

### MT. HOOD & THE COLUMBIA RIVER GORGE 2023 RESIDENT COMMUNITY SURVEY FINAL REPORT -SANDY







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# 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 o 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.



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





### **RESEARCH METHODS** SANDY SURVEY COLLECTION

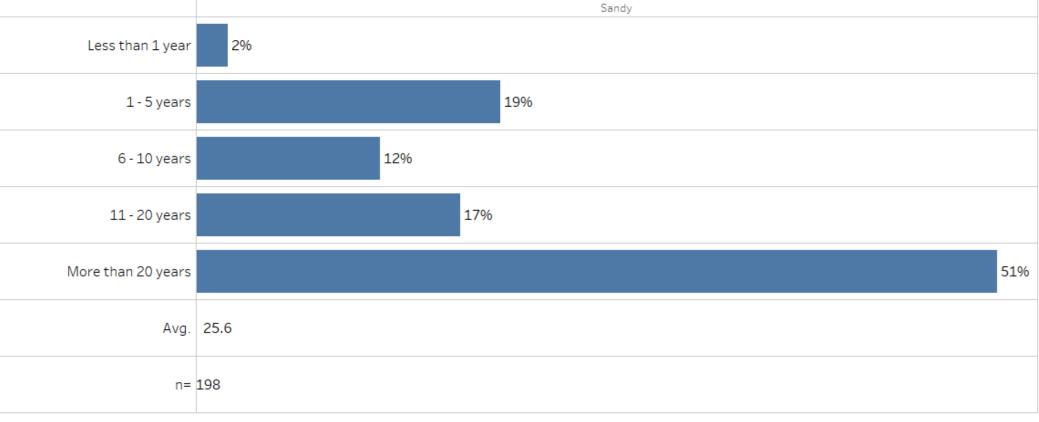
Due to low sample size, the Invite (statistically valid) and the Open link sample were combined to create a more reliable sample.





## LIVING IN THE MT. HOOD/COLUMBIA RIVER GORGE REGION





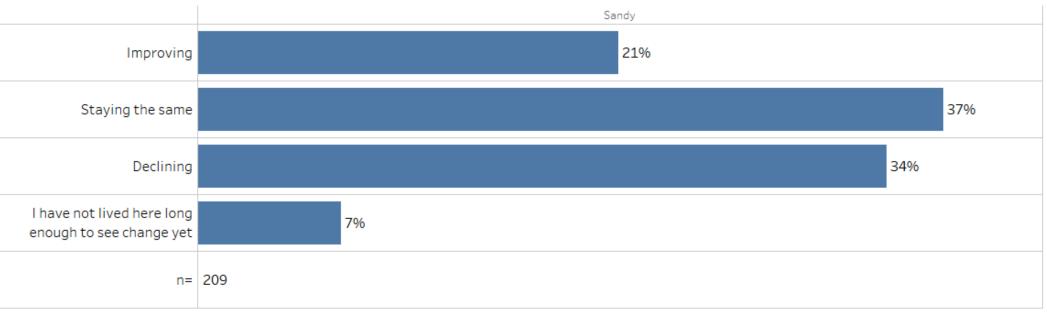
### What describes your residence in the Mt. Hood/Columbia River Gorge Region?

	Sandy
Primary residence/Year-round resident	
Seasonal or secondary residence/Second homeowner	
Temporary resident	
n=	213
	I

## QUALITY OF LIFE



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



### 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?

Sandy

Safety and security	n=208	Avg. 4.8	4%	17%				79%				
Scenic beauty	n=207	Avg. 4.6	5%		28%			66%				
Environmental quality	n=207	Avg. 4.5	9%		30	)%		59%				
Family friendly	n=204	Avg. 4.3	100	%		36%		50%				
Parks & recreation facilities	n=204	Avg. 4.1		20%		359	6		4	41%		
Access to outdoor recreational opportunities	n=200	Avg. 4.3		12%		33%		50%				
Small/local businesses	n=205	Avg. 4.0		19%		46%				31%		
Access to locally sourced food	n=204	Avg. 3.8	5% 6%	ó	23%	35				30%		
Variety of restaurants	n=203	Avg. 3.7	4% 8%	6	27	7%	3	35%		26%		
Access of area amenities to all user groups	n=191	Avg. 3.5	8%	8%		28%		35%			20%	
Schools (Pre-K – 12)	n=194	Avg. 3.6	19	9%	5%	14%	20%		4	3%		
Bike/walk mobility	n=202	Avg. 3.4	13%	9	9%	28%		27%			23%	
Arts/culture/entertainment	n=203	Avg. 3.2	10%	13	3%	359	6	29			13%	
Variety of retail shopping	n=206	Avg. 3.4	9%	10%		27%		39%			14%	
ocal events/festivals	n=203	Avg. 3.4	7%	11%		33%		35%			13%	
Economic opportunities	n=196	Avg. 3.3	15%	5	9%	26%		30%	ò		20%	
Local heritage	n=195	Avg. 3.4	9%	9%		36%		239	%	23%		
Diversity of the community	n=204	Avg. 3.3	11%	11	.%	33%		2	5%		20%	
Proximity to your workplace	n=188	Avg. 2.9		29%		11%	23%	23% 1			18%	
Access to public transportation	n=202	Avg. 2.6		29%		17%		29%		12%	13%	
Other: (Please specify:) 5 - Very important	n=38	Avg. 4.3	11%	5%	11%			74%				

Source: RRC

4

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

Scenic Beauty	n=199	Avg. 4.2	1	7%	35%		44	%
Family friendly	n=195	Avg. 4.0	4%	18%	2	18%		28%
Proximity to your workplace	n=123	Avg. 3.7	6% 5%	33%		24%		32%
Access to outdoor recreational opportunities	n=190	Avg. 4.1		19%	39%			37%
Parks & recreation facilities	n=194	Avg. 3.7	10%	29%		41	%	19%
Environmental quality	n=200	Avg. 3.8	6%	29%		40%		25%
Small/local businesses	n=198	Avg. 3.7	5%	36%			43%	15%
Local heritage	n=171	Avg. 3.6	9%	36	%	3	31%	22%
Access of area amenities to all user groups	n=162	Avg. 3.5	5%	439	6		36%	14%
Local events/festivals	n=187	Avg. 3.6	6%	379	6	2	9%	23%
Bike/walk mobility	n=169	Avg. 3.4	7% 1	33%			31%	17%
Access to locally sourced food	n=190	Avg. 3.5	16%	6	28%	3	33%	21%
Arts/culture/entertainment	n=175	Avg. 3.4	14%		41%		31%	13%
Diversity of the community	n=185	Avg. 3.4	5% 10%	6	41%		28%	17%
Variety of restaurants	n=196	Avg. 3.2	9%	15%	38%		27%	11%
Economic opportunities	n=143	Avg. 3.5	10%		41%		31%	15%
Variety of retail shopping	n=191	Avg. 3.3	5%	17%	35%		30%	12%
Safety and security	n=201	Avg. 3.6	<mark>4%</mark> 9%	29%	)	37	7%	20%
Access to public transportation	n=138	Avg. 3.6	4% 9%	3	38%		26%	23%
Schools (Pre-K – 12) 5 - Very satisfied	n=140	Avg. 3.5	5% 8%	34	%		35%	18%
Other: (Please specify:) 4	n=32	Avg. 2.1		38%		31%	19	% 6% 6%
2								Sour

