

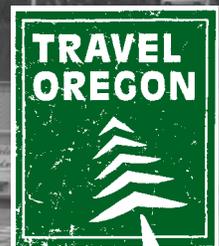


Towards Sustainable Tourism

Tourism Plan for South Columbia County & the City of St. Helens | June 2007



**Rural
Development
Initiatives**



RURAL DEVELOPMENT INITIATIVES (RDI)

Rural Development Initiatives, Inc. (RDI) is an Oregon based private, non-profit (501[c][3]) corporation dedicated to helping rural communities in the Pacific Northwest shape their futures by providing technical assistance, leadership training, strategic planning and access to resources.

RDI is a catalyst for community vitality in rural areas: we work with rural leaders and volunteers to expand the knowledge, skills and networks for building communities that foster opportunity, thrive and endure.

RDI has regional community development coordinators throughout the State of Oregon.

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This process and plan funded by a generous grant from Travel Oregon and the City of St. Helens.

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INTRODUCTION

Overview

Upon receiving a Tourism Development Grant from Travel Oregon, the City of St. Helens and the South Columbia County Chamber of Commerce engaged Rural Development Initiatives (RDI), an Oregon based non-profit organization, to lead a sustainable tourism planning process for South Columbia County starting in November 2006. Both the City and the Chamber sought assistance with an asset based tourism development plan to help give direction to both the Chamber's Tourism Manager, Julie Beehler, and the local Tourism Commission, a five-member advisory committee charged with promoting tourism activities in the City.

RDI's award-winning sustainable tourism planning process for rural areas was selected as it offered a good fit for the region with its emphasis on public participation and community, economic and environmental sustainability. The process involves a broad-spectrum of participants to help set the course for how the region should create diverse economic opportunities; protect and strengthen natural and cultural resources; and enhance livability through the development of tourism. Six principles of sustainable tourism are used to guide the planning process, appropriate for South Columbia County which is well-poised to develop a tourism industry around its natural amenities and unique cultural history.

With the Columbia River as one of the region's most prominent and viable assets, and as the main defining feature of downtown St. Helens, the desire was to focus planning efforts on the Columbia River and access to it, as well as linkages with Olde Towne¹ and the city owned Sand Island Marine Park. While the Chamber and City identified these desired outcomes early on, RDI recommended broadening the planning process to engage community members to look for additional ways of building off of local assets with regional tourism trends and viable target markets in mind.

The development of a community-based tourism plan comes at a time when the region is facing crucial decisions about the direction of its future. The population in the County is growing at a faster rate than the economic sector, creating a need for well-paid local jobs.

The Planning Process

The City and Chamber commenced the planning process in November 2006 to discuss goals, desired outcomes and to determine how to customize the planning process to maximize engagement and fit the needs of the community culture. As a result, RDI designed and delivered five three-hour community workshops over four months starting in February and concluding at the end of May 2007. Four of the five workshops took place on weekday evenings with the fifth delivered on a Saturday morning to engage participants before heading out on a local afternoon tour. The workshops were held in St. Helens with the intention of engaging participants from all over South County including Scappoose, Warren, Columbia City and Deer Island.

Thirty-six in all participated in the process including over thirty people from South County as well as several from outlying communities such as Vernonia, Rainier and Clatskanie. Participants included approximately 13 from the private for-profit sector, 9 from private non-profit sector, 6 from the public sector, 5 members of local Chambers of Commerce and 3 elected officials.

All workshops were facilitated by Kristin Dahl, RDI's Northwest Regional Community Development Coordinator and Lead Trainer for the Ford Institute Leadership Program, which coincidentally took place concurrently in South Columbia County. Guest presenters included Scott West from Travel Oregon on travel trends; Brian Mullis from Sustainable Travel International on carbon offsets, green travel certification programs and volun-tourism; and independent consultant Chris Jaworski on target market trends and case studies. Participant list, workshop agendas and workshop notes from the five tourism workshops can be found in the Appendices.

¹The Olde Towne portion of St. Helens, near the riverfront, is a Nationally Registered Historic District encompassing 10 blocks, which includes residences and civic buildings dating back nearly a century. (South Columbia County Chamber website).

Related Planning Efforts

A number of related planning efforts have taken place recently in South Columbia County offering guidance on the development of a sound local economy and necessary public infrastructure. However, aside from identifying tourism and recreation as viable opportunities for increased economic development, none of the planning efforts have ventured forth to outline how these opportunities might be realized and maximized for local benefit.

Recent significant planning efforts include:

- The City of St. Helens Economic Development Plan, June 2007
- St. Helens Comprehensive Plan Update, March 2006
- Columbia County Cultural Plan, February 2006
- St. Helens Strategic Plan 2006-08, December 2005

One consistent theme running through these planning efforts is a desire to have the community more involved in charting the future of the region. Other relevant themes include the desire for more diversified local businesses, improved aesthetics of both downtown St. Helens as well as the commercial corridor on Highway 30, and a need for waterfront development to improve the linkage between community centers and the 62-mile stretch of waterway forming the County's northern and eastern boundary.

The Columbia County Cultural Plan highlights that the County is rich in cultural amenities, but there is a call to make the resources both more accessible and well-protected to ensure their enjoyment and existence over time. The plan contains an inventory of cultural highlights from each community including such things as historical organizations, festivals, art galleries, theaters, musicians and museums, which could be of use to the Tourism Commission in assembling information for a new web-site and tourism marketing products.

Summary of Vision & Goals

The Towards Sustainable Tourism workshop participants generated a fifteen-year regional tourism vision and goals that would help move them towards fulfilling that vision. Both the vision and the goals reflect the thinking of a creative group of individuals that see great promise for the region. The wisdom in the group sees the South Columbia County region as place rich with local assets and talents yet to be discovered. Below are the five priority tourism goals for the region:

- A. Create better connectivity with the Columbia River, one of the region's most valuable assets.
- B. Increase the visibility of what South Columbia County has to offer in the state, region, and country and cross-promote with partners in the region. Develop marketing strategies to highlight the region's recreation opportunities, wildlife, inter-connected trail system, local events, and our unique cultural history.
- C. Create vibrant, robust downtown centers in the region that boast green businesses featuring local talents and products.
- D. Create a highly visible network of inter-connected trail systems for road cyclists, mountain bikers, hikers, horseback riders, and birders.
- E. Determine the theme or "hook" that sets our region apart from the rest. (Examples: "the greenest travel destination", "the "most dog-friendly destination", "the densest and most diverse trail networks in the state" or "the most majestic mountain views" etc.)

SUSTAINABLE TOURISM FRAMEWORK

Through national and international research of best practices commissioned by Travel Oregon, Rural Development Initiatives developed a set of principles to help guide regional tourism plans. These principles capture key characteristics of successful tourism plans in other rural communities that have fostered a triple-bottom line success in sustainable economic development, environmental conservation and socio-cultural preservation. The South Columbia County tourism work group used these principles as a screen for selecting target markets, developing goals and refining strategies.

Tourism products are developed in such a way that they:

1. Serve a target market that is profitable, with promising long term viability;

Typically, this market is characterized by low volume, higher priced, high value added goods and services.

2. Are integrated with and respectful of the culture, homeland, heritage, and people of a place;

Sustainable tourism does not overrun the community or detract from its "soul"; it enhances it by increasing local awareness and pride in what makes each place and its people special.

3. Generate localized economic development benefits;

There are diverse opportunities for local jobs, local entrepreneurs, and many locally owned businesses that grow and reinvest in the community.

4. Generate development that has a balanced and beneficial impact on the environment and community;

In support of this principle, the community chooses techniques for constructing and operating buildings, service provision and infrastructure in a way that has a net-zero or positive impact on the environment.

5. Generate revenue that is invested in conserving and enhancing the unique features of the community; and

Sustainable tourism creatively generates revenue to support efforts such as open space preservation, conservation efforts, schools, and trails.

6. Encourage diverse parties to work together to create new opportunities and to address challenges that emerge.

Communities that are successful with sustainable tourism have created organized ways to leverage and coordinate the efforts of many diverse people and entities.

SOUTH COLUMBIA COUNTY TOURISM VISION

The following is a 15-year tourism vision statement created by over 30 individuals from South Columbia County from both the private and public sectors in 2007:

Boasting 64 miles of river front along the mighty Columbia River, our region is a place where people honor and connect with the river and all that it has to offer. Several small, robust and vibrant downtown centers rich with cultural history are attractive to both residents and visitors. Art galleries featuring local artists, farmers markets featuring local products, restaurants offering local foods, antique shops, historical centers and recreation shops offer everyone a way to access the local bounty. Unique yurts and B&Bs offer travelers a place to stay, as there is just too much to see in a day. With a focus on “green” in business and in the built environment, our region attracts travelers who wish to leave a lighter footprint and learn about green travel.

Interconnected land and water trail systems offer hikers, bikers, kayakers, sail boaters and horseback riders a way to access and enjoy the region’s natural assets. Public gathering places and event centers are well-used for private and public events and festivals. With the future in mind, regional infrastructure has been established to capture tourism dollars for re-investment in the community and the preservation of its unique natural assets upon which the tourism industry thrives.

OPPORTUNITIES & CHALLENGES

Strengths & Opportunities

South Columbia County is a region with a surplus of opportunity for tourism development. During the planning process, the question quickly shifted from “what assets do we have to build off of?” to “which ones should we focus on?” A participatory asset mapping activity allowed the work group to identify the full range of assets the County has to offer visitors. A full list of tourism assets can be found in Appendix C. The following is a summary of the most important opportunities for the region to capitalize on to promote a sustainable tourism industry:

1. Local Talents, Local Products. Being that the travelers all over the world are looking for “authentic” small town experiences, the region would truly benefit if all of the local talents and products could be showcased. The region is home to a number of local artisans from graphite sketchers to metal sculptors; some that are featured locally, and others that are not. Art galleries already featuring local artwork are on the right track, but communities in the region could do a better job of telling the stories of the local artists and helping visitors to connect with how and where those pieces are produced. The same thing could be said of culinary artisans. Locally produced foods include fresh vegetables, cured meats, sauerkraut, goat cheese, bread and barbeque sauce. These small business owners could be featured in local restaurants and could even open their production sites for farm or factory tours! Farmers markets are also a big draw, so finding ways to publicize these types of events outside the community could broaden the market reach of culinary artists in the region.



A sampling of hand made foods available in Columbia County. Photo by Jeff Vanatta © 2007

2. Local Knowledge, Local History. There is a lot more to Columbia County than meets the eye. St. Helens, for example, has a quirky past as one of the first major ports in the state, and there are sites across the region steeped in Native American history. In addition to the organizations, festivals, museums and art galleries documenting this rich cultural heritage, there are some residents that have either studied or participated in the making of this region. Finding ways for those individuals to share this knowledge will allow the region to open windows into the past. A downtown walking tour with RJ Brown, Past President of the Historical Society of Columbia County, helped the work group see the richness storytelling can bring to an area. Finding ways to showcase these stories and document them as old-timers move on would be something to consider for bringing the past back into the future.

3. A River Runs Through It. With 64 miles of river front forming a significant portion of the County’s boundary and with many of the communities’ close proximity to the River, this is one of the region’s prime tourist amenities. Creating better linkages between the main Highway 30 corridor and the river, between each downtown hub and the river, as well as between river users and the downtown hubs should be a primary focus for increasing tourism. The river provides access to most of the communities in South Columbia County making them an easy stop for yachters, sports fishermen, kayakers, and other small watercraft.

