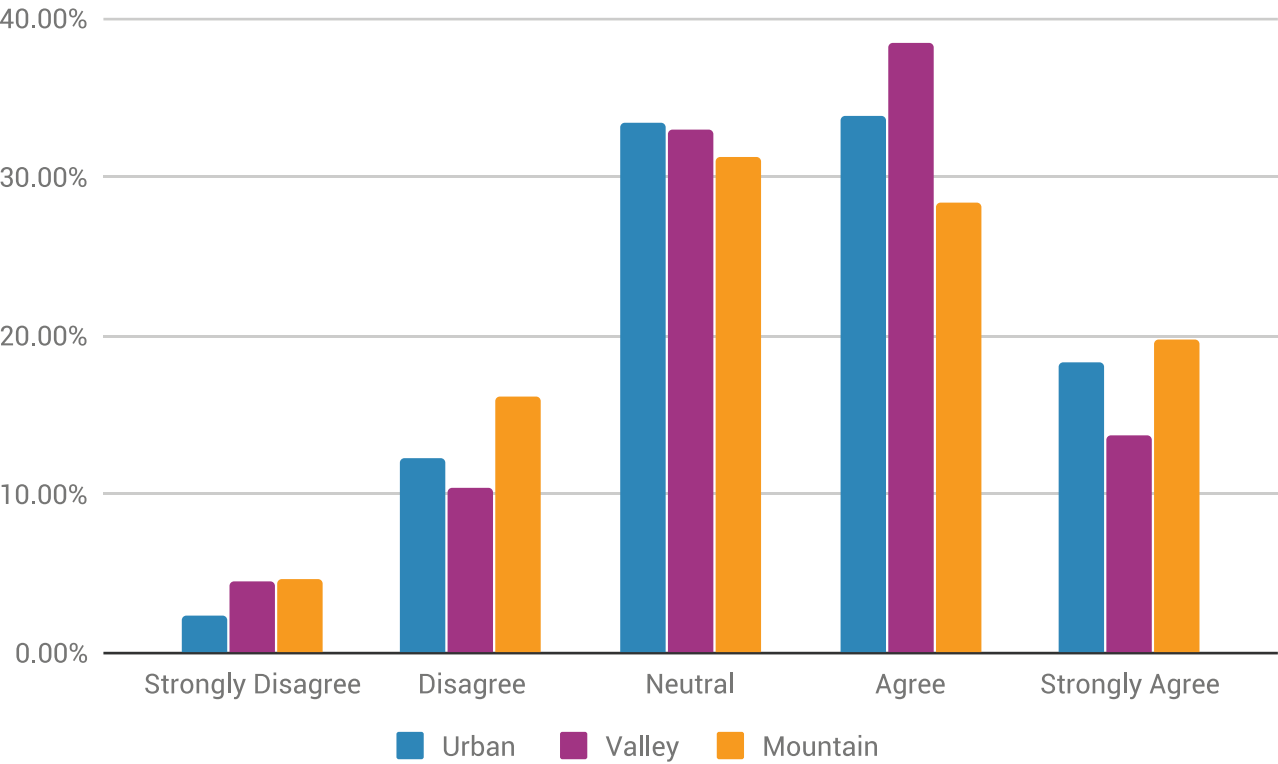


Table 13: Belief in Personal Benefits from Tourism, by Region

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	2.25%	12.19%	33.37%	33.85%	18.34%
Valley	4.40%	10.44%	32.97%	38.46%	13.74%
Mountain	4.62%	31.21%	31.21%	28.32%	19.65%





RESIDENT INVOLVEMENT

Next, residents were asked how satisfied they were with the level of community involvement in and influence on tourism planning, and whether resident concerns were taken into account during tourism development. Responses were overwhelmingly neutral, as shown in Figure 11 and Table 14. Only 21.43% of respondents agreed residents were adequately involved in or able to influence tourism planning; 19.70% disagreed, and 58.87% were neutral. The same pattern was observed when residents were asked whether their concerns about local tourism development were taken into account: 60.10% of respondents were neutral, 22.34% agreed at least somewhat, and 17.56% disagreed at least somewhat.

Figure 11: Overall Satisfaction with Resident Involvement in Tourism Planning

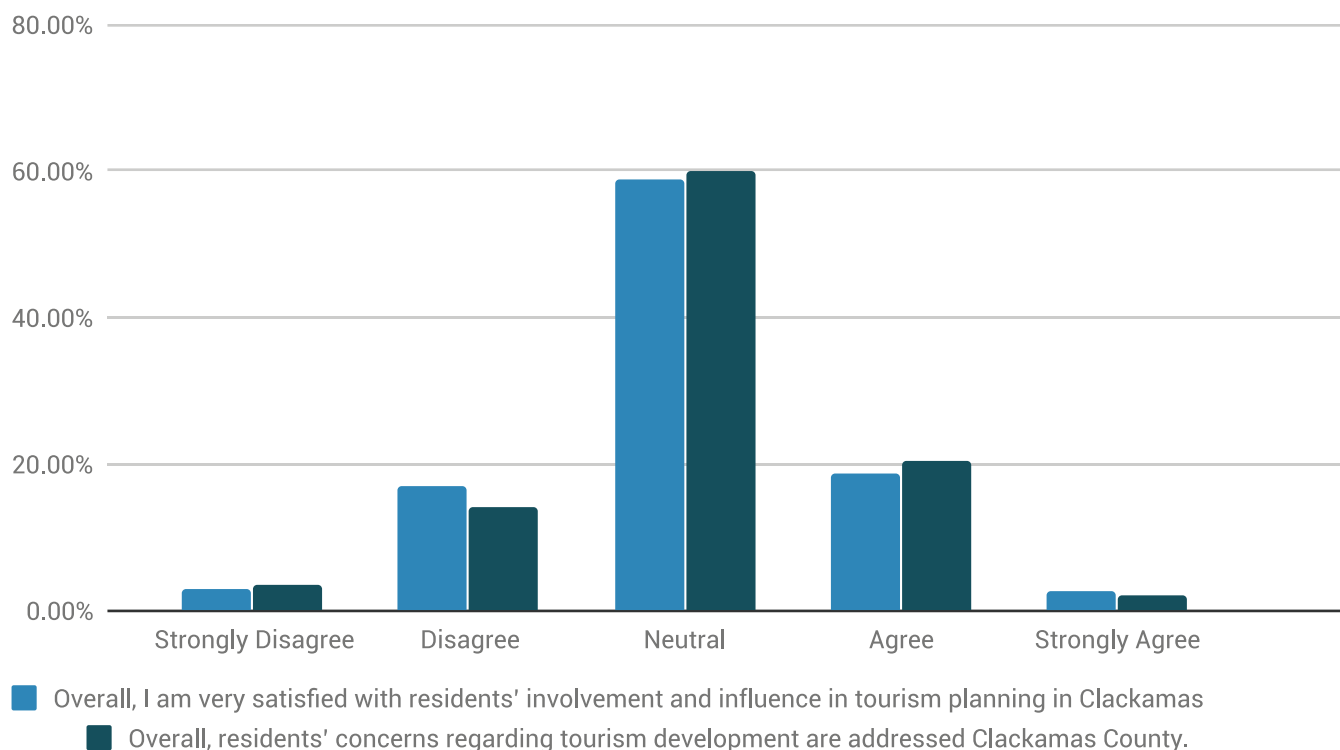


Table 14: Overall Satisfaction with Resident Involvement in Tourism Planning

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Overall, I am very satisfied with residents' involvement and influence in tourism planning in Clackamas County.	2.87%	16.83%	58.87%	18.72%	2.71%
Overall, residents' concerns regarding tourism development are addressed Clackamas County.	3.46%	14.10%	60.10%	20.28%	2.06%

While at least 50% of respondents from all three regions responded neutrally to this prompt, mountain residents were 10% more likely to want a greater voice in planning, compared to the urban and valley regions. This higher level of dissatisfaction could be the result of distance from central planning entities such as CCTCA. Less than a quarter of respondents in any region were satisfied with the level of their involvement in tourism planning. This is an area of improvement for tourism planning entities within Clackamas County.

Figure 12: Satisfaction with Resident Involvement in Tourism Planning, by Region

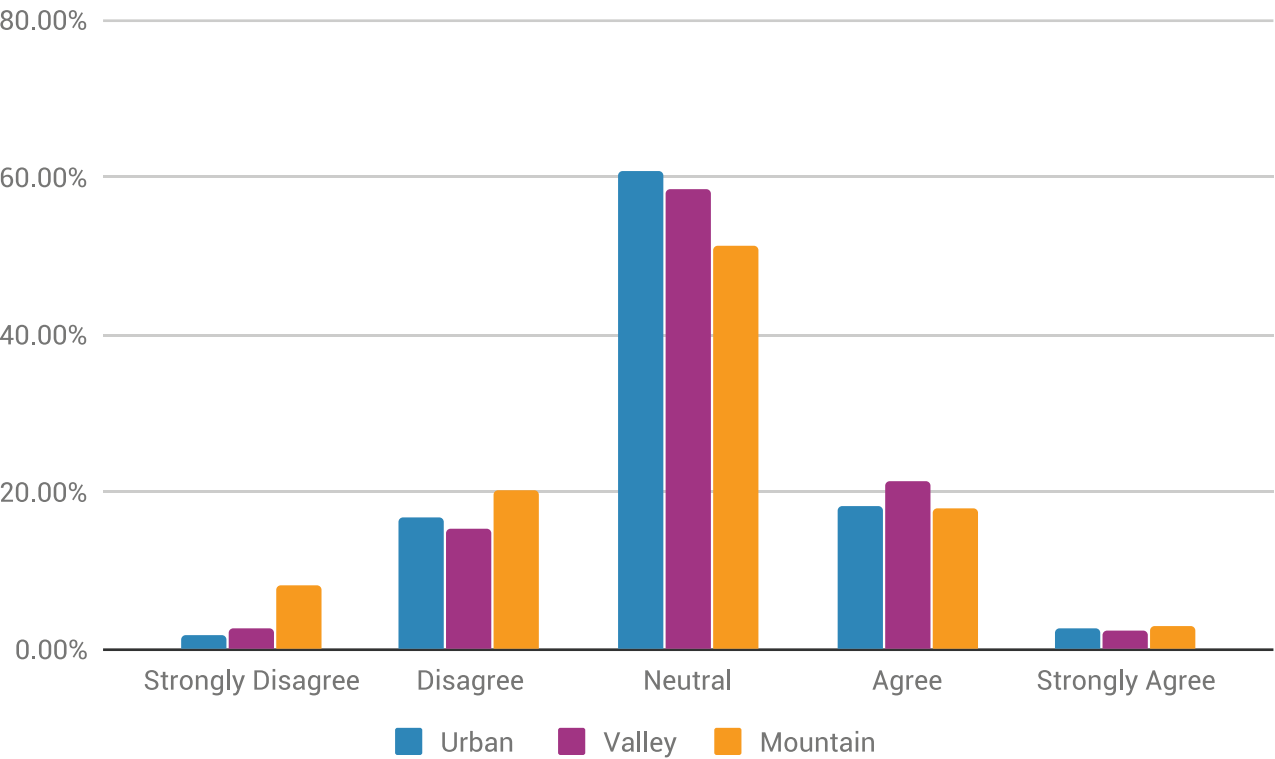


Table 15: Satisfaction with Resident Involvement in Tourism Planning, by Region

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	1.89%	16.67%	60.64%	18.09%	2.72%
Valley	2.73%	15.30%	58.47%	21.31%	2.19%
Mountain	8.05%	20.11%	51.15%	17.82%	2.87%

Similar results were found in the regional breakdown for this question. Approximately 22% of respondents across the three regions were satisfied. More than half were neutral, with urban respondents being the most neutral. The mountain region, again, was the least satisfied; 28.16% disagreed or strongly disagreed that their concerns were addressed. This is another area of improvement for CCTCA and other tourism planning entities.

Figure 13: Satisfaction that Residents' Tourism Development Concerns Are Addressed, by Region

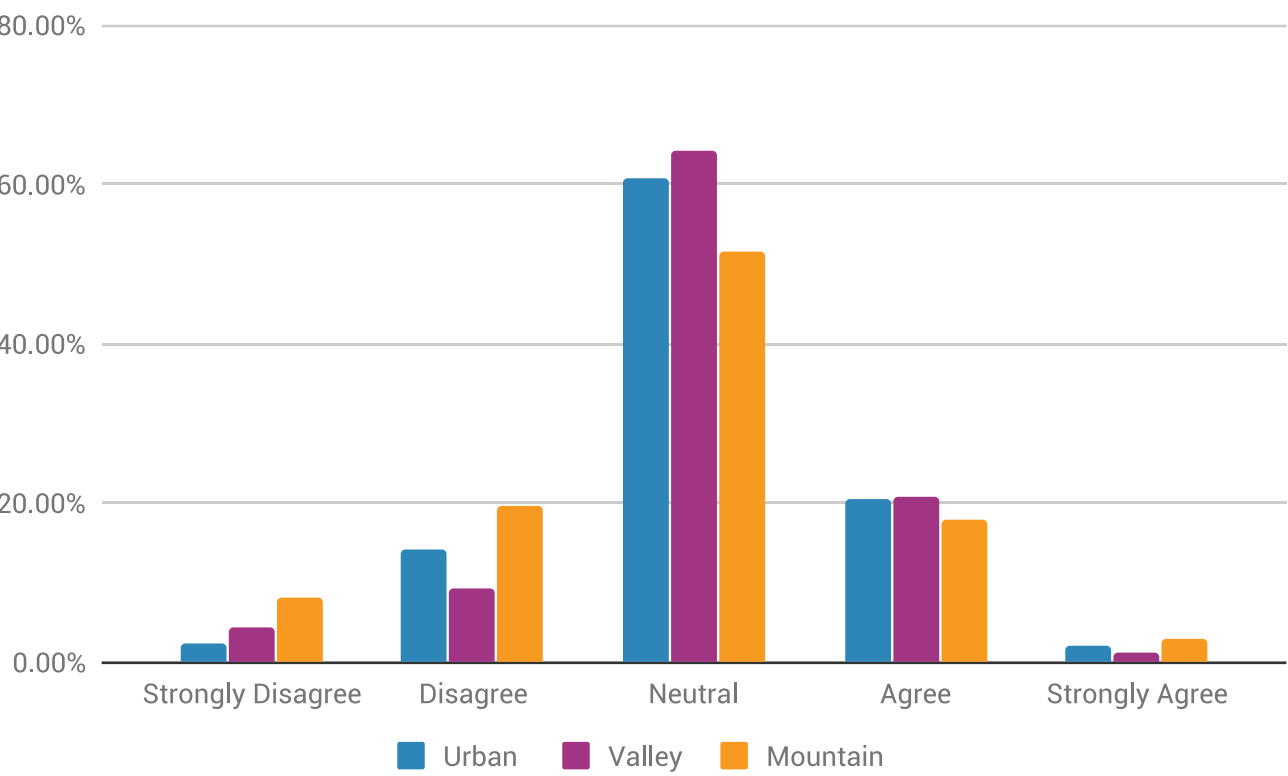


Table 16: Satisfaction That Residents' Tourism Development Concerns Are Addressed, by Region

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE
Urban	2.37%	14.23%	60.74%	20.52%	2.14%
Valley	4.40%	9.34%	64.29%	20.88%	1.10%
Mountain	8.09%	19.65%	51.45%	17.92%	2.89%

Thirty-four respondents commented that they were unaware of the local tourism offerings or of their ability to participate in tourism development. One respondent wrote, “I was not aware that I could have an impact on tourism decisions.” Another commented, “If there is news about local tourism, or promotional efforts about local tourism, it isn’t reaching long-term residents like me. It was hard to answer some of the questions because I haven’t received any digital or printed promotional material which makes me aware of tourism in Clackamas County.”

Six respondents commented on the need for both individuals and businesses to be more educated about and involved in the development of tourism offerings and sustainable tourism. One respondent noted, “Our communities do not do enough to cooperate with one another to create a seamless calendar of seasonal events that add to the quality of life for residents and attract tourists to visit. Local groups and nonprofits should meet to brainstorm cooperative and overlapping events that build upon one another and share resources, marketing and funds.” Some residents are wary of tourism development. One respondent described resistance to tourism development in “the more rural areas of Clackamas County due to a fear of change and congestion.” Another noted, “Sometimes cities and counties want to provide access to areas that affect citizens of the county and they really don’t care about the citizens.”

On the other hand, some respondents recognized the benefits that tourism development could bring. One in particular was encouraged that the county realizes “the big picture of what Clackamas County tourism has to offer” and appreciated efforts “to protect and sustain what we have here.”





COMMUNITY IMPACT

Survey participants were asked about the effect of tourism on four sectors of community development: cultural heritage, environment, economy, and quality of life. Respondents were asked to choose whether they believe tourism damages, helps maintain, helps improve, or has no impact on each of the four sectors. The strongest dichotomy reflected in Figure 14 and Table 17 was the widespread belief among all respondents that tourism improves the economy (85.44%), while 59.74% believe it improves the culture and heritage of Clackamas County, and 38.71% believe it improves quality of life. At the same time, 41.04% of respondents believe that tourism is helping to maintain the environment.

