

MT. HOOD & THE COLUMBIA RIVER GORGE

2023 RESIDENT COMMUNITY SURVEY FINAL REPORT -ESTACADA





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A misty forest scene with a waterfall and tall evergreen trees. The waterfall is a thin, white stream of water falling from a rocky ledge into a pool of water at the bottom. The surrounding forest is dense with tall, dark evergreen trees. The mist is thick and white, filling the air around the waterfall and the trees. The overall atmosphere is serene and mysterious.

INTRODUCTION |



INTRODUCTION

This research effort and subsequent analysis on behalf of the Mt. Hood and Columbia River Gorge Tourism Alliance consists of a resident survey with statistically significant results that addresses resident sentiment towards tourism in relation to key issues the communities within the region are currently facing. Throughout the report, the Mt. Hood and Columbia River Gorge area is referred to as the “Region”.

Topics were wide-ranging and diverse. Including:

- Road congestion/transit options
- Workforce housing
- Diversity, Equity, and Inclusion
- Impacts from climate change
- Cost of living/Living wage
- Local houselessness
- Vibrant main streets
- Recreation use
- Quality of Life as a resident
- Experience economy
- Sentiment about lodging & short-term rentals





RESEARCH METHODS

OVERVIEW

- RRC worked alongside MT. Hood and Columbia River Gorge Tourism Alliance to develop a survey instrument that would resonate with respondents and be tailored to the needs of answering questions regarding tourism sentiment in the region.
- Upon development of the survey instrument, the survey research was conducted using two methods:
 - A *statistically valid* survey with Invites sent via mail (also referred to as Invite sample).
 - An *Open Link* survey available to anyone with the interest to participate, distributed via Mt. Hood and the Columbia River Gorge's marketing (referred to as Open Link sample).
- Data was collected and analyzed using a variety of RRC's software, tabulated, and then formatted to display throughout this.
- Given the very successful response rate for this survey project, the data is considered representative at the regional level for the study.
 - Open Link data is also presented for comparison, as these individuals often highlight specific motivations for answering the survey compared to that of the statistically valid respondents. However, decision-making should lean towards using the statistically valid sample as the Open Link is not considered fully representative despite results being very similar.





RESEARCH METHODS

THE STATISTICALLY VALID SURVEY

- The statistically valid paper surveys were mailed to a stratified random sample of residential address in the Mt. Hood & Columbia River Gorge Region within the boundaries of the map on the right.





RESEARCH METHODS

THE STATISTICALLY VALID SURVEY

- Options to respond to the statistically valid survey were:
 - Via mail-back paper surveys included with the original mailing to each household.
 - Links to an online survey from included QR codes in the cover letter which used individual passwords to limit responses to 1 per household.
- Survey response was very strong, with 1,435 completed surveys for the Invite sample.
 - The margin of error in results in +/- 2.6%, indicating a small margin of potential error in either direction.
- Once the statistically sample was collected, the survey was opened to the public via an “open-link”.
 - This was promoted through local media channels from the corresponding communities.
 - A total of 361 Open link responses were collected overall for all communities.

1,435

Total Invite
Surveys
Completed

10,000 Survey Mailed
+/- 2.6% Margin of Error





RESEARCH METHODS

ESTACADA SURVEY COLLECTION

Due to low sample size, the Invite (statistically valid) and the Open link sample were combined to create a more reliable sample.

91

Total Invite
Surveys
Completed

18

Total Open Link
Surveys
Completed

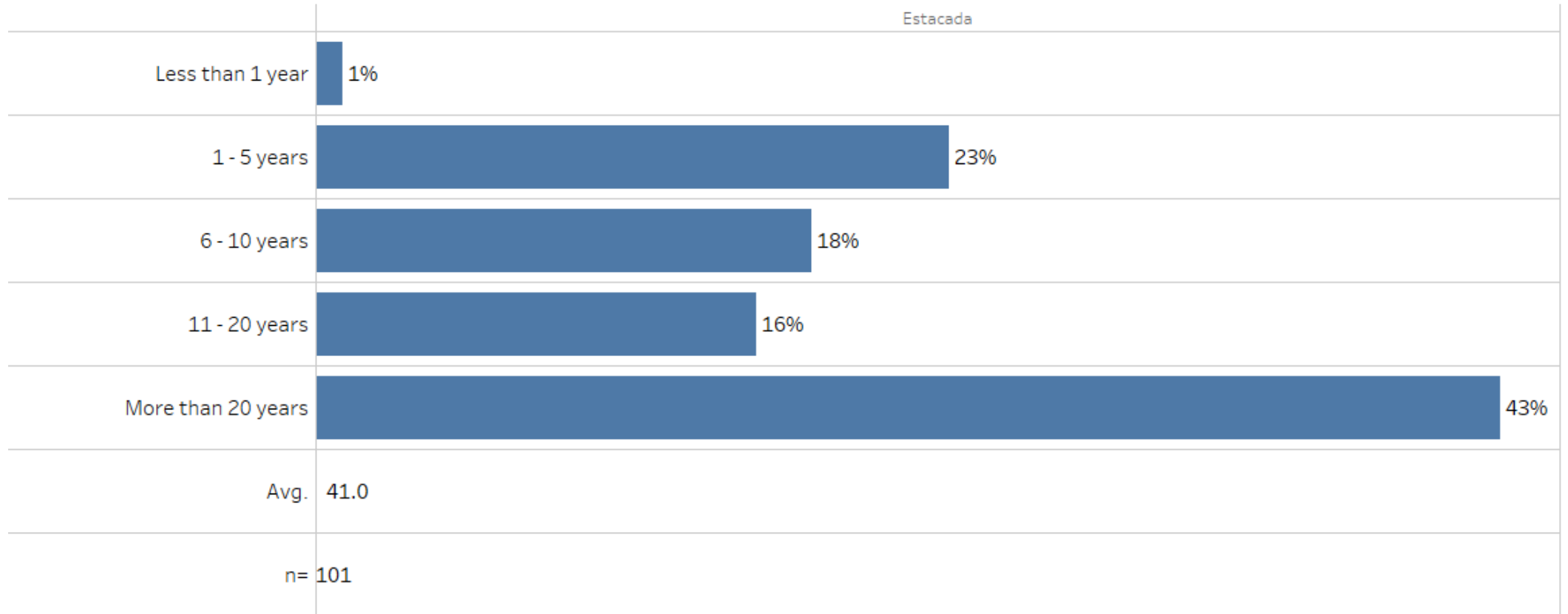




LIVING IN THE MT. HOOD/COLUMBIA RIVER GORGE REGION

LENGTH OF TIME IN REGION

How long have you lived in the Mt. Hood/Columbia River Gorge Region? Enter 0 if less than a year.



Source: RRC

RESIDENCE TYPE

What describes your residence in the Mt. Hood/Columbia River Gorge Region?

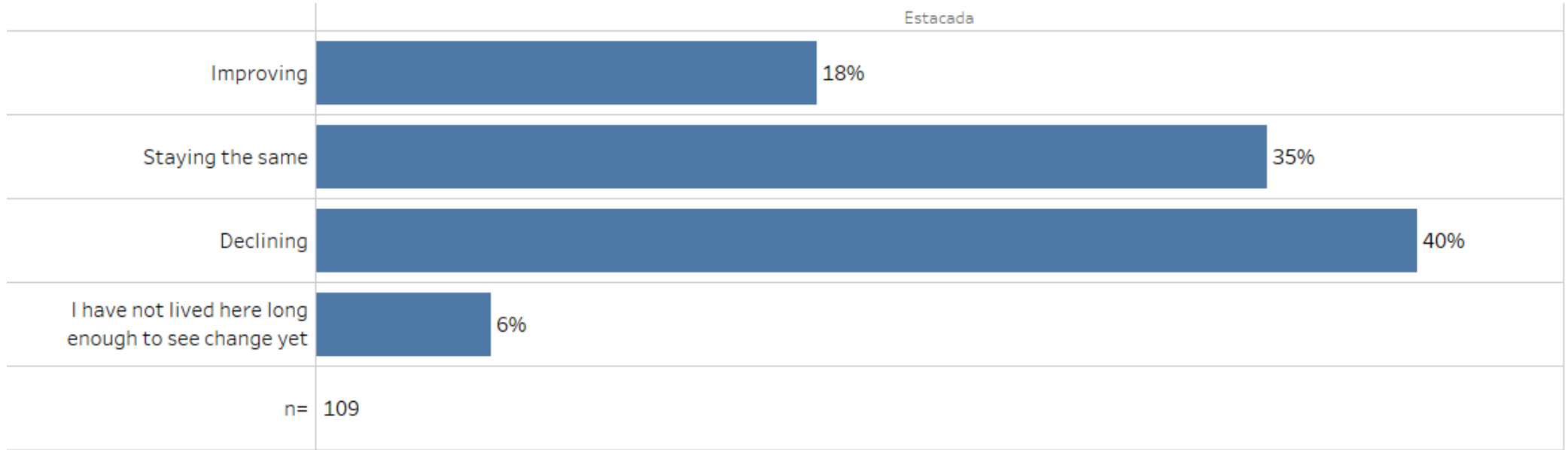


Source: RRC

QUALITY OF LIFE |



Would you say your overall quality of life in the Mt. Hood/Columbia River Gorge Region has been:

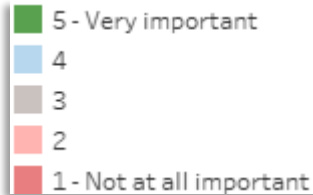
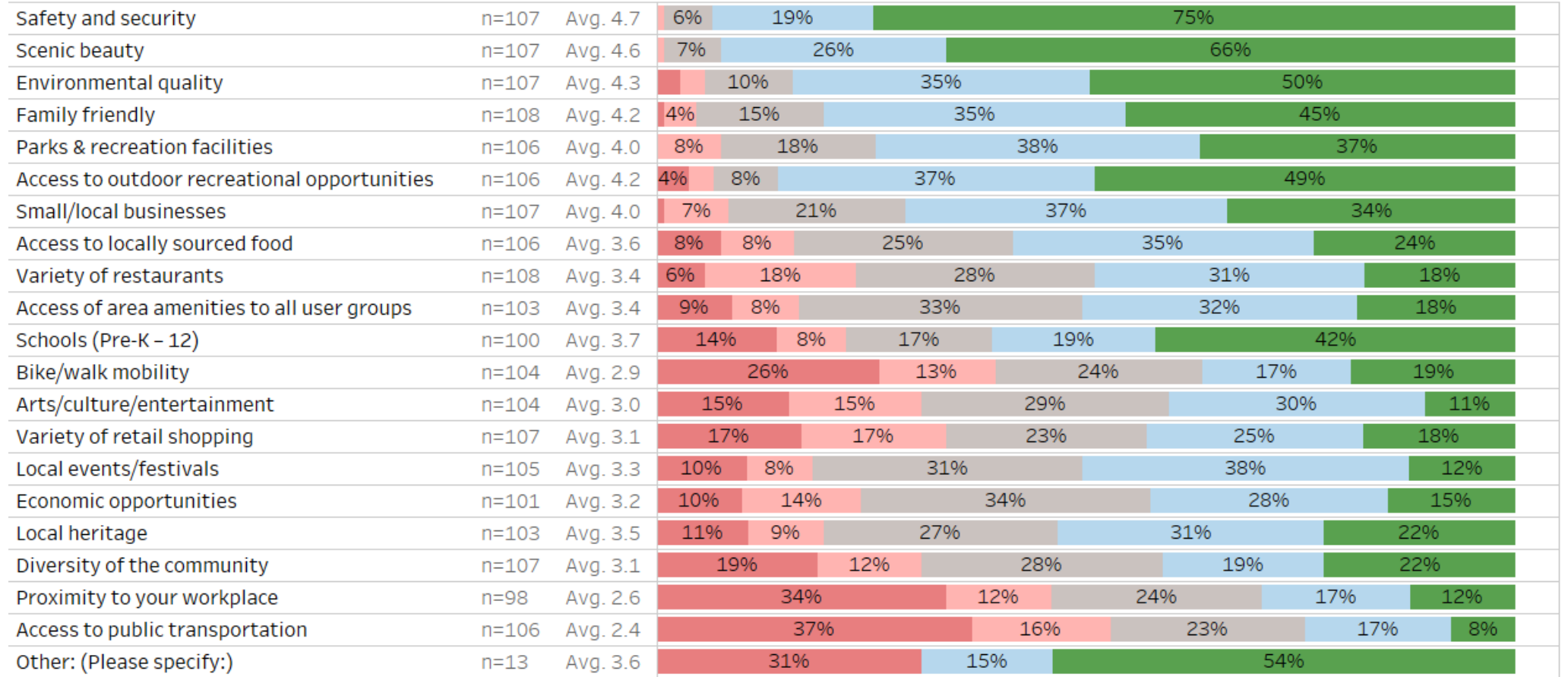


Source: RRC

QUALITY OF LIFE IMPORTANCE

Please rate how important are the following factors to your and your community's quality of life in the Mt. Hood/Columbia River Gorge Region?