4. Cyclists. The region’s location between Portland and the Coast has made it a pass-through zone for many road cycling races and rides via Highway 30. St. Helens, Scappoose, and Columbia City could all benefit from tapping into this already existing visitor stream. Entrepreneurs may want to consider how to expand cycling loops through the downtown areas on existing rides, or find ways to get cyclists to stop over and visit the more quaint commercial areas off the beaten path. The Banks to Vernonia Linear Trail is already drawing cyclists to the area and the Crown-Zellerbach Trail from Vernonia to Scappoose offers the start of a potentially attractive trail for off-road cycling. Mountain bikers are drawn to the area’s mountainous terrain and Vernonia is capitalizing on their interest by building a mountain biking skills park just outside of town. Currently, they are in the midst of Phase I development. Finding more ways to encourage cyclists to come and to stay longer, especially overnight, would especially benefit complementary local businesses.

5. A good base for an inter-connected trail system. A number of existing trails along the waterfront and through forestland already offer bikers, hikers, horseback riders and kayakers opportunities to enjoy the river and surrounding landscapes. A good strategy for the County parks department would be to assess existing trails and look for opportunities to create new linkages. Adding additional trail mileage would create more options for recreationalists, and could potentially serve as routes for non-motorized travel between key destinations.

In the short term, the County could benefit simply by providing visitors with information about existing trails in the area.

6. Unique festivals and events. A number of unique local festivals and events already take place in the region throughout the year such as the Sauerkraut Festival, the Salmon Festival and the Columbia City Celebration. Work group members felt that communities could better capitalize on these existing local events to draw more visitors by publicizing them beyond the region. Visitors passing by on their way to the coast may want to stop in to experience a small town celebration, or if publicized well enough, regional travelers may want to develop their own weekend itinerary around a particularly unique and inviting festival such as the Arts & Eats festival.

THREATS AND CHALLENGES

Several threats, both real and perceived, exist that have the potential to hinder the development of a tourism and recreation-based economy if not addressed.

- A number of participants noted that tourism-related efforts had been attempted in the past with no real evidence of success. It will be crucial for the Tourism Commission, City Council, County Commission and the Chamber of Commerce to provide the necessary support to help volunteer action teams implement the plan, and to help ensure some short-term, tangible successes. This will help boost the confidence and maintain momentum of the volunteers and the community.
- A number of different entities exist in the region that must work together to achieve the goals outlined in this plan, and currently those entities are not always well-coordinated with one another. In order for a multi-faceted economic sector like tourism to bloom, all of the related organizations will need to find ways to work together. It will be imperative for those taking the lead on implementation to inform key organizations of the planning work that has been done, determine common interests and to seek ways to support one another's work. The key to building a creative economy is to continue to build off of one another's ideas by saying, "Yes, AND" rather than "Yes, BUT".
- The quaint, pedestrian friendly downtown centers are nearly invisible to travelers passing by on Highway 30, the main arterial through the region. In addition to this, the commercial zone around Highway 30 is unsightly and unwelcoming. While several project ideas were surfaced to address this weakness, this may prove to be one of the most significant hurdles the region will have to overcome. Fortunately, the 2007 City of St. Helens Economic Development Plan offers a number of suggestions for combating this issue.
- Over 50 percent of St. Helen's residents commute to work¹. This may indicate a challenge for local business owners to generate steady revenue streams, as they will not be able to survive on tourism dollars alone. Innovation may be required of entrepreneurs to figure out how to deliver services to locals during hours they might be likely to need those services, or in ways that would convenience their lifestyle. For example, downtown business owners may want to agree to keeping certain late night hours for boutiques, cafes and ice cream shops on certain days of the week.
- Columbia County is mostly unknown to outsiders. While the region is unique and has a lot to offer for the visitor experience, Columbia County has yet to find a significant "hook" with which people can associate the region. Columbia County..."we're more than just Highway 30".

¹From *St. Helens Comprehensive Plan Economic Goals and Policies*, March 2006

TARGET MARKETS

In order to address ensure that our tourism planning efforts would serve a target market that is profitable with long-term viability, we first identified all of the existing target markets in the region and then narrowed them down. Twenty-four markets, or visitor segments, were identified in South Columbia County:

Sea kayakers	Hunters
Yachters	ATVers
Sailors	Concert go-ers
Sports fishermen/women	Photographers
Road cyclists	Garden/nursery seekers
Mountain bikers	Equestrian folk
Art seekers	Antique aircraft voyeurs
Tour bikers (motorcyclists)	Hikers
Birders	Scenic drivers ("coasters")
Filmmakers	Professionals (who come to work in the area)
Couples looking to get married	Antique shoppers

After reviewing statewide and regional tourism trends, workshop participants used the principles of sustainable tourism to select the most viable and locally appropriate target markets. Participants were encouraged to select markets that would have the most potential of generating tourism that would:

- Be integrated with and respectful of the culture, homeland, heritage, and people of the place;
- Generate localized economic development benefits; and
- Generate development that has a balanced or beneficial impact on the environment and community;

The work group chose to work with the following five target market groups in their planning efforts. Specific markets, like yachters were grouped with other users with similar behaviors and needs.

- 1) Small non-motorized watercraft / kayakers
- 2) Sail boaters / yachters / recreational boaters
- 3) Road cyclists / mountain bikers
- 4) Arts & craft seekers / antique shoppers
- 5) Wildlife watchers / birders

To better understand these target markets, we studied economic and demographic trends for each of these segments to determine whether or not they would be both viable for the region and a source of sustainable tourism growth (See Appendix D for segment profiles). Work group members used the local asset inventory to develop local itineraries for each of these key target market groups (see Appendix C for a full list of assets and Appendix E for target market itineraries). Through this exercise, work groups identified a number of ideas for the community to better accommodate each of these target markets.

Small Watercraft / Kayak

- Improve access to the water from St Helens and throughout Columbia County
- Provide access at Dalton Park
- Find places to accommodate trailer parking during usage
- Install low docks for small watercraft at existing public docks
- Provide watercraft rentals from Olde Towne
- Provide better access to Sand Island, possibly by ferry from downtown
- Install communications from Sand Island to St Helens (for emergencies)
- Install lighting on Sand Island
- Offer boating safety classes

Large Water Craft (Power boating & Sailing)

- Provide a river taxi or ferry service to and from Sand Island (the City park)
- Provide an information kiosk at the top of the dock in the courthouse parking lot (or above Columbia View Park) with information on services, activities, tours, retailers & restaurants
- Create a pamphlet with information on the haunted buildings & hauntings to draw people into town

Arts & Craft Seekers / Antique Shoppers

- Create more venues to show and sell local art
- “Artistically” utilize fencing along courthouse & Columbia View Park to guide visitors to see more of the downtown area
- Create a spring “Taste Test” of Arts & Eats Festival

Birders

- Provide good bird guides including what’s unique to the area, what you’ll see, and places to go
- Provide an education center down around the marina featuring wildlife, natural features, history of the area

TOURISM ACTION PLAN

A complete action plan is made up of goals, strategies, actions and measurable indicators of success. Each of the five goals listed here were selected by the work group as priority goals from a longer list of eight goals generated originally. Top strategies were selected from long lists of strategy and project ideas generated by all participants. Strategies were selected based on how well they would advance the goals of a sustainable tourism industry and using the following screening criteria:

- Strategic (catalytic, based on heritage)
- Doable within a relatively short time frame
- Fundable
- FUN!!

Four strategies were selected for immediate implementation and those strategies (in italics) have corresponding action plans in Appendix B. With the intention of achieving a few immediate successes, the work group decided to form two action teams to pursue the creation of a new visitor kiosk near the dock and new waterfront signage to welcome boaters into downtown St. Helens. Other strategies on this list will be implemented as time and capacity allows.

GOAL A: Create better connectivity with the Columbia River, one of the region's most valuable assets.

Priority Strategies:

- 1) *Enlarge signage on the Columbia River Highway from the south and add signage on the north end. Signage will be artistic and it will include important words such as "historical" and "river front"*
- 2) *Design and construct new St. Helens signage on river front*
- 3) *Design and construct a new visitor information kiosk on dock (next to Seaman) highlighting business, artisans, art & history information*
- 4) Make better use of existing events on the river and create new events!

GOAL B: Increase the visibility of what South Columbia County has to offer in the state, region, and country and cross-promote with partners in the region. Develop marketing strategies to highlight our robust downtown centers, inter-connected trail system, local events, and our natural and cultural history.

Priority Strategies:

- 1) *Enhance and build out the existing chamber tourism website*
- 2) Signage: Fix the existing courthouse dock signage and create a new informational kiosk
- 3) Education & Outreach: Improve the existing Chamber publication (brochure)

GOAL C: Create vibrant, robust downtown centers in the region that boast green businesses featuring local talents and products.

Priority Strategies:

- 1) Create a consistent downtown "Olde Town" theme with in-laid sidewalks, uniform lamps, benches and planters
- 2) Develop an artisan mall to showcase local artists offering art classes, information kiosks, and walking studio tours.
- 3) Transportation from Highway 30 to the docks/Olde Town

GOAL D: Create a highly visible network of inter-connected trail systems for road cyclists, mountain bikers, hikers, horseback riders, and birders.

Priority Strategies:

- 1) Determine and map possible trail networks that could stem off of the Crown-Zellerbach trail
- 2) Develop a "Bay Front" trail from St. Helens to Scappoose Bay Marina (floating trail)
- 3) Develop the Dike (Scappoose) as a bicycle trail with interpretive nature signs (birds)

GOAL E: Determine the theme or “hook” that sets our region apart from the rest. (Examples: “the greenest travel destination”, “the “most dog-friendly destination”, or the “the densest and most diverse trail net works in the state” or “the most majestic mountain views” etc.)

For this goal, participants did not develop strategies for how to determine the theme, but they spent time developing thematic ideas. Here is what they came up with:

- 1) Confluence of Rivers, People and History
- 2) Majestic Mountain Views
- 3) Community with the Power to Create, Reinvent, & Inspire

The following are the three goals that did not rise to the surface as priority goals for immediate consideration; however, they do provide direction as time, passion and capacity allows. An individual’s passion and commitment to act on any one of these goals or strategies will move it forward irrespective of any plan.

GOAL F: Develop Sand Island as a unique green public gathering destination within the region.

GOAL G: Create a handful of unique, new events and/or festivals that would draw large numbers of people year after year from outside the region and expose them to what the region has to offer. Increase the visibility of existing local events and festivals for broader participation.

GOAL H: Increase access to our unique cultural and natural history. Find ways of preserving both.

IMPLEMENTATION PLAN

Implementation of this plan will fall under the responsibility of the Tourism Manager for the South Columbia County Chamber. Julie Beehler, who serves in this role, will spearhead the implementation of the plan by convening the action teams established for the top priority projects and sharing the on-going work of this effort with key agencies and organizations. Julie's role will be supported by the Chamber of Commerce, the City of St. Helens and the St. Helens Tourism Commission.

The South Columbia County Chamber of Commerce is made up of an 11 member board, an Executive Director, a Tourism Director, support staff and a myriad of volunteers. One board member is assigned to the St. Helens Tourism Commission as a liaison between the two organizations.

The St. Helens Tourism Commission is an advisory board created by the City Council to oversee and promote tourism activities within the City. Its efforts are funded by a transient room fee tax of 7% that the Council passed several years ago. It is made up of five members of the community including a city councilor, a member of the Chamber of Commerce, a member representing the motel owners and two at large members. Additional resources to the St. Helens Tourism Commission include the South Columbia County Chamber of Commerce's Tourism Director, as well as the City of St. Helens' City Administrator. These two organizations have had a strong working relationship for the past two years as they have begun the development of tourism in the St. Helens area.