Figure 14: Perceptions of Tourism Effects on Community Development

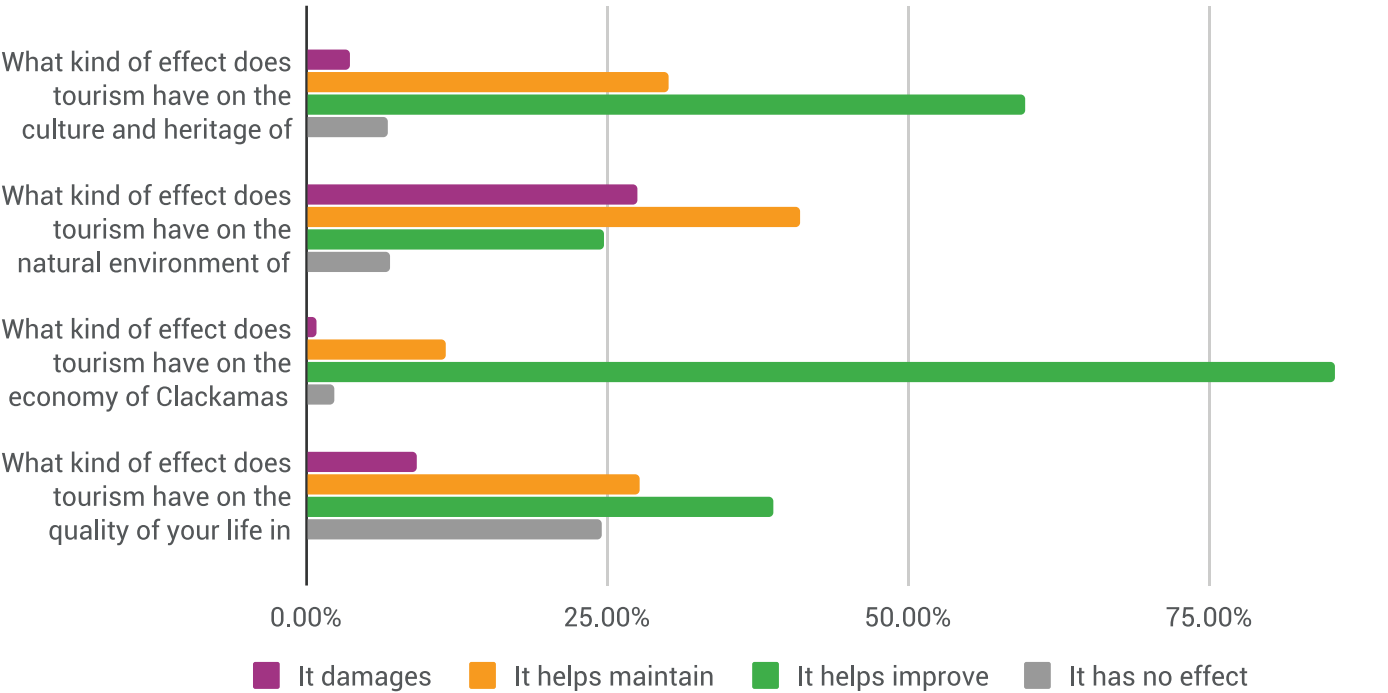


Table 17: Perceptions of Tourism Effects on Community Development

	DAMAGES	HELPS MAINTAIN	HELPS IMPROVE	NO EFFECT
In your opinion, what kind of effect does tourism have on the culture and heritage of Clackamas County?	3.53%	29.99%	59.74%	6.74%
In your opinion, what kind of effect does tourism have on the natural environment of Clackamas County?	27.47%	41.04%	24.67%	6.83%
In your opinion, what kind of effect does tourism have on the economy of Clackamas County?	0.82%	11.51%	85.44%	2.22%
In your opinion, what kind of effect does tourism have on the quality of your life of Clackamas County?	9.14%	27.68%	38.71%	24.46%



A. Cultural Heritage

Most Clackamas County residents (89.73%) believe that tourism helps to maintain or improve the county’s cultural heritage. The majority of comments around this issue were based on the desire for increased cultural heritage activities in Clackamas County. One respondent requested “more tourism that focuses on what makes Oregon and specifically Clackamas County different. I travel all over the US and many areas look/feel the same. We have an awesome heritage and environment here that we can use to set ourselves apart.” There were also suggestions around developing more attractions and tourism products focused “on honoring the native people of Clackamas County.” Another respondent noted seeing Native American cultural heritage presented in Alaska through “Arts, Language, Music, Dance, & Celebrations,” and believed Clackamas County could benefit by presenting Native American cultural heritage in a similar manner.

About one-third of respondents from each region believe tourism helps maintain cultural heritage (see Figure 15 and Table 18). Between 52% and 61% of respondents believe tourism improves cultural heritage. While opinions were generally positive, 9.77% of mountain respondents believed tourism damages cultural heritage, compared to only about 3.83% of valley respondents and 2.13% of urbanites.

Figure 15: Tourism Impact on Cultural Heritage, by Region

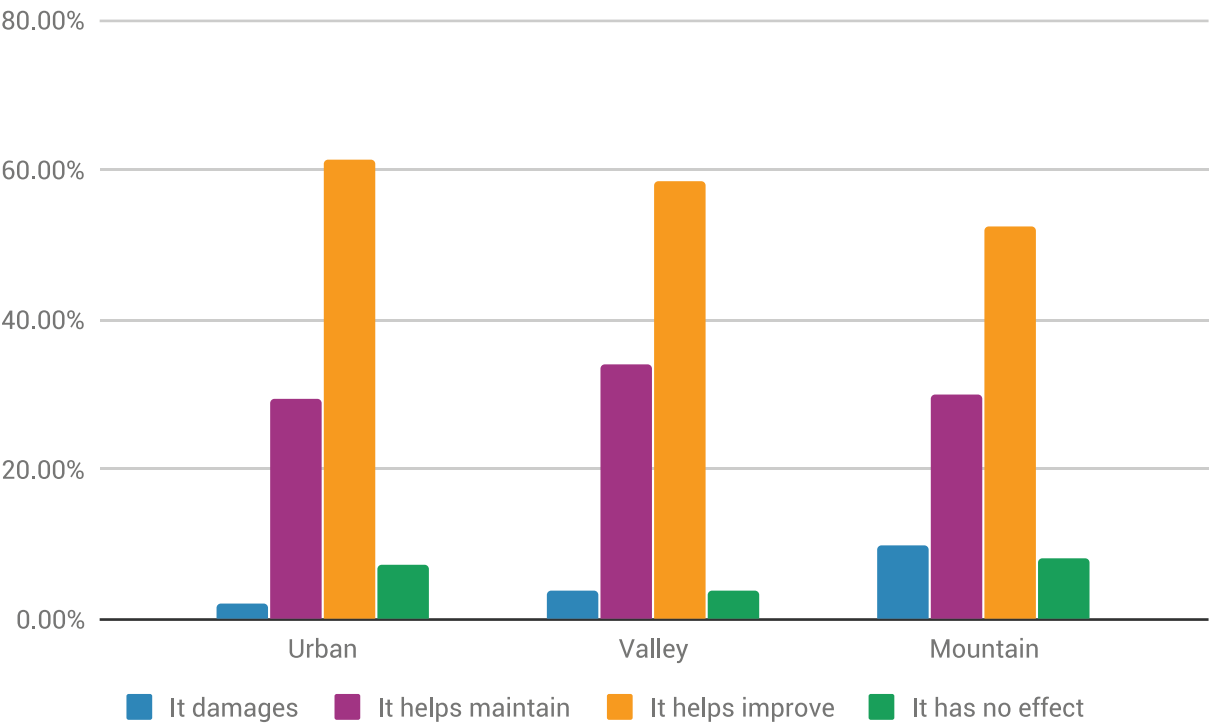


Table 18: Tourism Impact on Cultural Heritage, by Region

	DAMAGES	HELPS MAINTAIN	HELPS IMPROVE	NO EFFECT
Urban	2.13%	29.47%	61.18%	7.22%
Valley	3.83%	33.88%	58.47%	3.83%
Mountain	9.77%	29.89%	52.30%	8.05%

B. Environment

Mountains, waterways, and other natural attractions make the environment a critical component of the Clackamas County tourism product; however, 27.47% of respondents indicated that they believed tourism damaged the environment. Many respondents noted their love of the county’s natural beauty but expressed strong concern over environmental sustainability in the face of increased tourism. One respondent noted that the growing number of visitors is “making it harder to enjoy the natural beauty.” The most common environmental critiques involved overcrowding and overuse of land, trash left by visitors, bike and ATV use on trails, and the maintenance of protected lands. As one respondent said, “I understand that tourism increases our economy but wish that it didn’t have the impact it does on our natural environment.” Many seemed to concur with this.

Figure 16 and Table 19 depict the regional opinions on these effects. It is clear that residents across all three regions strongly believe tourism negatively impacts the environment, ranging from 21.43% in the valley region to a notable 42.20% in the mountains. Only about 16.76% of mountain respondents felt tourism improved the environment, compared to just over one-quarter of respondents from valley and urban areas.

Figure 16: Tourism Impact on the Natural Environment, by Region

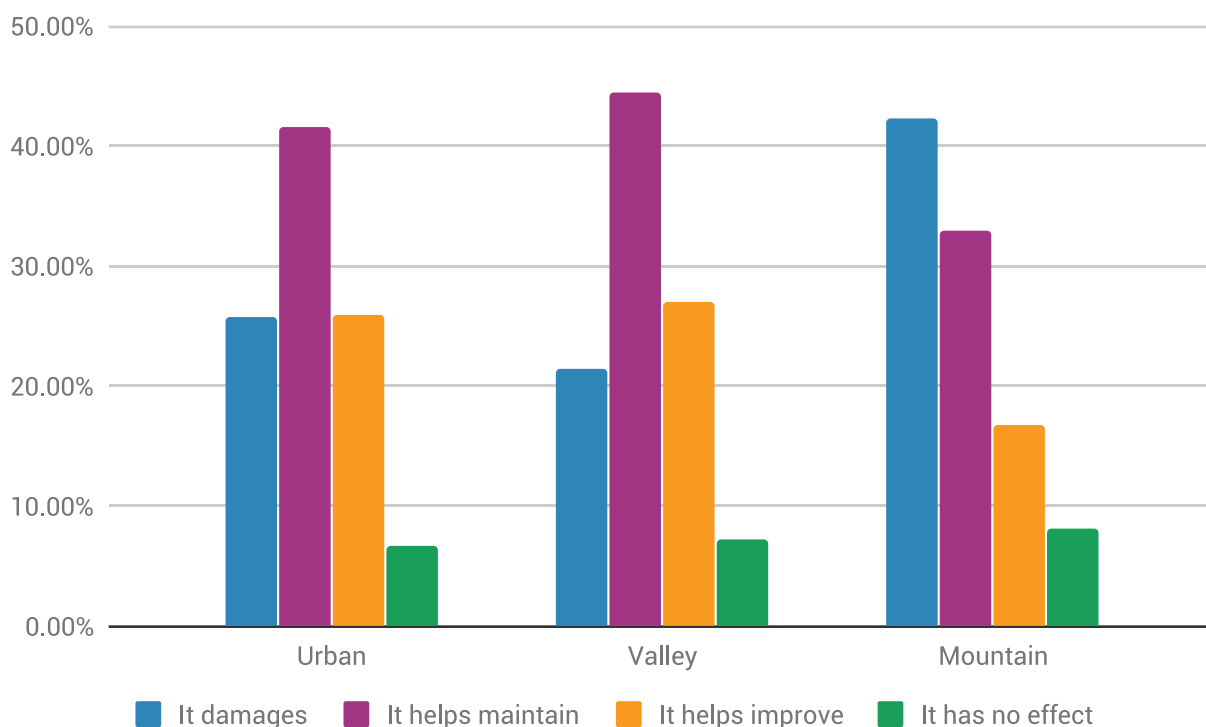


Table 19: Tourism Impact on the Natural Environment, by Region

	DAMAGES	HELPS MAINTAIN	HELPS IMPROVE	NO EFFECT
Urban	25.77%	41.61%	26.00%	6.62%
Valley	21.43%	44.51%	26.92%	7.14%
Mountain	42.20%	32.95%	16.76%	8.09%

C. Economy

A strong majority of respondents (85.44%) agreed that “tourism can bring new life and new ideas as well as add jobs and income to the area.” As one respondent said, “It’s been proven that outside money brought into a micro economy bolsters the economic strength of a community.” Many local business owners have personally experienced the positive impacts of tourism on their businesses. While most felt that tourism helped improve the local economy, one respondent noted that tourism funds should be used to improve infrastructure: “Tourism dollars need to be focused on making the places we have better to visit (bathrooms, trash pickup, signage). If you do that the private money will come in and the rest will happen.”

Regional opinions are quite similar across the board, and much more positive than the opinions on environmental impact (see Figure 17 and Table 20). A minimum of 80% of all respondents across the three regions, with the highest percentage being 87.32% in the urban region, believed tourism positively impacts the local economy. There is no doubt residents believe tourism is economically important to Clackamas County.

Figure 17: Tourism Impact on the Economy, by Region

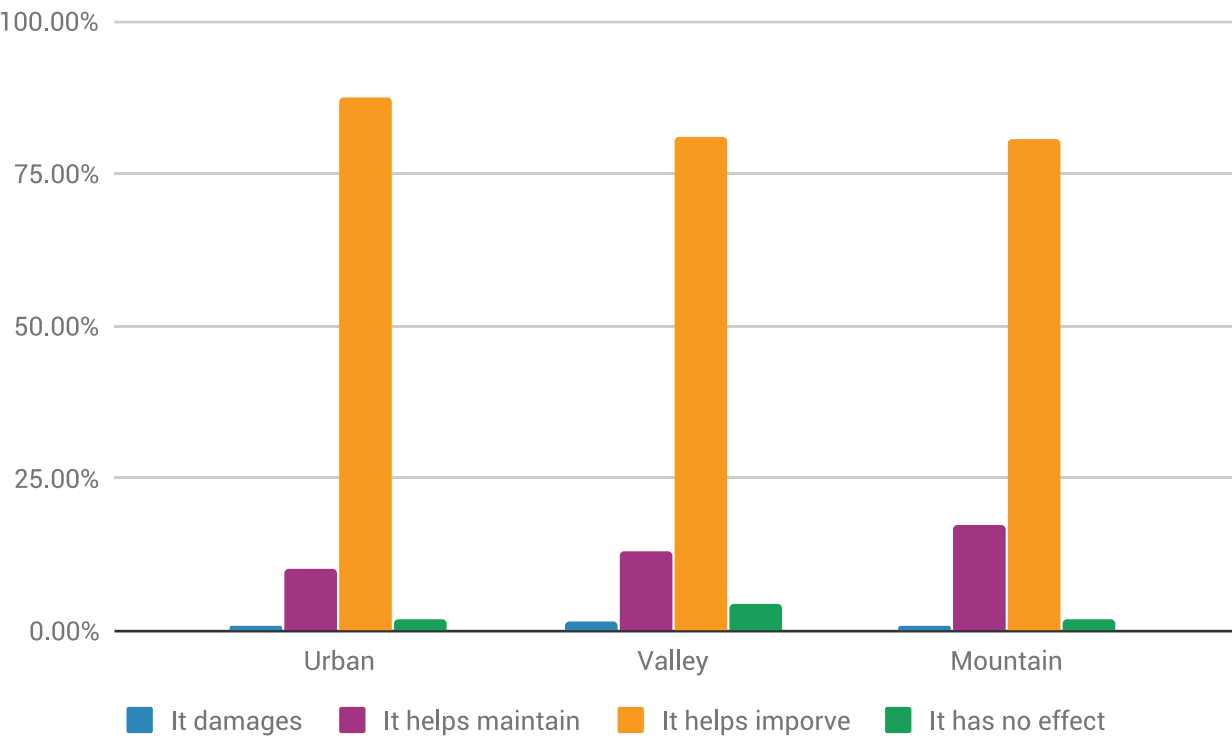


Table 20: Tourism Impact on the Economy, by Region

	DAMAGES	HELPS MAINTAIN	HELPS IMPROVE	NO EFFECT
Urban	0.71%	10.07%	87.32%	1.90%
Valley	1.64%	13.11%	80.87%	4.37%
Mountain	0.57%	17.24%	80.46%	1.72%

D. Quality of Life

Of the four categories discussed in this section of the survey, the impact of tourism on quality of life received the most divergent responses. Over 9% of all survey respondents stated that tourism damages quality of life, 27.68% said it helped maintain it, 38.71% said it helped improve it, and 24.46% said it had no effect on quality of life. While approximately two-thirds of respondents felt positively about the impact of tourism on their quality of life, nearly 10% felt negatively about it. One respondent summarized the dilemma this way: “If done right, tourism can be a great asset to a community. Unfortunately, the more popular a place becomes commonly the less those places are maintained or up kept and become overcrowded and tourism can really ruin a beautiful place. When managed ... I think certain tourism activities and places can really enrich quality of life in many counties.”

Respondents noted that tourism can improve facilities and attractions for visitors and residents alike. “There are so many beautiful parks and trails, areas to enjoy water activities, and great historical museums and landmarks. I think it is in the county’s favor to continue to improve these locations, to not only bring in outside tourists to boost the local economy, but also for residents of the county to enjoy the beauty that’s around them.” Criticism from respondents centered around overcrowding, which leads to increased traffic and congestion, a higher cost of living and higher housing prices, noise and other disturbances, and environmental degradation—all of which can impact the natural assets treasured by many county residents. One respondent wrote, “The promotion of tourism contributes to the loss of lifestyle, livability, and affordability for those who reside in the areas being promoted.” Another respondent stated, “Tourism brings in money, sure, but it also brings in disrespectful vacationers that leave garbage and trash our quiet community.”

