



GORGE TOURISM STUDIO

Six Month Progress Report December 2016

Prepared for Travel Oregon by:

Kathi Jaworski

Write to Know Nonprofit Consulting

Eugene Oregon

www.write-to-know.com

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A. Introduction and Key Findings

This report presents a progress assessment for the Gorge Tourism Studio (GTS) program in the Columbia Gorge region of Washington and Oregon. Adapted from Oregon’s award-winning Rural Tourism Studio (RTS), the Gorge Tourism Studio convened representatives from the six counties with land in the Columbia River Gorge National Scenic Area. Twenty-six different agencies and organizations signed on as partners. Given the bi-state region’s size and diversity, the national scenic area’s complex land-use regulations, the destination’s prominence as a world-class asset, and the challenges of managing crowding and congestion, the Gorge Tourism Studio was the most intensive and expensive Tourism Studio to date. While the Gorge is a unique area in many respects, it is not alone as a destination facing growth-related development challenges. Thus, the Gorge approach can potentially serve as a pilot for replication in other “over-loved” places.

GTS consisted of six day-long workshops and several evening networking events between January and April 2016. The workshops were preceded by an extensive stakeholder survey on key issues and promising strategies, as well as a commissioned “Visitor Opportunities Study” to discern visitor motivation and satisfaction patterns. As with other Tourism Studios, the region also received a matching grant from Travel Oregon to implement specific projects still to be determined.

The information here reflects the status of activity seven months *after* workshop completion, based on an electronic survey completed in November 2016. The e-survey focuses on determining what was most useful about the workshops; initial effectiveness of action teams; and planned tourism development activities for the coming year. Respondents to rate their progress on two categories of success factors for tourism development: their level of personal engagement to work effectively on tourism development, and community conditions—the broader context in which they operated.

The key findings are:

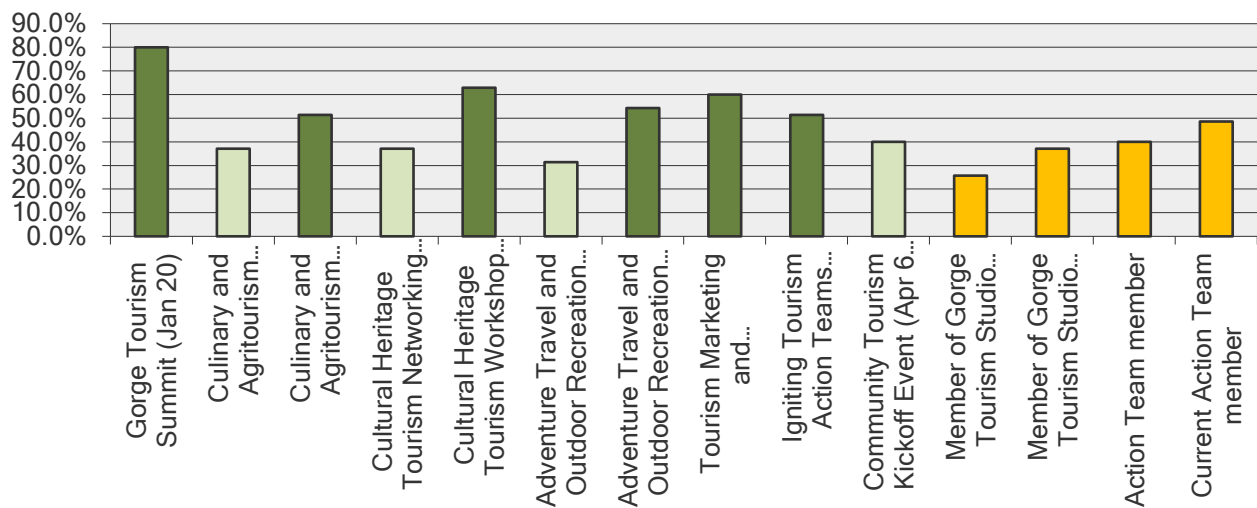
- Although the Gorge Tourism Studio started with a more mature tourism destination, more organizational assets, and higher levels of personal engagement and community conditions than past RTS communities, the region still gained significant benefits from its participation. Furthermore, survey respondents ascribe many of these benefits not to random factors or pre-existing conditions, but rather to the GTS services themselves. And of those services, the opportunity to network over a period of meetings is seen as having the greatest lasting value. This is consistent with past RTS communities.
- The challenges of balancing the goals as articulated in the GTS “Statement of Intent” are real and remain difficult. The difference is that relationships now exist across communities and organizations to work through the balancing act.
- More work is needed to keep the communities informed about what progress is being made and what opportunities exist to become involved.

B. Survey Results

The e-survey drew a 17% response rate: 36 of 212 people who attended and had valid email address on record. This is a typical community response rates for the Tourism Studio Six-Month Progress Report.