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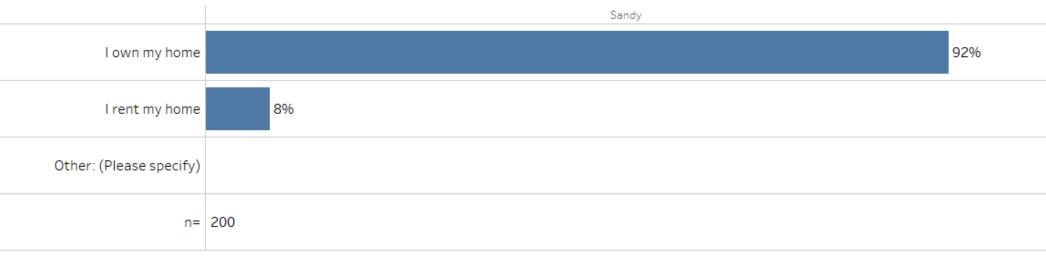
### In the graph below, average importance and satisfactions ratings are compared to demonstrate areas that may need more attention.

- 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.

								Sandy						
Safety and security				3.6					4.8	-1.2				
Environmental quality				3.8					4.5	-0,	7			
Variety of restaurants			3.2	2					3.7		0.5			
Parks & recreation facilities				3.7					4.1		-0.5			
Scenic Beauty				4.	2				4.6		-0.4			
Small/local businesses				3.7					4.0		-0.4			
Family friendly				4.0					4.3		-0.4			
Access to locally sourced food				3.5					3.8		-0.3			
Access to outdoor recreational opportunities				4.1	L				4.3		-0.2			
Variety of retail shopping			3	.3					3.4		-0.1	L 👘		
Schools (Pre-K – 12)				3.5					3.6		-0.1	1		
Access of area amenities to all user groups				3.5					3.5			0	.0	
Bike/walk mobility			:	3.4					3.4			C	0.0	
Diversity of the community				3.4					3.3				0.1	
Economic opportunities				3.5					3.3				0.2	
Arts/culture/entertainment			:	3.4					3.2				0.2	
Local heritage				3.6					3.4				0.2	
Local events/festivals				3.6					3.4				0.3	
Proximity to your workplace				3.7				2.	9					0.9
Access to public transportation				3.6				2.6						0.9
	0 1	2	3	4	50	1	2	2 3	4	5-1.5 -1.0	-0.5	0.0	0.5	1.0
		Ratings Sa	atisfacti	on 🖈			Ratin	g Import	ance 🖈	Importa	nce Satis	sfact	ion Diffe	erence

## CURRENT TOPICS IN THE REGION

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



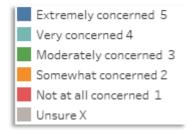
Source: RRC

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

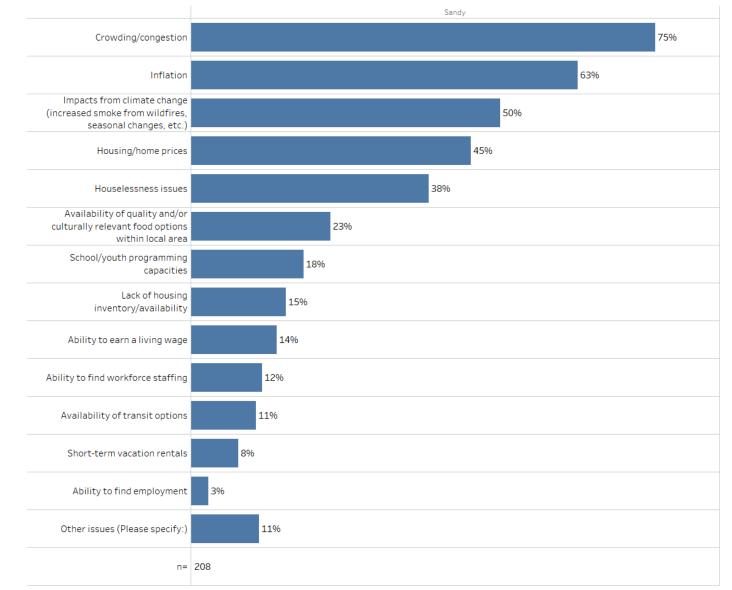


How concerned are you about the following aspects of housing in your community within the Mt. Hood/Columbia River Gorge Region Sandy

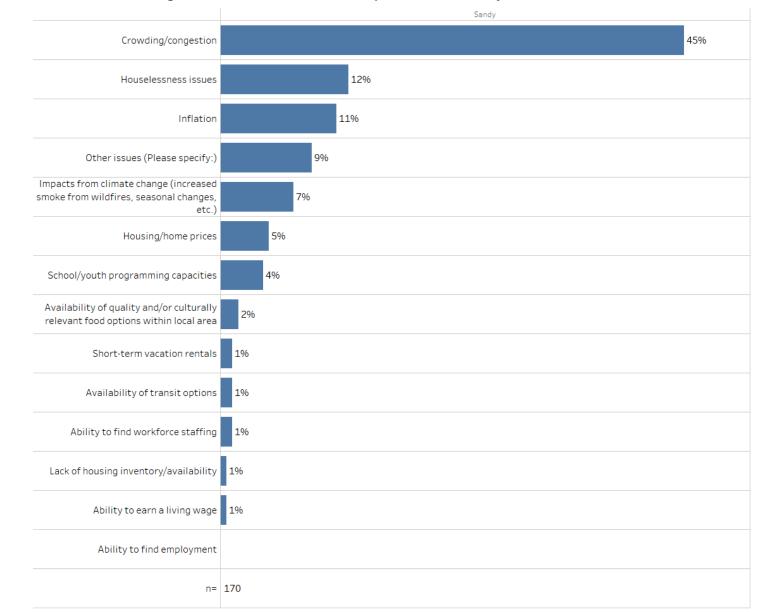
Cost of housing	n=205	Avg. 3.7	3% <mark>9</mark>	% 6%	27%	29%	2	26%		
Housing availability	n=201	Avg. 3.1	5%	21%	11%	27%	22%	12%		