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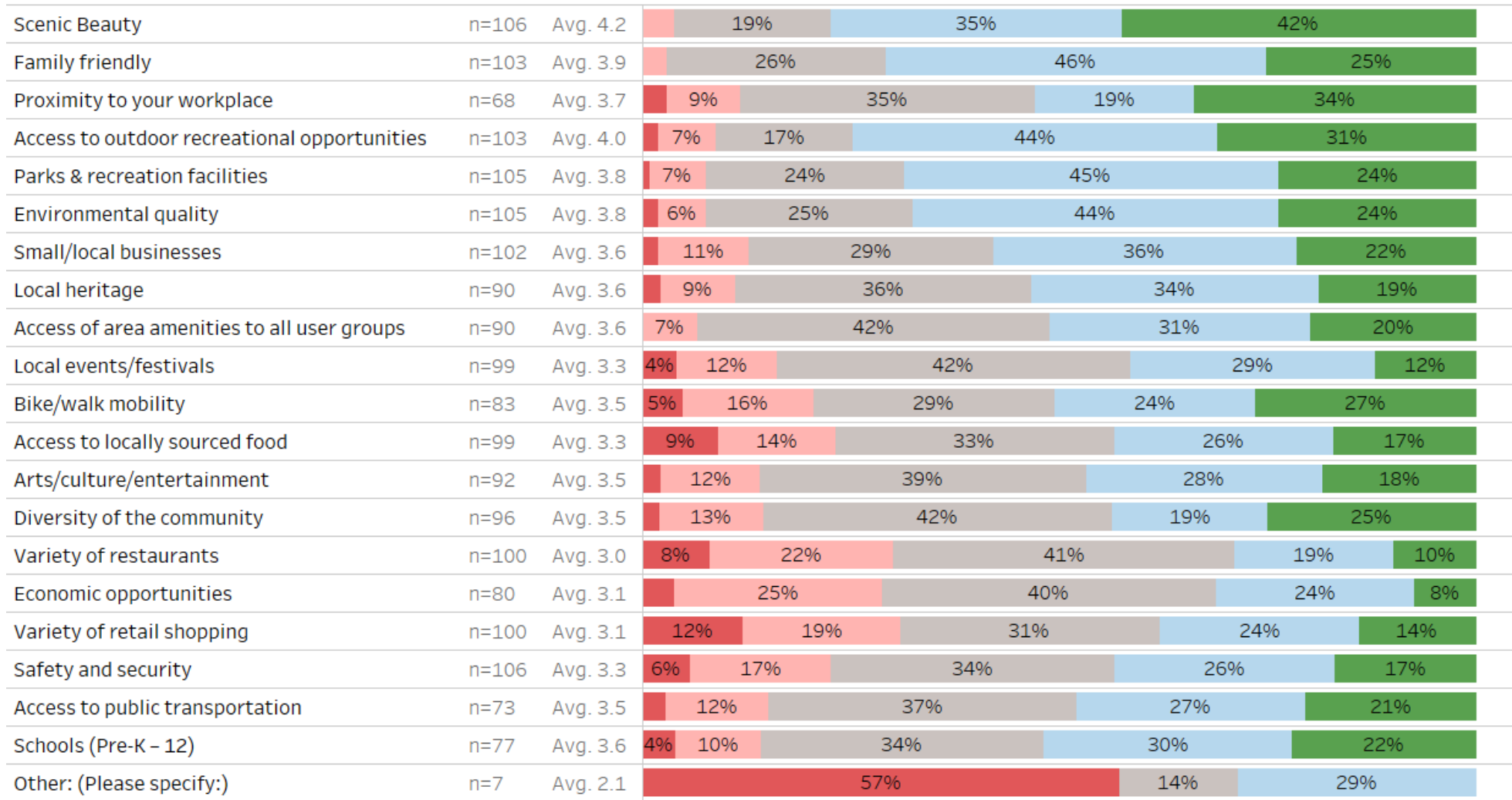


Source: RRC

QUALITY OF LIFE SATISFACTION

Please rate how satisfied you are with the region's performance on these factors?

Estacada



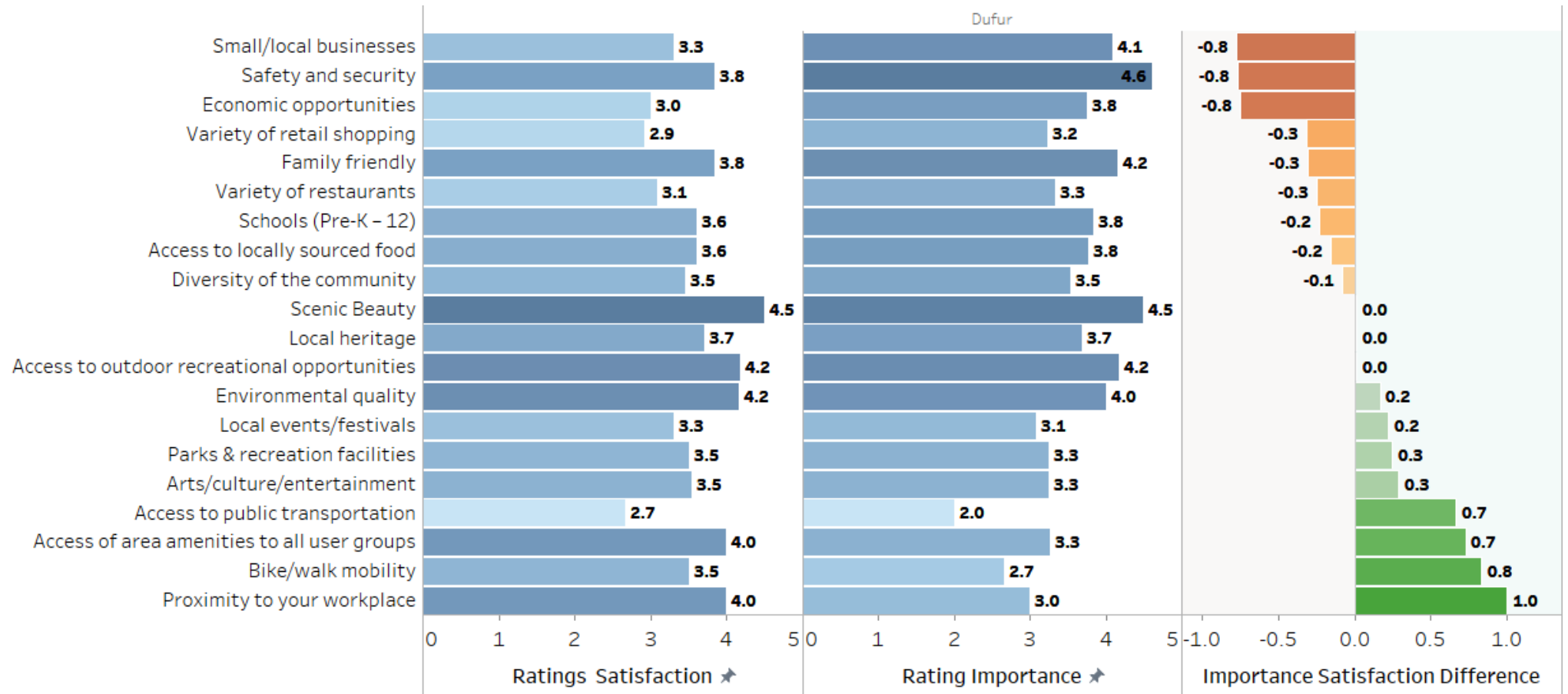
Source: RRC

QUALITY OF LIFE

IMPORTANCE/SATISFACTION

In the graph below, average importance and satisfactions ratings are compared to demonstrate areas that may need more attention.

- This is determined by those categories which have a higher importance rating than satisfaction.
- The “Needs Met” column details the importance/satisfaction discrepancy and may serve as an avenue to judge the priority of addressing the public’s concern regarding the various survey topics.



A scenic view of a waterfall cascading over moss-covered rocks in a lush forest. The waterfall is the central focus, with water flowing down a narrow, rocky path. The surrounding environment is dense with green foliage, including moss-covered rocks and trees. The overall atmosphere is serene and natural.

CURRENT TOPICS IN THE REGION

HOME OWNERSHIP

Do you own or rent your residence in the Mt. Hood/Columbia River Gorge Region?



Source: RRC

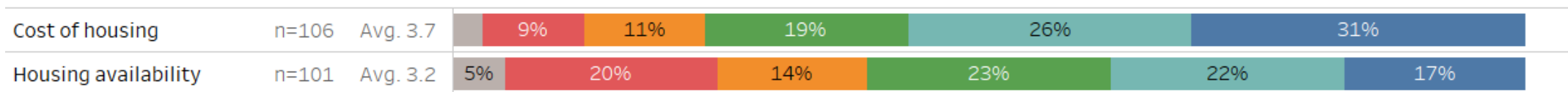
Have you ever used this home as a short-term rental/VRBO/Airbnb?



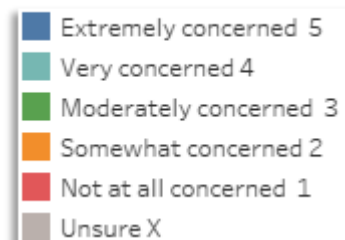
Source: RRC

COST & AVAILABILITY OF HOUSING

How concerned are you about the following aspects of housing in your community within the Mt. Hood/Columbia River Gorge Region
Estacada

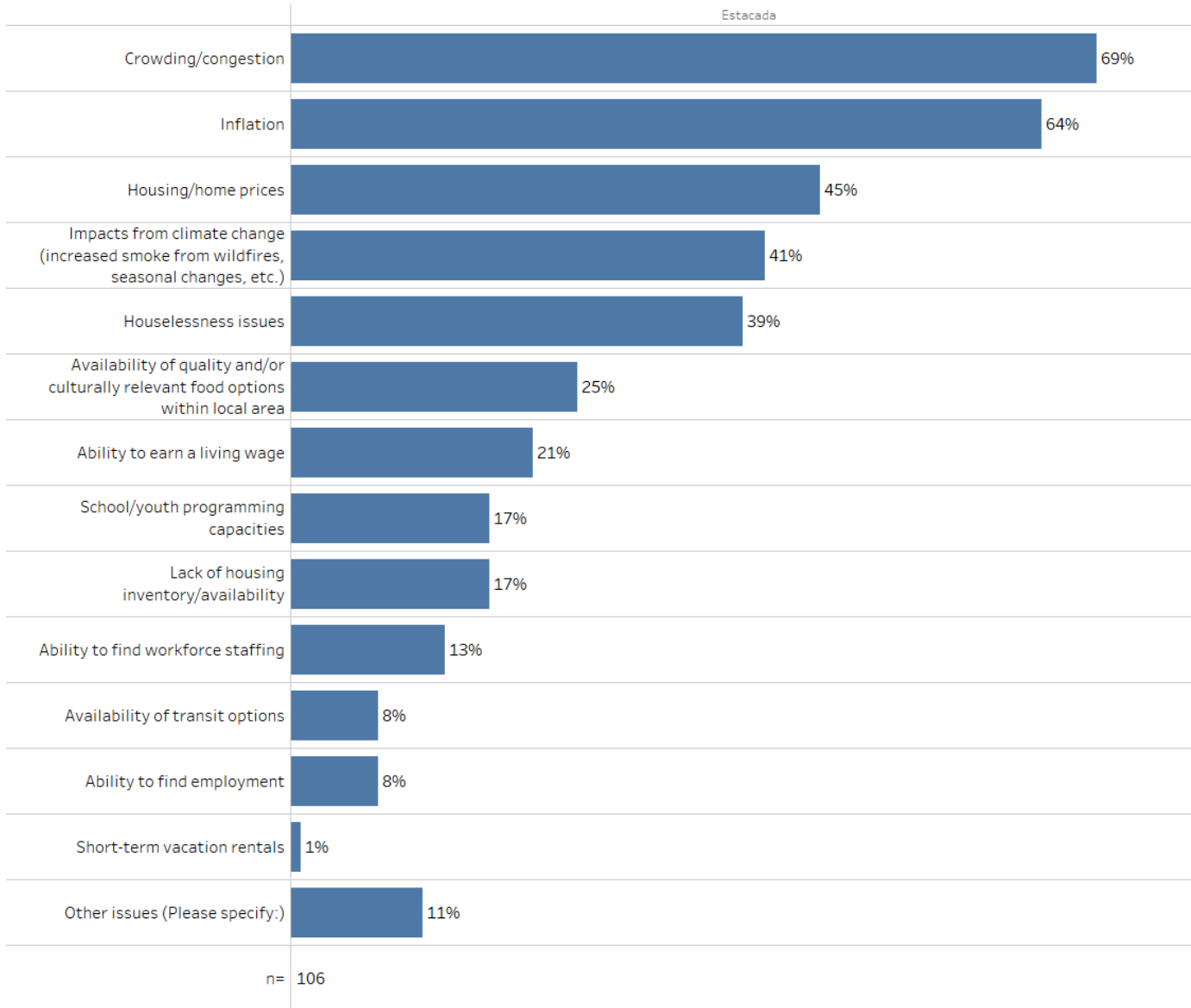


Source: RRC



CURRENT CHALLENGES

What are the biggest impacts or challenges affecting you personally or professionally in the Mt. Hood/Columbia River Gorge Region? (Check all that apply)