About 25% of respondents in each region felt tourism had no effect on their quality of life (see Figure 18 and Table 21). However, about 41% of respondents from the valley and urban regions believe it helped improve their quality of life, and 25.43% of respondents from mountain regions. Almost 20% of mountain respondents felt tourism negatively impacted their quality of life, only 5% less than the number believing tourism is beneficial. Negative sentiment towards tourism in mountain regions is an area that deserves continued monitoring by tourism planning entities.

Figure 18: Tourism Impact on Quality of Life, by Region

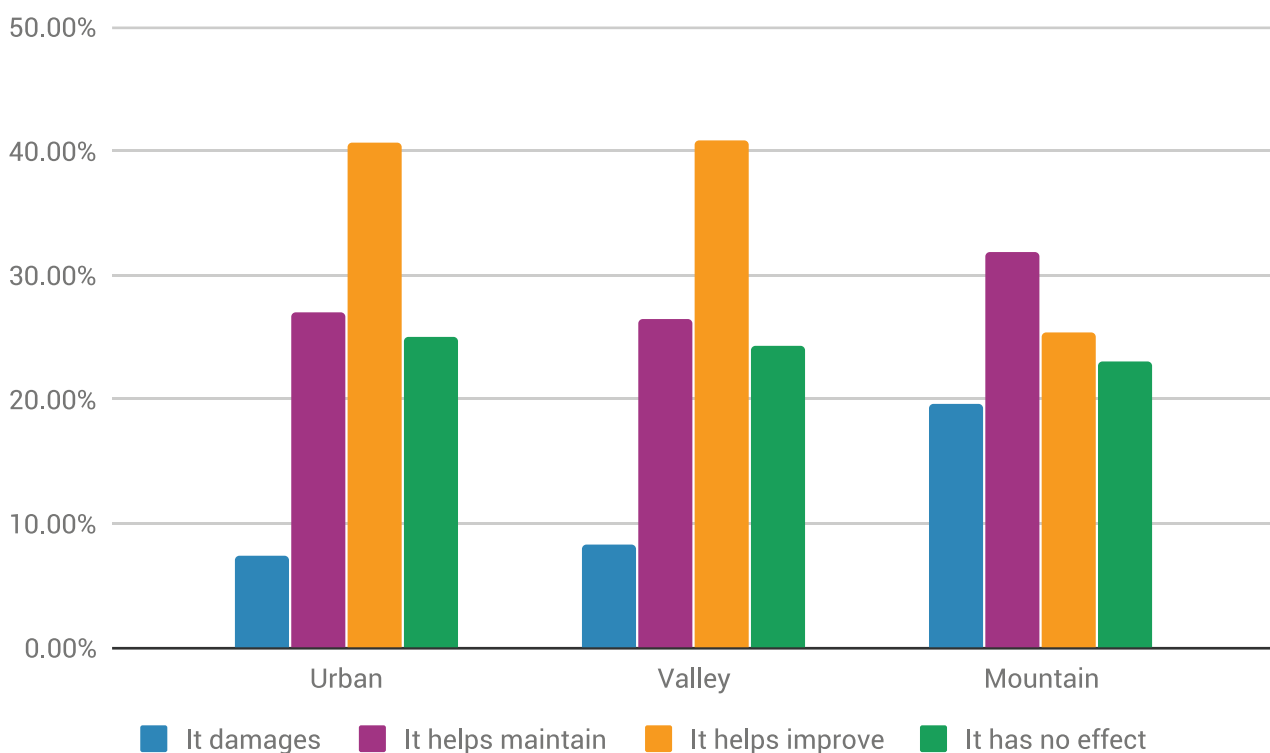


Table 21: Tourism Impact on Quality of Life, by Region

	DAMAGES	HELPS MAINTAIN	HELPS IMPROVE	NO EFFECT
Urban	7.33%	26.95%	40.66%	25.06%
Valley	8.29%	26.52%	40.88%	24.31%
Mountain	19.65%	31.79%	25.43%	23.12%





RECOMMENDATIONS

In general, Clackamas County residents seem satisfied with tourism overall, its benefits for the community, the resulting economic contributions, and its impact on local cultural heritage. Respondents have mixed feelings about the benefits of tourism to individuals, resident involvement in and influence on tourism planning, responsiveness to resident concerns regarding tourism development, and the impact of tourism on resident quality of life. The one area of major concern that surfaced from the resident survey was tourism’s negative impact on the environment. Furthermore, when the results are broken down by region the mountain residents are the least satisfied with the issues assessed in this survey.

While the resident survey generally received positive feedback, the following recommendations are designed to ensure the success of sustainable tourism development in Clackamas County.

Recommendation #1: **Regularly Collect Resident Feedback**

Using this survey as a baseline, continue to solicit resident feedback on a regular basis to track changes in overall opinions regarding tourism, both in general and by region. Periodic surveys (every 2-3 years) are not only a best practice for destination managers; they also fulfill the GSTC indicator pertaining to “Local Community Opinion,” which is designed to determine whether “local communities’ aspirations, concerns, and satisfaction with destination management are regularly monitored, recorded and publicly reporting in a timely manner.”

Recommendation #2:

Educate Residents on the Benefits of Tourism for Clackamas County

While CCTCA publishes tourism-related statistics annually, the survey indicated that most residents are unaware of the impacts of tourism. A targeted informational or educational campaign could lead to a more positive view of tourism generally and enable residents to participate in discussions about how tourism development is affecting the county. CCTCA could also generate more community involvement by ensuring that a CCTCA representative is regularly present at town hall meetings. Particular attention should be paid to the mountain region of Clackamas County as their respondents were less aware of (or less convinced of) the personal benefits of tourism.

Recommendation #3:

Facilitate Community Access by Providing Opportunities to Participate in Tourism Development

Several comments indicated that residents and tourism-related stakeholders do not feel they have the opportunity to participate in tourism development efforts. This seemed to result in a general lack of cohesiveness around the county's tourism product. CCTCA has the opportunity to facilitate more collaboration, either through the development of a tourism stakeholder network or regular meetings aimed at generating increased stakeholder collaboration. Again, more attention should be paid to the mountain region as their respondents were over 10% less satisfied with their involvement in tourism planning compared to the other two regions.

Recommendation #4:

Leverage Tourism as a Means of Improving the Natural Environment

Although the impact on the environment was the only section in the resident survey that received significant negative feedback, CCTCA has the opportunity to leverage tourism to preserve natural resources. This strategy will be especially important in the mountain region, where about 42% of respondents felt tourism damaged the environment. For example, the county could consider expanding the existing Trailhead Ambassadors program. Ambassadors can be instrumental in informing visitors about proper trash disposal and trail use. They can also steer visitors toward less visited trails or attractions, thereby helping to mitigate the potentially destructive impact of tourism on natural resources.

Annex

This annex provides the complete list of all respondent comments from the final, open-ended question on the survey: "Do you have any comments, questions, or concerns related to tourism in Clackamas County?" Of the 1,219 respondents, 403 provided comments.

Question 11 Responses from Clackamas County Resident Tourism Survey
The Willamette River locks in Oregon City need to be reopened to enlarge the tourist to other cities via the river. Tourism will give new revenue throughout Clackamas County.
Regarding the question about the effects of tourism on the natural environment, I felt that there are areas where recreational use can be damaging, but that is usually in areas where there is little to no maintenance/oversight or stewardship.
You need support small town festivals and not worry if there is a hotel that can be filled up.
I am encouraged to see that those who are in managerial positions employed by and in Clackamas county tourism are looking at and are finally seeing and realizing the "wholeness" of the BIG PICTURE of what Oregon's Mt. Hood Territory / Clackamas County tourism has to offer and what it all is and can entail to protect and sustain what we have here, and how it has developed into a growing economic and financial resource for employment and keeping Oregon so it can still attract tourism visitors, but that these visitors do not downgrade or partially start a decaying what we have because we the people, and the governing bodies are so busy with our and their own jobs and lives, that they have not put into a protective sustainability plan so it will all be here for the future people to enjoy.
I live in Clackamas County but my zip code was was not included. 97062
I attended your tourism presentation collecting data from Tripadvisor, went home and searched Tripadvisor. Top places to visit in Oregon? Mt. Hood (Territories) was not even on the LIST! Clackamas County could improve their tourism marketing by focusing on Trip Advisor and similar sites! They should be marketing trails on REI's Hikingproject.com, They should direct their marketing to existing, widely used platforms people use to plan their visits!
Tourism is great economically for the community of Sandy, except that tourists can be rude, sometimes do not obey laws, leave trash, and clog up main highways.
Thank you for your engagement in this process!
Clackamas County, and more specifically cities like Sandy are missing the benefit that tourism could bring to the area. Thousands of people travel through our area to get to Mt Hood area recreation and there is really no reason for them to stop either to or from their destination to boost the local economy. There are no recreational stores, outfitters, tours, etc, no large meeting places or restaurants geared toward attracting travelers or tourists. There is nothing to make people slow down and stop on their way to where they are going.
The traffic in Sandy is out of control. It's very difficult as a resident to shop at local businesses or even take my kids to school because of all the traffic going to and from Mt.Hood/Eastern Oregon. Vehicles small and big(semi trucks) go way faster than the posted speed limit and blow through

<p>traffic lights and cross walks. I hesitate to shop in the downtown area with my children because the traffic is so dangerous, which then affects our local economy. I know many other residents that feel the same. I hope a solution could be found, not necessarily more crosswalks being added however because that only adds to or commute time.</p>
<p>Only issue involves road infrastructure. Lots of crashes and traffic.</p>
<p>I live in Vancouver, WA and I recreate in the Clackamas Cty area from time to time as a kayaker and hiker. It's been proven that outside money brought into a micro economy bolsters the economic strength of a community. Good recreational opportunities accomplish that.</p>
<p>The city of Sandy in particular has so much potential yet, it is a drive thru town. Fast food restaurants litter the beautiful landscape and if we had less chains and more family owed shops and restaurants it could be a destination for people hiking or skiing in the area. We should be promoting a more sustainable, environmentally friendly city that fosters small businesses.</p>
<p>Bike riding or bike competing should not be allowed or encouraged to be on Ten Eyck Road. I live close by and have seen many close calls. It is dangerous for both the drivers and the bikers.</p>
<p>they do a good job reaching out to partners, but not the community. i.e. you have to be following them on FB and instagram. Not sure they are members of 'ILOVEAURORA or CANBYNOW, etc which has 15,000 participants.</p>
<p>Where can individuals find information on the impact tourism has on Clackamas County?</p>
<p>Oregon needs to promote tourism more in general. This state is not a usual visiting point for most tourists domestic or foreign. Promote our strengths - the natural environment for young or old adventurers, and eclectic foods and eateries.</p>
<p>Please keep Up with the traffic and cars that come with an influx of people</p>
<p>Agri-tourism and heritage tourism seem like the two most suitable areas of tourism in our area.</p>
<p>I would like to see the trolley and sternwheeler back on Oregon City</p> <p>LESS PARKING METERS!!!</p>
<p>What is the thoughts for the tri corner at High Street and Southend. Parking lot would be great?</p>
<p>How are you addressing cultural areas that could use your support monetarily and your expertise to preserve and educate these hidden gems but would be adversely affected by an increase in visitor hours that seemed to be required to meet qualification for grant monies from your organization?</p> <p>Have you ever made an effort to locate the tiny gems that have a rich history or cultural significance in Clackamas County but basically are only know by locals?</p>
<p>My Goal is to bring more awareness and grant funding to the Hillendale Pickle Ball courts.</p>
<p>Parking and accommodations for over night stays are a huge issue for increasing the number of tourists.</p>
<p>Not cohesively promoted</p>

My main concern is transportation issues. Too many cars, not enough lanes to drive in, not enough park and ride options to decrease gas emissions, unsafe parking conditions at lakes and trailheads because of so many people, lack of public restrooms etc...

To me, it seems like Mount Hood is a big draw for our county, plus fishing on various rivers (Mollala, Clackamas, etc). I also think Oregon City could get more tourism especially if Willamette Falls is showcased with the new natural project. I think that could draw a lot of people to Oregon City. I also like the Oregon Trail Museum in Oregon City. The farm loops in the areas are fun too. Also Estacada Lake and Milo McGyver Park are fun.

Living in sandy i feel tourism helps provide to the economy but also makes traffic really bad

If there are more tourist attractions added to Clackamas County it effects the cost of living, traffic, and housing. That is my main cause of concern and dislike.

There is a lot of unaddressed damage to the natural environment from "tourists"/recreational enthusiasts in rural south Clackamas County. Litter/roadside trash, underage drinking & intoxicated drivers, and illegal off-road/ATV use is a problem. It would be nice to see funding for regular Sheriff's patrols in the area due to the increase in crime the tourists bring.

I hope that the Willamette Falls project in Oregon City continues to move forward, it would be awesome to have better access to the falls.

Our natural sites are being taken from us including free camping on the Clackamas and Molalla Rivers. Please stop letting BLM and PGE take away access and stop granting management of approved campsites to for profit companies

Tourism needs to be promoted more.

I think that the Willamette Falls Legacy Project will bring a much needed boost to Oregon City and Clackamas County. However, the time line needs to be faster than what is currently planned. Many OC and CC residents do not have confidence that the project will come fruition.

Eco tourism, we need to save more oak trees and tall trees to keep our river life here and active. Keep our tall trees by our rivers, in our parks and save the tall trees in our neighborhoods. People think of Oregon with an out look of trees and wildlife and our developers are SNUFFING the life out of aur trees for a view and squished in housing. Curve our roads and save a tree, slow clear cutting from New developments. We need to stay true to our wildlife because that's why people come to Oregon. Fish around trees, walk amidst trees and feel the alive nature, and it will not fly if it does not have a tall tree to land in. Think hard on it please

Love our Clackamas County!

Have no idea what it does

I'd like to see the city of Oregon city do something with the old paper mill project. It seems they've been working on this for several years with no difenitive plan. I'd also like to see a Costco built in Oregon city or another part of Clackamas county

Keep enough trash cans available at boat ramps or popular launch/landing sites so floaters can have a place to put their trash.

I think Clackamas County is not as represented on the tourism front as Portland or the Bend area.

Clackamas county is so diverse in it's attractions, from Willamette Falls to Mt. Hood ski bowl. The farms, nurseries, antique shopping and so much more

Bicycle tourism is severely lacking in Clackamas County. Bicycle tourism has huge economic benefits given the average spending in this demographic. Unfortunately, bicycle tourism is often overlooked and ignored by politicians that don't personally participate in bicycling.

Stop crime at trailheads, reduce impact of people in forests, disallow shooting in forests, much greater patrolling of campsites and forest trails, traffic in 26 is ridiculous, we don't ski on weekends anymore because the drive is too dangerous, too many people drinking and getting high in ski resort parking lots.

THERE NEEDS TO BE MORE MONEY, GRANTS AND ORGANIZATIONS INVOLVED TO PROMOTE EVENTS AND TOURISM INVOLVED IN OUR HERITAGE IN OREGON IN A SAFE MANNER

Preserve the natural environment as much as is reasonable before climate change and humans destroy the whole planet!

Residents may not be well inform about where to go.

If done right, tourism can be a great asset to a community. Unfortunately the more popular a place becomes a lot of times those places are not maintained or up kept or overcrowded and tourism can really ruin a beautiful place. When managed by caring fore thinking individuals I think certain tourism activities and places can really enrich quality of life in many counties.

Currently the Clackamas River is heavily used in the summer time and people leave BAGS of garbage by the roadside when they decide to go home after a day of visiting the area.

This survey does not provide an adequate range of answers for some questions, so one is forced to select the answer that is the "closest match" to their true response, or to select no answer when the closest match is perceived as too distant from the true response. I suppose the architect of this device is aware of this situation.

Regarding tourism in CC, it obviously directly helps some stakeholders, primarily commercial. However, it directly or indirectly harms many other stakeholders.

Examples:

Tourism clogs already-congested roadways, which adversely affects many commercial and all residential uses of CC roadways.

Tourism increases demand for access to natural resource areas in the region, which effectively reduces the access enjoyed by residents of the region.

River-centered tourism destroys habitat, pollutes the river, and harms species that depend on the river. Many of these species have been in decline for decades due to energy, timber, farming and other commercial (and residential) uses impacting the river. A dead Clackamas River would eventually kill tourism along the river.

The addition of increasing numbers of tourists into the river ecology for the sake of profit by commercial users, should be done so in such a way that key natural resources are restored to sustainable levels, resources like water flows, steelhead runs and salmon runs.

If tourism funds restoration of key natural resources, and is carried out strictly in a manner consistent with restoring and sustaining natural resources, then maybe it would possibly make sense to encourage tourism in CC.

Oregon needs to get 100,000 Spring Chinook over Willamette Falls every year and you will see

people from New Zealand and all parts of the world. Just like in the 80's and early 90's and I talked to people at Fisherman's Marine Supply from New Zealand that came to OC to fish for the world's tastiest salmon. Because I've lived here for over 50 years and if there is Spring Chinook people will come from as far away as New Zealand to fish for them. It's a huge tourism resource that you don't hear about because ODF&W have let the fish disappear right along with the tourism that was associated with the Spring Chinook fishery.

Would Like to see more advertising of opportunities within Clackamas County - and more intertwine with local City's

The traffic in Sandy, during busy times, needs to be addressed.

I would like to see more effort put into Sandy. Right now it's a pass through not a destination. I remember years ago coming to Sandy and visiting the fun little shops. Now it's difficult with the high rents for individuals to invest in this type of venture. Unless the city cooperates with businesses (financial start ups, tax reductions, advertisement, etc) then no one will be able to step up.

People who live here know the area best. Using local contractors and providers will help overall impact of local residents connecting to tourism benefits.