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

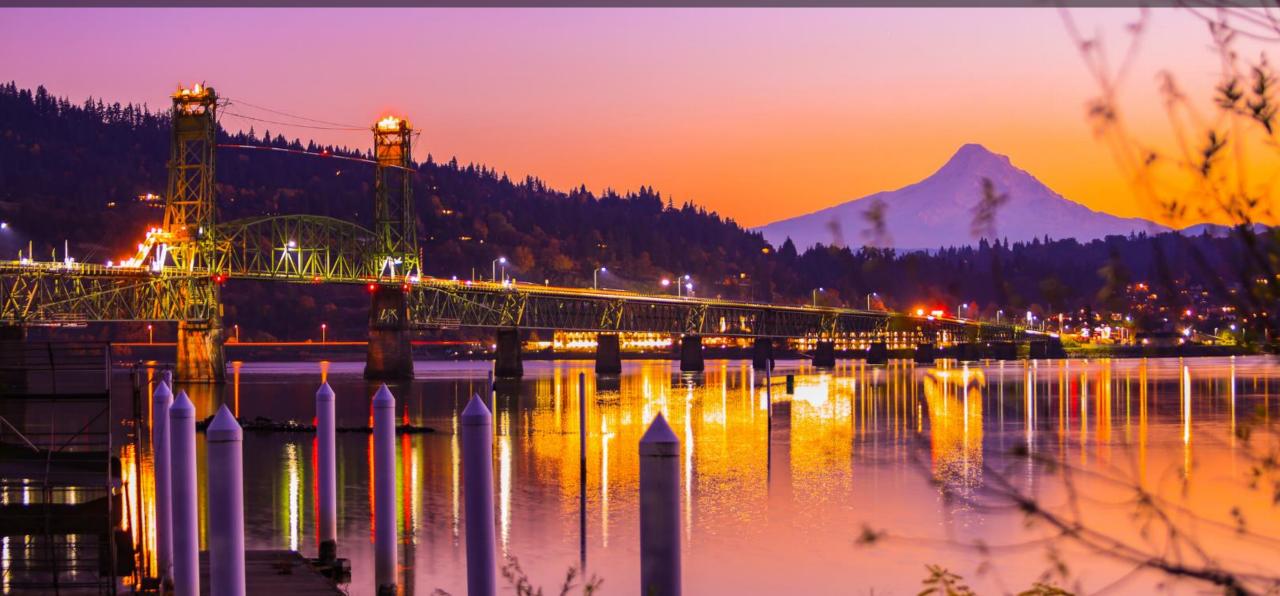


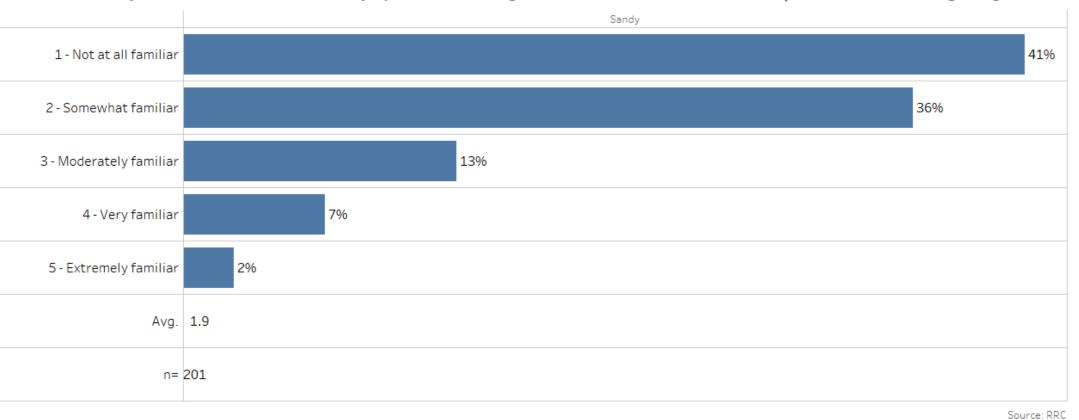




#### Which issue or challenge from Question 12 is the most important to address by local officials or decision-makers?

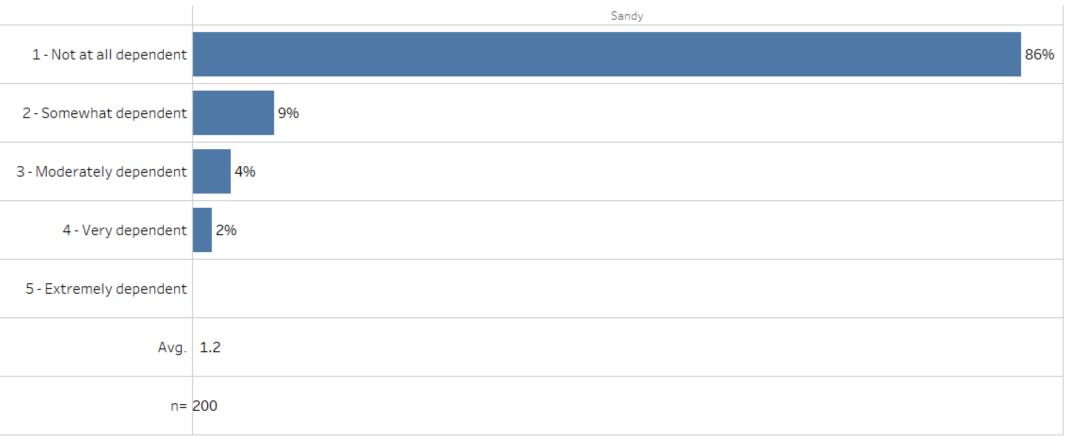
## TOURISM IN THE REGION



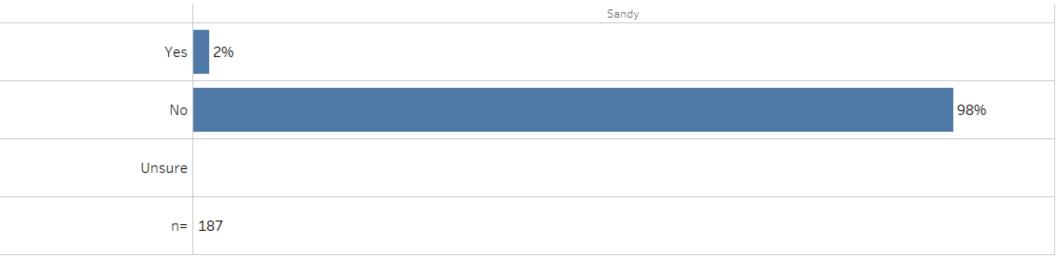


How familiar are you with the tourism industry operators, managers, or marketers in the Mt. Hood/Columbia River Gorge Region?