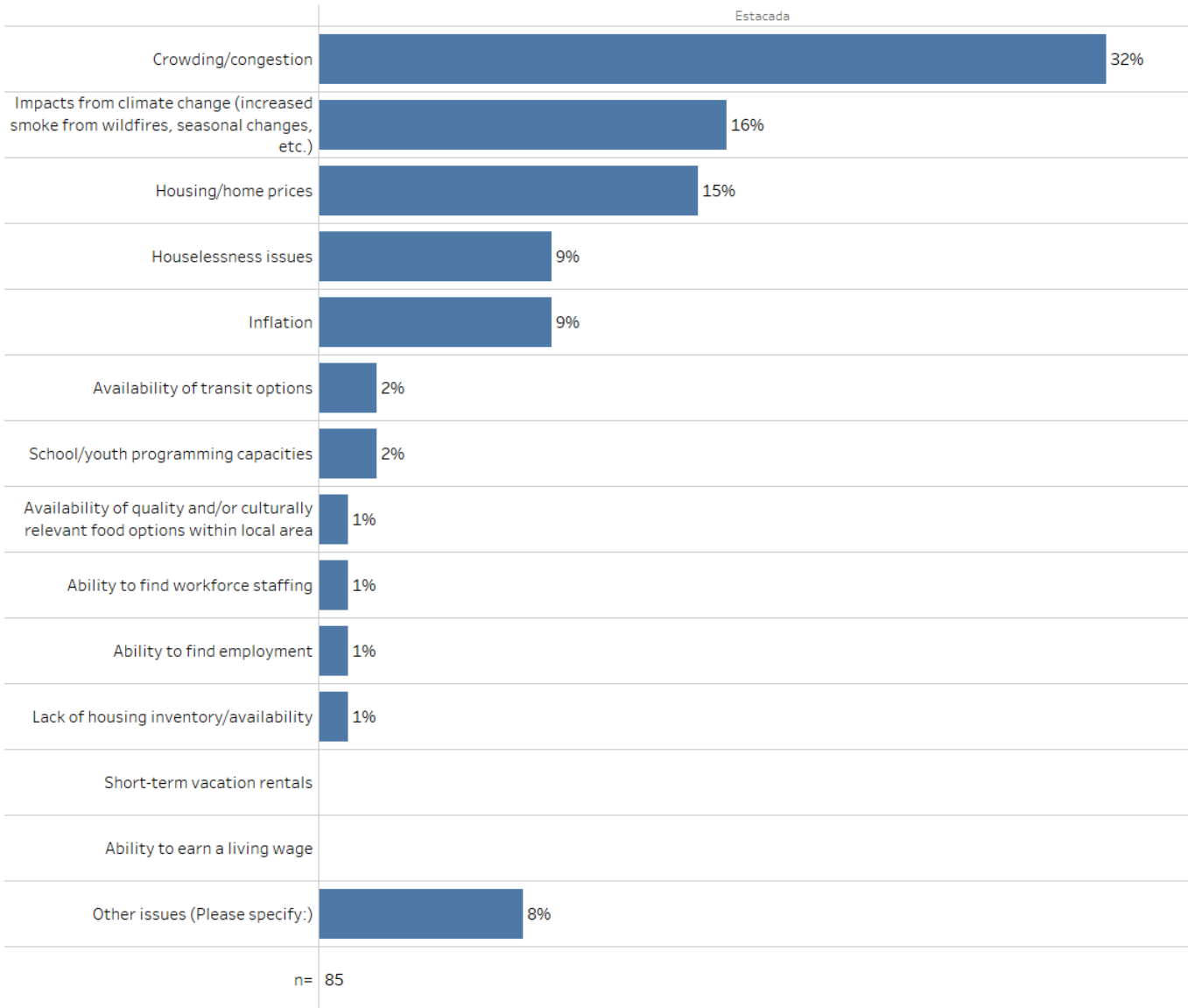


Source: RRC

[illegible]

TOP CHALLENGE

Which issue or challenge from Question 12 is the most important to address by local officials or decision-makers?



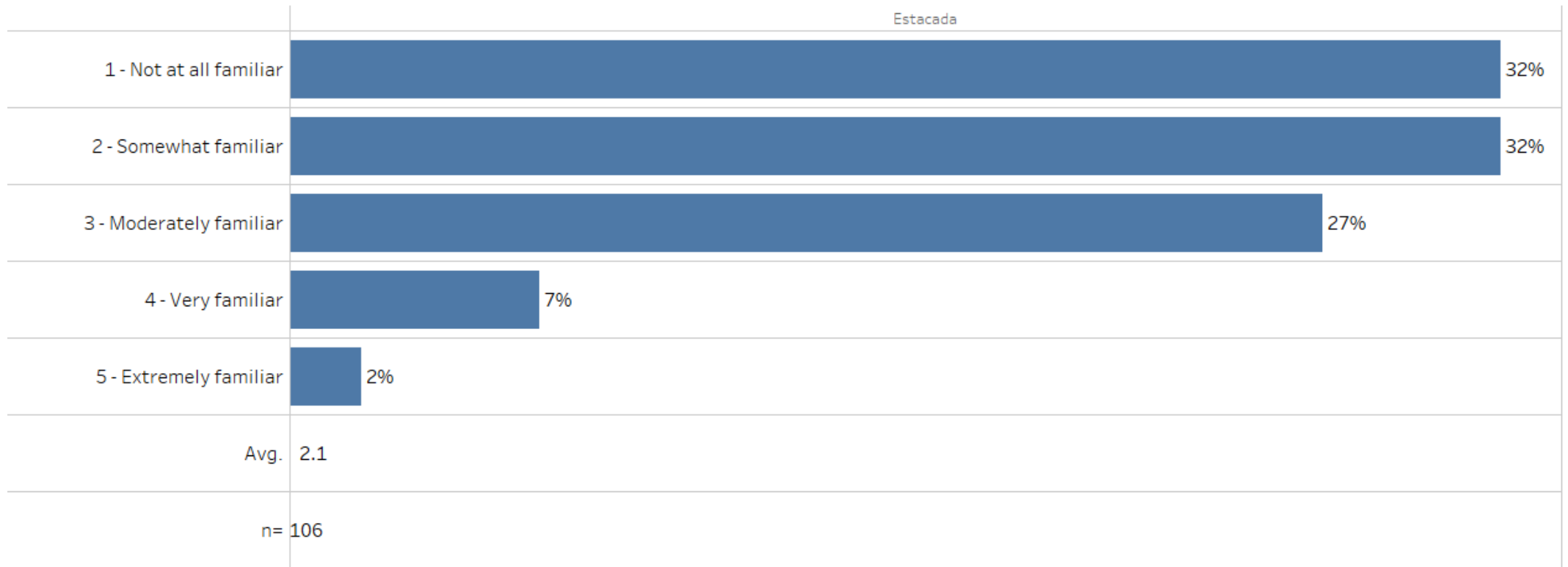
Source: RRC

| TOURISM IN THE REGION



FAMILIARITY WITH TOURISM INDUSTRY

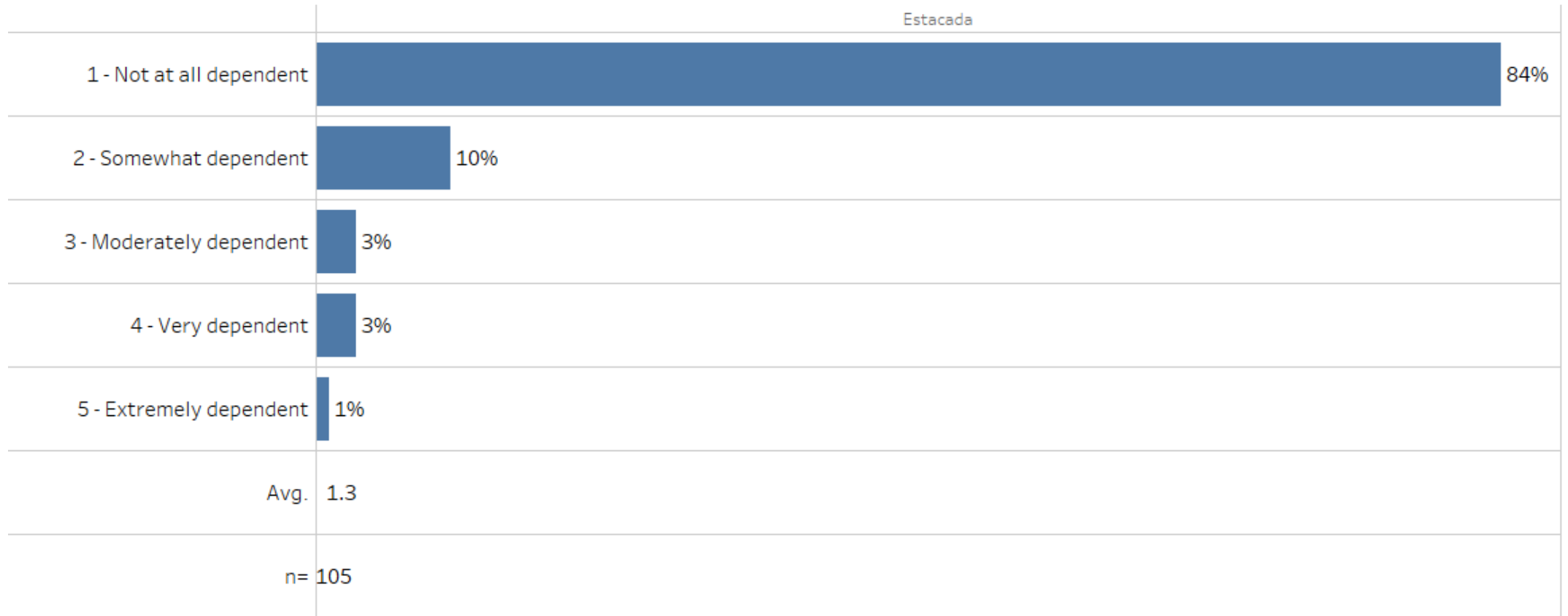
How familiar are you with the tourism industry operators, managers, or marketers in the Mt. Hood/Columbia River Gorge Region?



Source: RRC

RELIANCE ON TOURISM

To what extent do you rely on tourism in the region to support your livelihood?