Tourism Commission members include:

Ronda Courtney, Chair – Columbia County Event Complex Administrator
RJ "Bob" Brown, Vice-Chair – Historical Society of Columbia County, Past President
Keith Locke – St. Helens City Councilman, Council Rep to the Tourism Commission
Eric Dahlgren – Hotel partner, Best Western Oak Meadows Inn – Hotel Representative
Kim Shade – Operations Manager, Port of St. Helens – Chamber Representative

TRAVEL TRENDS

Understanding travel trends is important for designing tourism strategies at the local level. Included in this plan are both general tourism and travel market trends as well as sustainable or geo-tourism travel trends.

General Tourism & Travel Trends

Tourism is arguably the world's largest industry. It generates about 10% of total world GDP and employs over 10% of the global workforce, and it's on the verge of tremendous growth. In 2005, there were 808 million international tourism arrivals, a figure that the World Tourism Organization expects to reach one billion by 2010. (World Tourism Organization 2006)

The multi-billion dollar travel industry in Oregon is a vital part of the state and local economies. The industry is represented primarily by retail and service firms, including lodging establishments, restaurants, retail stores, gasoline service stations and other types of businesses that sell their products and services to travelers. The money that visitors spend on various goods and services while in Oregon produces business receipts at these firms, which in turn employ Oregon residents and pay their wages and salaries. State and local government units also benefit from the tax receipts that travel generates. The state government collects taxes on lodging, motor fuel and the income of travel industry employees. Local governments also collect taxes on lodging and auto rentals.

- In Oregon, total direct travel spending was \$7.9 billion in 2006. This represents a 6.7 percent increase over the preceding year, marking the third consecutive year of growth exceeding 6 percent. A substantial share of the increase in travel spending was due to higher gasoline prices and room rates. However, travel spending still increased by 2.4 percent during the last year when adjusted for inflation.
- Travel industry employment increased by 1.5 percent from 2005 to 2006 to 88,900 jobs with earnings of \$1.9 billion. Continuing declines in air transportation employment were offset by travel-generated growth in the leisure and hospitality sector. Travel spending in Oregon generated a total (direct and secondary) impact of 128,900 jobs with earnings of \$3.1 billion in 2006. Most of the secondary impacts were in various professional and business services.
- Visitors that stayed overnight in hotels, motels and bed & breakfasts accounted for one-half of all visitor spending in Oregon in 2006.
- Travel spending generated at least 4,000 jobs in eight of Oregon's thirty-six counties. It generated 1,000 or more jobs in twenty-one counties. In general, rural areas of Oregon are more dependent on tourism than urban areas, even though the latter have higher absolute levels of tourism spending. The four counties where travel-generated earnings comprise more than 10 percent of total earnings are Clatsop, Curry, Lincoln and Tillamook.
- In 2005, travel spending in Columbia County equated to \$26.1 million generating \$5 million in earnings. The County ranked 27th out of 36 counties in the state for travel spending and it ranked 29th for the number of travel industry jobs at 370 (Dean Runyan Associates 2006).

Oregon Travel Trends

From the Oregon Tourism Commission's 2007-09 Strategic Plan

The Oregon Tourism Commission recognizes and monitors several significant trends identified by the Travel Industry Association of America. Arguably the most important is that leisure travel continues to grow and accounted for 75% of all US domestic travel in 2005. This is a 7% increase from 1995 when it was 68%. Here are additional important trends that were taken into consideration in developing this plan:

Cultural Heritage:

Trips including cultural and heritage activities comprise one of the most popular and significant segments of the travel industry, accounting for 23.7% of all domestic trips. On average, this group spends more, stays longer and is more likely to use hotels, motels, and resorts than travelers who do not participate in historic and cultural activities.

Culinary Tourism:

Oregon has a distinguished culinary reputation for excellent wineries, microbrews, artisanal products and outstanding restaurants featuring local cuisine. According to TIA's 2006 Online Culinary Survey of Leisure Travelers, culinary travelers are looking for unique culinary experiences that are not available in their home area. These culinary activities include dining out for a unique and memorable experience, taking a cooking class, attending farmers markets, gourmet food shopping or attending food festivals. Furthermore:

- 17%, or just over 27 million travelers, have engaged in some type of culinary or wine-related activity while traveling within the past three years.
- In total, culinary travelers spend an estimated \$51 billion on all travel expenses for trips involving culinary activities; food-related travel accounts for \$35 billion of this total, while wine-related travel accounts for \$16 billion.
- Culinary travelers are active travelers. They are significantly more likely than the general leisure travel population to participate in cultural activities, enjoy spa services, visit state/national parks and participate in a variety of outdoor activities.
- 78% of American leisure travelers report they are somewhat or very interested in taking a culinary trip within the next year. Interest in future culinary travel is significantly higher among those with annual incomes over \$75,000.

Close to Home:

- Research shows that travelers are more likely to travel within their own state (57%), and to destinations outside of the traveler's state yet within their region (Pacific - Washington, Oregon, California) account for another 19% of trips for a combined total of 76% of all trips.
- Among the nine tourism regions, the Pacific ranks second for the number of trips originating from the region (16%), second only to the South Atlantic at 18%.
- An overwhelming majority (88%) of leisure trips are made via car, truck, or RV.
- Guided commercial whitewater rafting grew in Western states, and more Americans paddle (kayak, canoe, raft) than play soccer.

Outdoor/Active:

Active outdoor recreation includes popular activities such as bicycling, camping, fishing, paddling, snowsports and wildlife viewing. More than three out of every four Americans participate in active outdoor recreation each year. Americans spend money, create jobs, and support local communities when they get outdoors. Simple, healthy outdoor activities generate enormous economic power. Oregon is in a great position to benefit given its powerful combination of diverse outdoor assets including coastline, mountains, deserts and valleys. In addition to Oregon's outdoor assets, Oregon possesses a distinctive "outdoor attitude." Here are the A, B, C's of why this combination is so important to our tourism industry:

- Adventure travelers are everywhere. One-half of U.S. adults, or 98 million people, have taken an adventure trip in the past five years. This includes 31 million adults who engaged in hard adventure activities like whitewater rafting, scuba diving and mountain biking. Adventure travelers are more likely to be young, single and employed compared to all other U.S. adults. (Source: Adventure Travel Report.)
- Biking vacations attracted more than 27 million travelers in the past five years and they rank as the third most popular outdoor vacation activity in America, (following camping and hiking). People who take biking trips tend to be young and affluent. More than 80% of biking travelers took a camping trip in the past five years and 72% took hiking trips in the past five years. (Source: Adventure Travel Report.)
- Camping is the number one outdoor vacation activity in America. One third of U.S. adults say they have gone on a camping vacation in the past five years and only 6% of people who have gone camping said it was not for them. The average age of travelers who go camping is 37 and their median household income is \$43,000. People who go camping also tend to enjoy hiking, biking and canoeing. Fifty-nine percent of campers said they traveled with their spouses on their most recent outdoor vacation and nearly half traveled with their children. (Source: Adventure Travel Report.)
- Then there's the G: Golfing. Golf is a popular travel activity in the U.S. One in eight U.S. travelers (12%) played golf while on a trip of 100 miles or more, one-way, away from home in the past year. This translates to 17.3 million U.S. adults. Golfing travelers averaged 2.6 trips (mean) over the past year, with 10 percent golfing on six or more trips. Nearly one-half of golfing travelers did so on only one trip in the past year (46%). One-third went on either two or three golfing trips in the past year (34%). Sixteen percent of travelers who played golf said that golf was the most important reason for taking the trip. Over one-half of golfing travelers (55%) said that on their most recent golf trip, golfing was not a primary or secondary reason, but rather just an activity on the trip.

- Finally, R, for Recreation. Oregon ranks 7th in the number of state parks, recreation, and natural areas with 61.6 million land acres. Oregon ranks 4th nationally in the number of visitors to those areas (45 million annually). In addition, a 2001 economic survey by the USGWS showed that 82 million US residents over age 16 participated in wildlife related recreation activities. Those individuals spent \$38.4 billion. That same year, \$21 billion was spent on wildlife related recreation in Oregon.

Destinations:

Not only does Oregon's geography provide ample activities, its attractions are rich in history and educational opportunities. These assets are important because:

- Family travel (adults with children) will continue to grow at a faster rate than all other forms of leisure travel. Currently one in five U.S. domestic household trips include children (22%). Of 20 common trip activities, the most popular is dining, which is included on three in ten domestic household trips (31%). Shopping is also a popular trip activity (23%), as are entertainment (19%) and sightseeing (17%).
- Specific cultural, arts, historic, or heritage activities or events can influence choice of destination and scheduling of a trip; 19% of all overseas visitors (4.1 million) participated in cultural and heritage tourism activities while in the United States.
- More than 118 million people (81% of adult travelers) have included an historic or cultural activity while traveling. 62% of U.S. travelers say it is important that they learn about other cultures when they travel.
- The U.S. ski industry set an all-time national skier visit record by a substantial margin, reaching 58.9 million for the 2005-06 season. The number of annual participants in snow-based recreation is more than double the combined annual attendance for NASCAR's two premier series.
- Despite gas price hikes, 51 percent of campers said they would camp closer to home but would not decrease the number of days spent camping.

Sports Event Travelers:

With the passage of legislation ending the sports lottery program, Oregon is now eligible for NCAA basketball tournaments. This combined with OSU capturing the national baseball championship; the nationwide press from the U.S. Women's Figure Skating Championship; the unique benefit of Portland's two arenas; the upcoming 2008 Olympic track and field trials in Eugene; and the upcoming 2010 Olympics, could turn out to be a "perfect storm" from which a new visitor profile may emerge in Oregon: the Sports Event Traveler.

- In the past five years, 75.3 million U.S. adults attend an organized sports event, competition, or tournament while on a trip of 50 miles or more.
- Professional and amateur sports events are attended equally while traveling. Among amateur events, high school and college sports are most popular.
- The economic impact of the 2005 Portland Marathon was \$15 million.
- The number of Americans who participate in bicycling is double the population of Canada. Americans spent 88 times more on bicycle-based recreation in one year than the total box office draw for Titanic, the top grossing movie of all time.
- Attending sports events ranks 10th as a trip activity.

Oregon Travel Market Mix and Demographics

Based on extensive profiling and research, the Commission has identified Oregon's target demographic as working parents (30s to mid 50s) seeking something more personal and experiential in a vacation. The Oregon difference is that the destination is as much about them, as a family, and sharing quality time together, as it is about the location. Oregon's "high-yield" consumers consider themselves cultured and sophisticated, but not self-conscious or self-absorbed. For Oregon's target audience, it's not about size (or glamour or drama), it's about the quality and intimacy of the experience.

In a random survey of potential visitors, over half agreed that Oregon could be an exciting place to visit, that it appears to be a place welcoming to families and offering excellent sightseeing. The marketing challenge is that Oregon's key competitors, including California, Washington and British Columbia, have even stronger positive images among these consumers than Oregon. Research shows that travelers to Oregon are an adventurous lot looking to embrace all of the diverse topography, scenery and attractions the state has to offer.

Travelers to Oregon are most often looking for:

- An exciting, must-see destination that is particularly suited for families
- A place with outstanding sightseeing opportunities
- A place offering unique experiences, scenery, and customs
- A popular, well-known place
- A place with luxurious resorts and restaurant facilities
- A worry-free, safe place to travel and relax
- Entertainment that includes live music, nightlife, theatre and the arts

Travelers also noted the following, though with slightly less importance:

- Sports and recreation facilities and activities
- A pleasant climate
- An affordable place offering good value

The current mix of overnight vs. day trips, as well as visitors from Oregon, other U.S. and international points of origination is best depicted in the following table. The table shows the visitor mix based on dollars spent and clearly shows the importance of the out-of-state and overnight visitors to the economic health of Oregon's tourism industry, accounting for 66% and 77% of total visitor spending, respectively.