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



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

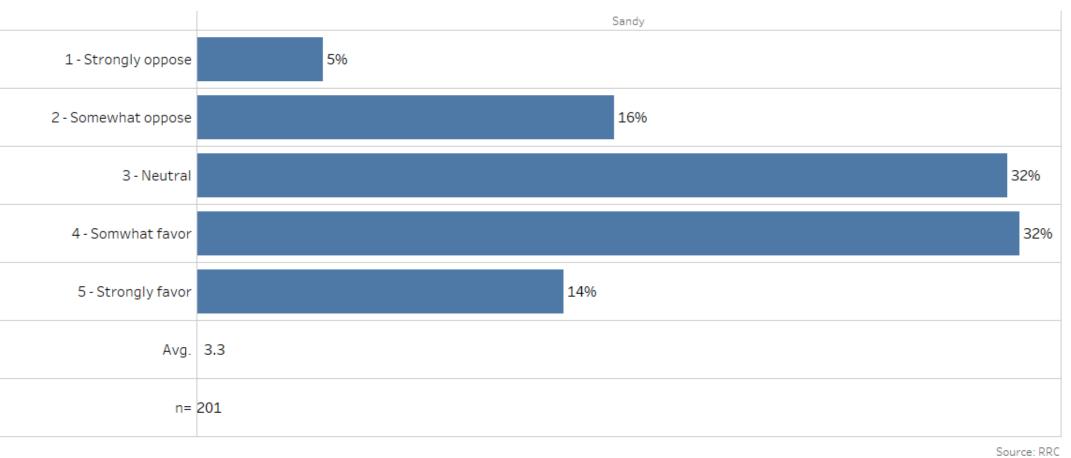


#### How much do you agree or disagree that...?

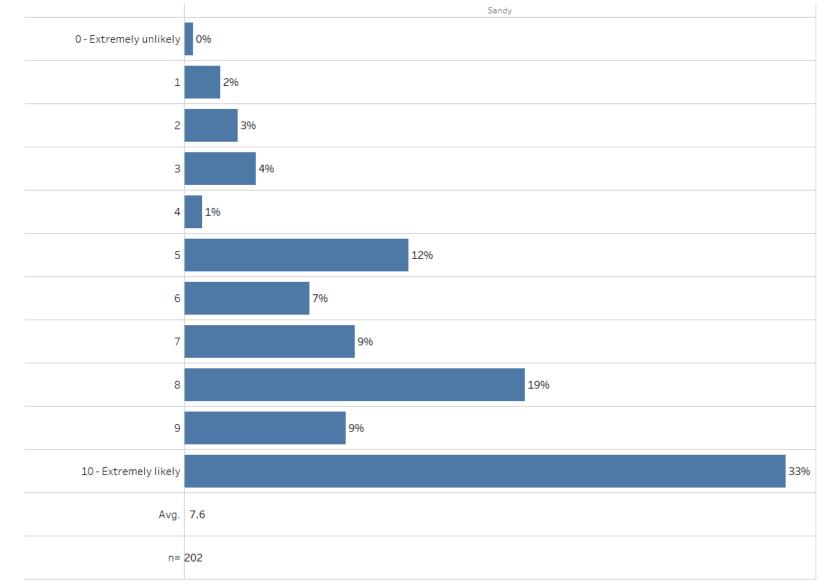
#### Sandy

head       head       24%       46%       24%         Hood/Columbia River Gorge Region in the region.       n=192       Avg. 3.3       25%       25%       47%       24%         Hood/Columbia River Gorge Region es a welcoming experience for people rse ethnic or religious backgrounds.       n=192       Avg. 3.3       4%       14%       41%       29%       12%         spending helps sustain regional ts' quality of life.       n=192       Avg. 3.3       5%       12%       29%       12%         are better shopping, dining, and lopportunities in the region because ism.       n=192       Avg. 3.1       8%       19%       33%       32%       30%       10%         sto Mt. Hood/Columbia River Gorge Region ism.       n=188       Avg. 3.1       8%       19%       33%       32%       30%       10%         sto Mt. Hood/Columbia River Gorge behave respectfully towards my inity.       n=188       Avg. 3.2       8%       29%       31%       29%       10%         Hood/Columbia River Gorge Region is the Hood/Columbia River Gorge Region is n=188       Avg. 2.5       18%       34%       28%       28%       19%       38%       9%         tinfrastructure and visitor services in hood/columbia River Gorge Region is ner currently being taken to address ia negative impacts of visitors to our       n=152 <td< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></td<>											
es a high-quality experience to people n=192 Avg. 3.9 25% 47% 24%   2. Hood/Columbia River Gorge Region is n=192 Avg. 3.3 4% 14% 41% 29% 12%   spending helps sustain regional n=192 Avg. 3.5 5% 13% 29% 37% 17%   spending helps sustain regional n=192 Avg. 3.5 5% 13% 29% 37% 17%   spending helps sustain regional n=192 Avg. 3.5 5% 13% 29% 37% 10%   re better shopping, dining, and n=189 Avg. 3.2 7% 20% 33% 30% 10%   re better shopping, dining, and n=188 Avg. 3.2 7% 20% 33% 30% 10%   re are better shopping, dining, and n=188 Avg. 3.1 8% 19% 33% 32% 8%   sto Mt. Hood/Columbia River Gorge n=188 Avg. 2.9 8% 33% 27% 19%   sto Mt. Hood/Columbia River Gorge Region is n=188 Avg. 3.4 19% 33% 27% 19%   sto Mt. Hood/Columbia River Gorge Region is n=188 Avg. 2.5 18% 34% 28% 18% 38%   sto Mt. Hood/Columbia River Gorge Region is n=188 Avg. 2.5 18% 34% 28% 18% 38%   sto Mt. Hood/Columbia River Gorge Region is n=188 Avg. 2.5 18% 34% 28% 18% 38%   sto Mt. Hood/Columbia River Gorge Region is n=188 Avg. 2.4 </th <th>Visitors to Mt. Hood/Columbia River Gorge Region benefit our local economy.</th> <th>n=195</th> <th>Avg. 3.8</th> <th>5%</th> <th>24%</th> <th></th> <th></th> <th>48%</th> <th></th> <th>219</th> <th>6</th>	Visitors to Mt. Hood/Columbia River Gorge Region benefit our local economy.	n=195	Avg. 3.8	5%	24%			48%		219	6
es a welcoming experience for people n=182 Avg. 3.3 40 1496 4196 2996 1296 1296 1296 1296 1296 1296 1	The Mt. Hood/Columbia River Gorge Region provides a high-quality experience to people visiting in the region.	n=192	Avg. 3.9		25%			47%		24%	
http://ulity.of life.       h=192       Avg. 3.5       Sto       13%       29%       37%       17%         are better shopping, dining, and il opportunities in the region because ism.       n=189       Avg. 3.2       7%       20%       33%       30%       10%         are better shopping, dining, and il opportunities in the region because ism.       n=189       Avg. 3.2       7%       20%       33%       30%       10%         are better shopping, dining, and il opportunities in the region because ism.       n=188       Avg. 3.1       9%       19%       33%       30%       10%         are better shopping, dining, and inty outweigh the negative impacts       n=188       Avg. 3.1       9%       19%       33%       32%       9%         s to Mt. Hood/Columbia River Gorge Region is powded because of too many visitors.       n=188       Avg. 3.4       19%       33%       27%       19%         are currently being taken to address ial negative impacts of visitors to our s to Mt. Hood/Columbia River Gorge       n=152       Avg. 2.4       15%       38%       38%       9%<	The Mt. Hood/Columbia River Gorge Region provides a welcoming experience for people of diverse ethnic or religious backgrounds.	n=182	Avg. 3.3	4%	14%		41%		29%		12%
Al opportunities in the region because       n=189       Avg. 3.2       7%       20%       33%       30%       10%         ism.       are all benefits of tourism in my inity outweigh the negative impacts       n=188       Avg. 3.1       8%       19%       33%       32%       8%         s to Mt. Hood/Columbia River Gorge ibehave respectfully towards my inity.       n=188       Avg. 2.9       8%       29%       31%       29%       9%         .       Hood/Columbia River Gorge Region is bowded because of too many visitors.       n=188       Avg. 3.4       19%       33%       27%       19%         .       Hood/Columbia River Gorge Region is bowded because of too many visitors.       n=188       Avg. 3.4       19%       34%       28%       18%       36%         .       Hood/Columbia River Gorge Region poort the volume of tourism in the reg       n=188       Avg. 2.5       18%       34%       28%       38%       9%         .       are currently being taken to address ial negative impacts of visitors to our       n=152       Avg. 2.4       15%       38%       38%       9%       9%       9%       31%       9%       12%	Visitor spending helps sustain regional residents' quality of life.	n=192	Avg. 3.5	5%	13%	29%			37%	1	7%
Inity outweigh the negative impacts       n=188       Avg. 3.1       8%       19%       33%       32%       32%       8%         s to Mt. Hood/Columbia River Gorge behave respectfully towards my inity.       n=188       Avg. 2.9       8%       29%       31%       29%       31%       29%       31%       29%       19%       33%       32%       8%       29%       31%       29%       31%       29%       31%       29%       19%       33%       29%       19%       31%       29%       19%       33%       29%       19%       31%       29%       19%       31%       29%       19%       19%       33%       29%       19%       19%       33%       29%       19%       19%       31%       19%       29%       19%	There are better shopping, dining, and cultural opportunities in the region because of tourism.	n=189	Avg. 3.2	7%	20%		33%		30%		10%
behave respectfully towards my n=188 Avg. 2.9 8% 29% 31% 29%   inity Hood/Columbia River Gorge Region is powded because of too many visitors. n=188 Avg. 3.4 19% 33% 27% 19%   t infrastructure and visitor services in . Hood/Columbia River Gorge Region oport the volume of tourism in the reg n=188 Avg. 2.5 18% 34% 28% 18% 3%   are currently being taken to address ial negative impacts of visitors to our . n=152 Avg. 2.4 15% 38% 38% 9%	The overall benefits of tourism in my community outweigh the negative impacts	n=188	Avg. 3.1	8%	19%		33%		32%	6	8%
bowded because of too many visitors. n=188 AVg. 3.4 1990 3390 2790 1990 1990 1990 1990 1990 1990 1990 1	Visitors to Mt. Hood/Columbia River Gorge Region behave respectfully towards my community.	n=188	Avg. 2.9	8%	29	9%		31%		29%	
. Hood/Columbia River Gorge Region oport the volume of tourism in the reg       n=188       Avg. 2.5       18%       34%       28%       18%       3%         are currently being taken to address ial negative impacts of visitors to our n=152       Avg. 2.4       15%       38%       38%       9%         s to Mt. Hood/Columbia River Gorge       n=191       Avg. 3.1       5%       28%       31%       25%       12%	The Mt. Hood/Columbia River Gorge Region is overcrowded because of too many visitors.	n=188	Avg. 3.4		19%		33%		27%	19	%
ial negative impacts of visitors to our n=152 Avg. 2.4 <b>15% 38% 38% 9%</b> s to Mt. Hood/Columbia River Gorge n=191 Avg. 3.1 <b>5% 28% 31% 25% 12%</b>	Current infrastructure and visitor services in the Mt. Hood/Columbia River Gorge Region can support the volume of tourism in the reg		Avg. 2.5	1	8%	34	4%		28%	18%	3%
	Steps are currently being taken to address potential negative impacts of visitors to our region.	n=152	Avg. 2.4	15	%	38	%		38%		9%
	Visitors to Mt. Hood/Columbia River Gorge Region disrupt my quality of life.	n=191	Avg. 3.1	5%	28%		31%	6	259	%	12%