- People with high levels of participation in the RTS workshop series are heavily represented among survey respondents. For all GTS participants, the average attendance rate per workshop ranged from 35% to 66%. For survey respondents, the average attendance rate per workshop ranged from 40% to 80%.
- For both groups, the highest attendance rates were for the opening summit. The “Community Kickoff” final event is the only one for which participants were slightly under-represented by respondents.
- Nearly half of respondents are current members of action teams, so the most active people in GTS implementation work may be overrepresented. This is typical of most other RTS communities at the same time interval after program completion.

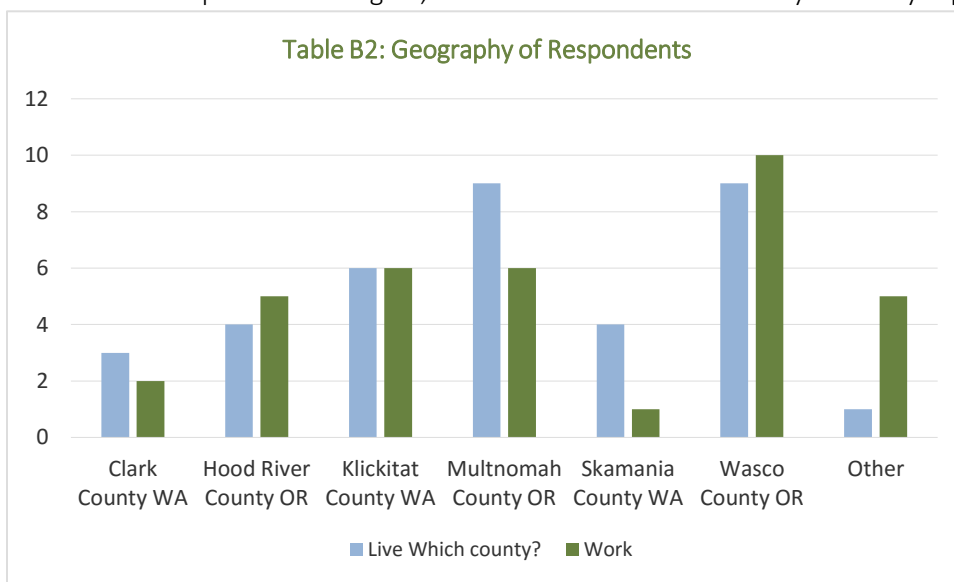
Table B1: Which Gorge Tourism Studio activities did you participate in?



Dark green bars represent respondent attendance rates for workshops. Light green bars represent their attendance rates at networking events, and golden bars represent their involvement in steering committee and action team work.

Respondents hail from all parts of the region, as shown below. Wasco County is heavily represented.

Table B2: Geography of Respondents



Personal Engagement

The starting level of personal engagement in the Gorge shown in light green on Table B2 is slightly higher than for past RTS communities. While respondents report positive changes in the level of personal engagement across all six indicators (ranging between 14%-38%), the size of the changes are smaller than past RTS community averages: for more detail, Section C of this report includes comparative statistics.



Table shows average scores, on a scale of 1-5, with 1 being “low” and 5 being “high”

Respondents credit the GTS program with contributing significantly to the positive changes as shown Table B4 below. In particular, respondents credit the GTS program with increasing awareness of regional assets and market opportunities.

Table B4: Impact of GTS on Changes in Personal Engagement, in order of size of change, Gorge Tourism Studio

	Before	After	% Change	Perceived Impact of GTS on Change
Your knowledge of sustainable tourism development principles	2.94	4.06	38.1%	3.67
Your knowledge of emerging market opportunities for tourism development	3.11	4.17	34.1%	3.82
Your awareness of assets and resources for tourism development	3.14	4.20	33.8%	3.85
Effectiveness of your working relationships with other organizations working on tourism development	2.89	3.76	30.1%	3.67
Your level of involvement with tourism development in your community	3.34	3.91	17.1%	3.52
Your commitment to take specific action to tap tourism development opportunities in your community	3.40	3.89	14.4%	3.61

Table shows average scores, on a scale of 1-5, with 1 being “low” and 5 being “high”

Community Conditions

In terms of their starting level of community conditions, Gorge respondents rates themselves higher than the average of past RTS communities. All indicators related to community conditions for future tourism development improved positively (by between 8%-39%) after the GTS workshops. In all cases, the change was lower than the average for past RTS communities (See Section C for more detail); the range of changes associated with indicators was also more narrow in The Gorge. This is not surprising, given the high starting level of community condition indicators in this mature tourism destination.