Visitor Spending in Oregon by Origin of Visitor, 2006

(Percent of Total Travel Spending)*

	Oregon	Other US	International	Total
Overnight	23%	40%	4%	67%
Day	21%	4%	0%	25%
Air fares	5%	2%	2%	9%
TOTAL	49%	46%	6%	100%

* Totals may not add due to rounding

Oregon Tourism Commission's 2007-09 Strategic Plan

Sustainable / Geotourism Market Trends

“Sustainable tourism [a.k.a. responsible travel] refers to a level of tourism activity that can be maintained over the long term because it results in a net benefit for the socio-cultural, economic, and natural environments of the area in which it takes place.” (International Council on Monuments and Sites, 2002)

- Nearly 36% of adult American travelers or 55.1 million people can be classified as sustainable or geotourists. These travelers have ceaseless expectations for unique and culturally authentic travel experiences that protect and preserve the ecological and cultural environment. (The Geotourism Study, Travel Industry Association of America (TIA), National Geographic Traveler 2002)
- The number of Americans who say they worry about the environment “a great deal” or “a fair amount” increased from 62% to 77% between 2004 and 2006 (The Gallup Organization 2006).
- Almost 90% of the U.S. population state that it is important for companies to not just be profitable, but to be mindful of their impact on the environment and society (Corporate Social Responsibility: Consumer Understanding and Influence, Natural Marketing Institute, 2005).
- 58.5 million Americans say they would pay more to use a travel company that strives to protect and preserve the environment. The majority (61%) of those who would pay more to use such companies would, in fact, pay 5–10% more. (Geotourism: New Trend in Travel study, TIA, National Geographic Traveler October 2003)
- Authenticity is important to travelers. 61% of Americans believe their experience is better when their destination preserves its unique natural, historic, and cultural sites. In addition, 41% of these travelers said their vacation experience is better when they can see and do something authentic. (Geotourism: New Trend in Travel study, TIA and National Geographic Traveler 2003).

In 2002, the Travel Industry Association of America and National Geographic Traveler completed the “Geo-Tourism Study”, a traveler survey designed to examine the patterns and motivations of various traveler groups, particularly those interested in sustainable tourism. One underlying assumption was that, although the “distinct characteristics, local customs and cuisines, regional architecture and culture are eroding in many travel destinations, it is these factors that primarily attract the customers who take the most trips, spend the most money, and produce the greatest volume of visitors overall.” The results of the study suggest this assumption is correct. Thus, communities seeking such visitors need to develop tourism in a way that enhances what is unique and what is beneficial for the whole community.

According to the Geo-Tourism Study, 154 million American adults traveled at least once in the past three years, 50 miles or more from home or overnight. Most travelers are city dwellers living in urban areas with a population of 500,000 or more, and four out of ten are between the ages of 35 and 54. Of the nine different traveler profiles developed as part of this study, three are particularly attractive for communities seeking to grow sustainable tourism. Together, they include 55.1 million people nationally and they are:

- **“Geo-Savvys”** | These are travelers who want their destination to actively preserve natural, historic and cultural sites and attractions. They seek educational programs, environmental programs, adventure travel, and small scale accommodations run by local people. Small towns are appealing. They like to be in places that are distinctly different from where they live, and experience different people, lifestyles and cultures. They like small towns. These travelers are concentrated in the Pacific region of the U.S: over 4 million travelers with this profile are in the region.
- **“Urban Sophisticates”** | Urban Sophisticates have similar desires as the group above, but this group is more oriented toward culture and less toward environment. They are more likely to seek fine dining, art, events, culture and nightlife, and upscale accommodations. They like to try local foods and cuisine more than any other group. They are also seeking authentic places that are “charming”. This is the highest income group, with average household incomes of \$76,630. These travelers are also concentrated in the Pacific region of the U.S: over 4 million travelers with this profile are in the region
- **“Good Citizens”** | These people are very involved in community affairs at home. They care about good communities, and like to meet other travelers on vacation. With an average age of 55, they are older than the other two groups. They value high quality visitor services, and cleanliness, safety, and security at their destination.

APPENDIX

- A. Participant List
- B. Project Action Plans
- C. Community Tourism Assets
- D. Select Target Market Information & Trends
- E. Select Target Market Itineraries

A. PARTICIPANT LIST

#	First Name	Last Name	Organization/ Affiliation	Title/Position	Community	Email
1	Phil	Barlow	City of St. Helens	City Commisioner		phillipb@ci.st-helens.or.us
2	Paul	Barlow	Bike shop	Owner	St. Helens	paul@barlowbikes.com
3	Shirley	Bartholomew	Rainier Chamber of Commerce	President	Rainier	hankb@opusnet.com
4	Rita	Beaston	SBWC	Outreach Coord.		sbwc2@opusnet.com
5	Julie	Beehler	Chamber of Com- merce	Tourism Manager		julie@sccchamber.org
6	Rita	Bernhard	Columbia County Commissioner	County Commis- sioner		bernar@co.columbia.or.us
7	Brandi	Bonney	Columbia County Women's Resource Center	Executive Director	Columbia County	execdir@colcenter.org
8	RJ	Brown	Historical Society		St. Helens	cchsb@columbia-center.org
9	Libby	Calnon	PUD	Communications		lcalnon@crpud.org
10	Ernie	Carman	Columbia County Cultural Commission/ Clatskanie Chamber of Commerce Com- mission	Vice Chair/Vice President		
11	Steve	Gibons	Scappoose Bay Kayaking	Owner	Warren	sgibons@comcast.net
12	Laura	Gibons	Geppetto's/Gibons Gallery	Member	St. Helens	gibonsgallery@comcast.net
13	Amanda	Hansen	Private		Rainier	
14	Jenny	Hicks	SCC Chamber			jenny@sccchamber.org
15	Tony	Hyde	Columbia County	Commissioner	Columbia County	hydett@co.columbia.or.us
16	Chris	Jaworski	Private interest		Portland	cjaworski@comcast.net
17	John	Joy	Portland United Mountain Pedalers (PUMP)	Board Member	Scappoose	
18	Marjorie	Kundiger	Retired		St Helens	marji5@opusnet.com
19	Brian	Little	City of St. Helens	City Administrator		brianl@ci.st-helens.or.us
20	Keith	Locke	City of St. Helens	City Commisioner		keithl@ci.st-helens.or.us
21	Jackie	Matthewes	National Property Inspection	Inspector	St. Helens	npjackie@comcast.net
22	Kathy	McGee	Retiree, new to region, Rainier		Rainier	lodge01@msn.com
23	Cheryl	Morrisey	Neighborhood citizen/ Sailing Club	Commodore	St. Helens	morrisey@opusnet.com
24	Curt	Nelson	Artisans Co-Op	Owner	St. Helens	cnelson@opusnet.com
25	Erika	Owen	County Parks (RARE)	RARE		owene@co.columbia.or.us
26	Lona	Pierce	Birder			alkpierce@colcenter.org
27	Beth	Pulito	Creekside Photog- raphy			beth@creeksidestudios.com
28	Steven	Sickles	City of St. Helens	Planning Comm		ssickles@assist2sell.com

29	Janelle	St. Pierre	Scappoose Bay Watershed Council	Coordinator		sbwc@opusnet.com
30	Judith	Taylor	Rice Pals / Rainier Chamber		Rainier	taylorjuditha@hotmail.com
31	Jeff	Vannatta	Vannatta Brothers		Rainier	jeff@vannatabros.com
32	Melanie	Veach	Best Western	Best Western		melwod@yahoo.com
33	Donna	Webb	Vernonia Chamber of Commerce	Chamber Director		info@vernoniachamber.org
34	Audrey	Webster	City of St. Helens	Planning Comm		abw@opusnet.com
35	Casey	Wheeler	Tourism Commission/ SH FCU	President/CEO	Columbia County	cwheeler@shcu.org
36	Skip	White	Private		Sauvie Island	

B. PROJECT ACTION PLANS

STRATEGY 1: Kiosk at Waterfront

Action:	Time Frame:	Budget:	Responsible Party:	Collaborators:	Progress Measure:
1) Kiosks location permission/permits	1-2 months	??	Brian/Phil City of St. Helens	Planning/ Engineering	Secure Permit
2) Estimate of cost to purchase sign & art structure	6 wks after plan approval	7000-10000	RJ	Jenny	Get Cost Estimates
3) Research funding: private and public grants or financing	08/31/07	Tourism Travel Oregon Private	Julie	Tourism Commission Chamber OTC Workgroup	
4) Gather and design community buy in	Though 04/08		RJ	Tourism Commission Arts & Cultural, Parks, Workgroup	Approvals
5) Bids and do	05/08		RJ	Artist(s)	Contract award
6) Review Completed Work	06/08		RJ	Artist(s)	Sign Completed

Work Group: R.J. Brown (convener), Jenny Hicks, Phil Barlow, Brian Little

STRATEGY 2: Waterfront Signage at Docks

Action:	Time Frame:	Budget:	Responsible Party:	Collaborators:	Progress Measure:
1) Sign location permission/permits	7/31/07		Keith	City of St. Helens	Secure Permit
2) Estimate of cost to purchase sign	6 weeks after plan approval	2000-10000	Keith/Julie	Artists Arts & Cultural Workgroup	Collection of Bids A&C buy in
3) How to fund, Private, tourism, city, business, grants, community funds	08/31/07		Julie	Travel Oregon Tourism Comm. Private, Workgroup	Grant Secured Additional funding secured
4) Gather and design community buy in	Through 04/08		Keith/Julie	City of St. Helens Tourism Comm. Arts & Cultural, Workgroup	Approvals
5) Bids and do	05/08		Keith/Julie	Artists	Contract award
6) Schedule work review permits	06/08		Tourism Comm./ Julie	Artists	Sign Completed

Work Group: Keith Locke (convener), Kathryn McGee, Amanda Furnish, Brandi Bonney, Julie Beehler

STRATEGY 3: Create a Tourism Website For South Columbia County

Action:	Time Frame:	Budget:	Responsible Party:	Collaborators:	Progress Measure:
1) Evaluate existing South Columbia County Chamber website	30 days	Volunteers	Chamber	Minimal	Review is complete
2) Choose an alternative	4-5 months	Chamber	Cities, county, chamber	Whoever we can get!	Choose alternative
3) Obtain funding	Depend on funding code	Volunteer	Travel Oregon chambers city tourism	Minimal	Funding received
4) Update web site	60 days	Contractor	Chamber web designer, high schools students	\$5K	Web site update

STRATEGY 4: Enlarge Signage On Highway 30 – Get People From Highway To The River

Action:	Time Frame:	Budget:	Responsible Party:	Collaborators:	Progress Measure:
1) Speak with appropriate agencies (city, ODOT, railroad) on signage regulations.					
2) Determine budget for signage. Determine funding source.					
3) Circulate sign project and solicit bids from local artists					
4) Commission artwork to be done					
5) Setting and dedication sign					

C. COMMUNITY TOURISM ASSETS

LODGING & ACCOMMODATIONS

Bed & Breakfasts

S - Scappoose Creek Inn
SH - Nob Hill B&B
SH - Ruby Ranch Inn
SH - Seawright house
Vernonia - Old Mill

Hotel / Motel

Best Western (St. Helens)
Clatskanie Inn
Northwood Inn (Clatskanie)
Rainier Budget Inn
Vernonia Inn
Village Inn