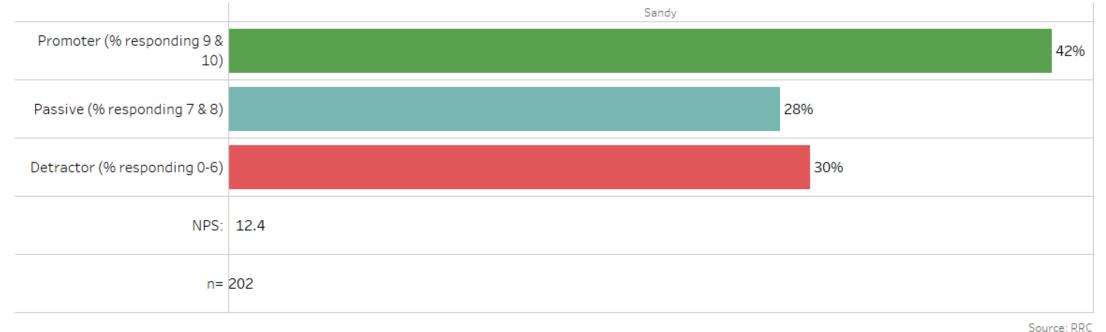
How supportive are you about promoting Mt. Hood and the Columbia River Gorge to attract visitors from out of the region to visit?



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)



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.



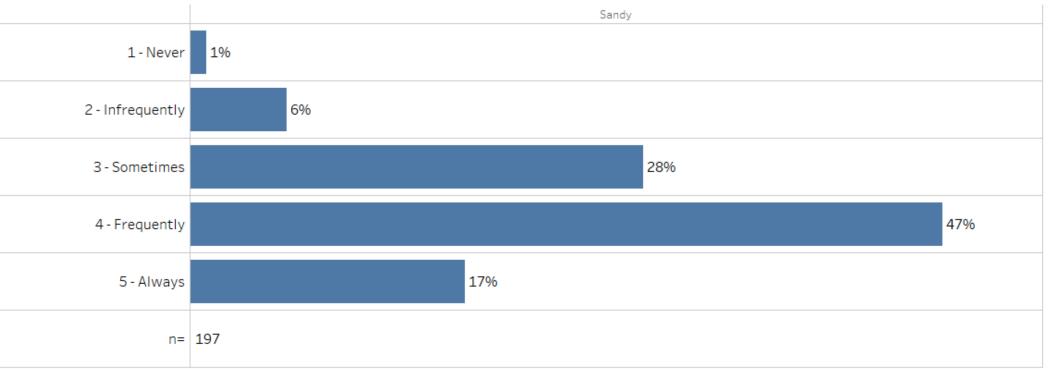
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TRAFFIC IN THE REGION

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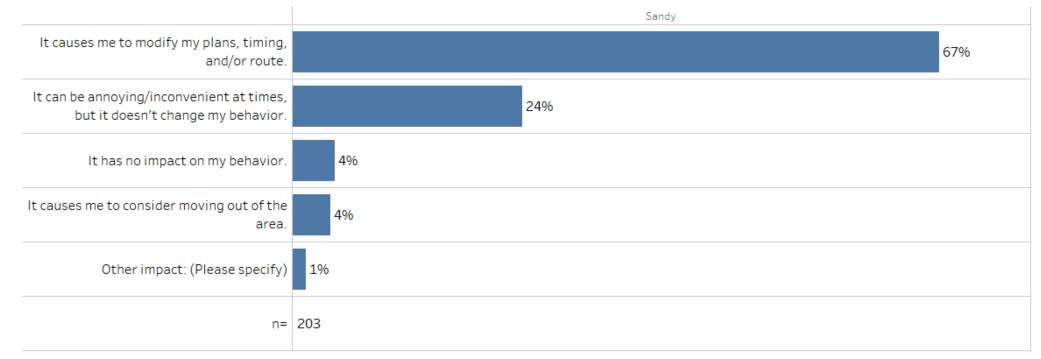
Thinking about your overall experience with vehicles and traffic in the Mt. Hood/Columbia River Gorge Region, how frequently do you experience challenges getting around your community?