The indicators that changed the most were:

- Clarity of community vision
- Clarity of action plan
- Level of collaboration
- Clarity of community priorities

The change in “capacity of organizations in your community to implement successful tourism development projects” was very close to the average change for this indicator in past communities. This is interesting because it suggests that even sophisticated community organizations benefit from participation in Tourism Studios- at the very minimum, they gain increased confidence in their capacity from others in their communities.

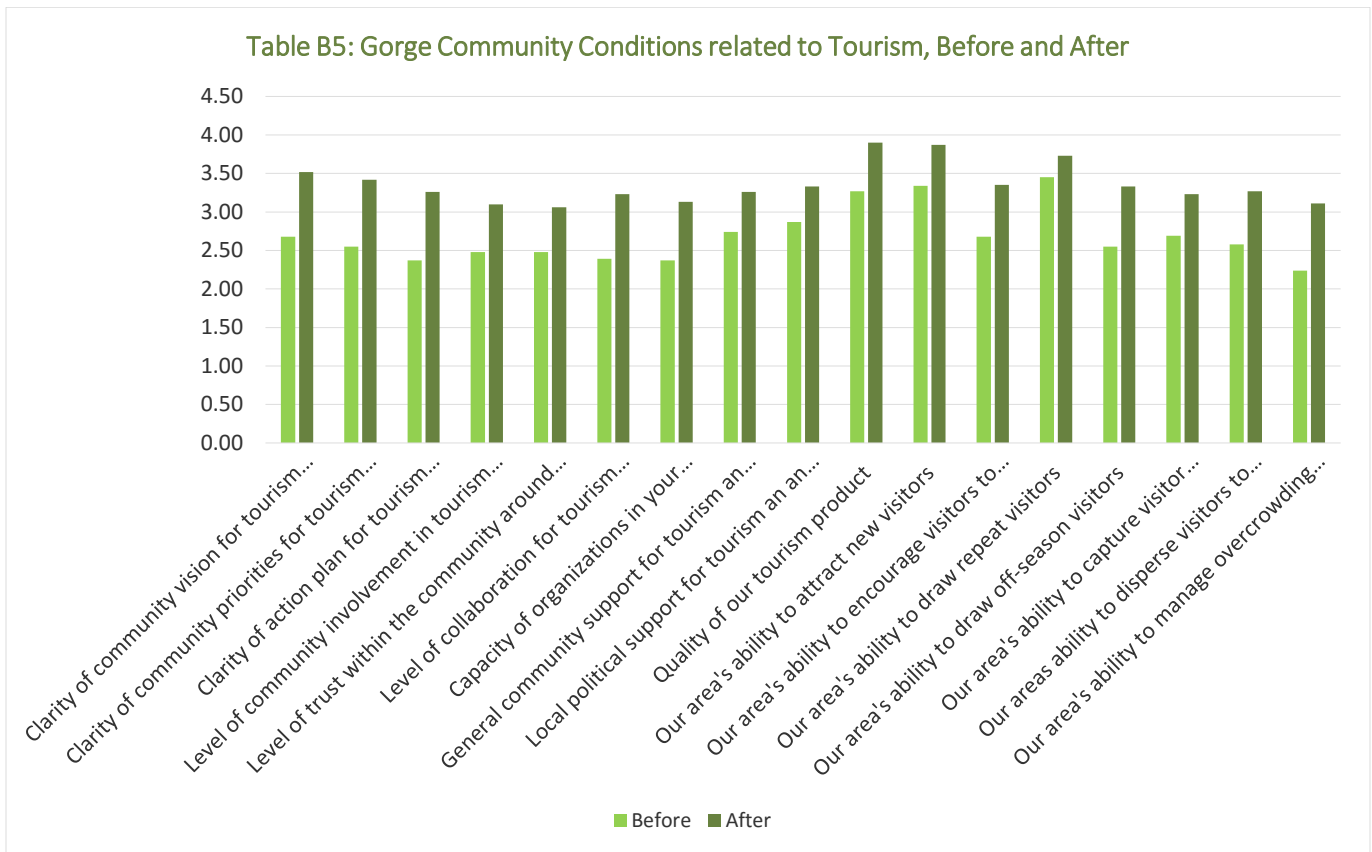


Table shows average scores, on a scale of 1-5, with 1 being “weak” and 5 being “strong”

Overall, respondents viewed GTS as highly impactful across all community conditions. The next table shows that the changes in community conditions most attributed to GTS (shaded) vary somewhat from those that changed the most.