RV & Camping Parks

Scappoose RV Park
Anderson Park
Big Eddy County Park
Camp Wilkerson County Park
Dibblee (Rainier)
Hudson
J.J. Collins
McCormick
Sand Island (St. Helens)
Scaponia Park
Vernonia Lake (primitive)

TRANSPORTATION

Infrastructure

Scappoose Airport
bike paths
Bicycle Lane (Hwy 30)
hiking trails

Marinas & Docks

Scappoose Bay Marina
St. Helens Marina
Brown's Landing
Sand Island (St. Helens)
Scappoose Yacht Club
mountain biking trails
roads, highways
raillines

Public Transport /

Social Services

Columbia County Rider
Emergency services vehicles
Metro
SCAT
Senior shuttle in Rainier

For-Hire Motorized Transport

Bridge View Taxi
K&L Taxi
L&C Train
St. Helens Taxi

For Hire Water Transport

Queen of the North
Sea or recreational kayaks

Aircraft

Antique aircrafts
Air planes
Gliders
Hang gliders
Helicopters
Ultra-lights

RETAIL

Existing Businesses (in no order)

Absolute Marble & Granite
All About Pets
Artisan's Co-op
Auto Baun (Scappoose)
Bike Shop
Children's Closet
Clay Art Studios
Columbia City Mini Mart
Columbia Electric Feed & Seed
Columbia Village
Crystal Garden Boutique
Dahlgren's Do-It Center
Dianna's Formal Affair
Embroidery Hutch
Emmert Motors
Enchanted Bungalow

Fibers & Stitches

Floeter's Attic
Flowers 4 U & Antiques Too
Fred Meyers
Fritz & Sassy
Gibbons Gallery
Grace's Rivertown Antiques
Grammy's Used Books
Harrington's
Hi-School Pharmacy
Jilly's
Kids 'n Co
KNAPPA
Knit Divas
Lofted Lair Gallery
Love Potions
Meg's Corner / ASH
Nothing New
NW Apparel
Pacifica Framing
Patina
Radio Shack
Richardson's Furniture
Rite Aid
Scappoose Bay Kayaking
Seawright House
Sew Simple
Small Town Memories
Smoke House (Scappoose)
Soothing Souls
Spiralz

St Helens Auto
St Helens Computer
St. Helens Book Store
Star Communications
Sunsations
The Clever Crickett
True Value (county wide)
Urban Trends
WalMart
Weird Harolds
Wicker Wonders
Winner's Circle
Wolfgang Forge

Vernonia Businesses

Buckleberry Cottage
Creatures
Ettcetera
Farm Women's Nursery
Grey Dawn Gallery
Karmel's Flower Shop
Out on a Limb
Vernonia Hardware

Categories of Businesses

Antique stores
Art galleries
Bike shops
Boat launch
Coffee shops
Computer & Electronics
Farms & Nurseries
Gas
Gift Shops
Grocery
Hardware
Lube shops
Marine repair companies
Moorage
Pet shops & Veterenarians
Restaurants
Spa & Beauty

MEETING FACILITIES**Public Centers**

911 (Emergency Services center)
 Chamber of Commerce
 City Council Chamber
 City Hall
 Columbia County Mental Health Bldg
 Columbia Learning Center
 County Fairgrounds Event Complex
 Scappoose Library
 Mike Avent Building (Rainier)
 OSU Extension Bldg
 PUD
 Scappoose HS Cafeteria or Gym
 Scappoose Middle School Gym
 Senior Centers (Scap, St. H, Rnr, Vrn)
 St. Helens High School Auditorium
 Tech Center
 Vernonia Learning Center

Private Venues

Olde School
 Boise Cascade
 Caples house
 Cedar Ridge (Vernonia)
 Church halls
 Col. Theater
 Fraternal Lodges
 Grange halls
 Camp Emerald Forest
 Restaurant Meeting Rooms
 Dyno Nobel Conference Room

Hotels / Motels w/ meeting space

Best Western
 Village Inn

Parks & Open Spaces

Camp Wilkerson
 City Parks
 County Parks
 Columbia View Park & gazebo
 Hudson Park Cabin
 McCormick Park gazebo & picnic area
 Scout Cabin (Vernonia)
 Prescott Beach
 Rainier Park
 Scappoose Bay Pavilion
 Trojan

RECREATION**Types of Activities**

aerial tours
 arts & crafts
 bicycling - road, mountain, BMX
 birdwatching
 boating & sailing
 bowling
 camping
 dancing
 fishing
 flying
 golfing
 hiking
 horseback riding
 hunting
 ind. sports - track, tennis, batting cages
 kayaking
 mountain watching
 photographing
 RV'ing
 scouting
 skate parks (McCormick & Scap)
 swimming
 team or group sports (softball, volleyball, etc)
 volunteer restorations
 walking trails & tours
 wildlife watching
 yachting

Recreation orgs & businesses

Art Associations
 Bike Shop
 Flying Model Airplane Club
 Historical Society
 Izaak Walton League
 Oregon Equestrian League
 Ridge Riders
 Scappoose Bay Kayaking
 Sailing/Boating clubs
 volunteer groups
 Yacht clubs
 Winners Circle
 Poolside Skateboards
 St Helens Golf Course - Pro Shop
 Port of St Helens
 City governments
 Scappoose Bay Watershed Council

Natural Assets

Columbia River
 wind
 Basalt Rock / Grey Cliffs
 Sand Island
 historic trees
 view points
 birds & wildlife
 Scappoose Bay
 Creeks & Tributaries
 forests
 marine parks
 botanical garden
 multi-use trails
 mt. biking trails
 walking trails
 equestrian trails
 Banks-Vernonia Linear Trail
 CZ Trail
 Multnohmah Channel
 Mt St Helens
 Nehalem River
 Clatskanie River
 Salmonberry Lake
 Vernonia Lake
 Beaver Falls
 River Islands / Inlets
 Gunner's Lake
 rocks and gems

CULTURE & HERITAGE**Potential Areas of Focus**

“hillside” art community
 agri-tourism
 haunted places
 history of Lewis & Clark
 Native American history
 natural history (geology, ecology)
 pioneer histories
 river history
 shipbuilding industry
 timber & logging history

Points of Interest
 Old Town St. Helens
 Crown Zellerbach Trail
 downtowns (St H, V, Scap, Rnr)
 fossils / artifacts
 haunted places
 historic homes
 historic pics in public buildings
 museums
 Columbia County
 St. Helens
 Vernonia
 Clatskanie Castle
 Scappoose - Watts House
 Columbia City - Caples House
 Old Columbia Theater
 Old Courthouse & City Hall (St. Helens)
 Oregon Trail Connection - 49ers
 Sauvie Island ship yard
 Warrior Lighthouse
 Natural rock houses
 Olde School
 City & County Parks
 Nurseries & Tree Farms
 Farms - agricultural
 Horsecamps & Corrals
 Sporting Fields
 Marine Parks
 Skateparks
 Multi-use trails

Organizations & Associations

Arts & Cultural Commission of St. Helens
 Clatskanie Arts Commission
 Columbia County Cultural Coalition
 Historical Society

St. Helens Tourism Commission
 Columbia Art Guild
 Columbia county Parks
 City Parks commissions
 Oregon 150
 Oregon Cultural Trust
 Oregon Heritage
 Title 7 (Native American)
 Riverside Arts Committee
 4th of July Committee
 13 Nights on the River committee

Local Talents & Skills

Honeyman Creek - Robert Hammond
 Jam/Jelly/Syrup/Honey makers
 Local artists
 making goat cheese
 Meat curers/smokers
 Michael Curry

ENTERTAINMENT**Venues / Performers**

bars with Karaoke, pool tables, sports t.v.
 Children's Theater
 Columbia Chorale
 Columbia Meadow
 Columbia Theater (movie theater)
 River City Theater / Choir
 Shoe String Community Players
 High School Drama / Thespians
 Local Bands

Festivals & Events

4th of July Fireworks
 Antique boat shows
 Antique car shows
 Antique plane shows
 Arts & Eats
 Columbia City Celebration
 13 Nights on the River
 Cruise Ins
 events at the Fairgrounds
 fishing derbies
 Heritage Day
 Jamboree
 KUPL Fishing with Father
 movie night at the library
 Mush Ball - co-ed softball tournament
 Oktoberfest

Quilt Fair
 Rainier Day w/ fireworks
 regattas
 Salmon Festival
 Saturday Markets (Rnr, Scap, SH)
 Sauerkraut Festival
 school concerts, sports, & plays
 senior cntr games, music, food, classes
 tugboat races
 Heritage Park Concert Series
 Columbia County Fair
 Sauerkraut Festival
 Christmas Ships
 Kiwanis Day Parade (3rd Sat in June)

CULINARY**Farms, Farmer's Markets**

fresh fruit & veggie stands
 Friendship Farm
 Big Daddy Jams
 Oregon Hill Farms
 Friendship Farm's low sugar fruit stand
 Friendship Circle Garden (Pittsburg Rd)
 weekend farmers' markets
 Truffles (mushrooms)

Outdoor Eating

Parks & waterfront
 Viewpoints (hilltop)

Catering

Wild Currant
 Independent Catering
 Cakes Just for You
 Willy V's BBQ
 Sunshine Pizza
 Mark's on the Channel
 Houlton Bakery

Restaurants

"Road" House
 Abella Caffeino
 Bing's
 Black Bear Coffee
 Bridge View Deli
 Burger King
 Burgerville
 Burrito Express
 Café 30
 Vinny's Chicago Subs
 Columbia Tavern
 Cornerstone
 Dairy Queen
 Dari Delish
 Dockside
 Domino's
 El Tapatio (Mexican)
 Evergreen
 Figaro's Pizza
 Fresh Start Espresso
 Geppetto's Deli (gelato)
 Goble Tavern
 Granma's Place
 Hawaiian Café

Houlton Bakery
 Hump's (Clatskanie)
 Icabod's
 Interstate Tavern
 Ixtapa (Mexican)
 Johnny's Tavern
 Klondike
 Kozy Korner
 Kuy's
 Lam's Lucky Inn
 Leonetti's Cedar Side Inn
 Longfellows
 Marks' on the Channel
 McDonalds
 Mini Mart (Quickie?)
 Miyako (Japanese)
 Old Saw Mill Eatery
 Old Town Café
 Papa Murphy's
 Pasttime
 Redline
 Richmond's Country Kitchen
 Romig's
 Spar Tree (Armenian)
 St. Helen's Café
 Subway
 Sunshine Pizza
 Taco Bell
 The Blue House
 The Buckhorn
 The Lyon's Den
 Varsity Grill
 Wayne's Chicago Hot Dogs
 Wayside
 Ruby Ranch Cookhouse
 Muchas Gracias
 Lung Fung
 KFC
 Pizza Vendor
 Warren Country Inn

MARKETING & PUBLIC RELATIONS**Local Mechanisms**

banners
 Chamber directories
 fundraising events
 local radio stations (KOHI)
 local service clubs

Local T.V. stations
 local websites
 newsletters
 newspapers
 signage
 through watershed efforts (articles, website)
 word of mouth
 billboards

Regional Mechanisms

city & county park brochures, kiosks, & websites
 Regional Cooperative Marketing Program
 Northwest Discoveries Magazine
 Portland Oregon Visitor's Association
 PUMP

Statewide Mechanisms

Travel Oregon website & materials
 Oregon Parks & Rec website & materials
 Oregon event calendar
 TIC - Tourism Information Council

National Mechanisms

AAA
 Bicycle America
 Culinary Digest
 DCI (RCMP)
 National Geographic Adventure
 National Geographic Traveler
 Outside
 Sunset Magazine
 Canoe (Campfires & Canoes)

Whole World Mechanisms

Internet (the World Wide Web)
 International Mountain Biking Association (IMBA)
 word of mouth

Newspapers & Print Media

- brochures
- Clatskanie Chief
- Columbia River Reader
- Fair Book
- flyers
- Freshwater News
- Oregonian
- Organizational newsletters
- Spotlight
- The Chronicle
- The Mercury
- Vernonia Independent
- Willamette Week
- The City Gazette

TV/Radio

- Local stations (CC TV)
- Portland stations (KGW)

D. SELECT TARGET MARKET INFORMATION & TRENDS

Prepared by Chris Jaworski, MTA for Rural Development Initiatives, Inc. March, 2007

PADDLING / KAYAKING (NON-WHITewater)

Size of Segment: 24 million U.S. ages 16 and up | 2% (Out of State Visitors to OR - WA, ID, CA) | 4.6% Oregon | 5.4% Portland Metro

Profile: Primarily male, young (16-24), Caucasian, married demographic on the rise.