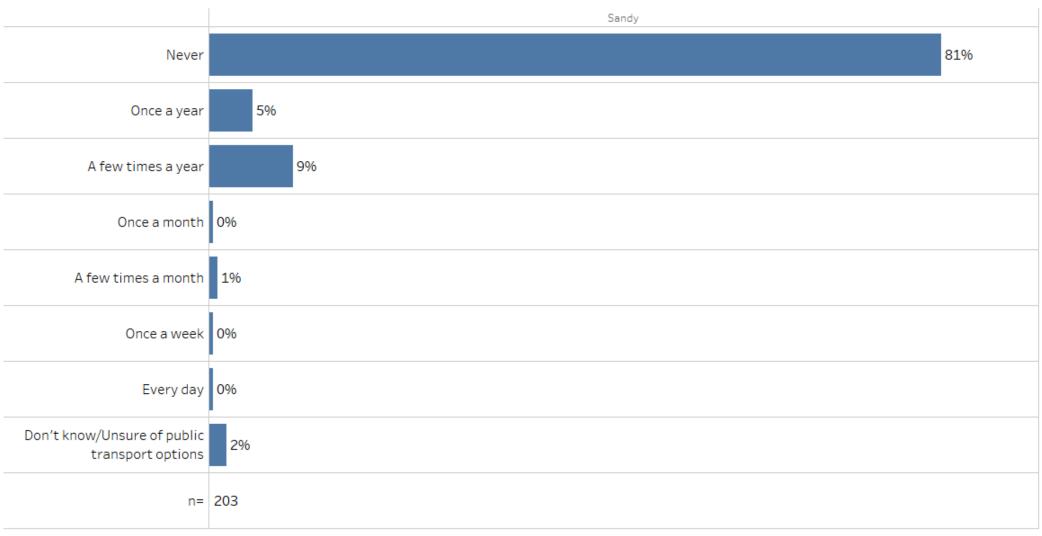
To what extent do you experience any challenges, if at all, driving in Mt. Hood/Columbia River Gorge Region during the following time periods?

		Sandy	У
Not at all challenging	Summer (June to August)	5%	
	Fall (September to November)	15%	
	Winter (December to March)	7%	
	Spring (April to May)	23%	
Sometimes challenging	Summer (June to August)	28%	
	Fall (September to November)		58%
	Winter (December to March)	33%	
	Spring (April to May)		53%
Very challenging	Summer (June to August)		64%
	Fall (September to November)	23%	
	Winter (December to March)		55%
	Spring (April to May)	19%	
Don't know/No opinion	Summer (June to August)	3%	
	Fall (September to November)	4%	
	Winter (December to March)	5%	
	Spring (April to May)	5%	
n=	Summer (June to August)	196	
	Fall (September to November)	189	
	Winter (December to March)	195	
	Spring (April to May)	191	

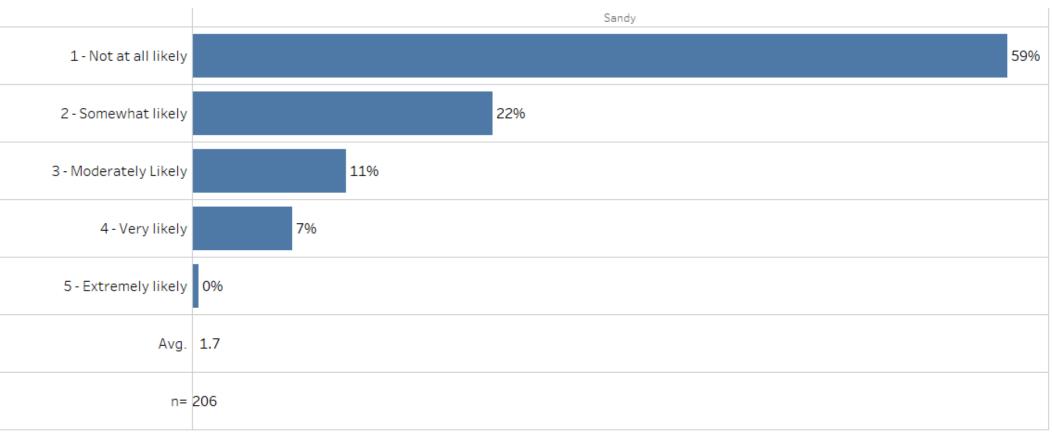
Do traffic conditions on the roads in the Mt. Hood/Columbia River Gorge Region at busy times cause you to modify your behavior?



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

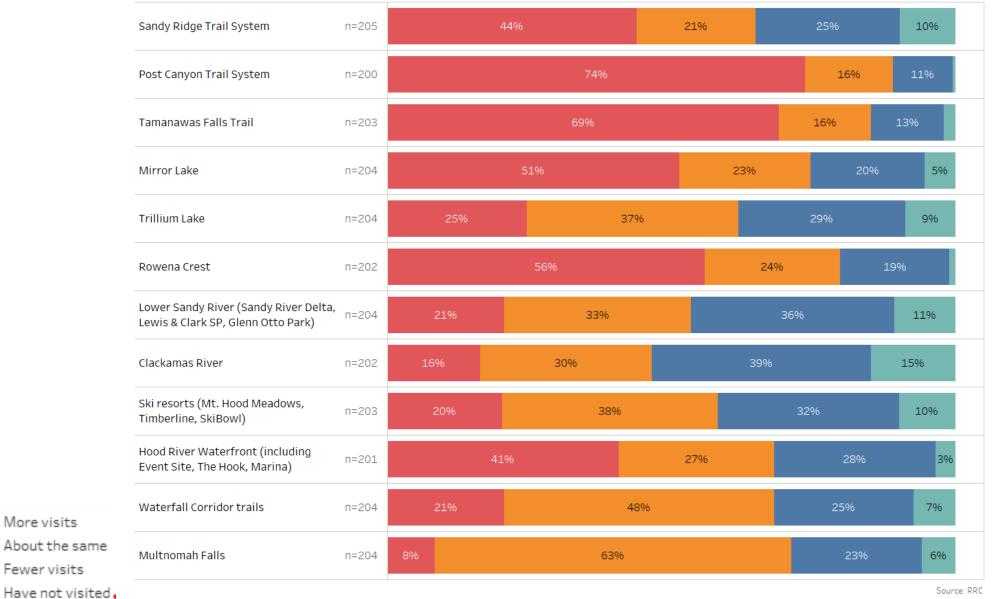


How likely would you and your household be to use public transit in the Mt. Hood/Columbia River Gorge Region if there were more options (e.g., more frequent service or additional routes)?