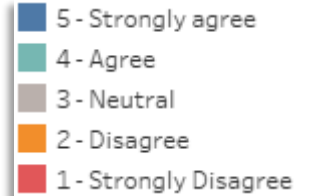
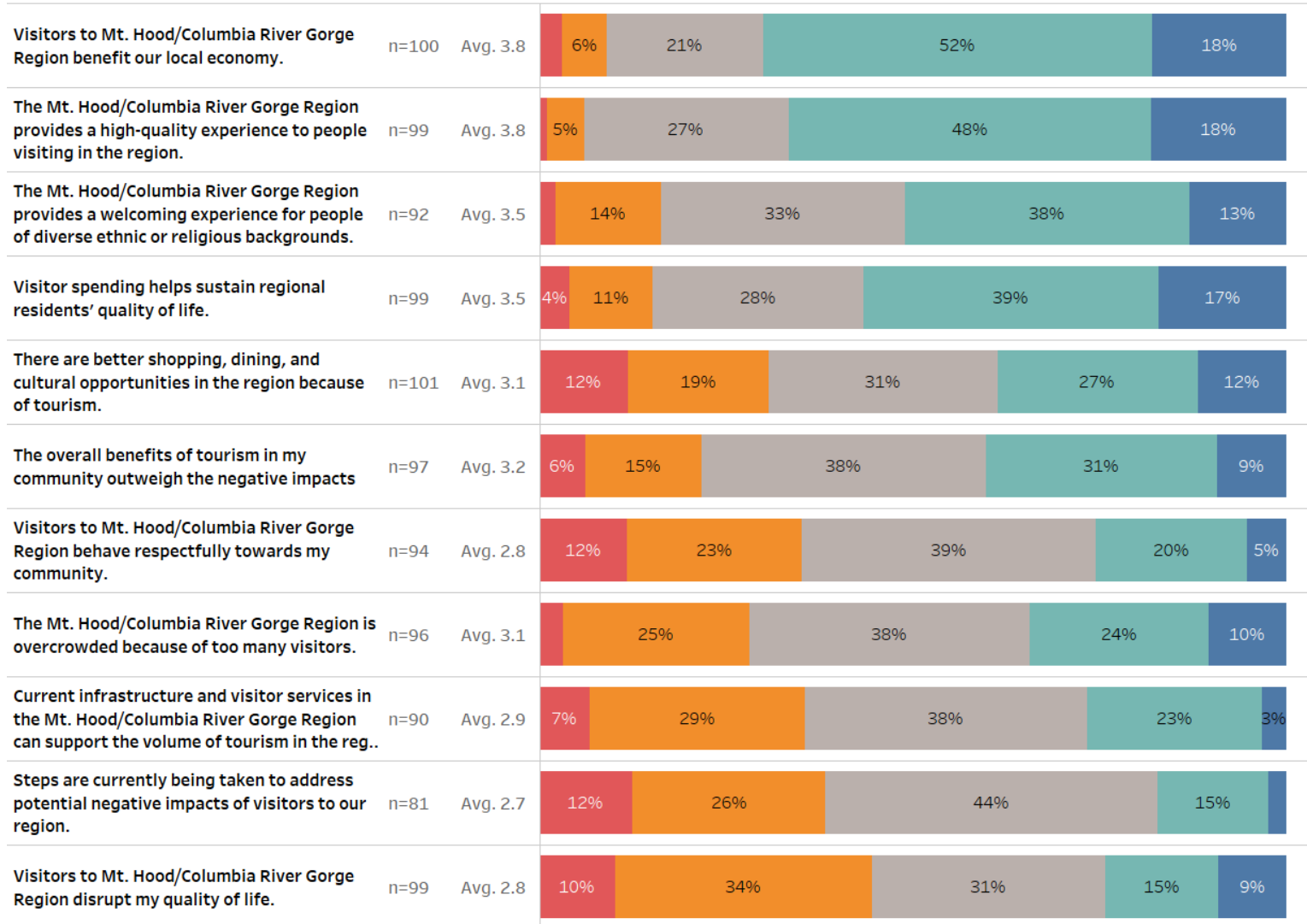
Source: RRC

Do you work in the tourism industry in Mt. Hood and Columbia River Gorge region?



Source: RRC

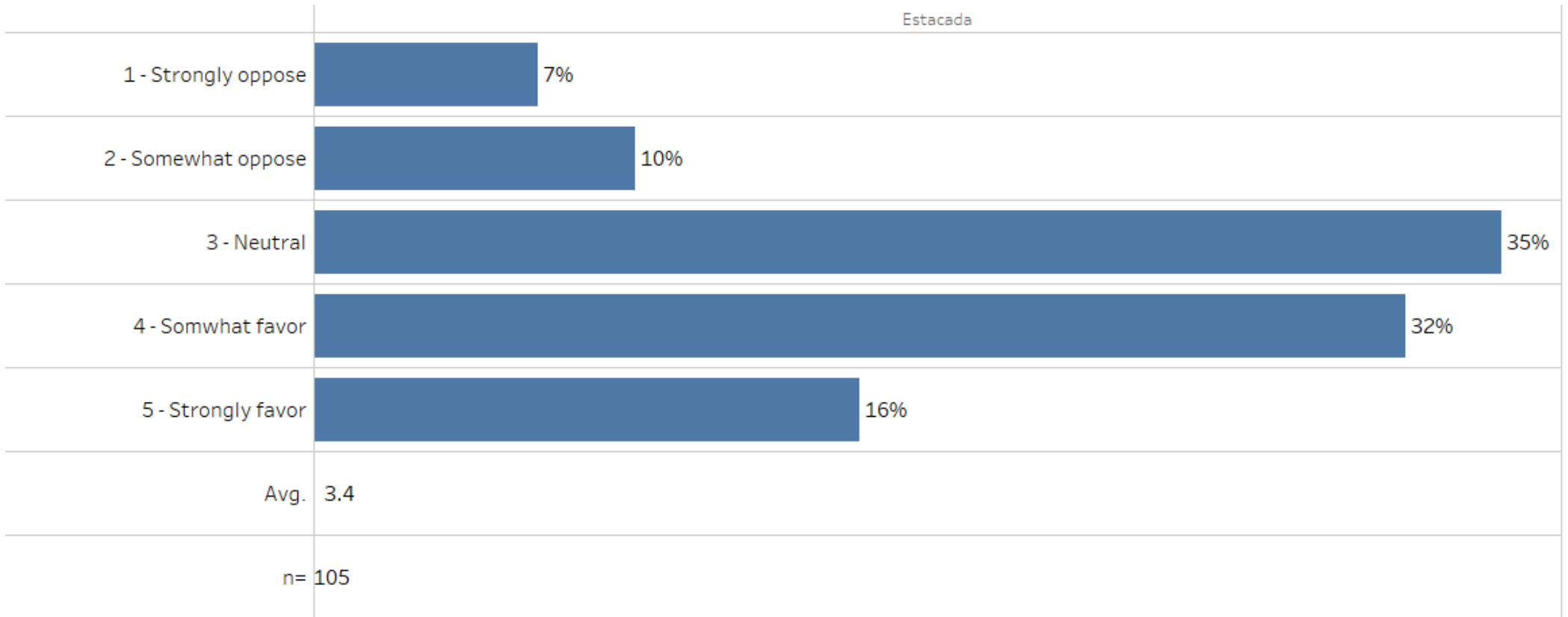
How much do you agree or disagree that...?
Estacada



Source: RRC

SUPPORT OF TOURISM

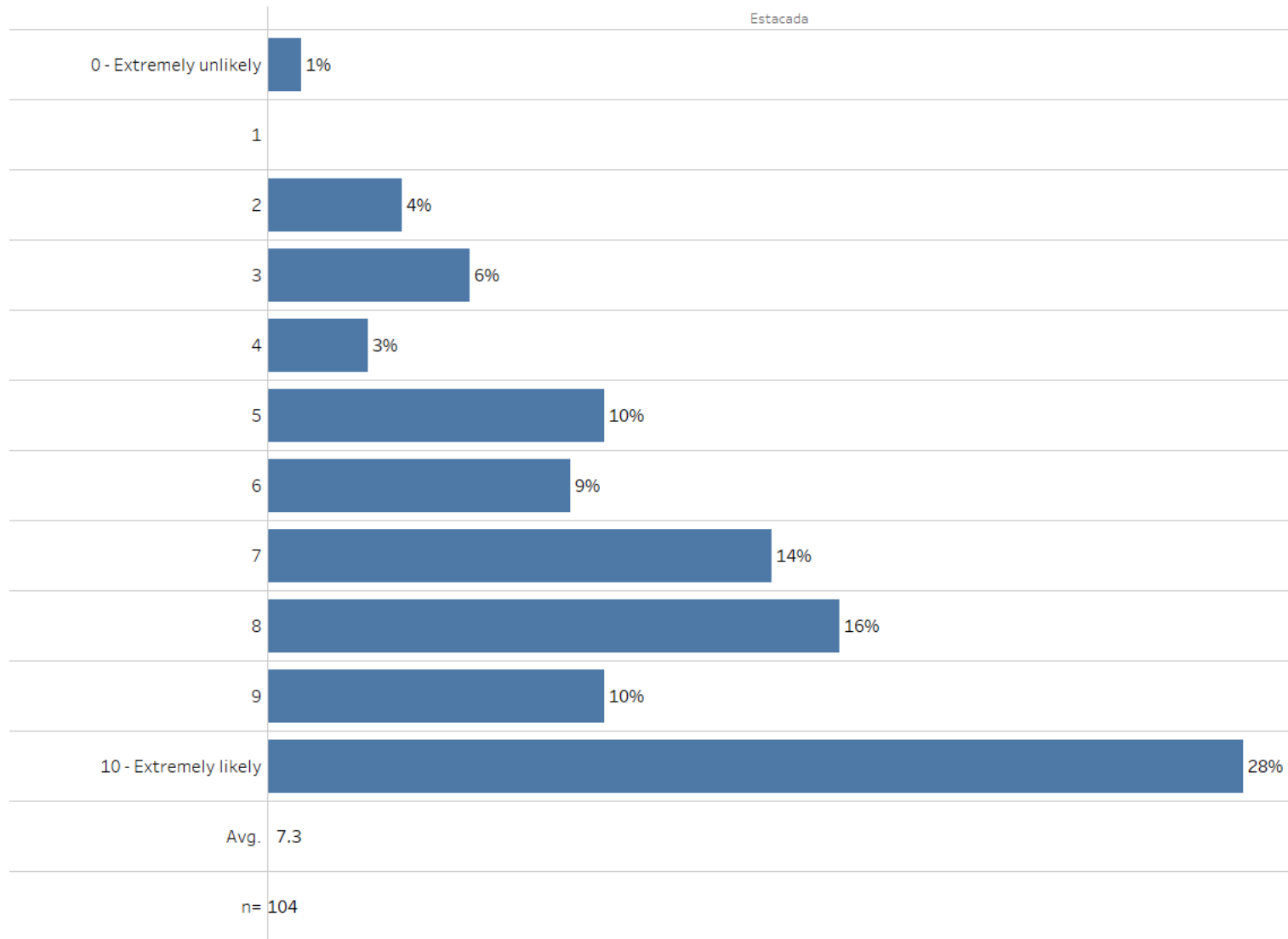
How supportive are you about promoting Mt. Hood and the Columbia River Gorge to attract visitors from out of the region to visit?



Source: RRC

LIKELIHOOD TO RECOMMEND

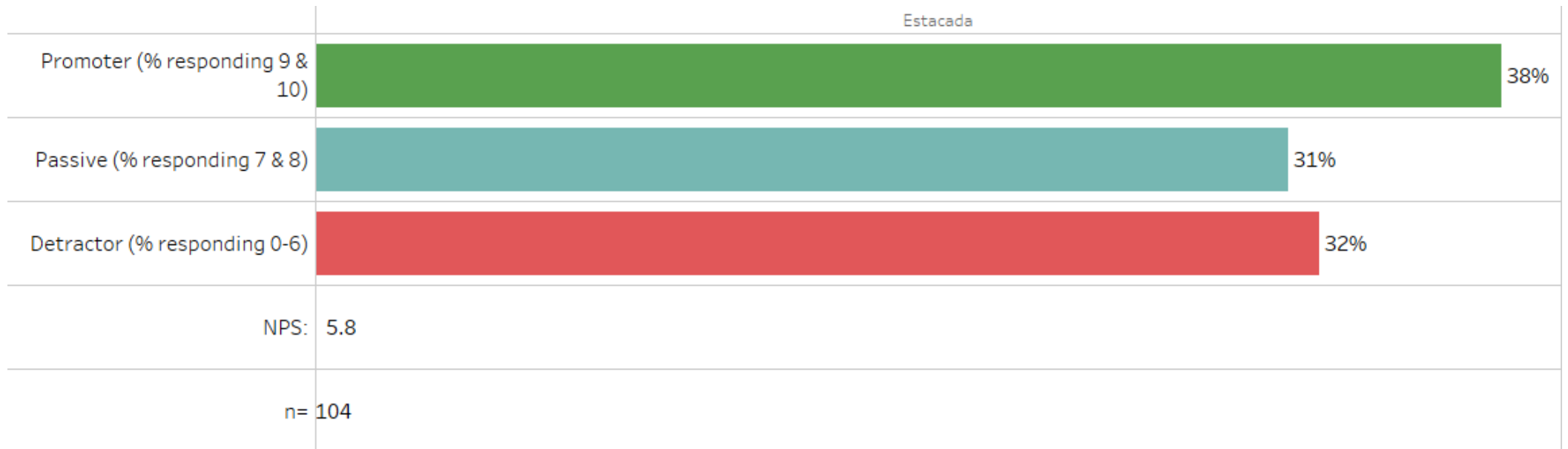
How likely are you to recommend the Mt. Hood/Columbia River Gorge Region to your family and friends as a place to visit? (Scale: 0 = Extremely unlikely to 10 = Extremely likely)



Source: RRC

NET PROMOTER SCORE

A Net Promoter Score (NPS) in a Resident Sentiment Survey tells local decision makers how satisfied residents are with their living community. It's determined by asking residents: "On a scale of 0 to 10, how likely are you to recommend living here to others?" The score is calculated by taking the percentage of residents who love living there (score 9-10) and subtracting the percentage who are unhappy (score 0-6). The result, ranging from -100 to +100, helps local decision makers understand if residents are happy and identify areas for improvement.