Benefits Sought: Fitness/health, Escape/getaway from routine, Learn/improve skills, Play

Economic Value:

* **Trip Related Sales:** \$3.2 billion

* **Annual expenditures on overnight trips per participant:** \$500 Per day expenditures: \$70
(Oregon – 1990 study in 2004 dollars)

* **Retail Sales:** \$585 million

* **Jobs Supported:** 50,805

* **Taxes:** \$700 million

* **Total Economic Contribution:** \$5.6 billion

*(Economic figures represent CA, OR, WA, AK)

Industry Growth Prospects: High

Oregon Focus:

Compatibility: Fits with existing images of Oregon's unspoiled natural assets, Columbia River recognition, Columbia Pacific National Heritage Area, Lewis & Clark recognition, and Oregon Parks & Recreation Water Trail planning.

Travel Oregon Radar: Yes. Supports industry partners in order to explore and assist in the development of river trails in Oregon.

Importance to South Columbia County - St. Helens/Sand Island: High – Capitalizes on existing assets (Columbia River, Sand Island, surrounding slough), boating docks, and supply (successful kayak company). Strong match with fastest growing outdoor recreational activity.

Potential for Sustainable Tourism Activity: Yes

Notes & Fast Facts:

- Fastest growing outdoor recreational activity.
- Fastest growing outdoor recreational activity.
- Low impact recreational activity.
- More Americans paddle (kayak canoe, raft) than play soccer!

Summary: Paddling, with its 24 million participants, is a fast growing outdoor recreation activity. Importantly, paddlers for the most part must leave their place of residence to engage in the activity. This growing market segment has seen phenomenal growth in retail and accessory sales in addition to numbers of recreational and kayak training centers open throughout the U.S. Tillamook County, Kayak Tillamook County, and the Tillamook County Estuaries Partnership have collaborated to create a Tillamook Bay Water Trail which is currently under development. The popularity of this sport, and the various items listed in the Oregon Focus section of this segment indicate positive development opportunities. Paddling sports have generated income, jobs, and federal and state taxes (\$4.8 billion – 2005) throughout the U.S. and holds potential for meeting all sustainable tourism criteria as part of this planning process. Examples of economic development surrounding this sport are plentiful. I.e. Reno/Truckee River whitewater park – in downtown Reno is attracting tourists interested primarily in the Truckee River. Kayakers and rafters are expected as over the next decade, more than \$100 million could be spent on river projects for recreation and for new greenbelt areas serving as flood-control areas. Tourism officials there are planning a river festival, vying for championship races, a Junior Olympic training camp, a Teva-sponsored competition and a national police and fire training camp. Travelers have the option to kayak from outside their hotel, not leave the destination (see Portland), and have a great vacation. Under the flood-control plans, Reno and Sparks would gain two miles of greenbelt in the Truckee Meadows. More than 1,500 acres

of forests and wetlands would be cultivated east of Sparks to make the river cleaner in the lower Truckee River. A network of county parks and new properties being purchased by the Truckee Meadows Water Authority would be opened to the public, providing destinations for various bicycle loops through scenic Verdi. Money would also be set aside for designing a mountain bike trail from Verdi to Truckee.

Sources: State of the Industry Report, Outdoor Industry Association, 2006

The Active Outdoor Economy, Outdoor Industry Association, 2006

Outdoor Industry Foundation, 2005

The Value of Recreation & Tourism To The State of Oregon, A Report for the Tillamook Rainforest Coalition, 2002

Oregon Outdoor Recreation Survey, Oregon State University College of Forestry, 2002

Travel Oregon Strategic Plan and Budget 2005-2007

Kayak, trail plans fit in with Reno's 'adventure place' campaign, Reno Gazette-Journal, 11/2003

POWER BOATING / SAIL BOATING

Size of Segment: 71.3 million U.S. participants (2005) | 4.6% (Out of State Visitors to OR - WA, ID, CA) | 8.2% Oregon | 8.9% Portland Metro (SCORP Region 2). California and Washington rank second and fifth respectively in new powerboat, motor, and retail accessory expenditures (2005).

Note: Power Boating represents the majority of segment size percentages over Sail Boating (1/10th of those totals).

Profile: Ages 41-60 represent nearly half of all boaters in Oregon. Three out of four boat owners have a household income under 100,000. 70 % of cruiser ownership (power and sail) are from the managerial-professional-executive ranks whereas 35% are of these ranks that own aluminum fishing vessels.

Benefits Sought: Be outdoors and see nature, relaxation and regeneration, fishing, social contact, freedom & self expression, adventure and discovery.

Economic Value:

Trip Related Sales: NA

* **Retail Sales:** \$ 19 billion (\$1 billion – Oregon)

Jobs Supported: 29,000 (Oregon – 1999)

Taxes: NA

Total Economic Contribution: NA

Industry Growth Prospects: Moderate - Low

* (Economic figures represent CA, OR, WA)

Oregon Focus:

Compatibility: Boat registration in Oregon is declining however, an Oregon Sea Grant publication (1999) study found that registered recreational boaters - those who own motorboats or sailboats longer than 12 feet - had the greatest dollar impact on the state. They spent more than \$850 million on their boats and boating activities, including accessories, fuel, repairs and lodging and meals associated with boat trips. Their spending alone generated nearly 26,000 jobs in 1995.

Travel Oregon Radar: No Importance to South Columbia County - St. Helens/Sand Island: Resources are in place for maximizing boating potential. Proximity to Portland marinas is an advantage for drawing day or overnight boaters. The number three benefit sought by recreational boaters is fishing. Perhaps this is an area to further investigate.

Potential for Sustainable Tourism Activity: ?

Notes & Fast Facts:

- US demand for recreational boating is estimated to grow 4.8 percent annually through 2009
- Oregon ranks 18th in the nation for new powerboat, motor, and retail accessory expenditures.
- 6 out of 10 boat segments showed positive growth in unit and dollar sales in 2005 including ski/wakeboards, sterndrive boats, sailboats, jet boats, personal watercraft, and kayaks.
- Registered boat owners in Oregon have declined slightly since 1998 in spite of the State's population increases.

Summary: Registered boat owners in Oregon have declined slightly since 1998 in spite of the State's population increases. The average age of boaters in Oregon continues to rise representing a maturing segment. Interestingly, California and Washington rank second and fifth respectively in new powerboat, motor, and retail accessory expenditures. Figures for trip expenditures are not available at this time. Boating registrations have declined not only in Oregon, but nationwide. Trends indicate boat buyers are pooling resource to purchase larger, more equipped vessels rather than footing the bill individually. Resources The water, marina, and proximity to Portland

Sources: Oregon Outdoor Recreation Survey, Oregon State University College of Forestry, 2002

The Freedonia Group, Inc., 2006

Triennial Boating Survey, Oregon State Marine Board, 2002

Recreational Boating Statistical Abstract, National Marine Manufacturer's Association, 2005

Facts & Figures, National Marine Manufacturer's Association, <http://www.nmma.org/facts/boatingstats/challenges/benefit.asp>

The Business of Boating Recreation in Oregon

BICYCLE RECREATION - ROAD CYCLING / MOUNTAIN BIKING

Size of Segment: 60 million U.S. population | 2.88% (Out of State Visitors to OR - WA, ID, CA) | 16.84% Oregon | 18.2% Portland Metro (SCORP Region 2)

Paved Road Cyclist Profile – Roughly 64% are male and 36% female, participants more likely resident of U.S. West

Mountain Biker Profile – Primarily male (16-24), resident of U.S. West or South. Nearly 90% of mountain bikers went paved road cycling in 2004 and nearly three-quarters went single track bicycling during that year. Single track participation similar. What does it mean? Opportunities for cross promotion and utilization.

Benefits Sought: Good health, active lifestyle, outdoor recreation, sight-seeing, new experiences, and community.

Economic Value:

* **Trip Related Sales:** \$9.2 billion

* **Retail Sales:** \$1.4 billion

* **Annual expenditures on overnight trips per participant:** \$300

Per day expenditures: \$35 (Oregon – 1990 study in 2004 dollars)

Jobs Supported: 135,422

Taxes: \$1.9 billion

Total Economic Contribution: \$15 billion

(Economic figures represent CA, OR, WA, AK)

Industry Growth Prospects: Road Cycling - Moderate, Mountain Biking - High

Oregon Focus:

Compatibility:

Travel Oregon Radar: Yes. Acts as facilitator and coordinator for developing statewide network-Oregon Bicycle Tourism Partnership (OBTP)

Importance to South Columbia County - St. Helens/Sand Island: Inventory of potential cycling routes and trails would need to be evaluated. Community has experience with cycling events (i.e. Cycle Oregon) and potential for more. Nearby mountain biking organizations have presence in area. Proximity to burgeoning Portland biking community suggests prospects are good for further analysis or development.

Potential for Sustainable Tourism Activity: Yes

Notes and Fast Facts:

- 3rd most popular outdoor vacation activity following camping and hiking
- Biking vacations attracted more than 27 million travelers from 2000-2005. Half are between ages 18-34 and one-fourth has household income of \$75,000 or more.
- A study of the Oil Creek Bike Trail (Pennsylvania State University, 1992) in Pennsylvania revealed the average visitor spending \$25.85 per day. This was broken down into \$9.09 for food, \$6.27 for transportation, \$2.56 for lodging (many visitors camp) and \$7.94 for equipment and other activities.
- The federal government has also budgeted significant transportation money for construction of bicycle-specific facilities such as bike paths and road improvements friendly to bicycles in the coming years. Making a more bicycle-friendly America is one of the cycling industry's key initiatives going forward (see www.bikesbelong.org and www.thunderheadalliance.org).
- Mountain bike sales have been the focus of much of the specialty industry in recent years. The category has apparently matured, however, and it represented 37.4% of all bicycles sold in the year 2002, according to NBDA's Retail Data Capture statistics (representing bicycle stores, not mass merchants). This figure was down from the years 2000 and 2001, and from the high point of approximately 60% several years before. However, mountain bikes continue to be the largest single bicycle category for specialty bicycle stores.
- The number of Americans participating in bicycling is double the populations of Canada...Americans spent 88 times more on bicycle-based recreation in one year than the total box office draw for Titanic, the top grossing movie of all time!

Summary: According to an Outdoor Industry Foundation report, bicycling is the most popular outdoor activity among Americans with nearly 37% of the population 16 and older participating. Sales of road bicycles have been in decline or flat and mountain bike sales had soared and now are leveling. Bicycling vacations (road cycling in particular) however continue to increase and have become the focus of niche tourism development both in the U.S. and internationally. Cycling (particularly road cyclists) vacationers tend to spend more on destination services such as lodging, food & beverage, and cultural activities than many other tourism segments. Cycle tourism and recreation offers cross promotional opportunities across similar high value travel segments. This bodes well for the travel trade and tourism services that are focusing on this evolving travel niche.