# REGREATION IN THE REGION

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



TIM M 20 **CHANGES** RECREATION

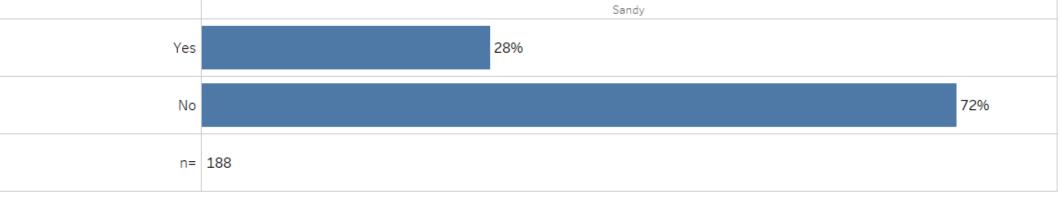
More visits

Fewer visits

About the same

# DEMOGRAPHICS

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



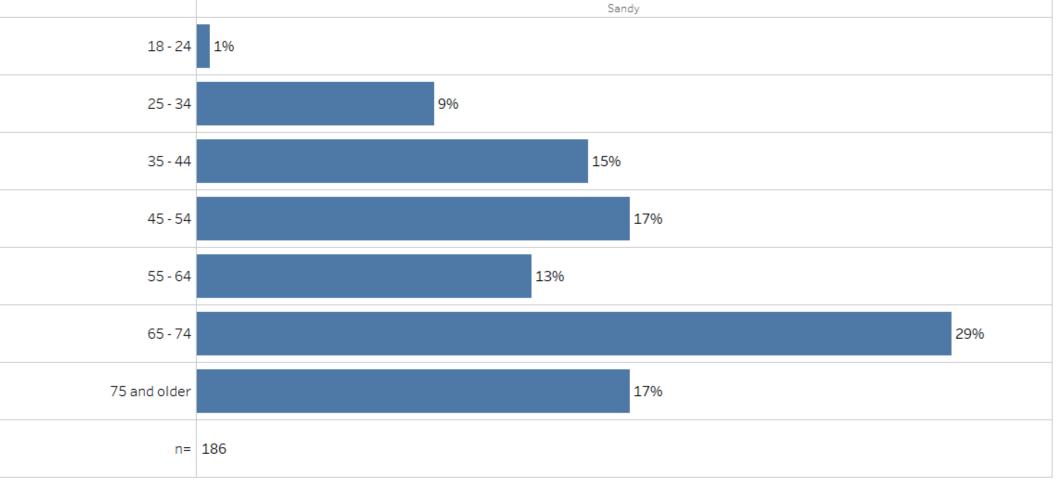
### How do you typically get around the area?

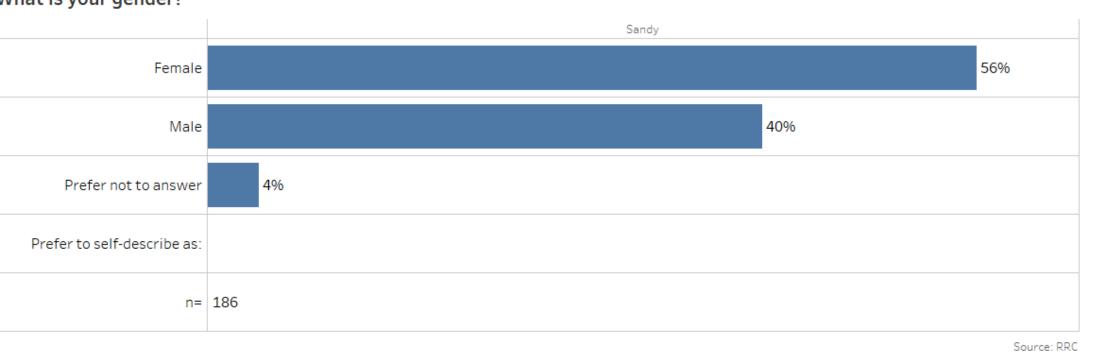
	Sandy	
Personal vehicle (car, truck, motorcycle, etc.)	99%	ю
Walk		
Bicycle		
Other	1%	
Bus		
Carpool/other person drives		
Uber/Lyft/Taxi		
n=	187	