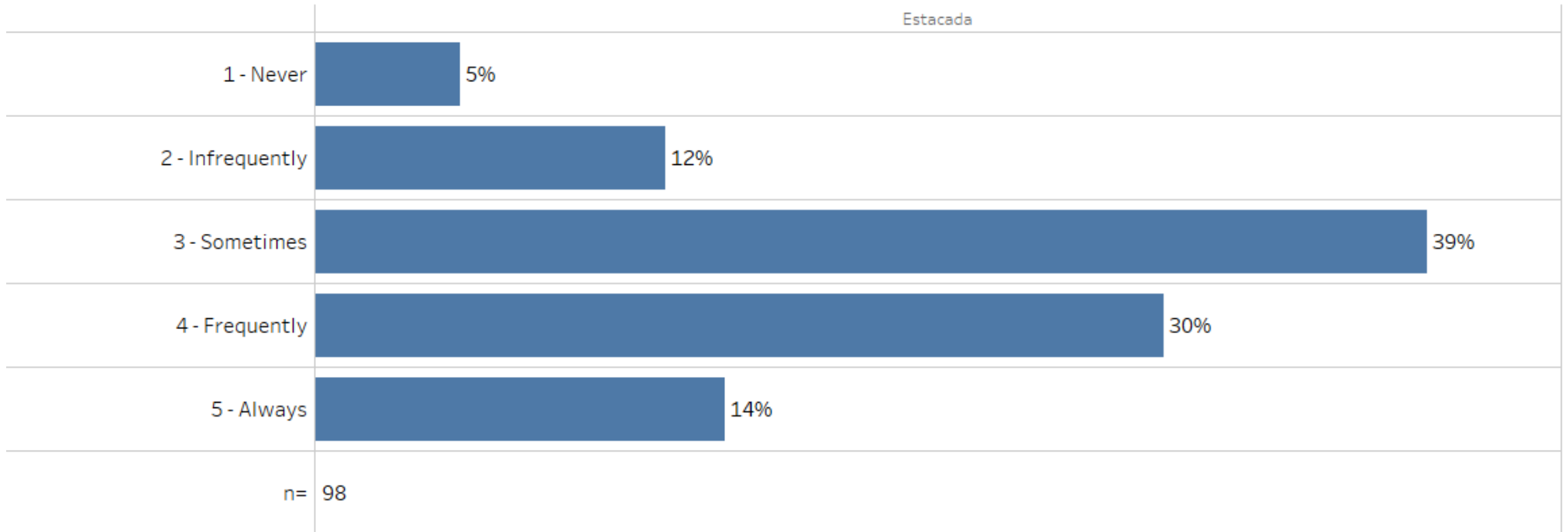
Source: RRC



TRAFFIC IN THE REGION |

TRAFFIC CHALLENGES

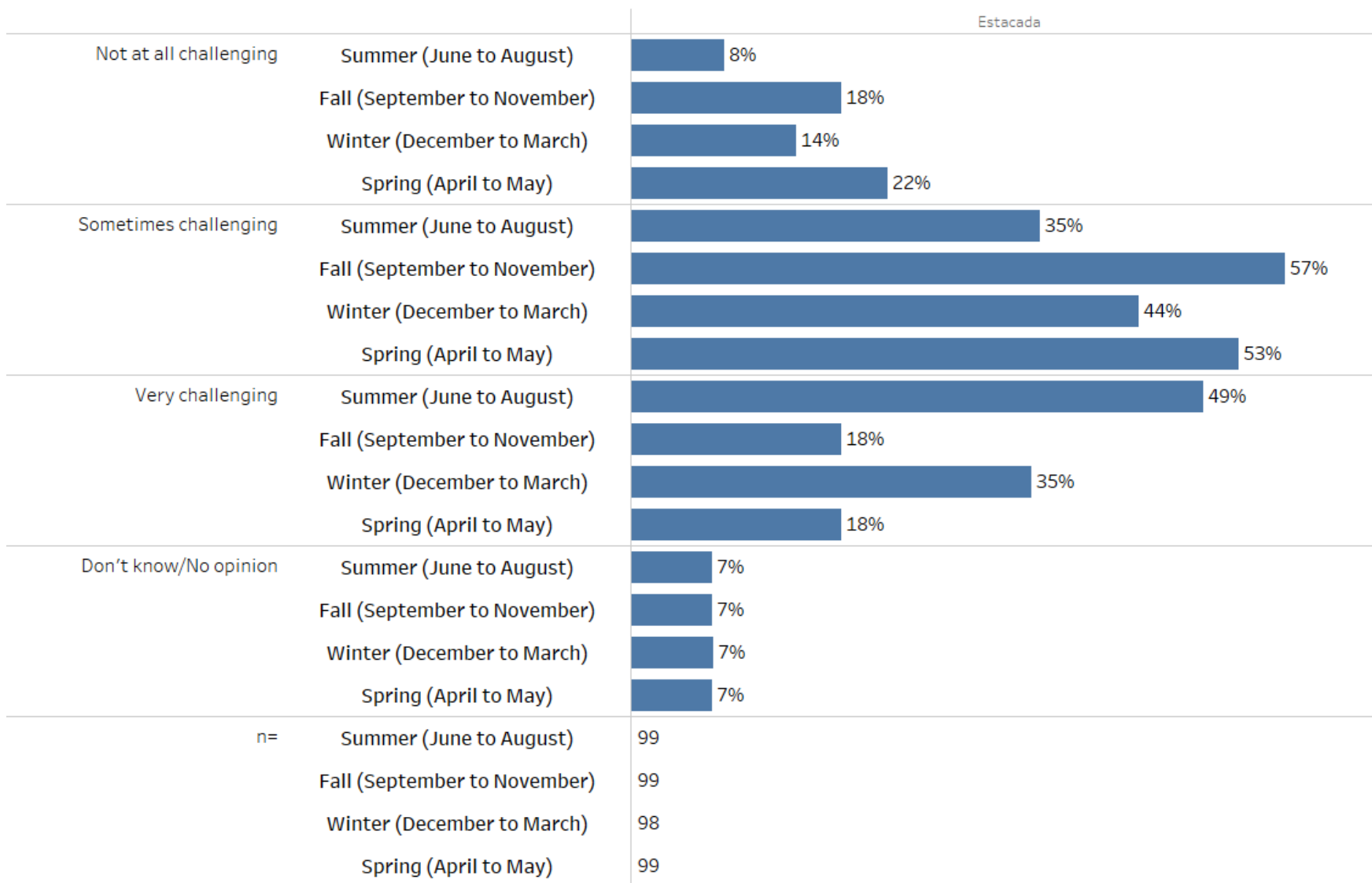
Thinking about your overall experience with vehicles and traffic in the Mt. Hood/Columbia River Gorge Region, how frequently do you experience challenges getting around your community?



Source: RRC

SEASONAL TRAFFIC CHALLENGES

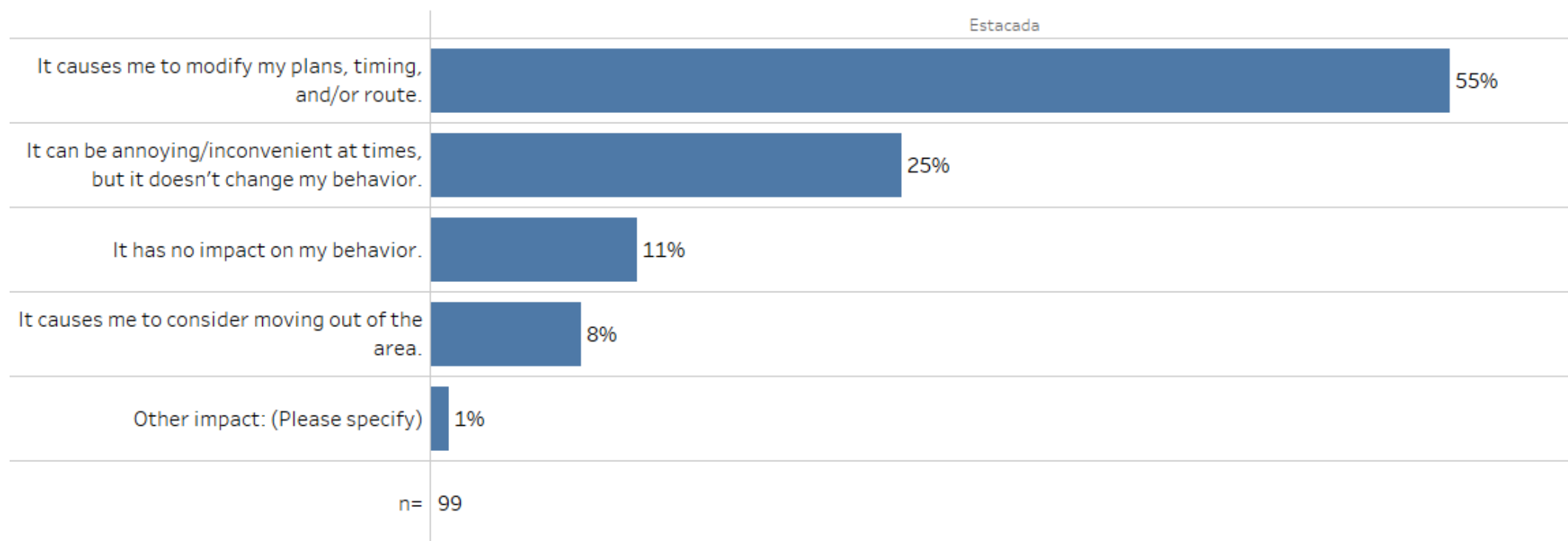
To what extent do you experience any challenges, if at all, driving in Mt. Hood/Columbia River Gorge Region during the following time periods?



Source: RRC

TRAFFIC IMPACTS ON BEHAVIOR

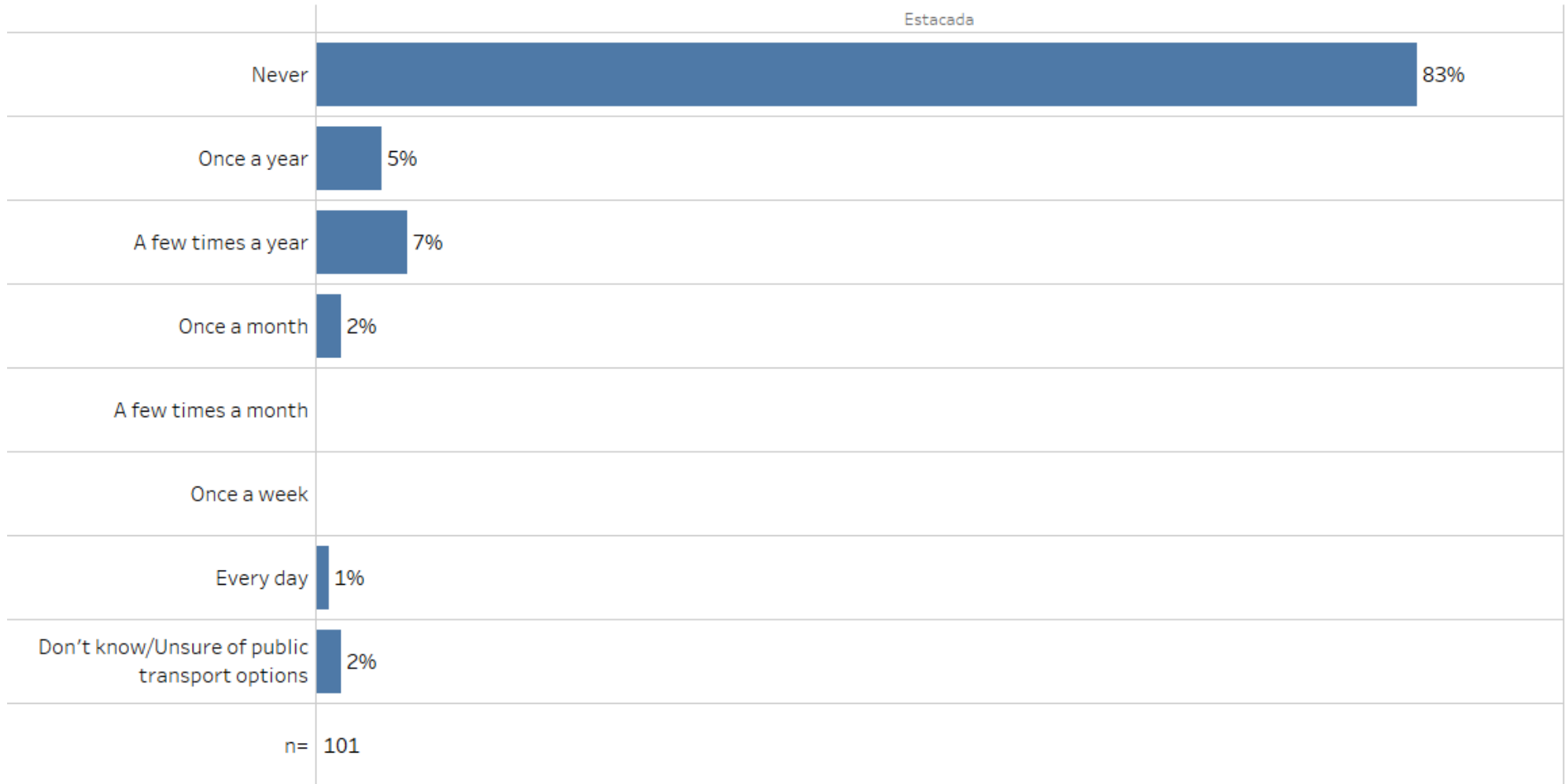
Do traffic conditions on the roads in the Mt. Hood/Columbia River Gorge Region at busy times cause you to modify your behavior?