Sources: State of the Industry Report, Outdoor Industry Association, 2006

The Active Outdoor Economy, Outdoor Industry Association, 2006

Outdoor Industry Foundation, 2005

Trend Analysis for the United States, Outdoor Industry Foundation, 2005

Bicycle Manufacturers Association, 2002

Oregon Outdoor Recreation Survey, Oregon State University College of Forestry, 2002

Travel Oregon Strategic Plan and Budget 2005-2007

ARTS & CRAFT SHOPPING / ANTIQUING

(Subset of Cultural Tourism)

Size of Segment: 81% of traveling U.S. adults participated (cultural, art, historic, and heritage activities or events). | 56% of U.S. adult population indicated they included at least one cultural, arts, historic, or heritage activity or event while on a trip in 2002. This represents 118.1 million adult historic/cultural travelers.

Profile: Baby Boomer households, educated and/or affluent. Four in ten historic/cultural trips are taken by Baby Boomer households (age 35-54). Six in ten historic/cultural trips are generated by households with a college degree, and one third by households with an annual household income of \$75,000 or more. One third of trips are generated by households with children. A significant number are somewhat older are more likely to be retired. 25% travel to experience cultural/heritage at least 3 times per year. Over half of these travelers indicated that they have hobbies and interests that have an influence on where they choose to travel and/or that on their trips they enjoy going to places that are popular with the local residents.

Benefits Sought: Life enrichment coupled with new travel experiences, learning something new.

Economic Value:

Trip Related Sales: \$563 (shoppers) per overnight stay (avg. 4.3 nights – 2002). \$623 (cultural tourists) per overnight stay (avg. 5.2 nights). Average traveler spends \$457 per overnight trip and stays 4.2 nights.

Retail Sales: NA

Jobs Supported: NA

Taxes: NA

Total Economic Contribution: 28.3 billion est. ($\$563/4.3 \text{ nights} = \$131 \times 216.8 \text{ million person-trips}$)

Industry Growth Prospects: High

Oregon Focus:

Compatibility: Niche development of this segment has statewide support including Travel Oregon, Oregon Heritage Commission, The Oregon Arts Commission, and Oregon Parks & Recreation Department programs.

Travel Oregon Radar: Yes. The Oregon Tourism Commission supports the Oregon Heritage Commission by providing marketing and technical assistance. Importance to South Columbia County - St. Helens/Sand Island:

Potential for Sustainable Tourism Activity: Yes

Notes & Fast Facts:

- Most historic/cultural travel is by auto and nearly all historic/cultural travel involves an overnight stay.
- Historic/cultural trips which include air transportation generate more trip spending than do other modes of transportation.
- Shopping continues to be the most popular trip activity for U.S. adult travelers. About 91 million people, or 63 percent of adult travelers in 2000, included shopping as an activity on a trip.

Summary: Arts, craft, and antique shopping is considered a subset of cultural tourism. Much attention is being afforded cultural tourism at the national, state, and local levels. A coalition of national associations and federal agencies exist to build a common agenda for cultural tourism which represents a broad spectrum of arts, humanities, tourism, and heritage organizations. Oregon's share of the cultural heritage tourism segment is not known. Yet, due to the Oregon's rich history and current activities and programs directed at this market, prospects for development are quite positive. Evaluating this segment can be approached from the broader context of cultural heritage tourism, segmented to cultural event goers, and then narrowed to include specific activities such as arts and crafts shopping or antiquing.

For example,

1. 81% of U.S. adults who took at least one trip of 50 miles participated in cultural, art, historic, and heritage activities or events.
2. 75% U.S. adult travelers attended a cultural activity or event while on a trip in 2002. Their households generated 97.7 million person-trips including a cultural event or festival in 2002. Examining the variety of cultural activities to do on trips shows that travelers most often attend performing arts events (48%) and/or visit art museums or antique establishments (47%).

3. Shoppers are almost as likely to stay at a hotel, motel, or bed and breakfast establishment (49% of person-trips) as they are with friends or relatives (48%). Overnight shopping trips average 4.8 nights and they spend, on average, \$563, excluding the cost of transportation to their destination. Most (81%) shopping travelers say that their most recent trip that included shopping was for leisure purposes. A majority (59%) of shopping travelers obtained information about shopping areas from friends, family or co-workers. Hotels were another popular source with travelers (in-room maps, brochures, a TV or the hotel concierge) (25%). The most popular place to shop on trips is traditional enclosed shopping centers or malls (62%). Shopping travelers are likely to be Baby Boomers and have higher-than-average household incomes.

Sources: Domestic Travel Fast Facts – Travel Trends from “A to Z”, Travel Industry Association

The Historic/Cultural Traveler, 2003 Edition, Travel Industry Association

Domestic Travel Market Report, 2003 Edition and The Shopping Traveler, Travel Industry Association

WILDLIFE WATCHING & BIRDING

Size of Segment: 66 million U.S. Population | 16.22% (Out of State Visitors to OR - WA, ID, CA) | 49.5% Oregon | 47.4% Portland Metro (SCORP Region 2).

Bird Watcher Profile – Female by a slight margin, age 45 and older, North Central, West and South Central U.S., Caucasian.

Benefits Sought: Broaden the Mind/education

Economic Value:

***Trip Related Sales:** \$1.3 billion

***Annual expenditures on overnight trips per participant:** \$500

Per day expenditures: \$35 (Oregon – 1990 study in 2004 dollars)

***Retail Sales:** \$1.5 billion

Jobs Supported: 21,535 (Oregon only, 2001)

Job Income: \$450.2 million (Oregon only)

Taxes: \$18.2 million (Oregon only – income tax)

***Total Economic Contribution:** \$263.6 million (Oregon only)

*(Economic figures represent CA, OR, WA, AK combined)

Industry Growth Prospects: High

Oregon Focus:

Compatibility: Fits with existing images of Oregon's unspoiled natural assets and developing image as a high-yield birding destination. Eight different birding trails have been developed or are under development for a comprehensive statewide birding trail map (including Oregon Coast, Cascades, Klamath Basin, and the Willamette Valley Birding Trails – portions through Columbia County). In addition, other organizations support or promote birding and naturalist activities to visitors including the Audubon Society of Portland and the Nature Conservancy's trip programs.

Travel Oregon Radar: Yes. Acts as facilitator and coordinator for developing statewide network - Oregon Birding Trails Working Group (OBTWG).

Importance to South Columbia County - St. Helens/Sand Island: Further investigation into the natural resource compatibility is required. However, given the physical nature of Sand Island and the surrounding slough and the plans for a Willamette Birding Trail, prospects for development should be positive.

Potential for Sustainable Tourism Activity: Yes

Notes & Fast Facts:

- Oregon ranks 8th in non-resident economic impacts for birders and wildlife viewers.
- In Tillamook Bay, wildlife viewing and birding in particular attracts an estimated 253,760 visitor days. In 2004 dollars, this activity translated to \$4.87 million dollars in travel-related expenditures there.
- Nearly 90% of all populations indicate participation in 5 categories of Nature Study Activities (Bird watching, Nature/Wildlife viewing, Outdoor photography, Tracking animal signs, Collecting [rocks, plants, berries, mushrooms, etc.]).

Summary: Information compiled by the Oregon Birding Trails Working Group indicates that in 2001 nearly 22 million people, or 10% of the U.S. population, watched wildlife away from home; over 18 million of these people watched birds. Over 5.8 million people left their home state specifically to watch birds. These 22 million wildlife watchers took a total of over 230 million trips averaging 2 days in length, and they spent over \$8 billion on trip-related expenses. Oregon attracted approximately 1.7 million wildlife watchers, 509,000 of whom were non-residents. These Oregon visitors spent over \$300 million in the state on trip-related expenses, ranking Oregon fifth in the nation. Birding festivals have proven to be profitable tourism events in communities around the country.

Sources: State of the Industry Report, 2006 – Outdoor Industry Association

The Active Outdoor Economy, 2006 – Outdoor Industry Association

The Value of Recreation & Tourism To The State of Oregon, A Report for the Tillamook Rainforest Coalition, 2002

Oregon Outdoor Recreation Survey, Oregon State University College of Forestry, 2002

Oregon Birding Trails <http://www.oregonbirdingtrails.org/>

Travel Oregon Strategic Plan and Budget 2005-2007

Birding Trails in North America, American Birding Association

CULINARY TOURISM

Size of Segment: 17% (American leisure travelers)

Profile: Active travelers, educated, frequent travelers. Fairly equally represented across genders and age groups (except mature travelers), high income, and enjoy outdoor activities. The likelihood to participate in future food-related travel is highest among women (51%), with a post-graduate education (54%), and those from households with annual incomes over \$100,000 (59%).

Benefits Sought: Seek unique experiences, culture, unique cuisine, learning about destinations

Economic Value:

Trip Related Sales: \$1.6 billion (Oregon)

Annual expenditures on overnight trips per participant: \$427-\$593 (36%-50% of personal travel budget depending on segment)

Per day expenditures: NA

Retail Sales: \$4.7 billion (Oregon)

Jobs Supported: 110,000 (Oregon restaurant employment)

Taxes: NA

Total Economic Contribution: \$9.7 billion (Oregon restaurant industry)

Industry Growth Prospects: Very High

Oregon Focus:

Compatibility: Portland is fast becoming known as a culinary destination. The surrounding region which supports or shares in the visibility of this development include, Willamette Valley wine country, nationally renowned craft breweries, an abundance of farms, culinary events, and a variety of artisan products.

Travel Oregon Radar: Yes. Culinary tourism is identified as an important niche market to develop in Oregon. Travel Portland vigorously promotes this niche market as well.

Importance to South Columbia County - St. Helens/Sand Island: Dependent on inventory of culinary tourism assets such including farms, artisan specialties, unique restaurants, smokehouses, etc.

Potential for Sustainable Tourism Activity: Yes

Notes & Fast Facts:

- The top motivating factor for U.S. travelers is local cuisine – 44% (2001)
- Three fifths of current American leisure travelers (60%) are at least somewhat interested in taking a trip to engage in culinary activities within the next year.
- Among those interested in culinary travel, going to restaurants to experience new cuisine represented 90% of those surveyed, 83% were interested in farmers markets, 81% interest in traditional artisan products, 77% in attending culinary festivals, 71% tasting wines or touring wineries.
- Compared to the average leisure traveler, culinary travelers take part in more activities while traveling.
- The share of U.S. travelers interested in culinary travel in the near future is significantly larger than those currently engaged.

Summary: Culinary tourism is a high priority among Oregon's tourism industry partners. The growth of this segment has been recently documented and there exists extraordinary data which profiles these traveler's activities and interests. Culinary travelers tend to return to their place of origin with products from host destinations providing valuable secondary benefits such as word of mouth reputation and a unique image of a destination. Furthermore, this travel segment shows good potential for cross promotion and possible packaged travel itineraries.

Sources: Profile of Culinary Travelers, Travel Industry Association, 2006

Tourism Impact Study, Pricewaterhouse Coopers, 2001

The Cornerstone of Oregon's Economy, Oregon Restaurant Association, 2004

Oregon State Impacts, Dean Runyan Associates, 2007

EDUCATIONAL TOURISM

Educational Travel: The learning aspect of travel is important to U.S. travelers, with about one-fifth —30.2 million adults— having taken an educational trip to learn or improve a skill, sport or hobby in the past three years. Eighteen percent of travelers in the past year said that taking such a trip was the main purpose of their travel. Overall, educational travelers are more likely than total U.S. travelers to be male (56%), younger (39 years, average age), a college graduate (49%), have a professional or managerial occupation (38%), have children in the household (51%), and have a higher annual household income (\$75,000 average (mean) annual household income). They are less likely to be married.