In particular, respondents credit the GTS program with:

- Clarifying community vision (3.62 on a scale of 1-5)
- Increasing the areas ability to disperse visitors to activities and attractions throughout the region (3.56)
- Clarifying community priorities for tourism (3.54)
- Increasing local political support for tourism 3.52)
- Increasing the level of collaboration (3.46)

Table B6: Impact of GTS on Community Conditions, in order of size of change, Gorge Tourism Studio

	Before	After	% Change	Perceived Impact of GTS on change
Our area's ability to manage overcrowding and congestion	2.24	3.11	38.8%	3.08
Clarity of action plan for tourism development in your community	2.37	3.26	37.6%	3.40
Level of collaboration for tourism development efforts	2.39	3.23	35.1%	3.46
Clarity of community priorities for tourism development	2.55	3.42	34.1%	3.54
Capacity of organizations in your community to implement successful tourism development projects	2.37	3.13	32.1%	3.42
Clarity of community vision for tourism development	2.68	3.52	31.3%	3.62
Our area's ability to draw off-season visitors	2.55	3.33	30.6%	3.31
Our areas ability to disperse visitors to activities and attractions throughout the region	2.58	3.27	26.7%	3.56
Level of community involvement in tourism development efforts	2.48	3.10	25.0%	3.23
Our area's ability to encourage visitors to stay longer	2.68	3.35	25.0%	3.38
Level of trust within the community around tourism work	2.48	3.06	23.4%	3.19
Our area's ability to capture visitor spending in local businesses	2.69	3.23	20.1%	3.42
Quality of our tourism product	3.27	3.90	19.3%	3.40
General community support for tourism as an economic development strategy	2.74	3.26	19.0%	3.35
Local political support for tourism as an economic development strategy	2.87	3.33	16.0%	3.52
Our area's ability to attract new visitors	3.34	3.87	15.9%	3.38
Our area's ability to draw repeat visitors	3.45	3.73	8.1%	3.44

Lasting Value

Consistent with results from past RTS communities, all program components are seen as having significantly lasting value, which is important to acknowledge! Also consistent with other communities, “connections with others in my community” is a top source of lasting value.

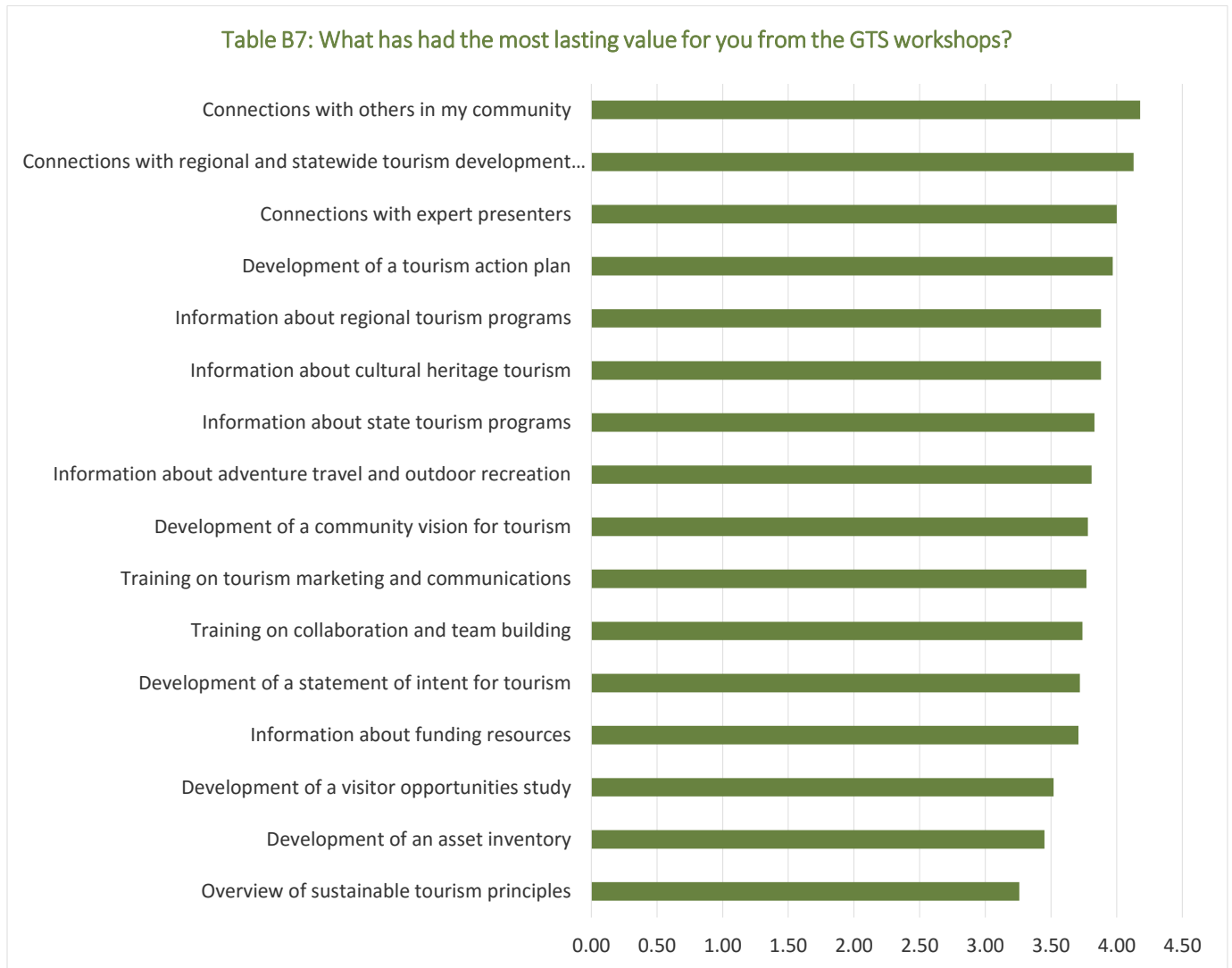
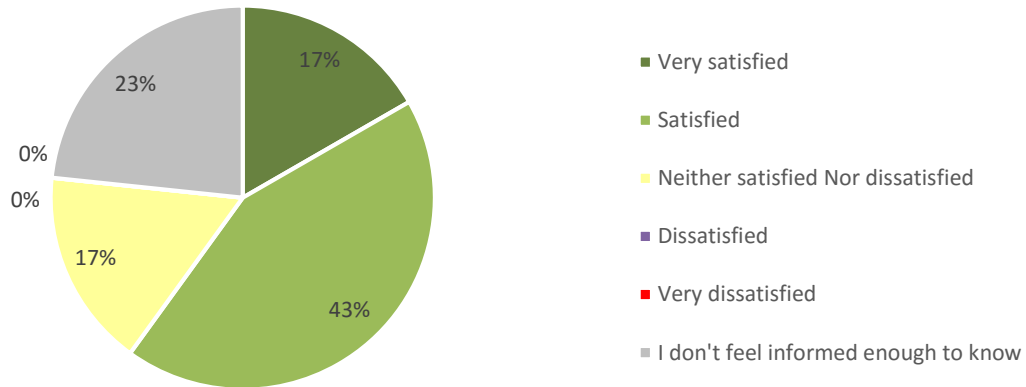