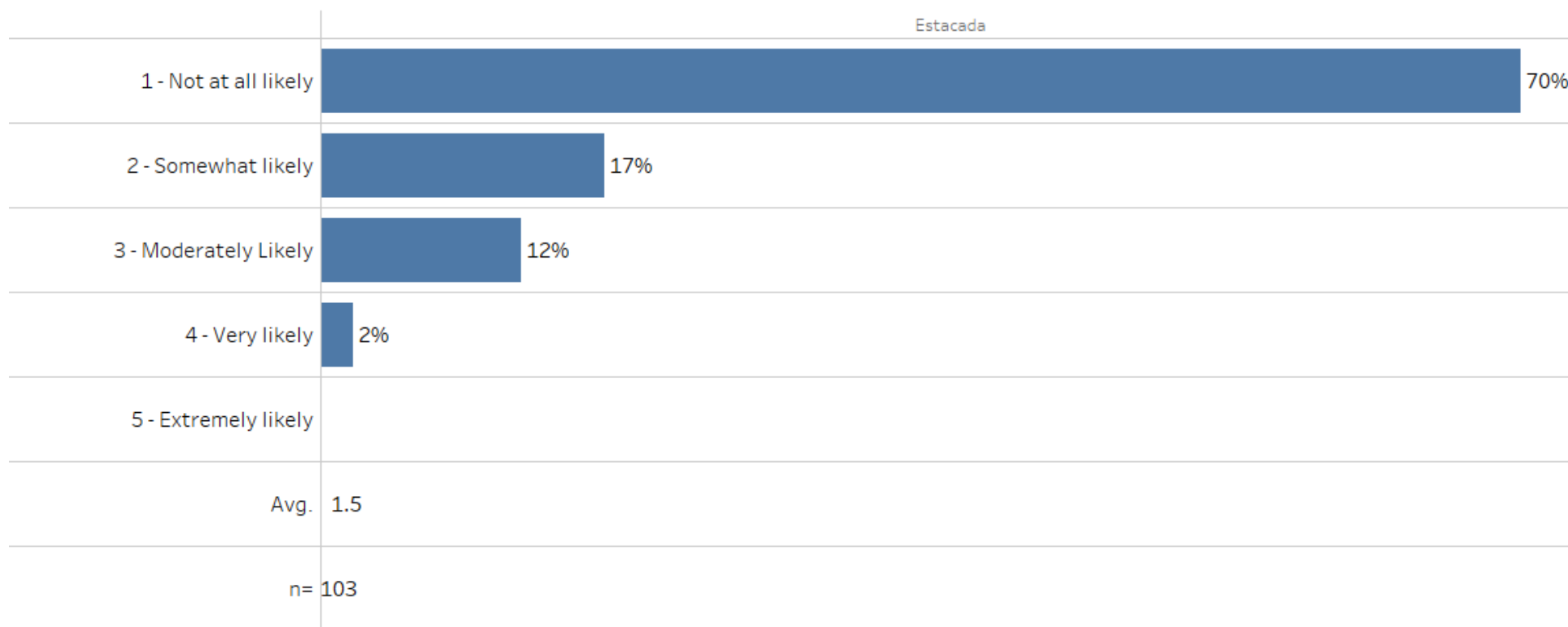
Source: RRC

PUBLIC TRANSIT USE

To what extent do you use public transit in the Mt. Hood/Columbia River Gorge Region (e.g., Columbia Area Transit, Mt. Hood Express)



How likely would you and your household be to use public transit in the Mt. Hood/Columbia River Gorge Region if there were more options (e.g., more frequent service or additional routes)?



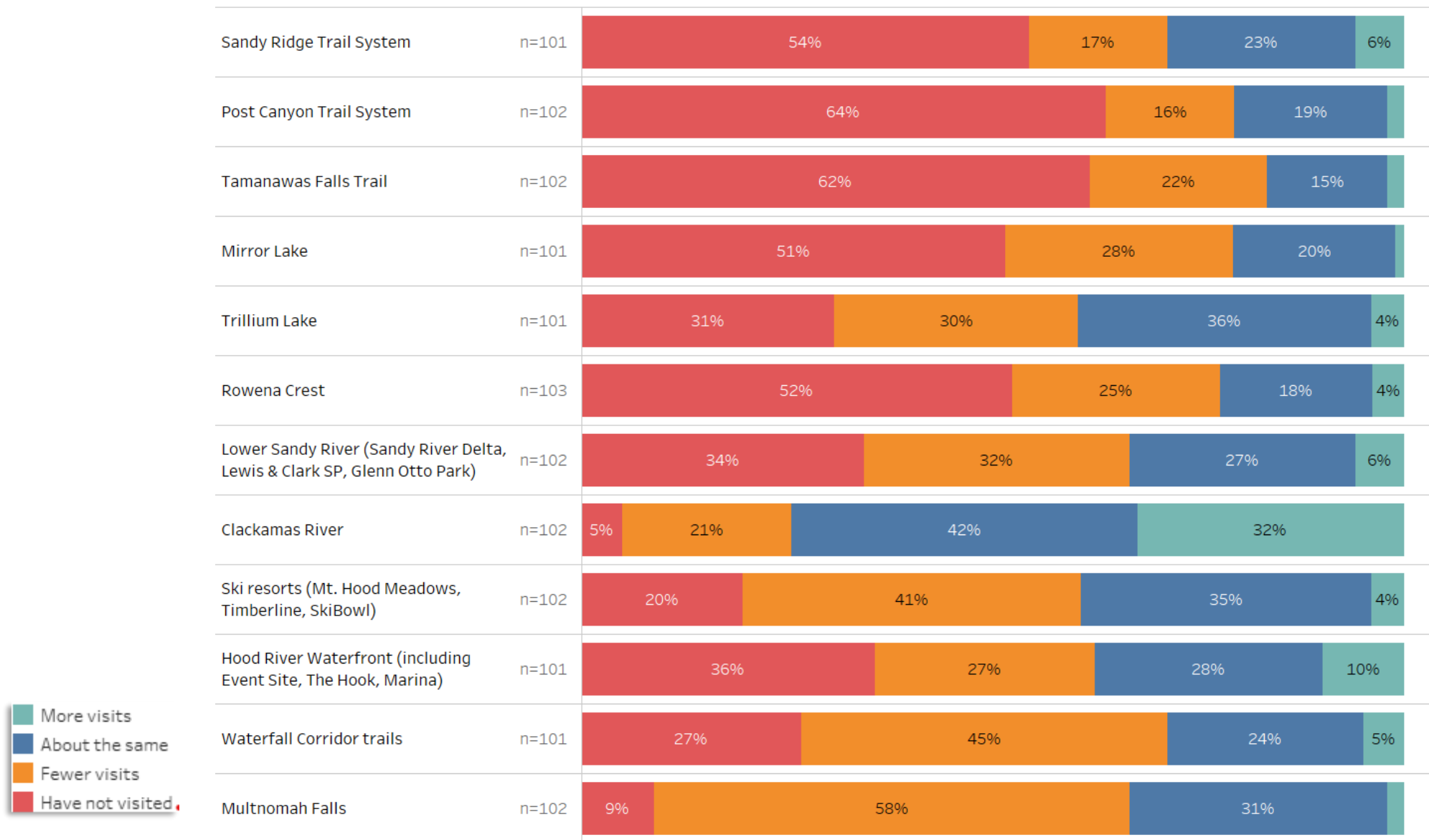
Source: RRC

An aerial photograph of a dense evergreen forest, likely spruce or fir, with a central vertical line running through the middle. The trees are a vibrant green, and the canopy is thick. A semi-transparent dark banner is at the bottom, containing the title text.

RECREATION IN THE REGION

RECREATION CHANGES OVER TIME

To what extent has your visitation/use of various locations in the Mt. Hood/Columbia River Gorge Region changed over time?
Estacada

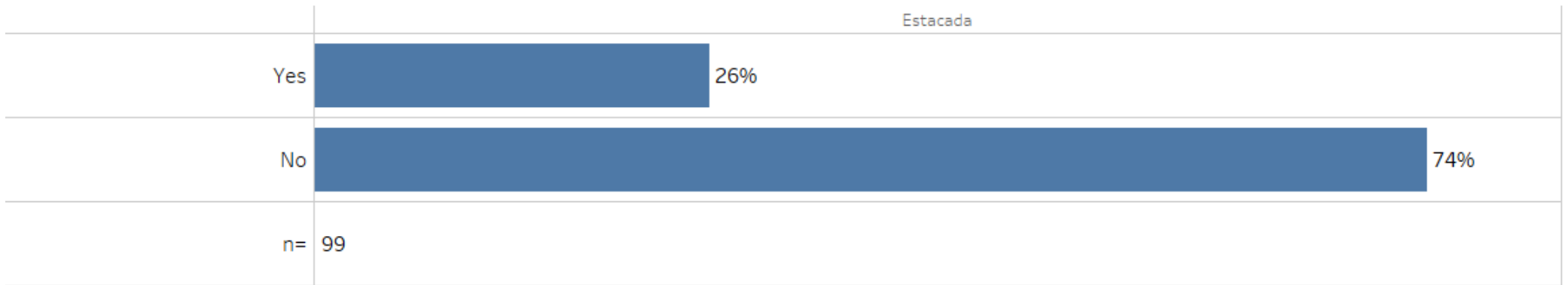


Source: RRC



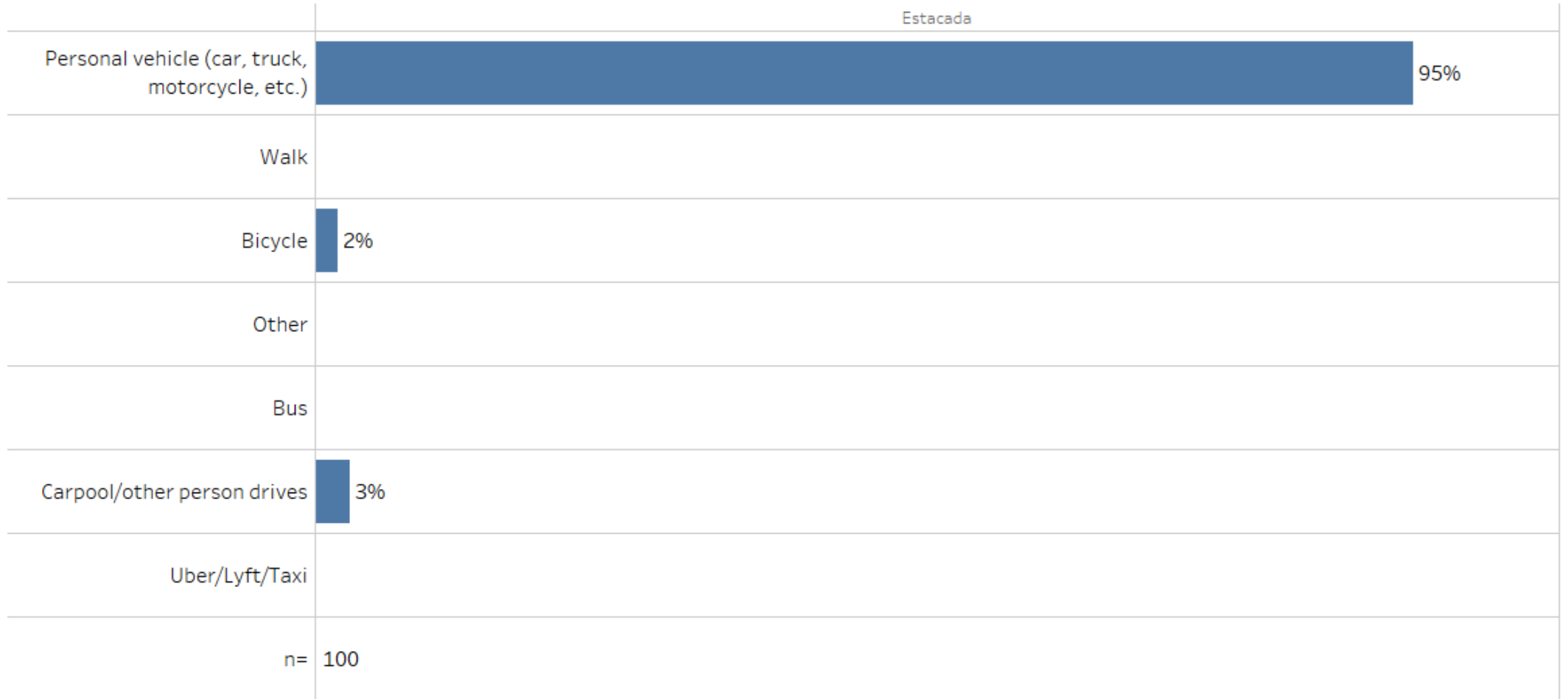
| DEMOGRAPHICS

Are you employed in the Mt. Hood/Columbia River Gorge Region?