To much traffic and nothing is being done to address the issue

Traffic in winter to get to and from the activities is my only issue.

I love everything about the county, and venturing in it too though over the past 13 years it's getting too crowded for the environment making it harder to enjoy its natural beauty.

Tourism is important to the economy of the community, however, the income received may not help with the health of the county.

I believe Clackamas County would benefit from stronger advertising the quality Tourism available year round.

It's a delicate balance, expanding tourism opportunities and keeping the livability of places intact for residents.

It's good to encourage tourism, however we need to be mindful of damage to the environment due to overuse, and people not be conscientious with low impact activities.

Agri-Tourism holds such possibilities. It needs more of a boost.

high tourism days effect traffic in local towns, which has a negative affect for locals and travelers. Local towns & ODOT need to work together to find solutions.

So much more could be done to increase tourism here. We have a great history, we have parks, etc. that could all be developed much better.

I feel that the promotion of tourism contributes to the loss of lifestyle, liveability, and affordability for those who reside in the areas being promoted. It also contributes to loss of habitat, and harm to wildlife.

I have concerns about the pollution in the Willamette River by the Mills, below the falls. I've also heard that they may turn the old Mill that was shut down into a shopping mall for tourism.

We need more historical places at least with signs and improve our museums.
More workshops between the County and recreational community Delineate working groups with planned goals and outcomes that are achievable in a relative time manner
The general public has no idea what tourism does because they really operate behind closed doors. If general public knew how much money was spent on staff and 'branding' they would be horribly upset when the monies could have benefited projects in the county.
Garbage left behind by visitors
Visited the upper Clackamas River. What a tragedy. Trash, toilet paper and illegal camp sites. An area that should be a jewel for Clackamas Co. is looking more like a garbage dump. I brought home a bag of the safer looking trash - so I guess I am entitled to complain. I know it's mostly FS and BLM-managed, but it's still our county.
Quit spending tax payers money on dumb stuff and fix the roads and improve congestion with out Tolls
I think there can be further improvement in this category and providing knowledge (whether that be classes) for residents and business owners of tourism and the marketing associated to it.
Own vineyard and winery so appreciate tourism
The part of tourism that bothers me is when people come into the county, leave their trash, disrespect the trails, rivers, etc. If tourists would behave as good stewards, I would have no problem. However, they don't seem to know how to do that!
While the community certainly appreciates tourism \$\$\$ spent in the county, Clackamas county doesn't seem interested in mitigating their effect on residents. ie traffic, park crowding. From a natural resources standpoint I really don't think the Clackamas needs more people recreating in it. IMO
There is opportunity to connect multi-use trail system between Portland and Estacada and including PCT.
My wife and I would love to see more tourism in the county, especially focused on the county's unique history. I'm concerned mostly about the crush of river use during hot summer days...more recreation than tourism.
To be honest, I'm not really sure what efforts are being made to attract tourists to Clackamas county versus Portland. I don't know that there are a lot of tourists in West Linn.
Traffic
Is there a way to purchase Clack County Park passes on line?
In Clackamas especially West Linn Old Willanette area helps us to keep our small business thriving.
Clackamas County Tourism has done a great job in advertising the destinations and things to do in our county.
City should have attractive/clean lodging for tourists. There is a definite need for over night stay

This would, of course, encourage tourism..
Lets Build The Falls
Road repair, improved literature about stuff to do
My concept of tourism in Clackamas is largely based on recreational ventures in the Mt Hood National Forest, on Mt Hood itself and its immediate area.
Get the Willamette Falls Legacy Project completed soon!
More transportation options. More public information needed regarding future of Heron Paper property.
It will improve the economy and quality of life as well as vibrancy of a community with pride and better shopping and dining options
We need more places for people to stay when they visit besides Air BnBs. Not many nice hotels available.
I am looking forward to the development of the Willamette Falls area.
I'm very interested in Clackamas county's approach to water tourism. I'd like the county to consider a more coordinated, proactive approach.
The development of the Riverwalk is if prime importance. Opening the locks would aid water tourism. Clackamas COunty has so much to offer and is under utelized
This is a very difficult survey because no information or figures are offered! We are left to wonder and guess! And what does Clackamas County actually do??
Traffic congestion and parking do become a concern with more tourism
I don't know much about tourism, but want to learn more
Lets make more opportunities along the river
I would like to learn more about tourism development efforts in Clackamas County and opportunities to provide input regarding those efforts, particularly about the activities planned for the Willamette Falls area.
Love to know how much we spend on tourism promotion and how much we get back
Development at the falls by west linn
I do not find or hear of Many people visiting C C . the questions asked are not relevant to what I know about tourism in C C as of now.
When you say tourism, I'm thinking about ski opportunities, snow sports,
Our infrastructure (roads, bridges, etc) can not handle any increase in traffic. If the proposed I-205 tolls are put in, traffic will automatically become a nightmare, with or without tourism related vehicles.

Accommodations for tourists is very limited
What are the main drivers or destinations for tourists in Clackamas County?
Our communities do not do enough to cooperate with one another to create a seamless calendar of seasonal events that add to the quality of life for residence and attract tourists to visit. Local groups and non-profits should meet to brainstorm cooperative and overlapping events that build upon one another and share resources, marketing and funds.
We need more facilities and activities for paddlers and camping along the Willamette. Kayak lockers and bike lockers and rentals for both.
Ensure adequate procurement oversight for incoming revenue please. Thank you.
We have the largest by volume waterfall in the U.S. and it is almost hidden. Some Clackamas county residents don't even know about it.
I know little about tourism in Clackamas Co. Greater emphasis on it - both to attract tourists and to expand the knowledge/understanding of local residents - seems a good thing.
Tourism is beneficial to the county and it's residents.
I've recently become interested in using the county's water assets to increase tourism.
It is key that tourism does not detract from our natural resources, natural spaces or livability of our communities. Revenue from tourism should, in part, be used to maintain and/or enhance those things.
I see huge potential for reworking the Blue Heron mill into a tourist destination but don't understand why it is taking so long. Also disappointed about the Oregon Trail Interpretive Center. Is it permanently closed? These are two tourism destinations that cause Oregon City/Clackamas County to be the laughing stock of tourism in the Tri-County area. Our elected officials and community should be more responsive to giving private business what they need in tax incentives to take over these properties.
Clackamas County is behind on dealing with the rapid growth of tourism. It's highways, parking, trails, campgrounds and lodging are at maximum capacity and dangerous in some ways to the local residents. Housing cost for locals have skyrocketed above workers wages. Future growth for the county needs to focus on handling the large numbers that visit and recreate. Lack of bicycle and pedestrian pathways need to be increased along with affordable housing.
ni think a lot of people come here because of the name of the city and the end of the trail
The traffic in Damascus on Hwy 212 is really bad.
The concerns I have with tourism in our County is that outsiders tend to litter and do damage to our environment. I understand that tourism increases our economy but wish that it didn't have the impact it does on our natural environment.
Tourism helps communities. However, taxing the "tourist" vs the citizens is political cowardice.
MORE FREE PARKING IN DOWNTOWN CORRIDORS ESPECIALLY OREGON CITY ON

WEEKENDS AND AFTER 5. SUPPORT FOR CENTRALIZED BUSINESS DISTRICTS OR HUBS. OFFER A COVERED WAGON TOUR WHERE VISITORS CAN RIDE A COVERED WAGON FOR A DAY OR MULTI DAY
I would be great to have our tourism areas fully open throughout the year.
I look forward to progress on the Willamette Falls Project.
I have observed some natural areas (such as Mirror Lake) become overly attended with overcrowded parking, trash, and damage to the trail from overuse. It's not the same as 10 years ago when you would only run into a few hikers.
think you need to promote ads on skiing and water sports from water skiing to fishing.. I think you need to put some money into the fishing industry across the county and assist the ODFW
McLoughlin is really unattractive and not friendly for pedestrians or visitors.
This goes deeper than we realize and it starts by understanding our full responsibility as citizens and when in a tourist role. We are all failing to be responsible and it is slowly deteriorating our community, environment, and our health.
In general, we do not see much advertising about tourism in Clackamas County.
If we make Clackamas County nice enough for tourist to want to visit, we make it nice enough for us too.
I believe tourism is healthy because it causes us to keep and improve destinations. Placed like Willamette Falls being developed into a destination actually improves the site for all of us locally. However, tourism at Government Camp creates more traffic than we can handle both on the roads and on the trails.
I feel that we should advertise more about all of the many things that we have to do here in our County. We have so much to offer those who do not know that we are here with the exception of Mt. Hood.
Tourism is a good thing but we need to put a lot of work into the infrastructure of Clackamas county. The county roads and bridges are in bad shape.
It needs more cultural events.
Clackamas County is a beautiful county. I appreciate the efforts to share this beauty with visitors. They bring tourism dollars to our economy
I work in Clackamas County but do not live in the county. I enjoy all the information on tourism the county offers, especially when we have out of town guests.
Continue to improve tourism and businesses relate to it. Be careful about things that ad costs to taxpayers
I like the new tourism posters. Many people seem to want to buy them online. Might be an opportunity

I love that our tourism focus is on the outdoor adventures people can have here. That helps both tourists and locals have the opportunity to enjoy the best our state has to offer.
I don't see how beneficial this survey could be...it's pretty vague
I fear that maintenance and protections of natural areas are underfunded.
Actually I live in Gresham 97080
The only thing I think of as far as tourism in clackamas county is the rivers and how they are a need in the summer with drunk and high kids floating down the clackamas River
Someone (County or State) should get involved in managing access to the Clackamas river. It's great that all these tourists are coming and spending money in local businesses, but they are also increasingly damaging our natural resources, preventing locals from enjoying them, and clogging up our transportation infrastructure. There has to be a balance.
We need more community involvement
I have cruised to Alaska and have seen how many people went out on short fishing trips, I would hate to see the rivers choked with that many extra boats.
I feel like we could offer more in the way of experiences for tourists and our community.
I have to admit that I have never seen anything promoting tourism, with the exception of Mt. Hood Recreation area.
Get the area around the falls developed ASAP! Enough studies, enough proposals, start development so tourists have a national natural wonder they can enjoy up close, even better than Multnomah Falls, and here!
I don't really see that much tourists here in Clackamas county. I barely know what to do to get to know the place better.
Would like to know how to find out more
What grants are available to quickly buy property in south Clackamas county 97038 to create RV parking for tourists? We really need this for our local economy!!
to make crosswalks safer by installing solar powered beacons!!!!
We need more parks, more camping parks in forests and along the river, more fishing opportunities/facilities, more public access to the rivers. We should be buying up property along the Clackamas and the Willamette every time it goes on sale to establish linear parks along the rivers. The white water rafting park above the falls would have been interesting. More festivals in the parks. :)
Even though I am a resident, not a tourist of Clackamas county, I would happily make an exception if there was some sort of destination resort! Staycations would be a huge hit for me and my husband if we could rent a place with a view, an in room jacuzzi and a nice lounge in the hotel. Would love to see something like that close to home someday
Hiking opportunities are not well advertised and marijuana tourism isn't fully embraced

My zip code 9706 is in Clackamas county but not listed on your list.
<p>More public transportation. The mt express is great but on busy days, there aren't enough runs and the bus needs to stop at more recreation sites on the mt.</p> <p>Traffic on peak winter weekends needs to be addressed. more parking in Government camp is not the answer - we need provide motivation to get folks to drive up/down a different times on weekends, encourage more midweek visitation. Need more OSP patrolling the mt on weekends.</p> <p>So much of the mt is getting beaten - winter the ground can handle it but in the summer yikes - trillium is hammered. we can't grow another lake. Also with the wilderness areas in central Oregon going to limited use soon - that may have a cumulative effect on the trails in the summer here on hood since there are no limits.</p>
It seems to be almost invisible.. When I have out of town guests, I take them to the places I like. That is virtually the only time I actually see the impact of tourism.
Seems like more people visit Multnomah County and then visit Clackamas County on there way to someplace else ex. Mt. Hood, Salem, etc.
Promote the Canby Ferry.
It needs to be more accessible for those who don't or are unable to drive.
I volunteer at the Museum of the Oregon Territory. The Clackamas County museums need serious financial help.
I wish I was better informed about tourism opportunities in Clackamas County. I wasn't aware of www.mthoodterritory.com before. I would love to explore and have adventures in our vast county (my extended backyard). A great alternative to going to the coast, (sorry to say they do a better job promoting tourism). Please get the word out about tourism in ClackCo! I'll do my part through my network.
As a business owner, would welcome more tourism to the area.
The beautiful Willamette Falls have local and tourism potential but are currently an industrial eye-sore.
I wonder if the average citizen has any awareness of how tourism benefits the local economy and residents. Might be a good PR campaign to consider.
You did not provide a zip code for those of us with Sherwood addresses living in Clackamas County. I do feel this corner of the county is sorely neglected!
Traffic infrastructure needs to be addressed sooner than later
I feel that tourism in Clackamas County is so much lower than the surrounding regions that we just don't see it much as a local resident.
I'd prefer not to promote. Small towns are quaint and warm. Tourism is too busy, distracting and commercial.
Tourism is great for Restaurants and other related businesses but it is very seasonal. We have tourist from the local county Park trespass on our farm damaged equipment, barn and they tried to set fire to our guest house. Not good, especially since it was a drought time of year. It was

bad. So my feelings are very mixed
Need more community interaction let's get ppl involved
I didn't think Clackamas County was much of a destination for tourists.
Unfortunately there will always be bad with any good
1) Attract more lodge style accommodations 2) Improve and enhance access to river and other natural environments 3) Invest more in recreation opportunities that increase quality of life for residents and attract tourists (BEND!)
Oregon has really great highways! I-5 is ridiculous during the summer months due to the combination of tourists and scheduled highway maintenance projects. Hopefully, some of the tax revenues from tourism related industries goes towards paying for that maintenance.
We have a tremendous history to promote and the resources for a bright future if properly nurtured.
It would be nice if some of the lodging tax collected by the county was actually used in the AREAS that collect it.
I've never even met a tourist and I've lived here my whole life
Would always love more hiking trails!
Owner of a small business, tourism is important.
I think Clackamas County has wonderful tourist attractions. There are so many beautiful parks and trails, areas to enjoy water activities, and great historical museums and landmarks. I think it is in the county's favor to continue to improve these locations, to not only bring in outside tourists to boost local economy, but also for residents of the county to enjoy the beauty that's around them. Thank you for what you do!
Would love help finding grants and applying for them.
I think careful and thoughtful consideration should be given to tourism in CC. There needs to be a balance of preservation and growth. I've lived in communities where historical preservation was sacrificed and the community became completely reliant on tourism. Communities such as St Augustine, Florida have been successful finding a healthy balance.
The main problem I see involves noise and fire danger in Mountain residential areas.. More enforcement and review of noise ordinances and zoning rules need to happen. The use of homes as vacation rentals has dramatically increased, but regulating it so that vacationers can be welcomed into our communities has not kept pace. Many residents are very angry about these issues.
I would like to see tourism expanded in Clackamas County...it has so much to offer tourists.
Keep up the good work and better fund the Heritage aspect of tourism.....when we travel it is to visit local historical sites
I think having more tourists visit would be good, there is a lot to do here!

<p>Is there a current "barnstorming" group in Clackamas County addressing entertainment, int'l visitors, cross-references to new business start-ups, or small business ups? How is tourism concerns addressed in library forums?</p>
<p>I feel that the Milwaukie/Oregon City area could do much more to utilize the riverfront for tourism. Also, many residents would like more opportunities and places to picnic and for day use other than small neighborhood parks.</p>
<p>There is not much publication of Tourism efforts by Clackamas County.</p>
<p>There is much room for improvement in tourism options in Clackamas County, especially in developing connections between End of Oregon Trail and surrounding communities. There is also a need to focus on history in Clackamas County prior to arrival of overlanders using Oregon Trail. There is a huge need for greater state and federal funding to support a bigger museum presence, and more heritage programs throughout Clackamas County which the oldest county west of the Mississippi and north of San Francisco merits.</p>
<p>More outreach and public opinion about tourism activities would be nice.</p>
<p>I understand the benefit to the economy but, don't like what it does to the environment; like mountain bikes destroy the trails and they don't stay on the trails seems like it is not worth the damage to offer service to those folks as another example, additional traffic on Mt Hood just makes everyones experience unhappy, campgrounds full of out of state folks, what is good about any of that for average people. I can see where it might keep a museum open but beyond that? Unless I owned a business what possible benefit could there be to me to have a bunch of people coming here?</p>
<p>More ads sent nationally will help bring more tourists.</p> <p>Can't wait until the OC Falls developments happen!</p>
<p>I don't really see much public discourse about it. If the public is expected to comment on it, there needs to be an easy way to do that and something that is visible to interact with.</p>
<p>The community group representing the Mt Hood area is a division of the Chamber of Commerce. Businesses that are not members of the Mt Hood Chamber do not have equal access to tourism information, grant opportunities, local fulfillment (USFS and other venues) and tourism marketing participation. By controlling "information" the Mt Hood Chamber is negatively impacting non-member businesses. We have been collecting data regarding this phenomena and believe that it is ultimately actionable. Tourism management in local communities should never be subordinated to membership organizations.</p>
<p>I am fairly unaware of much tourism in the county, except perhaps that which takes place closer to Mount Hood.</p>
<p>Consider a whitewater park to attract young people & active people</p>
<p>We are still playing catch-up. There are some wonderful opportunities, like the river that are still not as accessible as it could be if better access was available; Plus we do have an issue with river use - the power boats vs. the paddlers. some festivals have become so crowded they are no longer a fun experience.</p>

I think the county has a lot to do and see but needs to get the word out more through more promotion and highlighting activities that appeal to many different kinds of people.
Where is it?
Thank you for asking for our input.
Tourism dollars need to be focused on making the places we have better to visit (bathrooms, trash pickup, signage). If you do that the private money will come in and the rest will happen :)
Need more water (access and use of rivers and lakes) and bicycle tourism.
More festivals. Allow food carts.
It is frustrating to have government entities encouraging tourism but not providing the infrastructure to do it properly
Redo the wagon covers and make it a tourist site again. So sad to see it basically abandoned
Always proud of what we have to offer with visitors
Tourism can bring new life and new ideas as well as add jobs and income to the area.
work to protect the environment and create more adventure activities for families, and in particular, families with teens and activities/events/outdoor opportunities for teens - work opportunities in tourism for teens to help learn about our county and what sciences, math, social skills, etc benefit our community (and can lead to future jobs)
Traffic is terrible in our community and summer is the worst-tourism causes gridlock
Winter options coming?
We need more parks and more dog parks.
Don't come looking for a place to live.. Leave your money, pick up your trash and go back home. If you can't pick up your trash, don't bother to come back - ever.
We think that understanding Oregon's rich history needs to be put forth as the main draw for potential residences and that history focusing on "diversity" needs to NOT be on the forefront of our awesome state's legacy.
Not looking to increase tourism with increased traffic, people, more people deciding to move into the area. would like to maintain a quiet, rural atmosphere.
There is little information related to citizen involvement in tourism
I have just moved here, but traveled here many times in the year before I moved (monthly). Very little was I made aware of even though I searched online many times for things to do. Yet, I still chose to move here. There is lots to do, but Multnomah county does an far better job advertising themselves than my observation about Clackamas.
Social media advertising for county events
I don't know much about tourism here except it can make things more crowded.