Table shows average scores, on a scale of 1-5, with 1 being “not useful” and 5 being “extremely useful”.

Progress

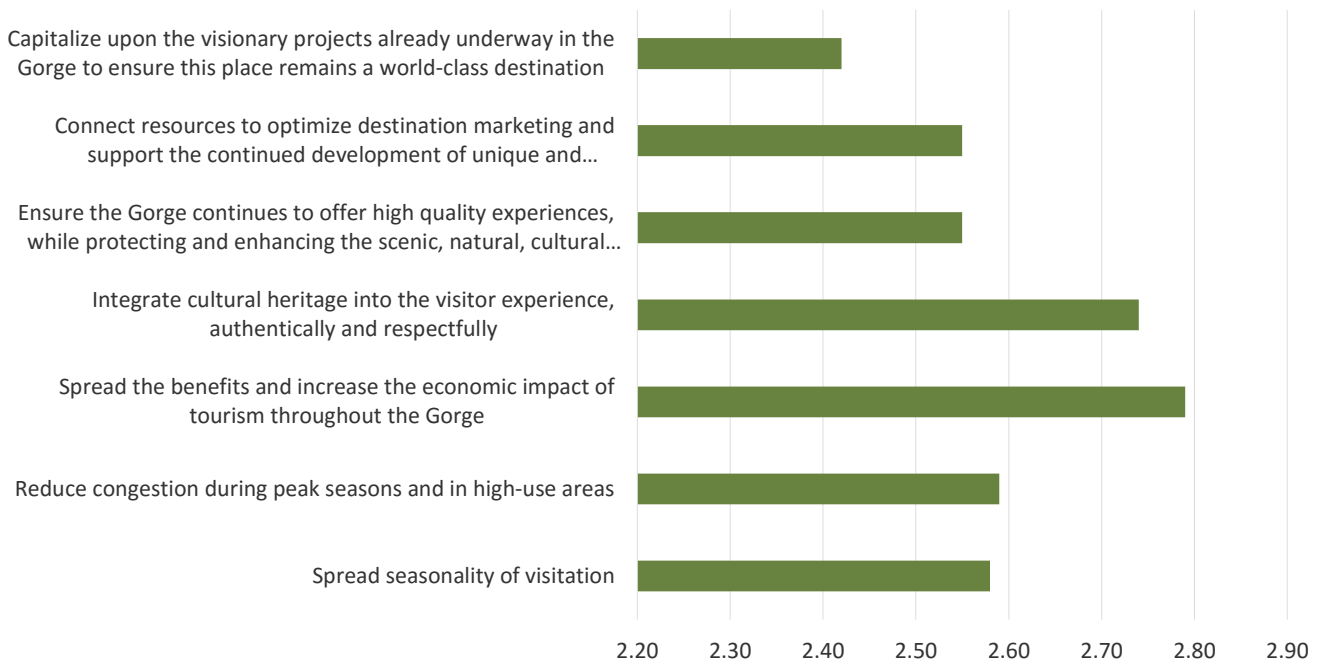
Most respondents are “very satisfied” or “satisfied” with progress so far: no one responded that they were dissatisfied, though a significant number are still on the fence.