Source: RRC

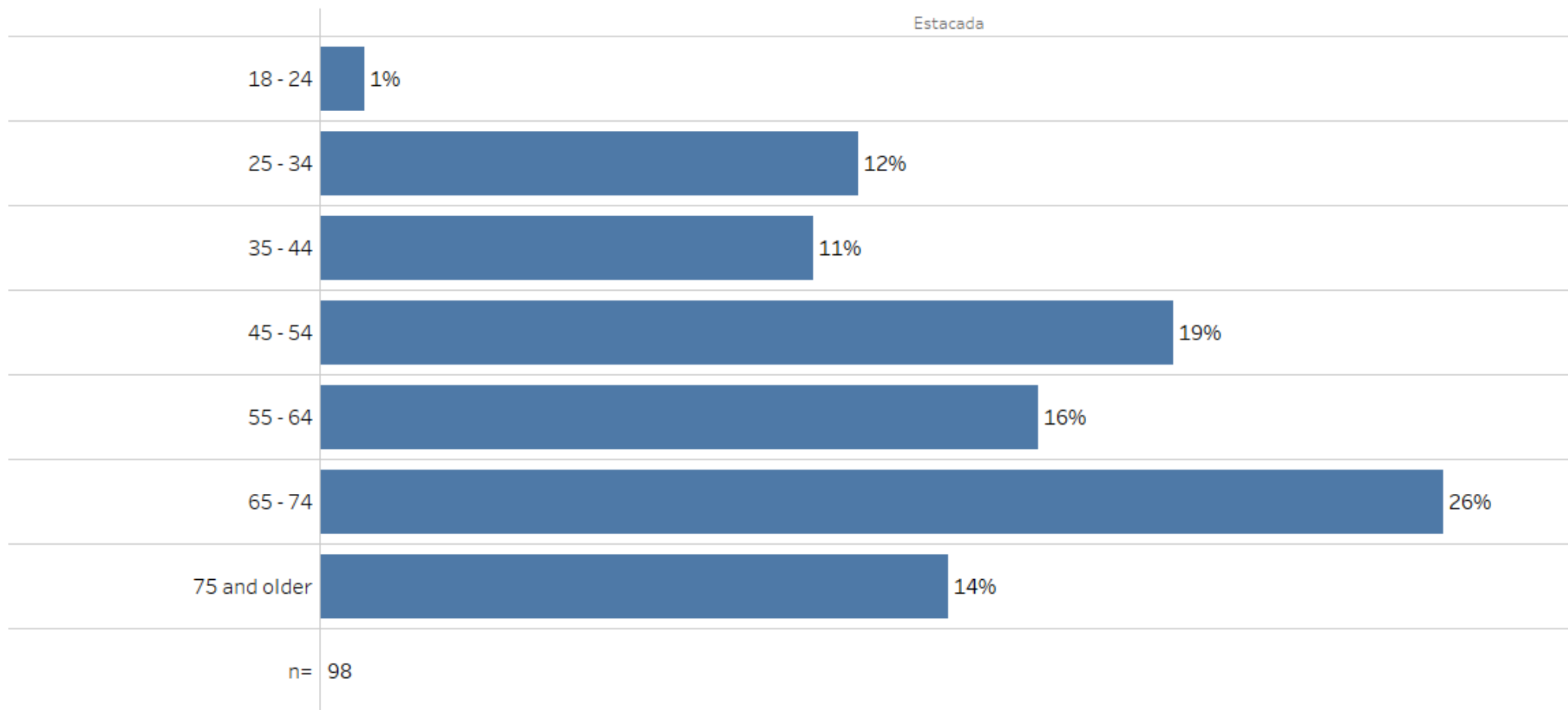
How do you typically get around the area?



Source: RRC

RESPONDENT AGE

What is your age?



Source: RRC

RESPONDENT GENDER

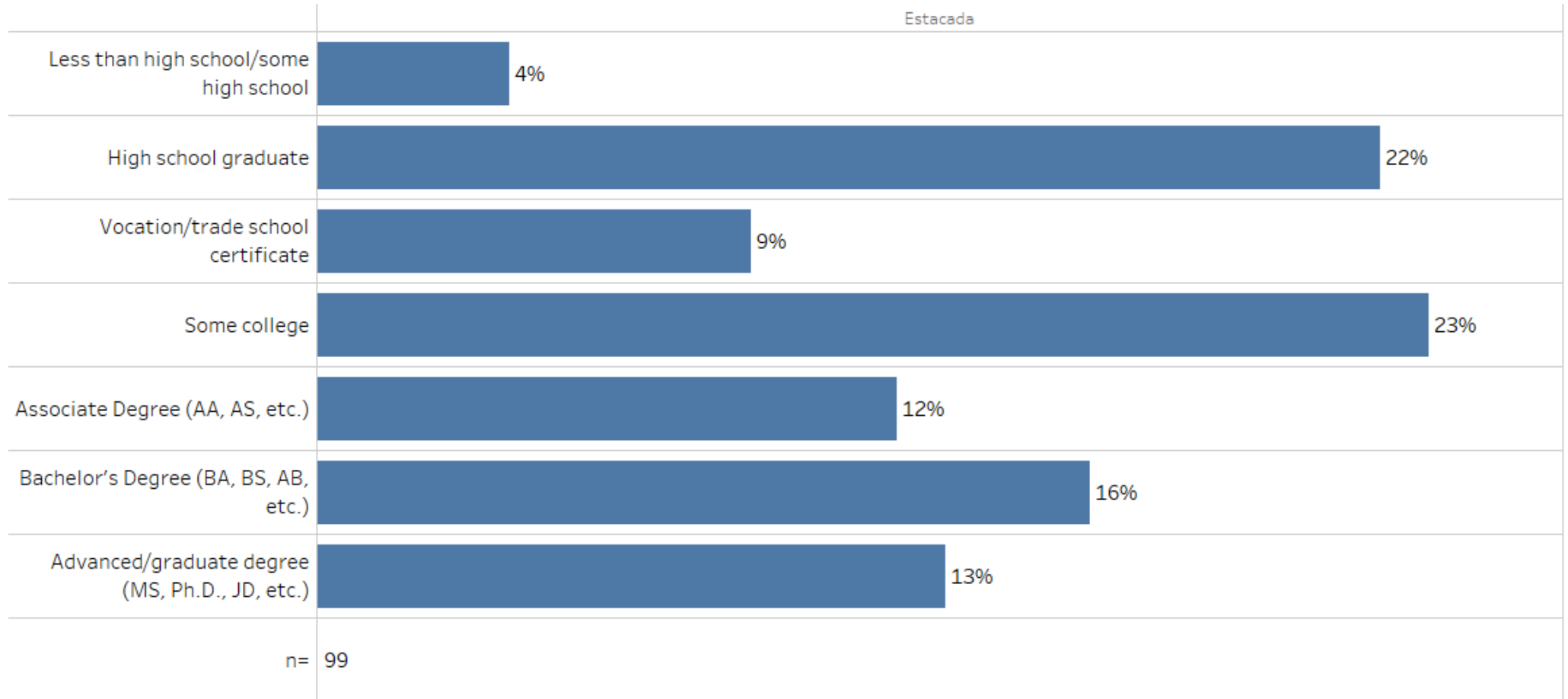
What is your gender?



Source: RRC

EDUCATIONAL ATTAINMENT

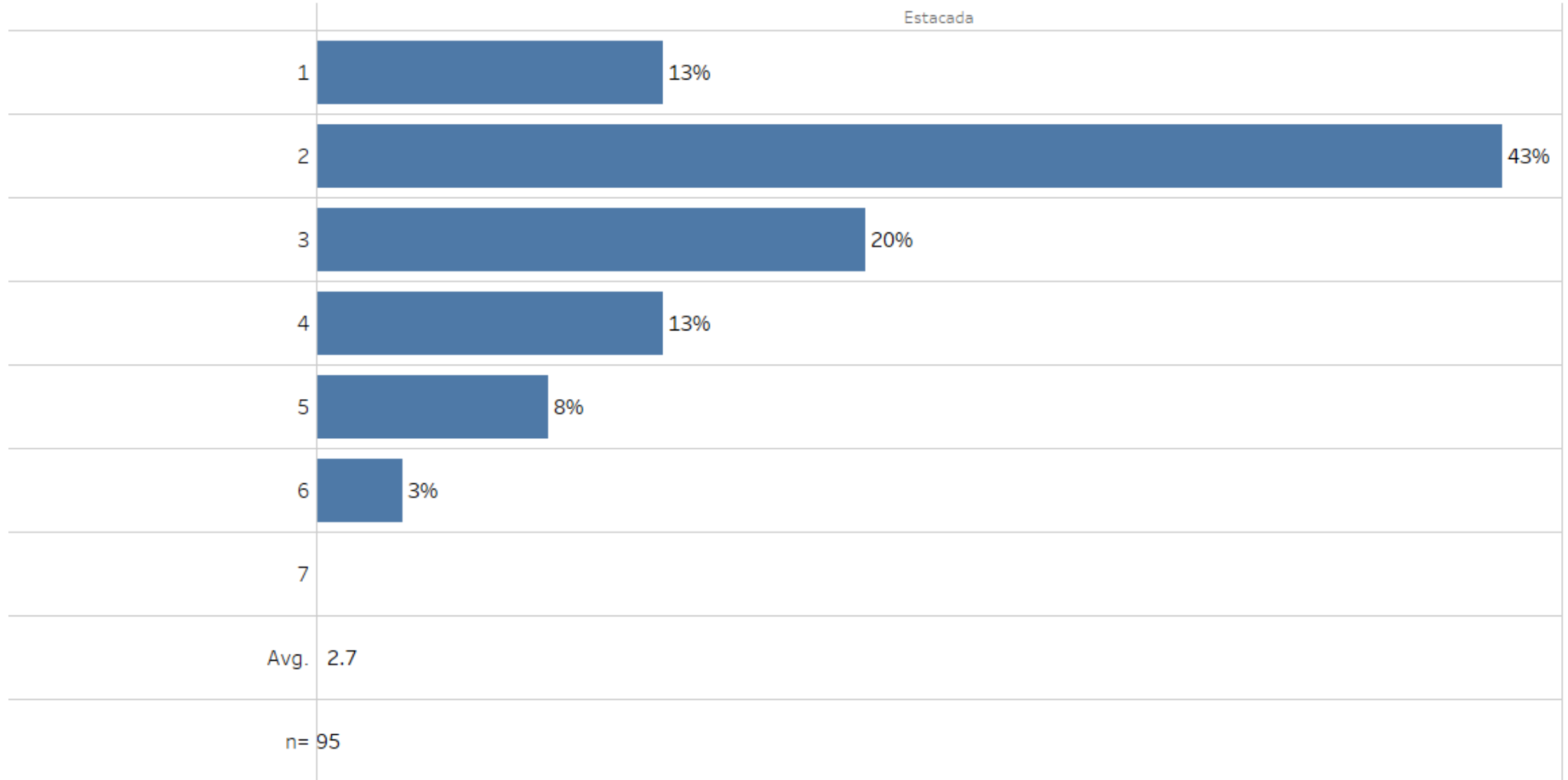
What is your highest level of education?