Terrible traffic congestion throughout Clackamas county needs to be addressed and improved. People are avoiding coming here and instead going elsewhere to spend their time and money.
We need to be about more than Oregon City/Oregon Trail. We've abandoned our own fair buildings—we need to capitalize on an agricultural draw like hazelnuts (filberts) or geographic interest like the falls—none of which is celebrated
I would like to see more county dollars spent on attracting more foreign and American tourists to our area with advertising and development of current desired activities and attractions.
How much money is spent on advertising in ratio to how much money is gained from tourism?
If there is news about local tourism, or promotional efforts about local tourism, it isn't reaching long-term residents like me. It was hard to answer some of the questions because I haven't received any digital or printed promotional material which makes me aware of tourism in Clackamas County.
Would like to see more organized tube floats down the Clackamas river.
Our roads can't handle anymore cars!
Not enough parking
I think the homeless situation would have to be improved for visitors to get a good feeling about our area.
Tourism may encourage climate refugees, but smoke from forest fires in summer and fall may make them think twice.
Let's keep the Willamette Falls project going.
Can't afford any more taxes for anything.
Historic aspect of End of Oregon Trail and natural beauty/resources of rivers, Mt. Hood and the Pacific Flyway make this area very appealing.
This place is wonderful! I wonder how we can get more people to visit
I am not really aware of how much tourism occurs in Clackamas County
What tourism places/activities does Clackamas County promote?
Make it even dog friendly!
I think we get to "advertise" more about what we have to offer.
It is very easy to "love the place to death". Too much tourism in any one spot is worse than not enough. Also Oregon's land use zoning laws tend to prohibit rural tourism, by not allowing Urban style development. This maintains the beauty of the rural environment while limiting the tourist enjoyment of the same.
Our zip code not listed. 97089
Having lived in Multnomah Co. 1988 - 2005, then Clackamas Co. 2005 - present, I've never been

able to 'afford' staying at Timberline Lodge. For even 1 night. It'd be wonderful if they'd offer a special package for locals every once in a while. It's like living near the Statue of Liberty but being out-priced of the fee to tour it. Thanks.
Financial backing of historic sires, especially Oregon ztrail sites, is sorely lacking.
To improve the publicity of the area not just focus on Portland or Mt Hood
I am unable to rent my home for STR, but I do believe that STR add to the neighborhoods, and economy. The homeowners I know that have Air B&B rentals, or VRBO are extremely respectful and responsible. They should be allowed to have them.
The most key item for success of tourism in Clackamas County is acceleration and completion of development of Willamette Falls
Transportation Infrastructure, ie: roads and bridges. This is very is a big problem that limits growth, livability and tourism.
We need more fishing opportunities. Over by Estacada, Faraday lake, North Fork reservoir, plus so many more. Consider putting some more public docks on the Willamette river.
Other than Mt Hood, there are few year round destination spots. Need to play them up, along with the seasonal events like Dahlia, tulip shows. Sandy, Clackamas river uses?
My main problem with tourism is the number of out of state residents who always seem to be in a hurry and don't obey our traffic laws. The other is tourists who deface public property.
While tourism is a valuable asset, too much in natural areas causes too much damage, imo.
There is some damage from over use of the Clackamas River by floaters in the summer. They leave trash and bottles in the river and along the shore.
I know that the County has some tourism programs and staff, but I don't know what they are.
I would love to see an amphitheater on the river in West Linn near the falls. I think this would bring business and tourism to our communities.
Would like to see the falls and locks projects completed
Don't make it too enjoyable, more people will want to move here!
My only thought after responding to these questions is that I have very little idea how decisions regarding tourism in Clackamas County are made.
Do visiting fishermen take too many fish from the rivers
Sure would be nice to see the state do more for our fishing in Clackamas county. Funding, stocking, etc. is getting almost non-existent anymore. We used to be one of the best in the state!
We need to implement a sales tax for the state of Oregon and Clackamas County. We are losing so much potential revenue that could be generated from tourists.
County need to clearly define clearly its objective of promoting tourism, and the attractions it can

provide, and a plan how to promote that.
Your first question in the survey assumes citizens know about tourism in the county
I am sure the revenue helps, but my concern is about parking and driving and what impact increased tourism will bring to this concern. Thank you
Please keep the Canby Ferry in operation. It is great for tourism and quality of life
Traffic congestion and speeding up 26 around Mt Hood is a problem
I like the variety the county provides, from museums and play facilities to natural scenery and winter sports.
I am really pretty uninformed about the tie-in between tourism and development of parks and trails. Some of our parks seem overused.
I think Clackamas County needs to focus on Traffic Congestion and, the ways to add more lanes to 205 etc... Tourism
Tourism brings in money, sure, but it also brings in disrespectful vacationers that leave garbage and trash our quiet community!
<p>I think Clackamas county could do a much better job promoting and supporting tourism. One specific example is the lack of use of the Canby Ferry. Most people barely know it exists, that's why its not making enough money to support itself. In general, I have noticed that native Oregonians do not support tourism and would prefer to keep people from coming here.</p> <p>Tourism must be supported in addition to simply promoting it. By supported I mean: the idea of tourism must be embraced by residents and the tourist destinations be supported monetarily by the county. Find a sister county in Colorado to mentor CC on how to manage tourism without destroying the things that people are wanting to engage with while maintaining a high quality of life for residents. It can be done!</p>
I know it keeps the community going but the traffic can be annoying!
Never heard of it being addressed in all the years I've lived here!
When will the makeover at the mills on the Oregon City and West Linn side on the Willamette River get started so we can enjoy a beautiful place on the river?
Thank you for supporting and promoting the Gladstone Community Festival the first weekend in August. I am part of the organizing committee, and attendance was up significantly last August!
The more attractions we have, the more revenue is generated for the good of all of the residents of Clackamas County.
More of diversity featuring different cultures and events focusing on family and community.
We have some very negative "tourism" along I-5 in the form of the sex and drug trades, as well as some theft near interchanges. We need to maintain adequate policing of those problems so that they don't become "normal" in the areas near interchanges and recreational spots such as the Family Fun Center in Wilsonville.

We need better accommodation and transportation
Ok with me to tax those who tour here. Inject those funds back into our county and pass some relief to full time residents of ClackCo. Thank you for asking 🙏
I think more should be spent making special area more accessible for residents and tourists alike. Honestly I've never thought of Milwaukie as a destination for tourism, more of a pass through, it could be more of a destination if we weren't trying to be like "Portland".
If possible, residents may benefit by a method of prioritizing them in signing up for various activities within the Clackamas County area.
I'd like to see more tourism that focuses on what makes Oregon and specifically Clackamas County different. I travel all over the US and many areas look/feel the same. We have an awesome heritage and environment here that we can use to set ourselves apart.
it would be great to keep the water clean, and invite more people to enjoy the waterways.
I think we could do more.
I love what we have done with mountain bike paths and hiking trails. We need to do move to promote outdoor activities.
Print advertising is beautiful. Excellent job. I love to share with out of state friends and relatives.
I didn't see my zip code! 97089
We love being a tourist in our "own backyard"! There is so much to close to home which we appreciate having three kids. We are truly blessed to live here and when we have family visit, stops in Clackamas County are on our "must-do" list with out-of-towners.
Would like to have more community involvement and a ailabikty if the tourism plan and activities
I am not aware of or see much tourism
Clackamas County is one of the most beautiful Counties in the State, with forests, water ways, lakes offering sport minded visitors to enjoy its rural beauty. The infiltration of commercial marijuana grows and retail pot stores are a negative to the once beautiful areas of rural Clackamas County. The skunk smell odors, the shootings one that just happened in November in the Welches community in which the man that was shot in the head was an employee of the local Smoke on the Mountain pot shop, are not very inviting reasons to visit the area. On Thanksgiving and Christmas day, the only Hwy 26 businesses that were open were the local pot shops. It is a disgrace to our tourism beauty.
I'm a Real Estate Broker of 29 years here in Oregon City. Having a healthy tourism flow to Clackamas County helps tourists see how beautiful our area is, and then some will buy a home here. That helps my business.
Section 4s answers aren't broad enough. It depends on the tourism, and how the money is being reinvested in the community. What is the type of tourism being offered, etc.
I support all the good work re: tourism in our County. In fact served on the Tourism Advisory Board many years ago. I'm excited to see a continuation what became one of the best tourism councils in perhaps the US. Kudos!

I am TOTALLY AGAINST removing long-standing TREES for ANY reason.
from my experience with city of Milwaukie, Clackamas County - overall processes for developing small event space, applying for Airbnb have been cumbersome and should be improved to support encouragement of tourism.
I love our natural resources. I would like to see Willamette falls promoted more. My friends that live in Portland aren't even aware that it exists.
Clackamas County has a lot to offer. This survey is the first I've been aware of a Tourism office/department....
Thankful to have places for tourism in our county.
All the natural resources, golfing, hiking, farm-garden visit/vendors are wonderful to have available to the county residents and the great metro area.
There really is no tourism that we see other than summer time in the estacada area
I fear the STR's / AirBnb/VRBO will impose NO available house for residents - disrupting our neighborhoods
I love being part of Clackamas County, it makes me proud.
Being Native American, I rarely see any Native American usage in Oregon tourism. Ever. Anywhere. It's as if ppl of Oregon are prejudiced against American Natives. It's as IF the ppl of the "Oregon Trail" are still brow beating American Natives here, & I had NOTHING to do with the Oregon Trail! American Natives have such a beautiful natural history & culture, I see it used in Alaska to their betterment in all ways; Arts, Language, Music, Dance, & Celebrations where indigenous ppl are invited from around the world. I NEVER see that HERE in Oregon. It's sad to say there's obvious residual prejudice after ALL THESE YEARS. It's #shameful -
Thanks, keep up the good tourism work you do.
Relax the rules on B & B lodging. Bring in more tourism that does not need massive hotels, etc. Develop the Willamette River area.
I believe there is room for sustainable growth that would greatly benefit the quality of life here, while still maintaining the essence of what makes the County so unique and livable.
I honestly have no idea what Clackamas County does in regards to tourism for our area.
More promotion needed and more choices provided.
The outdoor recreational areas, such as the forests near Mt. Hood, are over used, while our urban area facilities, such as the end of the Oregon Trail museum in Oregon City are no longer available. A lot of resources have been put into developing road tours for minor locations, such as the Heritage House in Lake Oswego and more significant locations, such as the end of Oregon trail museum in Oregon City, have been closed down. Is this the best use of funding? Everybody in the US and Canada knows the history and significance of the Oregon Trail. I have to take my out of town guests to the Oregon Historical Society in Multnomah County to show them the most important event in our state's history. With the conversion of Willamette Falls into a tourist attraction, can you get the end of the Oregon Trail museum back open? Oregon City could

become s tourism attraction very easily and would help to revitalize the charming downtown area. Trimet Bus 35, along a beautiful route, already offers public transportation to/from downtown Portland.
Hwy 26 through Sandy is a mess. Gets worse every year. McMinnville created a bypass, how bout that!
It does not make sense to go to an east coast university when there is abundant survey expertise at the three big Oregon universities.
Survey doesn't have 97089 zip code
I'm not aware of any real tourism in Clackamas County.
I am so proud of our history. I want to share, We are so very fortunate to live where we live!
The Milwaukie Historical Society /Museum thanks Clackamas Co for the \$ help in the past and, hopefully, the future.
Paper Mill updates?!?
Would like to know more about what is offered as far as tourism in Clackamas County.
Difficult survey when only choices are so dramatically spaced on a scale. CC probably lives in the shadow of Portland and their activities.
They add to traffic issues.
Need for better education and involvement of CC residents in tourism issues.
Without improvements to traffic and infrastructure, tourism is problematic for the county residents. I agree that it certainly helps local businesses, especially in east Clackamas County including Mount Hood.
What and where can you find out about the tourism in Clackamas?
There are mire opportunities for new tourism product development.
I love traveling and therefore pro tourism. So I am not opposed to newer things being built to attract tourists or even residents such an fun activities or restaurants. Of course the main concern is traffic and road maintenance and upkeep.
Is there a tourism magazine for Clackamas County?
I am a Clackamas County resident, but my zip code is not listed. It is 97002.
I am thinking of all the info online of what to do and where to go, which is great, and when people come to visit, it is very useful; I just wish I had a list of all the places on one piece of paper ready to hand visitors with the websites for those places for them to take home with them; I run off mine for them, but I's sure like an "All You Can Do" paper; I would love to know if there already is one, and where I can find it and run it off; the amount of info to search through to find what you want is overwhelming! We love it here, and our County is quite amazing!

Automobile traffic is a problem...the more people and cars, the more congestion.
I am not familiar with tourism in the county
I would LOVE to see more emphasis made on creating sustainable tourism and agrotourism.
I love the "Close to Portland...A World Away" poster series! Awesome and beautiful way to promote the county, tourism, pride! Very effective promotion campaign! Thank you.
Tourism around Estacada helps bring in and support small business which helps improve our community and strengthen our downtown.
Seems just about right.
Tourism seems to be focused predominately on the Mt Hood area. This is great for these areas but the focus could and should expand to the towns and other natural areas in a more organic way through literature, advertising and media.
The subject of tourism has been largely silent in Clackamas County, at least it has never really hit my radar.
I love the End of the Oregon Trail Interpretive Center!
I think the homeless problem, and the trash they leave hinders the tourism trade. People who visit me used to comment on the beauty and how clean and safe the Portland area was, now they comment on the homeless tents everywhere and how dirty and unsafe they feel. I also think having more small town mom and pop shops and restaurants with off street parking would add a lot to the tourist experience. More activities that are indoors, or can enjoy nature and in Clackamas county not just Multnomah county.
Help develop Oregon City's area around the falls.
Good for economy. The problem I see is parking and traffic issues.
I'd love to more from the Oregon trail interpretive center!!
I hate the added traffic to the roads that are not designed for it.
Wish the Willamette Falls area/Blue Heron area could be cleaned up/converted to multi-use. Eyesore for OC.
There are good opportunities not recognized or ignored.
I think Mt. Hood areas are well marketed for tourism, but I think there are other areas that could use some help. Any tourism \$ spent here helps the economic health of the county.
Our infrastructure is already stressed to the breaking point with the people who call Oregon home. We don't need anyone else.
I believe tourism is one of the major industries in Clackamas County. I am only peripherally aware of the county's role in promoting tourism.
I would like to see more opportunities for hiking and road biking. Also, I support any attempt to improve appearance and tourist attraction for the city of Sandy. I would like to see more activity

and focus related to the arts.
Other than the river and forested areas, I am unaware of tourist attractions in Clackamas County.
I enjoy my community and the activities provided.
Even as residents, we play tourists with weekend trips out to Mt. Hood or around the county.
I don't watch TV or read ads much. Not sure how else you reach out to people about tourism here, but would love to see more!
Improvement of our roadways so that it encourages tourism
Always concerned about trash, plastics, recycling and not straining the natural environment while being tourists
Lots of opportunities with the development of Willamette Falls
My zip is Damascus which is very much part of Clackamas county. 97089 should be an option in your survey link. No further comment on survey
My wife has applied for a home exchange program and has arranged to exchange homes with people from Europe. She has learned that there are people interested in coming to this area for a visit. The lady that was on a Wilsonville committee and I learned about Equestrian activities etc. in the area I think helped develop some of the equestrian activities and we can continue to do more of that
Our transportation system is not able to support the increasing number of cars on our roads.
Previously, I lived in Clackamas County for over 40 years
I first came here as a tourist in the late 1980's, ended up buying a house. Had to move away due to a job transfer for many years, but am happy to say, moved back in 2018!! So happy to be here!!!
I would like to see more focus on honoring the native people of Clackamas County and protecting the natural Environment
I felt one of our best asset was Lynn Peterson. I was sorry to see her move to Metro.
I was not aware that I could have an impact on tourism decisions.
You don't have all the zip codes for Clackamas County listed to select from. For example Happy Valley 97086
I'd like to see more parks and maintained dog parks.
They are great community partners and advisors for heritage and community efforts.
Seek activities and Advertise! We'd love to know what is happening!
That our parks have ample staff members to keep up with the amazing amounts of folks now

visiting.
Tourism in Clackamas county has never crossed my mind before. I believe the impacts are complicated.
There is no need whatsoever for governmental involvement in tourism in Clackamas County, including surveys like this.
We could do a better job of promoting natural and waterways. There is so much more to Clackamas County than just Oregon Trail and heritage.
Clackamas County is beautiful and full of natural wonders that easily attract visitors to this part of Oregon. We just need to maintain and/or improve our natural sites and keep our trails clean and safe. The Willamette Falls area could be a key visitor attraction that needs forward thinking people to develop it to its full potential.
Get involved with volunteering in your community! The Downtown Oregon City Business Association is a great place to start. The Willamette Falls Legacy Project is also worth looking into.
why did you move your office?
I think the County needs more outdoor activities.
Thank you. Keep up the good work.
I believe we are well represented by our Tourism Department.
I would have appreciated being able to answer "unsure" on some of these questions - I left blank those for which I am unsure.
Need to promote the beauty of the county globally. Promote tourism thru local community colleges, schools. Show off the beauty by filming tourists visiting Clackamas County and interviewing them. Just my suggestion!
As a resident, I don't personally see much marketing in regards to tourism that is directed at me. I find that I have to seek it out and find things rather than seeing/receiving marketing.
Need more campgrounds in the Upper Clackamas River and Mt Hood Areas.
Yes, I work in Clackamas but do not live here. There is no option that I could see that allows me to indicate this.
Have enjoyed seeing more activities being held in the downtown Oregon City area.
I think there is a resistance to tourism in much of the more rural areas of Clackamas County due to a fear of change and congestion. This fear is unfortunate and often results in resistance.
Obviously downtown parking is an issue and the 7th St bridge can really snarl traffic even without added tourism. But I'm excited to see things grow and improve. Especially better access to the river & falls.
So where is the advertising/promoting (publications/media) of Clackamas County taking place? Are they working with local Chamber of Commerce? I've traveled to Canada and stayed in many provinces of Canada and looked at their travel kiosks and saw nothing of Oregon/Clackamas