Table B8: How satisfied are you with the progress made by Action Teams and the Steering Committee (now operating as the Columbia Gorge Tourism Alliance) since the Gorge Tourism Studio workshops wrapped up last spring?



Rating how well current activities align with the GTS “Statement of Intent,” respondents were most satisfied with the work to spread benefits throughout the Gorge, as well as work to integrate cultural heritage into the visitor experience. They were least satisfied with progress in capitalizing on existing visionary projects. In general, respondents were modest in their assessment: no statement was rated higher than 2.8 on a scale of 1-5.

Table B9: Alignment of Current Activities with Statement of Intent Priorities



Themes in Narrative Responses

Throughout the survey, respondents were asked to explain and elaborate on their responses. Several key messages recurred throughout the comments.

- The value of networking, networking, networking as a foundation for new working relationships and a catalyst for change. It was also enjoyable!
 - “I think GTS has greatly expanded the inclusion of communities with each other and brought resources stakeholders together in a special way.”
- Travel Oregon provided professional, committed and effective leadership to the process. “There is such good energy and coordination in the Gorge thanks to all your hard work. We really appreciate what you did!” There were a couple of expressed concerns about difficulties created by the bi-state nature of GTS.
 - The continued lack of funding from Washington State to invest in complementary activities
 - The different perspectives within Travel Oregon’s other departments about investing in bi-state activities.
- Many comments focused on the inherent tensions in the vision, strategies and statement of intent-- and the importance of working through a balanced strategy. For example:
 - “I work for a company that encourages adventure travel . . . I also have personal relationships with folks who despise the significant increase in tourists to the Gorge. It’s a benefit to be able to see all sides of the arguments and be able to support both sides.”
 - “I think a lot of these intents are good, but have not yet had time to bear fruit. We are still strategizing.”
 - “The lack of coordination and permitting for new agritourism events creates frustration and there should be a strategy to address it.”
- Reflecting the above tension, there were also several comments in support of, as well as against, work to disperse tourism activity to outlying areas.
 - “I just see tourism being more and more centralized in hood River. . . Efforts to get folks out to enjoy the rest of the Gorge seem weak”
 - “Too much emphasis on negative impact and focus on peripheral and marginal attractions.”
 - “I’m not sure we have developed the tools assets to draw people at non-peak times and to lesser known assets.”
 - “The majority of people in our small community are not interested in tourism.”
- Organizational and political leadership changes have generally been noted as hampering progress.
- Even in this group of people who were on average, highly engaged with GTS, there are some who feel uninformed, in ways that may be also be felt by other survey non-respondents. Specifically, it is worth looking at what types of communication are going out to the community beyond Basecamp postings, and intentionally increase communications about progress and opportunities to get involved.
 - “I really have no idea what is happening. And more importantly, how to become re-engaged and participate.”

Overall, the Six Month Assessment confirms a great start in tackling the complexity of developing and managing tourism in the Columbia River Gorge—and doing so in a regional and collaborative manner. Ongoing communication beyond the primary actors may help with building further momentum and accomplishment.