Source: RRC

HOUSEHOLD MAKEUP

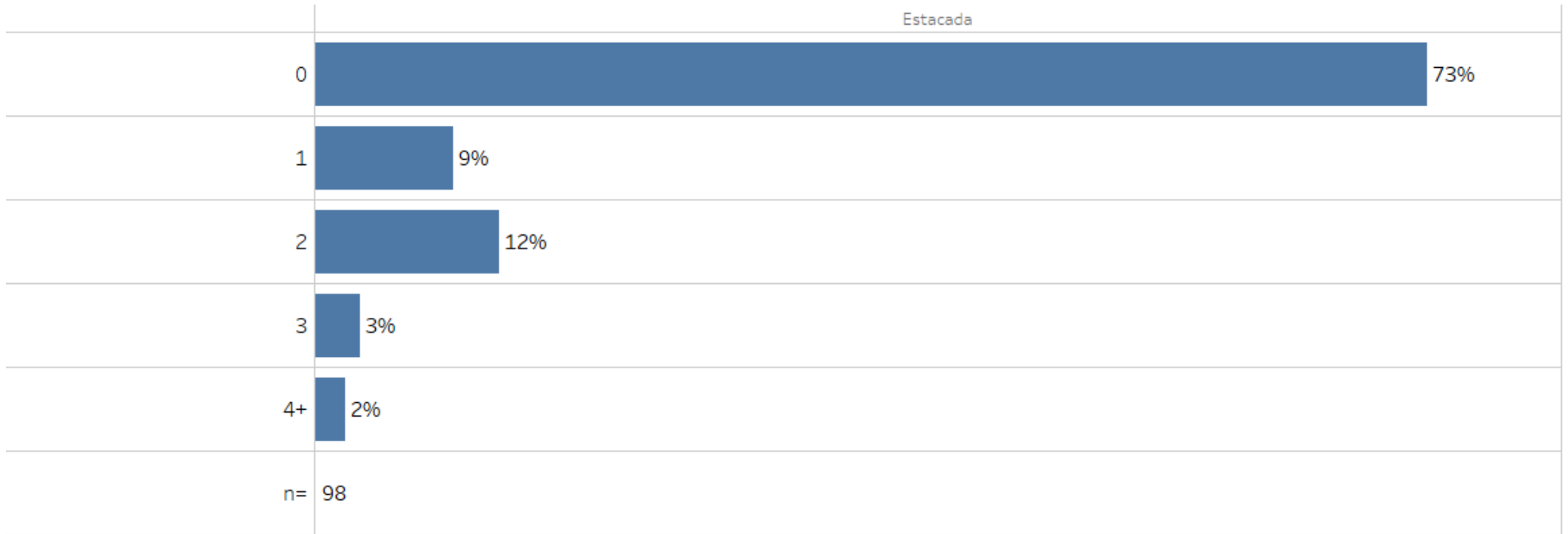
Including yourself, how many people live in your household? (Enter 1 if you live alone)



Source: RRC

PRESENCE OF YOUTH

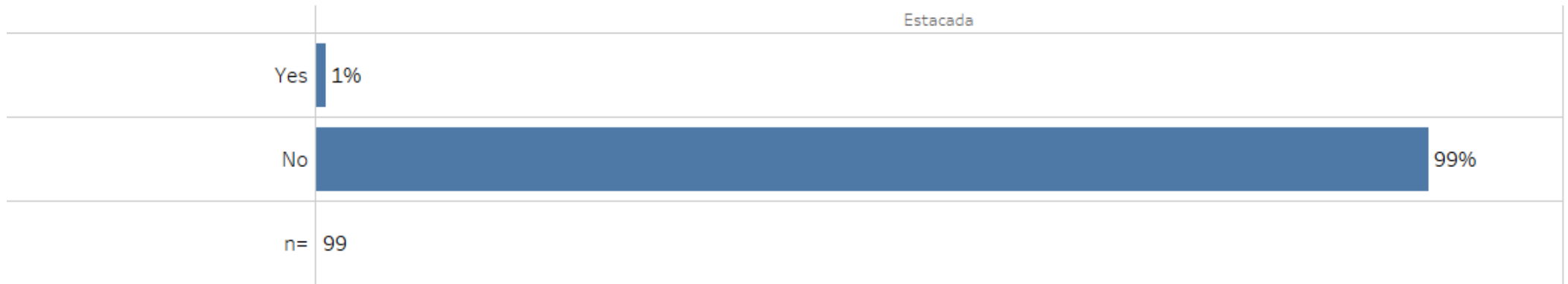
How many people in your household are under 18 years old?



Source: RRC

RESPONDENT ETHNICITY

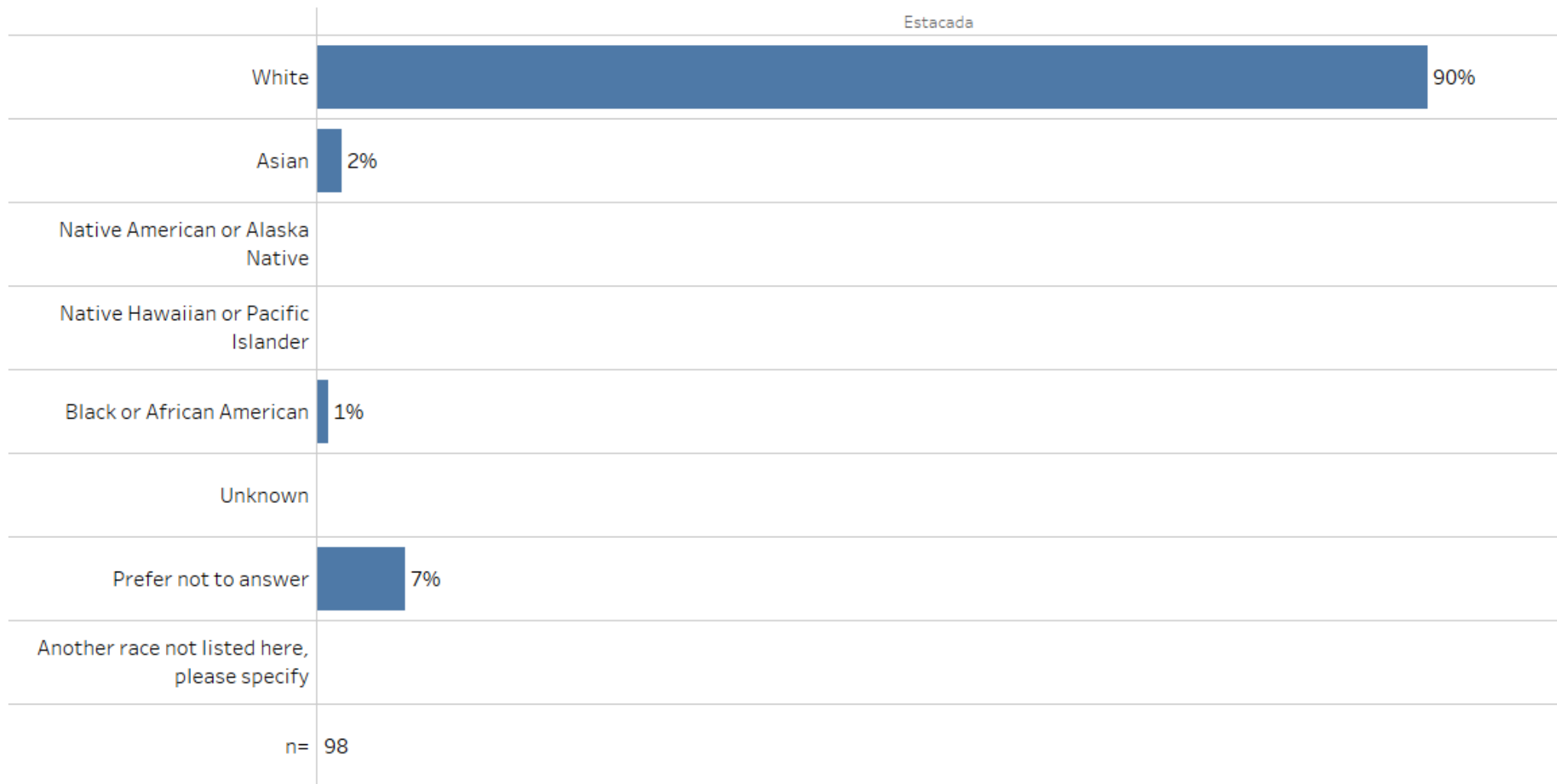
Are you of Hispanic, Latino, or Spanish origin?



Source: RRC

RESPONDENT RACE

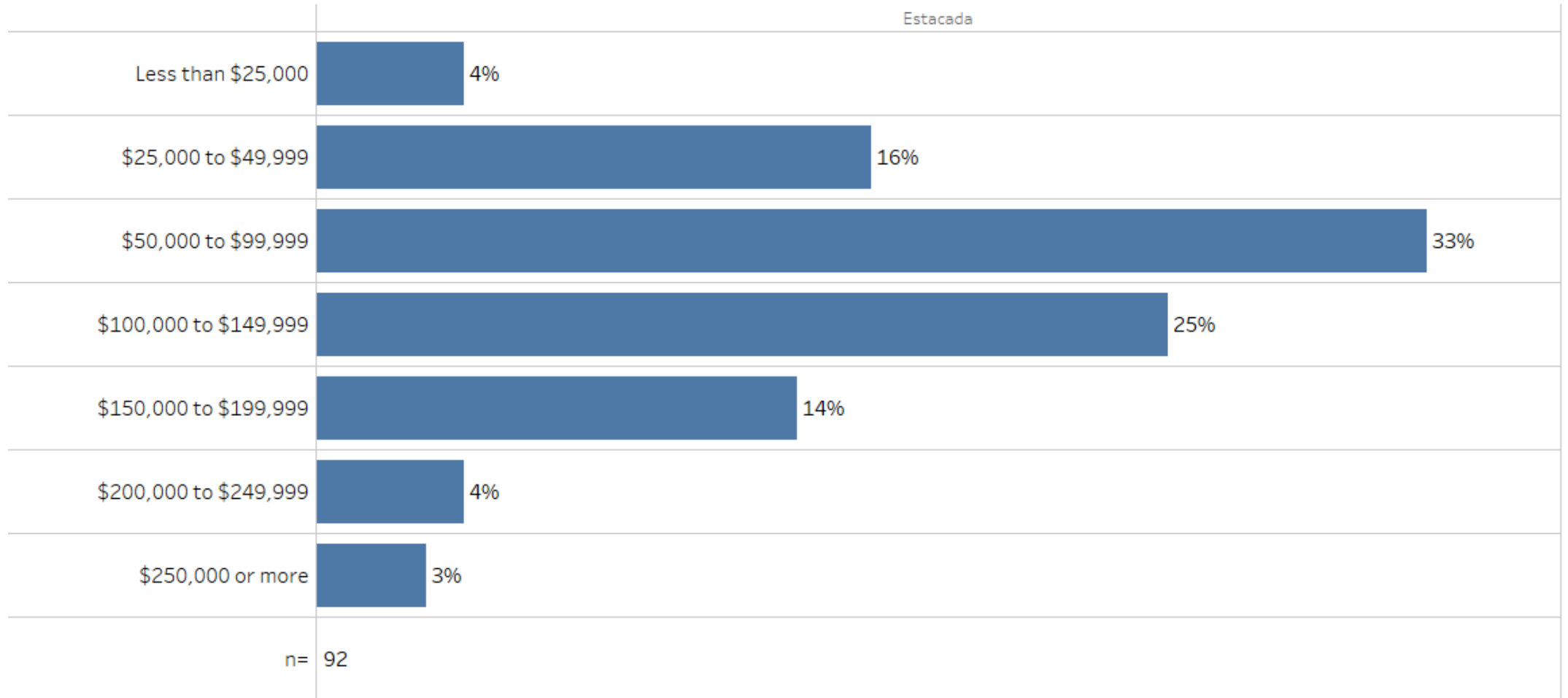
Which race or ethnicity do you most identify with? (Please select all that apply)



Source: RRC

HOUSEHOLD INCOME

Which of these categories best describes the total gross annual income of your household (before taxes)?



Source: RRC



THANK YOU!



RRC

RRC Associates

4770 Baseline Road, Suite 355
Boulder, CO
80303

(303) 449-6558

www.rrcassociates.com