County! I know of opportunities to work with independent business owners to bring in visitors and Tourism did nothing! It was the business owners website that brought visitors from Alaska and Idaho to the event!

when residents can not get to Clackamas county "tourism" spots due to HEAVY traffic and or no parking/transportation options that work, then we have a problem on our hands, dare I say crisis. And when we do not have even a low level of tourism sustained for our county businesses during off peak seasons, then again there is a problem. It would also be a good idea to pull in larger groups when you have historical content that is now controversial e.g. Lot Whitcome before giving grants to citizens to build things on public property without any coordination with the larger public or the public agency who owns/ manages that facility. thanks!

Would like to see the mill turned in to something locals can enjoy as well as draw tourism dollars from out of towners.

Sometimes cities and counties want to provide access to areas that affect citizens of the County and they really don't care about the citizens. All they see is providing access to that river or area and that's all they see. Remember, we live here year around.

I feel that there are tourism businesses that have been allowed to come into the County unchecked that are causing harm to our community, for example: Air BnBs.

Tourism attracts lots of folks that will then want to move here. I love our small town and want it to stay that way.

There is too much emphasis on tourism in Clackamas County and NOT enough emphasis on safety, enforcing Marijuana ordinances and other codes and insuring that we have enough law enforcement.

My only concern is short-term rentals. In some heavy-tourist areas around the US, too many short term rentals make affordable housing for residents more difficult. I don't want to see that happen in Clackamas County - affordable housing is hard enough already.

I think tourism does an excellent job

So many people come here. The roads are jammed. Parking lots are full at popular sites.

I think tourist attractions could be better created, developed, and advertised.

Traffic, road conditions and safety should be addressed before continuing to add more vehicles as well as additional people (even just visiting) in Clackamas County.

I have a vacation rental in another county and have had conversations with a friend who has a vacation rental in Clackamas County. Her experience with paying her transient tax is far more cumbersome than my experience in Tillamook county.

Efforts to promote tourism seem to benefit the big dogs like Portland and Mt Hood....but how does a rural resident know what is good or bad for our state if efforts seem so focused?

Overall good job. Would like to see building codes concerning agriculture and agritourism loosened up. Allowing more building construction if it's to house farmworkers, or more family to enable farm to thrive with more helping hands.

Why not promote the Fairground and Rodeo with facilities improvements
Clackamas county is not fully taking advantage of it heritage potential related to tourism
Innovative / Creative / Out of the Box
<p>I don't think we do enough for our tourists.</p> <p>I am disappointed that the horse, carriage rides business is not required to pick up the horse poop. It gets tracked in to all the businesses and homes.</p>



International Institute
of Tourism Studies

THE GEORGE WASHINGTON UNIVERSITY

WHAT VISITORS ARE SAYING ABOUT TOURISM ATTRACTIONS IN CLACKAMAS COUNTY:

Results Of 2019
Analysis Of Social
Media Reviews



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of Tourism Studies

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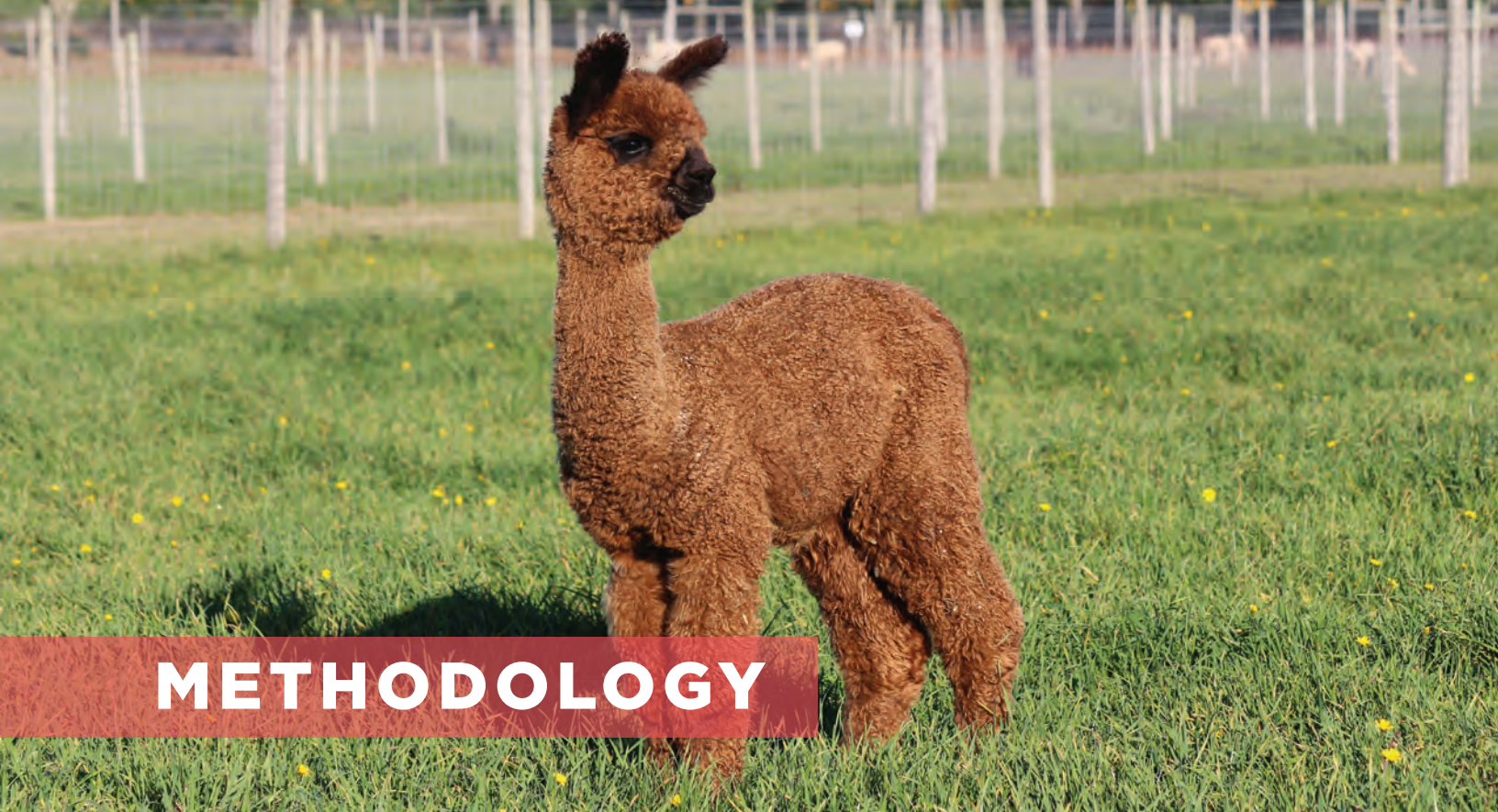


INTRODUCTION

A thorough analysis of visitor feedback can help destination managers develop their sites and attractions to meet the needs and expectations of tourists.

Researchers at the George Washington University International Institute of Tourism Studies worked with the team at Clackamas County Tourism and Cultural Affairs (CCTCA) to assess entries posted on TripAdvisor, the industry's largest website for traveler reviews. Focusing primarily on sustainability-related issues as well as the emotional responses expressed by visitors, our analysis is intended to provide a holistic picture of the county's tourism assets and areas for development.





The team spent two months analyzing visitor reviews of Clackamas County attractions that were posted from October 2017 through September 2018.

Reviews were divided into three tourism product pillars: outdoor recreation, agritourism, and cultural/heritage. Table 1 provides a complete list of the attractions included in this study.

Table 1: List of Attractions in Clackamas County

OUTDOOR RECREATION	AGRITOURISM	CULTURAL/HERITAGE
<ul style="list-style-type: none">• Bagby Hot Springs• George Rogers Park• Jonsrud Viewpoint• Milo McIver State Park• Mount Talbert Nature Park• Mt. Hood• Mt. Hood National Forest• Mt. Hood Ski Bowl• Timberline Lodge Ski Area• Tryon Creek Natural Area• Wildwood Recreation Site• Willamette Falls	<ul style="list-style-type: none">• Alpacas at Marquam Hill Ranch• Lake Oswego Farmers Market• Milwaukie Farmers Market• Oregon City Farmers Market• Oswego Hills Winery• St. Josef’s Winery• Swan Island Dahlias• Wooden Shoe Tulip Farm	<ul style="list-style-type: none">• Bob’s Red Mill Tour• End of the Oregon Trail Interpretive Center• McLoughlin House• Mt. Hood Cultural Center and Museum• Museum of the Oregon Territory• Oregon City Municipal Elevator• Timberline Lodge• Willamette Shore Trolley• World of Speed

For each pillar, the team analyzed attractions representative of the county’s geographic diversity—mountain, urban, and rural. Accommodations were not included.

To ensure relevance, all selected attractions had to meet the following criteria:

- **Geographic relevance:** All selected attractions are located (at least partially) within Clackamas County.
- **Review volume:** Outdoor recreation and cultural/heritage attractions have at least 25 reviews, and agritourism attractions have at least 20 reviews.
- **Representative variety:** TripAdvisor lists far more outdoor attractions than cultural/heritage and agritourism attractions. To ensure that all three pillars were equally represented and to avoid skewing the results, the team included reviews from Mt. Hood National Forest and Mt. Hood itself but excluded reviews for four eligible outdoor sites within Mt. Hood National Forest: Salmon River Trail, Trillium Lake, Mirror Lake Trail, and Summit Ski Area.

For each attraction, the team analyzed reviews submitted during the study period. This ensures that findings take into account issues associated with seasonality. Across the 29 sites, 330 reviews were analyzed. Overall, the reviews covered a range of experiential and sustainability-related categories that fell into three themes—amenities, environment, and experience—across the three tourism product pillars established by CCTCA. The reviews were given a score of 0 for a negative mention and 1 for a positive mention in each category in Table 2 below.



Table 2 shows the organization of the categories and themes. Insights gleaned from interviews with two respondents who visited Clackamas County during the study period were consistent with the findings from the social media listening analysis of the reviews.

Table 2: Categories and Themes of Attractions in Clackamas County

THEME	OUTDOOR RECREATION	AGRITOURISM	CULTURAL/ HERITAGE
AMENITIES	<ul style="list-style-type: none"> • Access/Infrastructure • Camping • Facilities • Food & Beverage • Hotels/Lodging • Information/ Interpretation • Resources/Maps 	<ul style="list-style-type: none"> • Access/Infrastructure • Additional Local Goods & Services • Facilities • Food & Beverage • Information/Interpretation 	<ul style="list-style-type: none"> • Access/Infrastructure • Facilities • Information/ Interpretation
ENVIRONMENT	<ul style="list-style-type: none"> • Health and Safety • Overcrowding/Use Level • Scenery • Trash • Weather/Seasonality • Wildlife 	<ul style="list-style-type: none"> • Health and Safety • Overcrowding/Use Level • Scenery • Trash • Weather/Seasonality 	<ul style="list-style-type: none"> • Health and Safety • Overcrowding/Use Level • Scenery • Weather/Seasonality
EXPERIENCE	<ul style="list-style-type: none"> • Accurate Promotion • Activity Difficulty • Customer Service • Emotional Impact • Interaction with Other Customers/Hikers • Value and Price 	<ul style="list-style-type: none"> • Accurate Promotion • Customer Service • Emotional Impact • Interaction with other Customers • Value and Price 	<ul style="list-style-type: none"> • Accurate Promotion • Customer Service • Emotional Impact • Interaction with Other Customers • Uniqueness • Value and Price

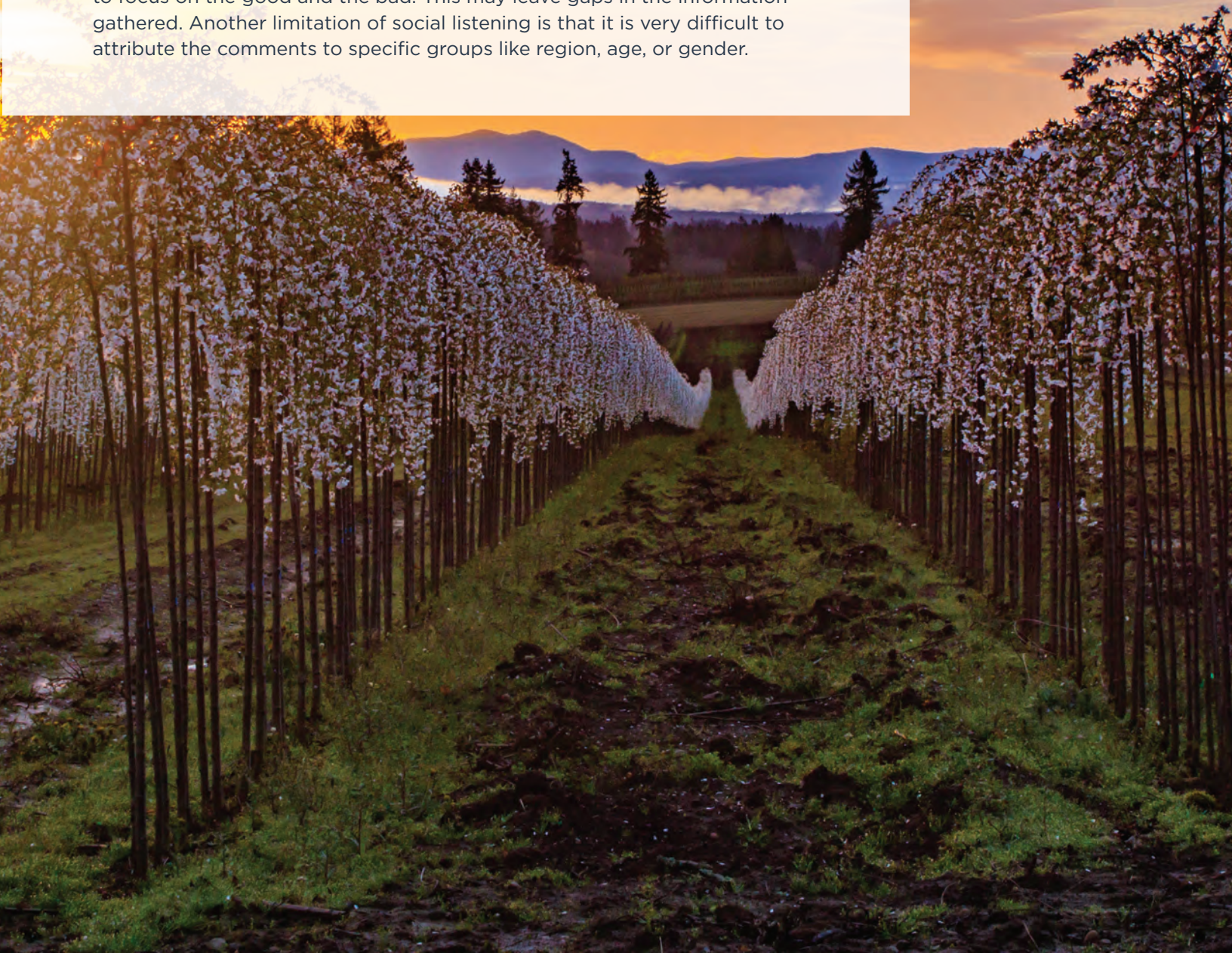
Two researchers analyzed reviews and compared findings for each site. In cases where they found significant discrepancies, a third analyst was invited to review the findings.