C. Comparison across RTS Communities

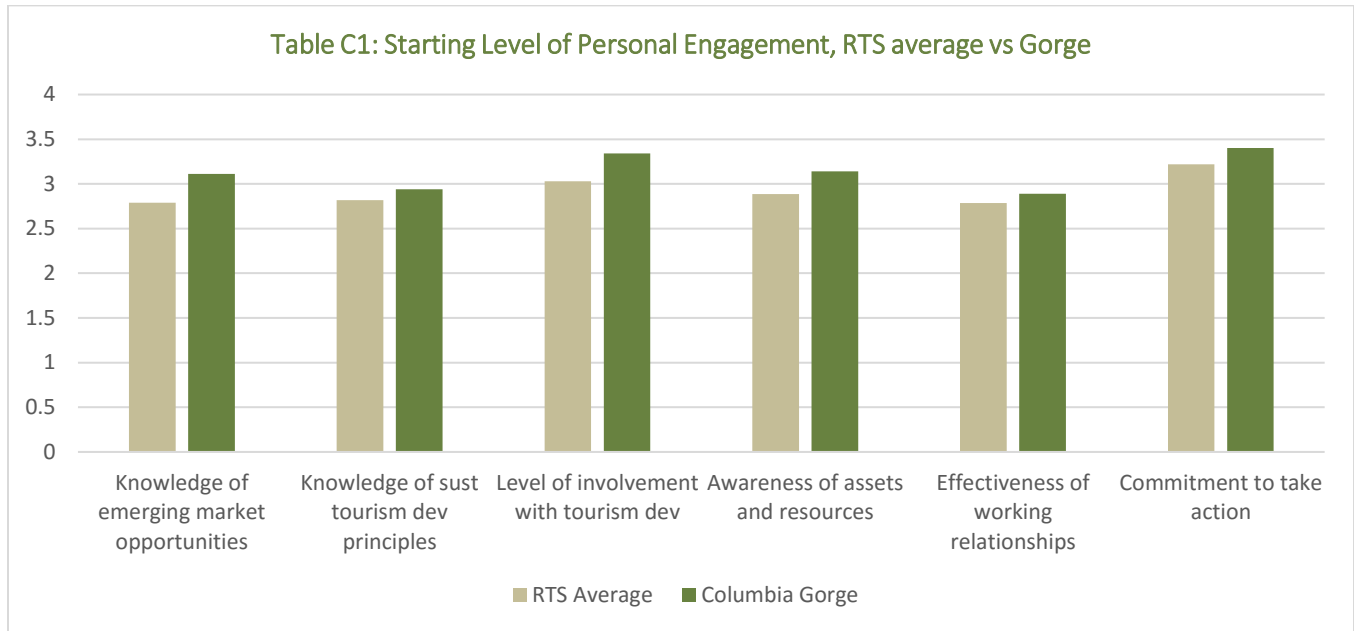


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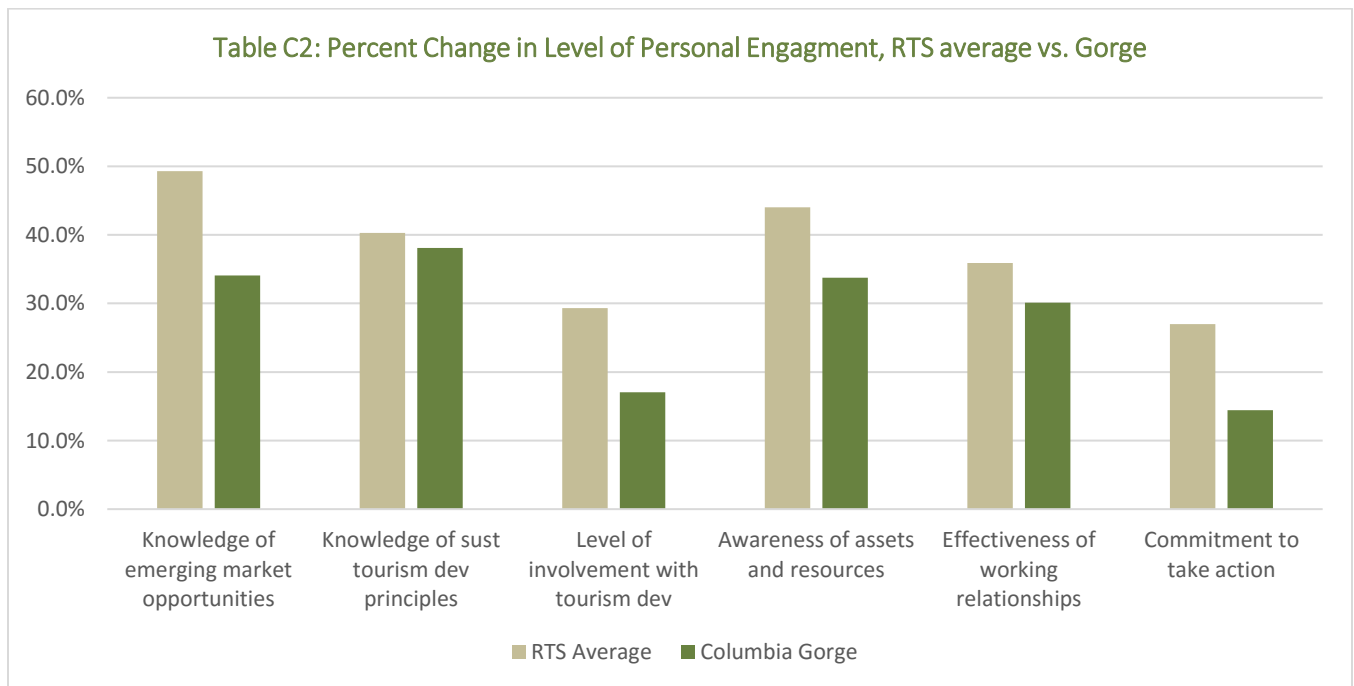