**TRANSPORTATION** 

#### What is your age?

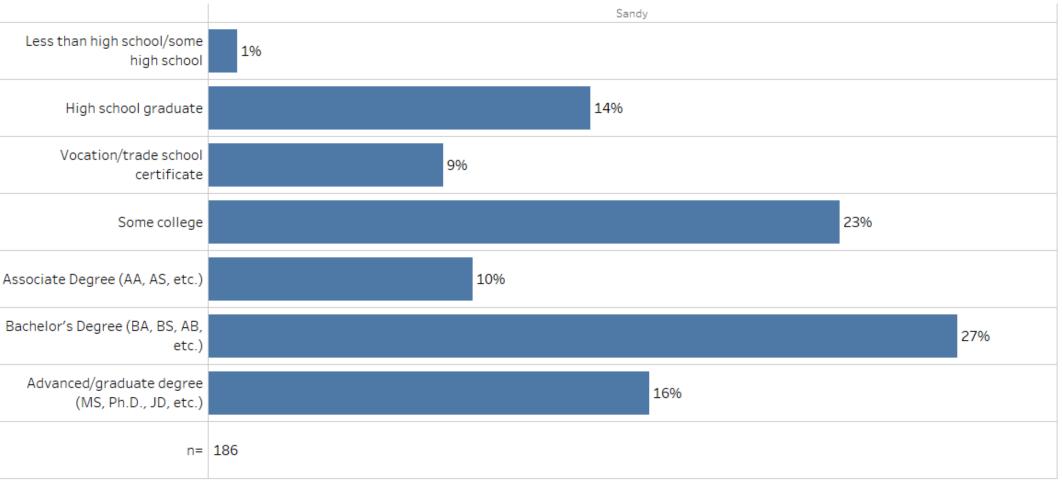


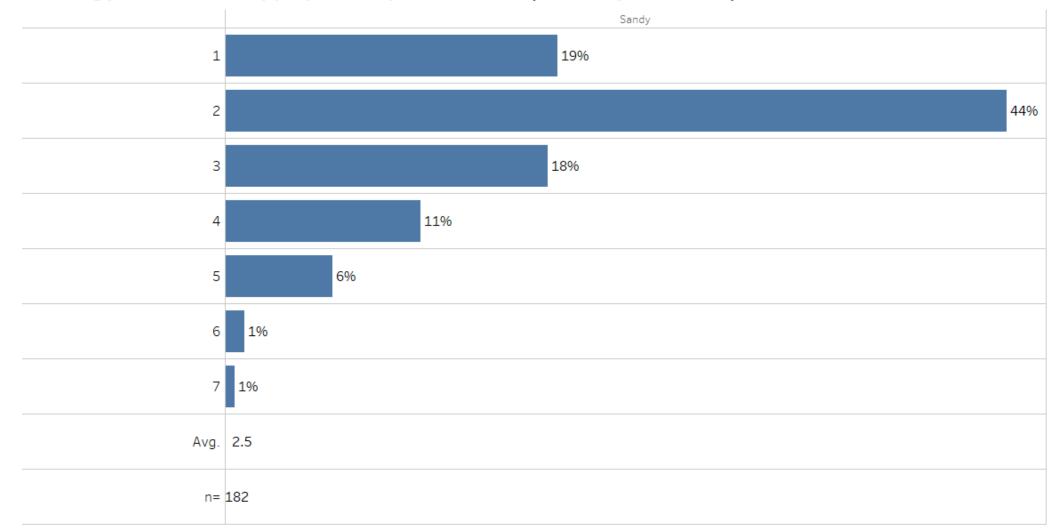




### What is your gender?

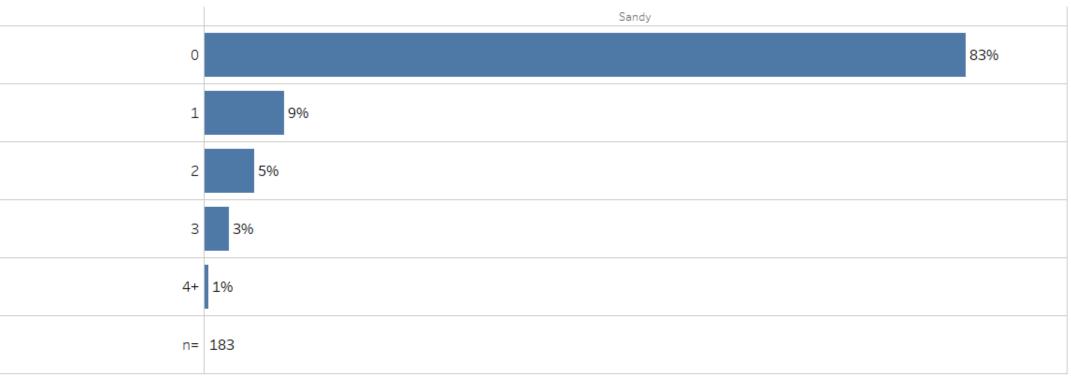
#### What is your highest level of education?





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

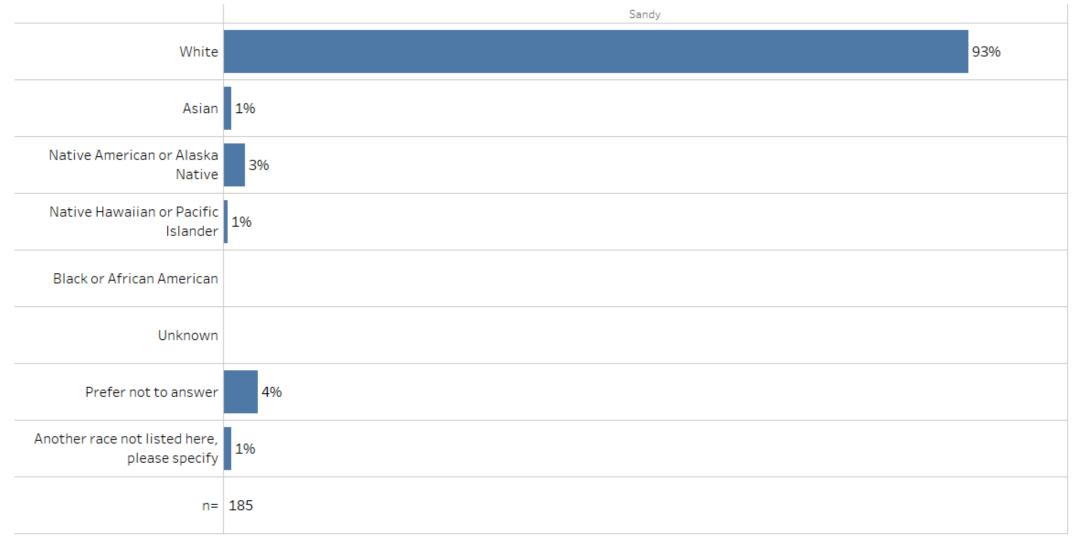


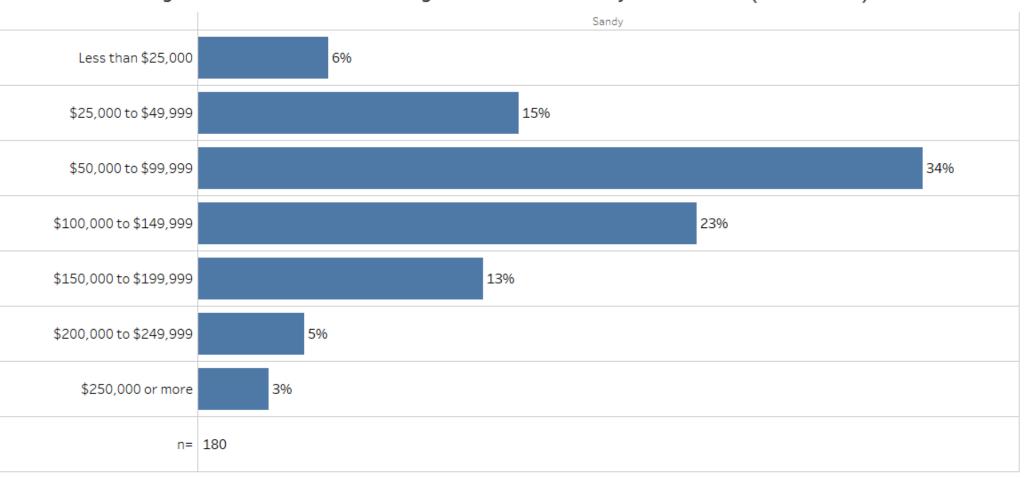


#### Are you of Hispanic, Latino, or Spanish origin?

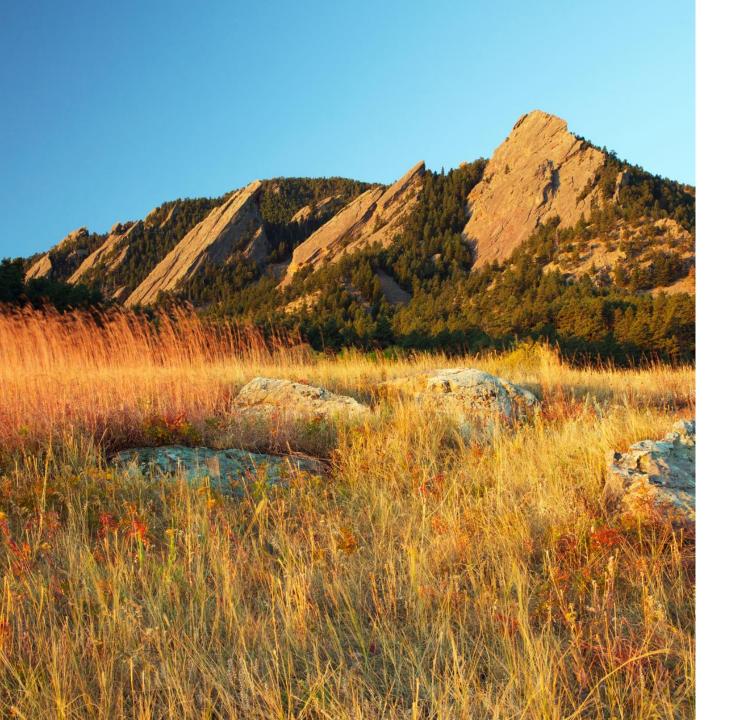


#### Which race or ethnicity do you most identify with? (Please select all that apply)





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



# THANK YOU!



## **RRC** Associates

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