The analysis helped identify categories of significance. A category was deemed significant if mentioned (positively or negatively) by over 10% of reviewers.

LIMITATIONS

This social media listening study was a pilot project. Online reviews of tourism attractions and sites were gleaned primarily from TripAdvisor, the world's largest travel site. TripAdvisor was selected because it provided the most abundant reviews across all attractions and sites included in this study. There are other online review platforms, such as AllTrails, that may be worth exploring for additional analyses.

Social media listening has its limitations as a research technique. Online reviews typically do not cover the whole range of experiences; they tend to focus on the good and the bad. This may leave gaps in the information gathered. Another limitation of social listening is that it is very difficult to attribute the comments to specific groups like region, age, or gender.





GENERAL FINDINGS

All of the Clackamas County attractions assessed through the TripAdvisor analysis were rated 4 (Very Good) or above, indicating a high-quality destination. The average rating of the 29 attractions analyzed was 4.58—between Very Good and Excellent. TripAdvisor ratings for the three tourism product pillars were relatively consistent.

Reviews were also analyzed to determine whether age was a factor in the ratings and experience, however 75% did not indicate their age range. Of the reviewers who did provide their age on TripAdvisor (25%), only 2% were in the youngest age bracket (18–34). The highest average scores came from reviewers aged 50 to 64. Otherwise, there were no significant observations in ratings by age bracket.

Pillar 1: Outdoor Recreation Attractions

THEME 1 - AMENITIES

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Access/Infrastructure (mentioned in 28% of reviews):** George Rogers Park, Mount Talbert Nature Park, Milo McIver State Park, Mt. Hood, Wildwood Recreation Site, Tryon Creek Natural Area, Timberline Ski Area
- **Facilities (mentioned in 13% of reviews):** George Rogers Park, Milo McIver State Park, Wildwood Recreation Site
- **Food & Beverage (mentioned in 12% of reviews):** Willamette Falls
- **Hotels/Lodging (mentioned in 11% of reviews):** Mr. Hood National Forest, Mt. Hood, Timberline Ski Lodge Area

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- None

THEME 2 - ENVIRONMENT

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Scenery (mentioned in 69% of reviews):** Willamette Falls, George Rogers Park, Mount Talbert Nature Park, Mt. Hood National Forest, Mt. Hood, Mt. Hood Ski Bowl, Timberline Lodge Ski Area, Wildwood Recreation Site, Tryon Creek Natural Area, Bagby Hot Springs, Jonsrud Viewpoint
- **Weather/Seasonality (mentioned in 36% of reviews):** Milo McIver State Park, Mt. Hood, Timberline Lodge Ski Area
- **Wildlife (mentioned in 11% of reviews):** Willamette Falls, George Rogers Park, Mt. Talbert Nature Park, Wildwood Recreation Site, Tryon Creek Natural Area

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **Overcrowding/Use Level (mentioned in 17% of reviews):** Mt. Hood, Timberline Lodge Ski Area, Wildwood Recreation Site, Tryon Creek Natural Area, Bagby Hot Springs

THEME 3 - EXPERIENCE

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Emotional Impact (mentioned in 92% of reviews):** Willamette Falls, George Rogers Parks, Mount Talbert Nature Park, Milo McIver State Park, Mt. Hood National Forest, Mt. Hood, Wildwood Recreation Site, Tryon Creek Natural Area, Jonsrud Viewpoint, Mt. Hood Ski Bowl, Timberline Lodge Ski Area

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **Activity Difficulty (mentioned in 15% of reviews):** Mt. Hood National Forest, Bagby Hot Springs, Mt. Hood Ski Bowl

The team analyzed twelve Clackamas County outdoor attractions reviewed on TripAdvisor with an overall average 4.55 rating. Six of these sites—Willamette Falls, George Rogers Park, Mount Talbert Nature Park, Milo McIver State Park, Mt. Hood Ski Bowl, and Timberline Lodge Ski Area—received positive comments associated with the significant categories listed above. No mixed or negative reviews were associated with the significant categories. Scenery and wildlife emerged as strengths for Willamette Falls, George Rogers Park, and Mount Talbert Nature Park. Table 3 details the results of the outdoor attraction analysis.

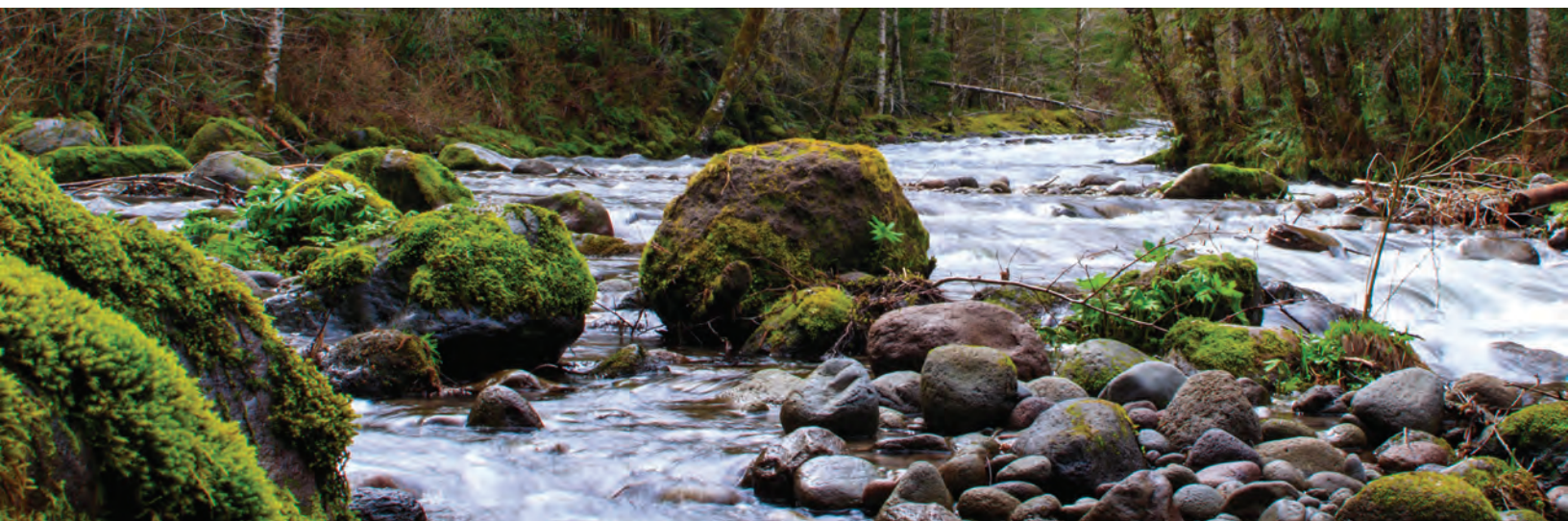


Table 3: Outdoor Recreation Attraction Analysis

ATTRACTION	AVERAGE SCORE	POSITIVE CATEGORIES	MIXED CATEGORIES	NEGATIVE CATEGORIES
BAGBY HOT SPRINGS	4.0	Camping Scenery	Activity Difficulty Emotional Impact	Access/Infrastructure Facilities Interaction with Other Customers/Hikers Overcrowding/Use Level Trash
GEORGE ROGERS PARK	4.5	Access/Infrastructure Activity Difficulty Emotional Impact Facilities Scenery Trash Wildlife		
JONSRUD VIEWPOINT	5.0	Emotional Impact Scenery		Access/Infrastructure
MILO MCIVER STATE PARK	4.5	Access/Infrastructure Emotional Impact Facilities Weather/Seasonality		
MOUNT TALBERT NATURE PARK	4.0	Access/Infrastructure Emotional Impact Scenery Wildlife		
MT. HOOD	5.0	Emotional Impact Hotels/Lodging Scenery	Access/ Infrastructure Overcrowding/Use Level Weather/Seasonality	
MT. HOOD NATIONAL FOREST	5.0	Camping Emotional Impact Hotels/Lodging Scenery	Access/ Infrastructure Activity Difficulty Weather/Seasonality	Health and Safety
MT. HOOD SKI BOWL	4.0	Emotional Impact Scenery	Activity Difficulty Hotels/Lodging Value and Price Weather/Seasonality	

TIMBERLINE LODGE SKI AREA	4.5	Access/Infrastructure Emotional Impact Hotels/Lodging Information/ Interpretation Scenery Weather/Seasonality	Food & Beverage Overcrowding/Use Level Value and Price	
TRYON CREEK NATURAL AREA	4.5	Access/Infrastructure Emotional Impact Information/ Interpretation Scenery Wildlife	Overcrowding/Use Level Weather/Seasonality	
WILDWOOD RECREATION SITE	5.0	Access/Infrastructure Activity Difficulty Emotional Impact Facilities Scenery Wildlife	Weather/Seasonality	
WILLAMETTE FALLS	4.0	Emotional Impact Food & Beverage Scenery Wildlife		
AVERAGE	4.55			

Reviews for Mt. Hood National Forest were overwhelmingly positive, especially with regard to scenery and emotional impact. Interviewees called Mt. Hood “out of this world” and “remarkably peaceful.” Sentiments around access/infrastructure, weather/seasonality, and activity difficulty were more mixed. Several reviews mentioned difficulty accessing the Mirror Lake Loop Hike. One hiker wrote, “Getting to the trailhead was a little painful. You can only access the trailhead from one direction and finding a parking spot even on a weekday was challenging” (ncsu83, TripAdvisor, 7/28/18). It is important to note that a new trailhead opened in October 2018. This has helped to improve the situation.

Negative reviews regarding the weather/seasonality in Mt. Hood National Forest referred primarily to variable weather and cloud cover that obstructed mountain views. Some reviewers felt that the hikes were particularly challenging, but most viewed this positively. Others expressed concerns about potential safety hazards due to loose rocks or sheer drop-offs on the trails. One reviewer noted, “Coming down has roly pebbles, incline, and dampness, so watch your footing. Two of our kids wiped out” (SeesTheWorld5, TripAdvisor, 10/12/18).

Reviews for Mt. Hood specifically were similar, except that activity difficulty and health/safety were not significant themes. In mixed reviews, overcrowding/use level was a frequent concern. Reviewers mentioned crowds on the ski slopes and trails, and on the roads in and around the forest. One hiker wrote, “Timing is important if you don’t like to be among 5 million others enjoying the views. We arrived before the sun was up, and enjoyed several trails all to ourselves. The parking lot was packed by the time we got back to our car though, and it’s truly a gorgeous sight to see” (Glen M, TripAdvisor, 12/7/17). Reviewers also expressed concerns about what they see as an increasing number of homeless people in the towns and cities serving as entry points to Mt. Hood. While this may be true in cities such as Portland and not necessarily in Mt. Hood and at other attractions, it is important to note that first impressions last.

The Wildwood Recreation Site had a strongly positive emotional impact, and reviewers mentioned access/infrastructure and wildlife in particular. Accessibility for people with disabilities was mentioned several times. Tryon Creek Natural Area scored highest in the emotional impact and scenery categories. Several reviewers complimented the paved trails and the nature center; other reviews complained about crowds on the trails and in the parking lot, particularly on weekends.

Bagby Hot Springs scenery evoked positive reactions, but several issues detracted from the overall experience for reviewers. Overuse/crowding was mentioned several times. As one visitor put it, “many visitors overstay their time in the tubs when others are waiting outside for them, and there is nobody to enforce the time limits” (KayMa84, TripAdvisor, 12/6/17). There were also concerns about broken tubs and unsanitary conditions. Jonsrud Viewpoint received enthusiastic reviews for the scenery, with reviewers calling it “spectacular,” “iconic,” and a “must-stop.” However, many of the reviews cited the very limited parking area, which is often full.

Overall, the two most significant categories across the ten outdoor attractions were emotional impact (84%) and scenery (73%), both of which were overwhelmingly positive (see Table 4).



Weather/seasonality and access/infrastructure were also significant categories, present in over 25% of reviews. While most of these mentions were positive, negative issues do exist, particularly around weather expectations and access—especially parking.

Overcrowding/use level, mentioned in 13% of reviews, was the only significant category in which the majority of mentions were negative. The most common complaints were that visitors found the sites crowded or that congestion made access difficult.

Wildlife was mentioned in 11% of reviews, with all reviewers sharing positive sentiments in this category—an indicator of habitat health.

Table 4: Outdoor Recreation Attractions: Significant TripAdvisor Categories (mentioned in >10% of reviews)

CATEGORY	MENTIONS (%)	POSITIVE (%)	NEGATIVE (%)
EMOTIONAL IMPACT	92	93	7
SCENERY	69	96	4
WEATHER/SEASONALITY	36	74	26
ACCESS/INFRASTRUCTURE	28	74	26
OVERCROWDING/USE LEVEL	17	32	68
ACTIVITY DIFFICULTY	15	60	40
FACILITIES	13	82	18
FOOD & BEVERAGE	12	70	30
WILDLIFE	11	100	0
HOTELS/LODGING	11	89	11

Cross-Tabulation of Age and Theme Scores

The results for each theme were cross-tabulated with respondent age to provide an overview of average scores by age range. Positive mentions of categories in each theme (amenities, environment, and experience) were scored with a 1, negative mentions were scored 0. Table 5 shows the average distribution of positive and negative reviews. For example, an average score of .60 under amenities would mean 60% of the reviews that mentioned amenities were positive. Any score under .50 means that reviews tended to be negative, above .50 means they leaned positive. The closer the score is to 0, the higher the number of negative reviews. Scores closer to 1 had a higher number of positive mentions.

Reviewers aged 65+ had lower than average review scores in all themes. Reviewers aged 25–34 had the lowest average score for the amenities theme. The 35–49 age bracket had higher than average scores in all themes.

Table 5: Outdoor Recreation Theme Scores by Age Bracket

OVERALL AVERAGES				
AGE	REVIEWERS	AVERAGE SCORE		
		AMENITIES	ENVIRONMENT	EXPERIENCE
18-24	1	1.00	0.50	1.00
25-34	5	0.67	0.78	1.00
35-49	12	0.91	0.95	0.94
50-64	29	1.00	0.85	0.91
65+	18	0.71	0.77	0.73
N/A	141	0.80	0.82	0.87
TOTAL	206	0.82	0.82	0.87

Key Section Takeaways

- Scenery received overwhelmingly positive reviews.
- Access/infrastructure and weather/seasonality received mixed reviews.
- Overcrowding/use level is an issue at some attractions.



— Pillar 2: Agritourism Attractions —

THEME 1 - AMENITIES

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Additional Local Goods & Services (mentioned in 58% of reviews):** Wooden Shoe Tulip Farm, Swan Island Dahlias, Oregon City Farmers Market, Alpacas at Marquam Hill Ranch, Lake Oswego Farmers Market, Milwaukie Farmers Market
- **Food & Beverage (mentioned in 52% of reviews):** Wooden Shoe Tulip Farm, Swan Island Dahlias, Oregon City Farmers Market, Oswego Hills Winery, St. Josef's Winery, Lake Oswego Farmers Market, Milwaukie Farmers Market
- **Facilities (mentioned in 18% of reviews):** Swan Island Dahlias, Alpacas at Marquam Hill Ranch, Oswego Hills Winery, St. Josef's Winery
- **Information/Interpretation (mentioned in 12% of reviews):** Swan Island Dahlias, Alpacas at Marquam Hill Ranch

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **Access/Infrastructure (mentioned in 15% of reviews):** Wooden Shoe Tulip Farm

THEME 2 - ENVIRONMENT

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Scenery (mentioned in 58% of reviews):** Wooden Shoe Tulip Farm, Swan Island Dahlias, Oswego Hills Winery, Lake Oswego Farmers Market

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **Weather/Seasonality (mentioned in 29% of reviews):** Wooden Shoe Tulip Farm, Swan Island Dahlias
- **Overcrowding/Use Level (mentioned in 24% of reviews):** Wooden Shoe Tulip Farm, Swan Island Dahlias, Oswego Hills Winery, Milwaukie Farmers Market

THEME 3 - EXPERIENCE

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Emotional Impact (mentioned in 86% of reviews):** Wooden Shoe Tulip Farm, Swan Island Dahlias, Oregon City Farmers Market, Alpacas at Marquam Hill Ranch, Oswego Hills Winery, St. Josef's Winery, Lake Oswego Farmers Market, Milwaukie Farmers Market
- **Value and Price (mentioned in 28% of reviews):** Wooden Shoe Tulip Farm, Swan Island Dahlias, Alpacas at Marquam Hill Ranch, Lake Oswego Farmers Market
- **Customer Service (mentioned in 16% of reviews):** Alpacas at Marquam Hill Ranch

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **None**

TripAdvisor reviews were analyzed for eight Clackamas County agritourism attractions, which received a 4.65 rating on average. Four attractions (Oregon City Farmers Market, Alpacas at Marquam Hill Ranch, St. Josef's Winery, Lake Oswego Farmers Market) received only positive reviews for the categories identified in the study. Table 6 details the results of the agritourism attraction analysis.