Source: Travel Industry Association, 2006

HUNTING

13 million U.S. adults participate in hunting activities. Hunting generates significant retail sales, related employment and state and federal taxes. There are 850,000 participants, representing 2% of the population in Oregon, California, Washington, and Alaska. Trip related sales in this region are approximately \$992 million and nearly 26,000 jobs are supported by this activity. 15.5% of Oregon population participates in this outdoor activity.

Source: The Active Outdoor Economy, Outdoor Industry Association, 2006

Recreation Participation Survey, OPRD, http://egov.oregon.gov/OPRD/PLANS/scorp_survey.shtml#Results

SCENIC DRIVERS (“COASTERS”)

Oregon has more state and national scenic byways than any other state in the nation. Travel by automobile still ranks as the number one mode of transportation for travelers. The Oregon Scenic Byway Program is administered through the Oregon Department of Transportation and marketed by Travel Oregon. 42% of Oregonians participate in this activity.

Sources: Travel Oregon Strategic Plan and Budget 2005-2007

Recreation Participation Survey, OPRD, http://egov.oregon.gov/OPRD/PLANS/scorp_survey.shtml#Results

EQUESTRIAN

Down in Activity use 32% from 1987 - 2002

E. TARGET MARKET ITINERARIES & INFORMATION

Developed by the South Columbia County Towards Sustainable Tourism Work Group

BIRDING IN & AROUND ST. HELENS

Submitted by Lona Pierce, Warren

Columbia River waterfront:

Osprey nests are visible on pilings both north and south of the courthouse. Osprey are common in the summer. These could be highlighted for birders. Also often seen by the marina, park and courthouse: double crested cormorants, gull species, bald eagles, swallows, geese. There isn't much vegetation to encourage birds right along the waterfront. I have never birded on Sand Island – but it might be good.

Hiking trail between Columbia City and St. Helens. The paved trail already in place offers birding through a woodland community. Good for woodpeckers, nuthatches, warblers, chickadees, even great horned owls. Nice variety of native wildflowers too. A bird blind with LIMITED trails at Dalton Lake would be a great attraction. It would be easy to build a hiking trail to the lake along the power lines. An actual road for cars would pretty much kill its natural value: garbage, parties, worn vegetation. It would create another Salmonberry Lake mess. If the lake is heavily developed most of the wildlife would be forced out. A hiking trail only to the lake would encourage exercise and limit overuse. Right now a large variety of ducks can be viewed there, as well as woodland birds. Wildlife can also seen: otters, beaver. Treating this as a nature preserve would be highly recommended since so few natural areas are available locally on public land. It's a small lake so it wouldn't take much to ruin it. There are also many nice native plants all around the lake. It could be a premium nature park attracting birders if properly managed. Low-key development is also cheaper and easier to maintain.

McCormick Park: prime trails for birding have been ruined the past few years because gravel has been applied to much of the trail network. This is a very noisy surface when walked on, which alerts wildlife and birds to approaching people. I have quit using these trails since the gravel has been laid down. Far better to maintain the trails would be wood dust or chips, with boardwalks over particularly wet areas. A quiet surface is the norm for trails in nature parks. Asphalt is also acceptable, but keep the paved part as narrow as possible (one wheelchair wide), and avoid fill. Fill over wet areas simply gives nonnative plants like blackberries a place to take over. It also ruins habitat for plants and animals that use the wet areas. A wide variety of woodland birds use the park, as well as deer, chipmunks, and other wildlife. There are also native flowers and other plants (some rare), although many of these are being lost to cultivated beds, mowing, development and nonnative weeds like scotch broom. The less natural the environment, the fewer birds.

Trestle Park: The combination of natural woodlands, creek and river make this a good birding site for a variety of birds. The dredge spoils don't add much.

McNulty Industrial Park at the Mental Health Clinic. McNulty Creek and surrounding wetlands and trees provide habitat for many birds: warblers, woodpeckers, jays, etc. It is a good little stop on any local birding tour, and there is room to park in the parking lot. People ought to be able to walk around the back of the building on the patio to look over the creek.

Scappoose Bay is the premium place to birdwatch in south Columbia County. Do you include this area for places to birdwatch in St. Helens? The nature trail at Scappoose Bay Marina is excellent for birding. There are large oak trees, cottonwoods, shrubs and dead standing trees, which provide excellent bird habitat. Good birding is available all around the marina, as well as by kayaking. It could be improved with more bird-friendly management around the marina itself. A long list of species can be seen there, from swans and eagles to warblers and sapsuckers. It is a shame more land adjacent to the marina is not open for the public to enjoy, while protecting its natural features.

Millard Road mitigation ponds: This is St. Helens School District property. The mitigation wetland closest to McNulty Creek has been a great wetland for ducks and shorebirds since it was established. The open field was also good for meadow birds, like savannah sparrows, before the practice golf course was put in recently. If the school district controlled the reed canarygrass taking over the wetland, it would remain a good birding site. The water level needs to be a little deeper to fix the problem. It also is a great place for amphibians. I took a Girl Scout troop on a field trip there once and they had a ball. The woodland along the creek on the north side of the property is also good for various birds. This could be a great opportunity for the school to enhance natural areas right on its grounds, especially when a school is built there.

The Nature Trail off of 6th Street by the Elks Lodge is rather depressing. The canyon is heavily infested with English ivy and needs considerable maintenance before promoting. The natural oak woodlands right there above the canyon would be an ideal place for a nature park in a rare habitat (perhaps 40 acres or so). It also has rare wildflowers that would attract people. I don't know who owns it, but there are now "No Trespassing" signs up. It is being overrun with Scotch broom. This would be an excellent addition to city parks, and would feature more unusual birds and wildflowers once the broom was removed. There is a serious dearth of natural areas to enjoy in the St. Helens area, and the rare oak woodland/camas meadow habitat would be ideal to preserve and promote. It's a great place for a nature trail system! The Elks Lodge itself offers a nice view of Dalton Lake from its patio, plus a view of the Columbia River as well. You would need permission from them to include that on a bird tour route, but it's one of my favorite quick stops to see a nice variety of birds. (I have received permission).

Most of the other parks around St. Helens do not offer good birding because they are too manicured, just lawn and a few trees. Birds need more natural cover, like shrubs and tall grass here and there. Surface water is always an attraction, especially if it isn't bordered just by lawn. Any area with water and natural vegetation (trees, shrubs, forbs) is a good place to birdwatch. Too much open lawn and cultivated plantings reduce birds. Birds also need dead standing trees to nest in. These dead trees should not be removed except if right next to a trail where they may be a hazard. A standing dead tree is actually more valuable than a live tree in many circumstances for birds and wildlife.

There are other excellent places to bird, or potential places, around St. Helens. They are on private property. Please let me know if you want more details on any of the locations I've mentioned. There are other good birding sites in the county, but I listed only those close to St. Helens.

ARTS & ANTIQUES ITINERARY

Local Tourist Itinerary for Art & Antique Seekers

Friday:

- Arrive St. Helens Olde Towne (late afternoon/evening)

Monthly Art & Antique Walk

- Brochure that explains the historical aspects/stories of each of the buildings in the National Historic District and the galleries & antique stores located in them (restaurants should be included as well)
- Showcases local artists who set up in the stores/galleries
- Possibly wine tasting or food related displays as well (i.e. Oregon Hill Farms, Big Daddy Jams, Honeyman Creek Farm, Oregon Wine tours – could include countywide food assets)

Overnight at a local B&B or Motel – Nob Hill B&B, Seawright House, Best Western

Saturday:

- Local artists willing to open their “studio” one Saturday per month (same weekend as Art & Antique Walk)
- Local historical homes open their homes once per year (or month, if willing) – historical vignettes by SSCP
- Check out Weird Harold’s on Hwy 30
- Walk through Columbia Learning Center Art Display

Any insights that the county either has or does not have to offer to our target market

- Place in the Olde Towne area that local artisans can make & display their products (relates to the Riverside Arts & Eats Festival – experiential / demonstrations / more personal) – Masonic Lodge would be an ideal location for something like this – housing SSCP upstairs as a performing “arts” activity
- Utilizing the fencing along CVP & Courthouse parking lot to “invite” people to St Helens
- Relate something to Riverside Arts & Eats Festival in the spring (i.e. RAEF Taste Test preview, selection of logo from local submissions)

WILDLIFE VIEWING ITINERARY

Friday:

- 5:00pm Check in at Best Western Hotel, St. Helens, OR.
- 6:00pm Dinner at Ruby Ranch Cookhouse

Saturday:

- 6:00am Continental breakfast
- 6:30am Depart Hotel
- 6:45am Arrive at Scappoose Bay Kayaking
- 7:00am Depart docks

(Guided trip into Scappoose Creek and wetlands - loop around Scappoose Bottoms) Expected sights include: Tundra Swans, Sandhill Cranes, Canada Geese, Bald Eagles, Herons, Egrets, Shorebirds, Ducks, River Otter, Beaver, Mink and Martin

- 11:30am Return to docks
- 12:00pm Lunch at Wayne's Red Hots

Back to Hotel

- 2:00pm Depart Hotel for land tour of Scappoose Bottoms

Saturday Evening: Dinner at one of the local restaurants. Movie or local event.

Sunday:

- 8:30am Depart Hotel to Scappoose Bay Kayaking
- 9:00am Pontoon Boat tour to Sauvie Island to view the Lewis & Clark walking trail.
- 10:00am Arrive at Sand Island
- 11:00am Lunch on Sand Island
- 12:30pm Arrive back at Hotel & Check out

CYCLING ASSETS & INFORMATION

Paul Barlow
 Barlow Bikes & Boards
 503-397-4900 office
 971-563-8786 cell no.

Interest Road: BMX MTB Riding

Age group: All ages

Gender: M&F

How they might travel: By vehicle or Bike

Cycling Asset - Local	Description of the asset	How cyclists would interact with it	Why it might be of Interest to Cycling
Rural community	Country side etc	There could be possible routes identified through media outlets	Natural beauty
Natural resources			
Cultural resources			
River		Viewing rest area	View - A place to cool down
Barlow Bikes & Boards	Bike Shop	Service	It is the only shop on Hwy30 between Portland and Astoria
Coffee shops		Stop in for a break	Place to get out of the heat for a bit and get something to drink - eat
Bike path	Defined bike path in Saint Helens	Could be a possible route to downtown if properly identified	River - Old Towne - The opportunity to see St.Helens
The Dike	Bike route in Scappoose	Could provide cyclists with the opportunity to get to know the country side in Scappoose instead of just the country. Route needs to be properly identified from the highway	A chance to see a different part of Scappoose. Most cyclist ride south on hwy30 from Portland and then just turn around and head back to Portland on Hwy 30. This loop would offer cyclists the chance to see more of the area and still give local businesses the chance to cash in
Trails	CZ Trail	Ride on it with the entire family	Because of it's easy access and lack of technical features.
BMX track	Bicycle Motocross racing facilities for the entire family	Organized racing events & open riding for everyone	Competition - fun - chance to improve riding skills
BMX Park	Concrete skate/ bmx park	Organized events & open riding for everyone to enjoy	Competition - fun - chance to improve riding skills - make new friends
McCormick Park	Local city Park	Camping - Showers - Rest stop. Needs to be identified from the Hwy	Because of it's services, beauty and close proximity to the Hwy.