Table C3: Starting Level of Community Conditions for Tourism Dev, RTS Average vs. Gorge

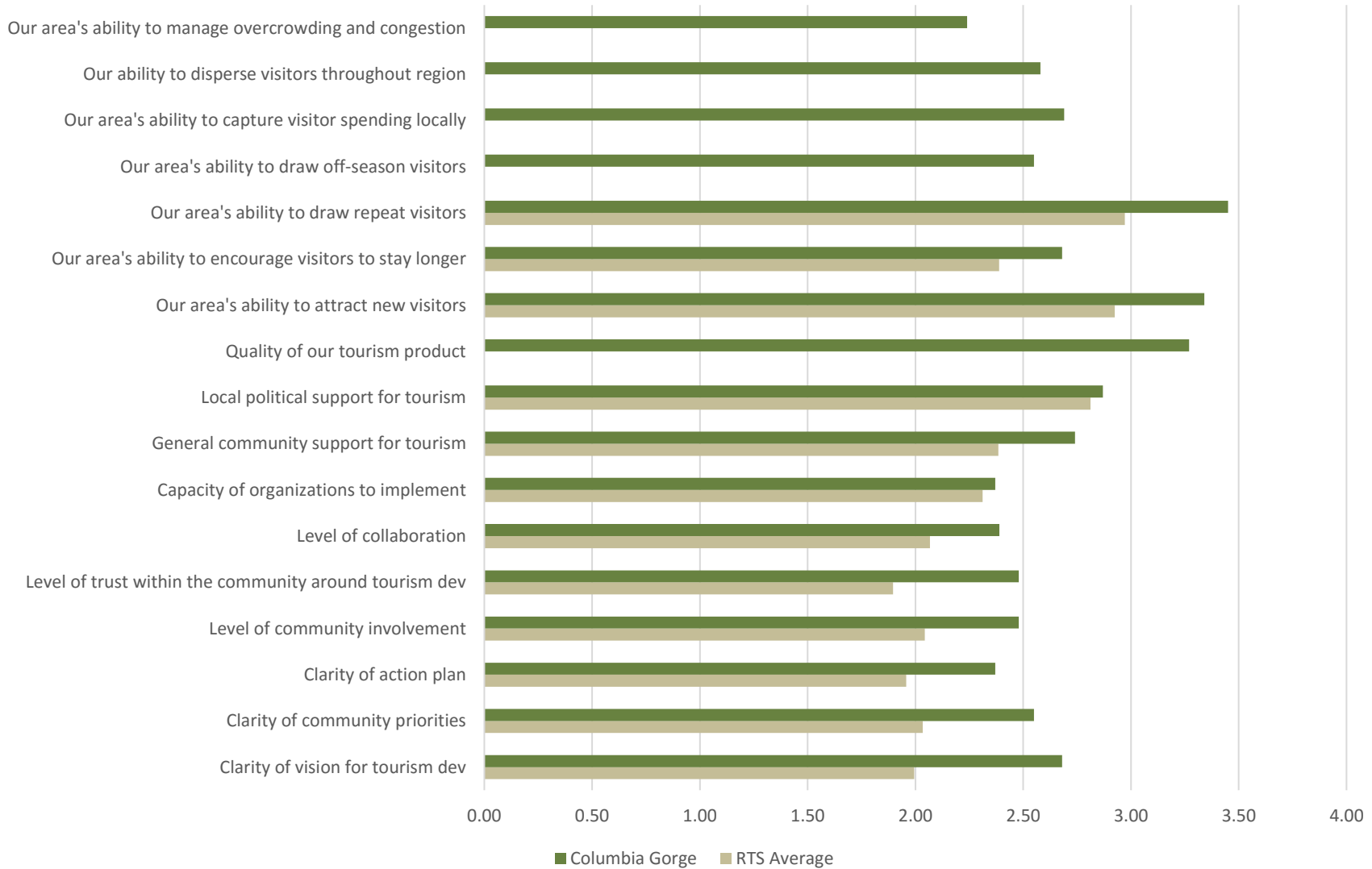


Table shows average scores, on a scale of 1-5, with 1 being “weak” and 5 being “strong”: Four indicators were added to the survey after the first two communities were complete: “level of trust within the community around tourism development”, as well as three market related questions. Furthermore, four additional indicators were added for the Gorge Tourism Studio: there are no corresponding “RTS averages” (shown by tan bars) for those.

Table C4: Percent Change in Community Conditions for Tourism Dev, RTS Average vs. Gorge