Table 6: Agritourism Attraction Analysis

ATTRACTION	AVERAGE SCORE	POSITIVE CATEGORIES	MIXED CATEGORIES	NEGATIVE CATEGORIES
ALPACAS AT MARQUAM HILL RANCH	4.5	Additional Local Goods & Services Customer Service Emotional Impact Facilities Information/ Interpretation Value and Price		
LAKE OSWEGO FARMERS MARKET	4.5	Additional Local Goods & Services Emotional Impact Food & Beverage Scenery Value and Price		
MILWAUKIE FARMERS MARKET	4.5	Additional Local Goods & Services Emotional Impact Food & Beverage		Overcrowding/Use Level
OREGON CITY FARMERS MARKET	4.5	Additional Local Goods & Services Emotional Impact Food & Beverage Weather/Seasonality		
OSWEGO HILLS WINERY	4.5	Emotional Impact Facilities Food & Beverage Scenery		Overcrowding/Use Level
ST. JOSEF'S WINERY	4.0	Emotional Impact Facilities Food & Beverage		

SWAN ISLAND DAHLIAS	4.5	Additional Local Goods & Services Emotional Impact Facilities Food & Beverage Information/ Interpretation Scenery Value and Price	Weather/Seasonality	Overcrowding/Use Level
WOODEN SHOE TULIP FARM	4.5	Additional Local Goods & Services Emotional Impact Food & Beverage Scenery Value and Price	Access/ Infrastructure Weather/Seasonality	Overcrowding/Use Level
AVERAGE	4.65			

The emotional impact and local goods and services were key strengths for the Oregon City and Lake Oswego Farmers Markets and for Alpacas at Marquam Hill Ranch. According to reviewers, the ranch excelled in customer service and information/interpretation. Visitors to St. Josef's Winery enjoyed the experience and the wine. Half of the winery reviews also praised the facilities, specifically the new events center at Oswego Hills Vineyard and Winery, as well as comfortable seating available at most of the wineries.

Reviewers had favorable comments about the Wooden Shoe Tulip Farm and mentioned the emotional impact and scenery in particular. Visitors also felt positively about the price of entry, food trucks, and gift shop. However, given the limited bloom season, there were also complaints about crowds, the congested approach to the farm, and rainy/muddy spring weather throughout the festival. One reviewer explained, "The flowers were very beautiful and the fields are huge so it was possible to take nice photos even though there were tons of visitors. We went on Sunday afternoon and the weather was very nice so it was extremely busy. We waited 3.5 hours in the car to enter—it was fine because we did not have other plans or any young children to entertain :) but I would be aware of that. It seems that a lot of the roads leading up to the farm are stop sign only so this causes some traffic issues (no traffic lights and no one directing traffic until you reach the actual farm entrance). Try to go on a weekday if possible!" (Jessica L, TripAdvisor, 4/27/18).

Swan Island Dahlias reviews were similar, but access to the attraction was not a detractor (although crowds during the annual festival were mentioned). Visitors were impressed with the information/interpretation and the facilities, such as food/beverage and exhibits at the property. "Food vendors galore and the indoor displays of the different plants in their underground root cellar was unbelievable. So much work put into this presentation by a family sharing their love of the business of growing dahlias" (Dan S., TripAdvisor, 12/27/17). Visitors to Oswego Hills Winery were positive, especially about the wine, facilities, and scenery. There were several negative remarks about facility crowds; one review noted, "it seemed like there wasn't enough sitting room to do the tasting comfortably. Could use some reorganization" (Jonefer, TripAdvisor, 9/16/18).

As with the outdoor recreation attractions, emotional impact (84%) and scenery (67%) were the two dominant categories across the agritourism attraction reviews (see Table 7). Local goods and services (48%) and food

and beverages (41%) were also frequently mentioned in reviews; the vast majority of these mentions were positive. Weather/seasonality (36%) and access/infrastructure (17%) were two significant categories with the greatest divide between positive and negative mentions, signaling the range of offerings and experiences in agritourism sites.

Overcrowding/use level (27%) was the only category in which the majority of mentions were negative, which closely mirrors the results of the outdoor attraction analysis. Three additional categories that were not significant for outdoor recreation attractions—customer service (19%), information/interpretation (16%), and value and price (31%)—were significant for agritourism reviewers. The reviews for these categories were overwhelmingly positive.

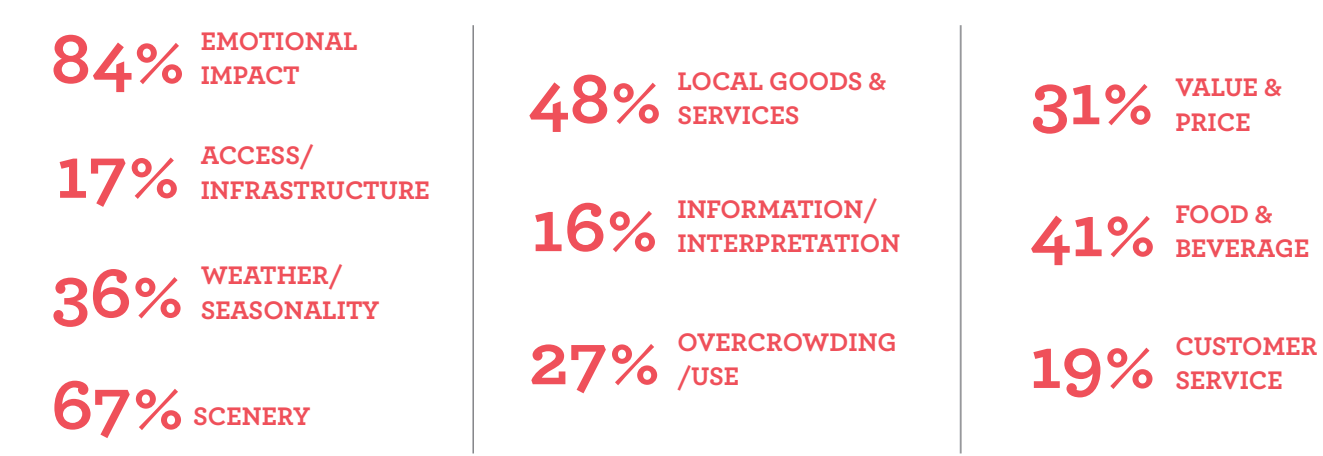


Table 7: Agritourism Recreation Attractions: Significant TripAdvisor Categories (mentioned in over 10% of reviews)

CATEGORY	MENTIONS (%)	POSITIVE (%)	NEGATIVE (%)
EMOTIONAL IMPACT	84	94	6
SCENERY	67	100	0
ADDITIONAL LOCAL GOODS & SERVICES	48	97	3
FOOD & BEVERAGE	41	97	3
WEATHER/SEASONALITY	36	52	48
VALUE & PRICE	31	85	15
OVERCROWDING/USE LEVEL	27	24	76
FACILITIES	22	86	22
CUSTOMER SERVICE	19	100	0
ACCESS/INFRASTRUCTURE	17	55	45
INFORMATION.INTERPRETATION	16	90	10

Note: The totals for positive and negative mentions may exceed 100% due to mixed reviews that contained both reactions.

Cross-Tabulation of Age and Theme Scores

Agritourism attractions received the lowest average scores out of all of the pillars. The 35-49 age bracket had lower than average scores across all three pillars. The 35-49 and 65+ age brackets had the lowest score for environment (.60). The 25-34 age bracket had higher average scores in amenities and experience, but this group represented a small sample size (N=2). (There were no agritourism reviewers in the 18-24 age range.) Table 8 provides a cross-tabulation between age groups and average theme scores.

Table 8: Agritourism Theme Scores by Age Bracket

OVERALL AVERAGES				
AGE	REVIEWERS	AVERAGE SCORE		
		AMENITIES	ENVIRONMENT	EXPERIENCE
18-24	0	-	-	-
25-34	2	1.00	0.67	1.00
35-49	3	0.50	0.60	0.67
50-64	6	0.92	0.63	1.00
65+	4	0.83	0.60	1.00
N/A	70	0.93	0.75	0.95
TOTAL	85	0.91	0.72	0.95

Key Section Takeaways

- Visitors typically had an engaging and worthwhile experience.
- Opportunities to buy local goods and services were well received.
- Access/infrastructure and overcrowding/use level received mixed reviews.



— Pillar 3: Cultural/Heritage Attractions —

THEME 1 - AMENITIES

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Information/Interpretation (mentioned in 72% of reviews):** McLoughlin House, End of the Oregon Trail Interpretive Center, Museum of the Oregon Territory, Mt. Hood Museum and Cultural Center, Willamette Shore Trolley, World of Speed, Oregon City Elevator, Bob's Red Mill Tour

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **None**

THEME 2 - ENVIRONMENT

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Scenery (mentioned in 23% of reviews):** End of the Oregon Trail Interpretive Center, Willamette Shore Trolley, Oregon City Elevator

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **None**

THEME 3 - EXPERIENCE

Significant positive categories (mentioned in over 10% of reviews, >70% positive):

- **Emotional Impact (mentioned in 86% of reviews):** End of the Oregon Trail Interpretive Center, Mt. Hood Museum and Cultural Center, Willamette Shore Trolley, World of Speed, Oregon City Elevator, Bob's Red Mill Tour
- **Customer Service (mentioned in 25% of reviews):** McLoughlin House, End of the Oregon Trail Interpretive Center, Mt. Hood Museum and Cultural Center, World of Speed, Oregon City Elevator, Bob's Red Mill Tour
- **Value and Price (mentioned in 21% of reviews):** McLoughlin House, Mt. Hood Museum and Cultural Center, Oregon City Elevator, Bob's Red Mill Tour
- **Uniqueness (mentioned in 13% of reviews):** Mt. Hood Museum and Cultural Center, World of Speed, Oregon City Elevator

Significant mixed/negative categories (mentioned in over 10% of reviews, <70% positive):

- **None**

Eight Clackamas County cultural/heritage attractions were analyzed, averaging a 4.38 rating. Six attractions received only positive feedback, with no mixed or negative sentiments associated with the significant categories. For the End of the Oregon Trail Interpretive Center, the most significant categories were information/interpretation and emotional impact, and reviews related these categories were mostly positive (81%). One reviewer commented, “Jeff the interpreter made the Oregon Trail History come alive!” (Mira V, TripAdvisor, 10/23/17). Customer service was also a relative high point. Table 9 details the results of the cultural/heritage attraction analysis.

Reviews of the Museum of the Oregon Territory reflected the same significant categories. Information/interpretation was notable, with one reviewer remarking, “Great video about the history of Willamette Falls. Learned a lot about the abandoned buildings along the river and the use of water power to bring electricity to Portland (ElizabethP999, TripAdvisor, 5/3/18).” Several reviews also positively mentioned the value of the museum.

The Mt. Hood Cultural Center and Museum received positive reviews for information/interpretation, emotional impact, and value, and also stood out to reviewers as being unexpectedly unique. As one review put it, “Hidden Gem: Another couple joined us to visit this small museum hidden away in the heart of Government Camp on Mt. Hood. Their exhibits run the gamut from early Euro-American settlement in the area, to fine arts and historic photographs, to Forest Service management, to Steiner cabins, to the history of ski clubs surrounding Mt. Hood, among others” (S M, TripAdvisor, 1/6/18).

Uniqueness was also mentioned in 24% of reviews for World of Speed. Like the other museums, World of Speed also scored positively for information/interpretation and emotional impact. Good customer service was also a standout category and, unlike for previously mentioned attractions, reviewers made several positive mentions of the facilities—particularly the meeting and banquet amenities and kids’ room.

The Oregon City Municipal Elevator’s most significant categories were scenery and positive emotional impact. Information/interpretation was mentioned in 38% of reviews analyzed. This category overlapped with customer service, particularly with regard to the elevator attendants. One reviewer remarked, “With the geography of OC this is a huge help and it is a great way to welcome visitors as it is run by a person who gives you all the history you want!” (Tom D, TripAdvisor, 7/26/18).

Visitors also felt positively about Bob’s Red Mill Tour information/interpretation and mentioned a positive emotional impact overall. One recent visitor recalled, “We had a great time on the tour! The fact that the tour was free, informative and great for all ages was a big plus. Truly great to learn about entrepreneurship and the value of hard work. Bob’s story and the results are exceptional” (Brian T, TripAdvisor, 4/1/18).

The emotional impact was more mixed for McLoughlin House, but there were only a few recent reviews for the team to analyze. Information/interpretation was highly touted in the reviews, with compliments to the park ranger and tour guides. There was one negative mention of an “unenlightened” comment made by a guide, but most found the experience interactive and informative.

Key categories for Willamette Shore Trolley were scenery and positive emotional impact. Visitors also felt the experience provided good information/interpretation, but there were mixed feelings about the value. One reviewer wrote, “It is not an inexpensive thing to do. \$120 for a family of four” (Maconthemove, TripAdvisor, 12/30/17).

Table 9: Cultural Heritage Attraction Analysis

CLACKAMAS COUNTY CULTURAL/HERITAGE ATTRACTION	AVERAGE TRIPADVISOR REVIEW	POSITIVE CATEGORIES	MIXED CATEGORIES	NEGATIVE CATEGORIES
BOB'S RED MILL TOUR	4.5	Customer Service Emotional Impact Information/Interpretation Value and Price		
EN OF THE OREGON TRAIL INTERPRETIVE CENTER	4.0	Customer Service Emotional Impact Facilities Information/Interpretation Scenery		
MCLOUGHLIN HOUSE	4.0	Customer Service Information/Interpretation Value and Price	Emotional Impact	
MT.HOOD CULTURAL CENTER AND MUSEUM	4.5	Customer Service Emotional Impact Information/Interpretation Uniqueness Value and Price		
MUSEUM OF THE OREGON TERRITORY	4.5	Customer Service Emotional Impact Facilities Information/Interpretation Value and Price		
OREGON CITY MUNICIPAL ELEVATOR	4.5	Access/Infrastructure Customer Service Emotional Impact Information/Interpretation Scenery Uniqueness Value and Price		
WILLAMETTE SHORE TROLLEY	4.5	Emotional Impact Information/Interpretation Scenery	Value and Price	
WORLD OF SPEED	4.5	Customer Service Emotional Impact Facilities Information/Interpretation Uniqueness		
AVERAGE	4.38			

86%**EMOTIONAL
IMPACT****72%****INFORMATION/
INTERPRETATION****25%****CUSTOMER
SERVICE****23%****SCENERY****21%****VALUE &
PRICE**

Emotional impact (86%) and information/interpretation (72%) were the two dominant categories that emerged across the cultural/heritage attraction reviews (see Table 10). Customer service (25%), scenery (23%), and value and price (21%) were also frequently mentioned; the overwhelming majority of these mentions were positive. In aggregate, no significant categories emerged with a split of positive and negative reviews, and none of the categories received many negative mentions. This may be because travelers that visit cultural heritage attractions typically go to learn about the significance of the attraction; since information/interpretation was widely positive, those visitors were more likely to have positive and deep experiences.

Table 10: Cultural/Heritage Attractions: Significant TripAdvisor Categories (mentioned in over 10% of reviews)

CATEGORY	MENTIONS (%)	POSITIVE (%)	NEGATIVE (%)
EMOTIONAL IMPACT	86	93	7
INFORMATION/INTERPRETATION	72	97	3
CUSTOMER SERVICE	25	96	4
SCENERY	23	100	0
VALUE AND PRICE	21	85	15
UNIQUENESS	13	100	0



Cross-Tabulation of Age and Theme Scores

Cultural heritage attractions received high average scores from all age groups. Table 11 provides a cross-tabulation between the different age brackets and the average score of each of the three themes. The 50-64 age bracket had higher than average scores in all three themes.

Table 11: Cultural Heritage Theme Scores by Age Bracket

OVERALL AVERAGES				
AGE	REVIEWERS	AVERAGE SCORE		
		AMENITIES	ENVIRONMENT	EXPERIENCE
18-24	1	-	1.00	1.00
25-34	2	1.00	-	1.00
35-49	10	0.89	1.00	1.00
50-64	15	1.00	1.00	0.94
65+	6	1.00	1.00	0.86
N/A	86	0.97	0.94	0.91
TOTAL	120	0.97	0.96	0.92

Key Section Takeaways

- There were no negative reviews for any of the themes.
- Visitors reported overwhelmingly positive emotional impacts.
- Visitors were also very satisfied with information/interpretation at these attractions.





CONCLUSION

Analysis of TripAdvisor reviews shows that, for the most part, visitors to Clackamas County are enjoying their time at the county's myriad attractions. In all three pillars—outdoor recreation, agritourism, and cultural/heritage attractions—visitors recalled positive emotional impacts. Travelers also enjoyed the scenery at attractions throughout the county. Overcrowding/use level was an issue at some outdoor recreation and agritourism sites. This category deserves further monitoring to determine the best ways to improve visitor management at these sites.

Visitors to agritourism sites had an engaging and impactful experience and appreciated the opportunities to buy locally. There were varied responses to access and infrastructure, as well as seasonality and weather; however these were counterbalanced by positive feedback on customer service, value and price, and information/interpretation, none of which were significant themes at the outdoor recreation sites.

Outdoor recreation received strong positive reviews for scenery, although these were dampened by concerns about overcrowding/use level at some sites. Some guests also noted concerns with level of activity difficulty, although reviews were mixed; some outdoor adventurers appreciated the challenge.

Cultural/heritage attractions did not receive any significant negative feedback. Emotional impact and satisfaction with information/interpretation were notable categories for positive reviews. Customer service, value and price, and scenery were also strong categories.

Attractions throughout Clackamas County rely on their beautiful environments and scenery, as well as the emotional impact the experiences have on visitors. These two themes are central to all three attraction pillars (outdoor recreation, agritourism, and cultural/heritage attractions). There is, of course, room for improvement in some areas—like access and overcrowding at some sites—but most visitors to Clackamas County attractions enjoy their experience.

Clackamas County should consider social media listening as a critical tool to monitor changes in guest perceptions and experiences, so the destination can continually adapt and improve.



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