

March 2021

Lewis Clark Valley **Cruise Boat Industry** *Needs Assessment*

PREPARED FOR

 Port of
Lewiston
Idaho - USA

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Clarkston
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McDowell
GROUP

March 2021

Lewis Clark Valley Cruise Boat Industry

Needs Assessment

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Executive Summary

Riverboat cruises have been sailing to the Lewis Clark Valley for over 40 years, bringing thousands of annual visitors and benefitting a wide variety of local businesses. This Needs Assessment provides an in-depth analysis of the industry, along with a roadmap for accommodating anticipated growth and maximizing the potential for economic benefit to the region. Sources included industry reports, promotional materials, interviews with representatives of riverboat lines and local tour



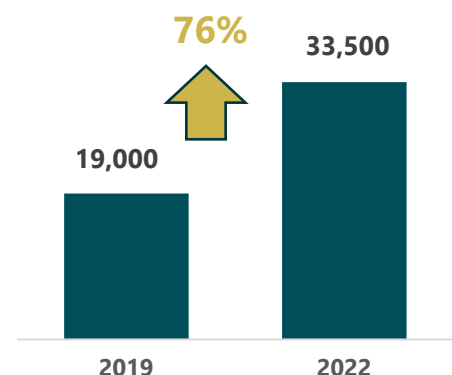
Source: Port of Clarkston.

operators (among others), and a site visit. The Needs Assessment, along with an accompanying Economic Impact study, were funded by the Ports of Lewiston and Clarkston with support from the U.S. Economic Development Administration, the States of Idaho and Washington, and local stakeholder organizations (see Appendix for a full list of funders). Following are key findings of the study.

Riverboat Market Outlook

- The U.S. river cruise industry consists of **20 vessels representing 3,000 berths**. Of the five total lines in the U.S. riverboat market, four called at the Port of Clarkston in 2019.
- The Columbia/Snake River region represents the number two river cruise area in the U.S., with **nearly one-third of nationwide passenger capacity** (30%). The number one region is the Mississippi River, with 60% of capacity.
- Despite the impacts associated with the COVID-19 pandemic, the outlook for U.S. river cruising remains very positive. Nationwide passenger capacity is **projected to grow by 80%** between 2021 and 2027.
- Riverboat traffic to the Lewis Clark Valley is also anticipating growth: between 2019 and 2022, passenger capacity is **projected to increase by 76%** based on additional vessels and a lengthened season.

Cruise Passenger Capacity at Port of Clarkston, 2019 and 2022 (proj.)



Destination Assessment

The Lewis Clark Valley boasts a wide variety of **assets** with strong relevance to the riverboat market.

- **Hells Canyon** jetboat tours are already the most popular tour among riverboat passengers. The combination of history, scenic beauty, and low-impact activity level are a perfect match for this market.
- Passengers are reportedly very interested in the **Lewis and Clark** story, reflecting their high education levels and interest in local history.

- **Nez Perce culture** represents a strong match with the riverboat market, and is heavily featured by cruise lines and local tour operators.
- Charming and walkable, **Downtown Lewiston** holds significant appeal for riverboat passengers, including shopping and dining opportunities as well as museums and historic attractions.
- **Local wineries** represent another strong match with the riverboat market; passengers appreciate the opportunity to sample locally made items, and cruise lines offer several wine-related tours along the Columbia/Snake.



Source: Visit Lewis Clark Valley.

Additional regional assets identified and analyzed in the body of the report include **Clarkston, scenic waterfront, fishing, golf**, and the **Clearwater River Casino and Lodge**.

INFRASTRUCTURE

- **Docks:** The Port of Clarkston operates two docks that serve riverboats: the 7th Street and 14th Street docks, with the 7th Street dock much preferred (and more frequently used) by lines. The 7th Street dock is in good repair; can be used by two boats simultaneously; and offers all the necessary services and amenities for riverboats. Its drawbacks include distance from downtown areas, limited parking/staging area, and inaccessibility by the largest riverboat vessel due to depth. The 14th Street dock is less desirable due to the lack of visual appeal and walkability. The ability of the Port of Clarkston to accommodate riverboat traffic has become a growing concern, particularly with additional vessels planned over the next several years.
- **Hotels:** The Lewis Clark Valley has 14 lodging properties with at least 30 rooms; only three of these properties are rated as 3.0 or 3.5 stars, and none are rated higher. Several cruise line representatives noted that the quality of local lodging options is a limiting factor to them offering pre- and post-stays, as their guests usually require a minimum of 4-star level accommodations. However, the Holiday Inn Clarkston-Lewiston is conveniently located adjacent to the 7th Street dock, and is currently included in pre- and post-stay packages for American Cruise Line passengers.
- **Airport:** While the Lewiston-Nez Perce County Regional Airport is conveniently located only 15 minutes from the cruise docks, nearly all riverboat passengers use the Spokane airport due to limited flight options. (The only current scheduled service is two daily non-stop flights to/from Salt Lake City.) Cruise line representatives noted the lack of airlift as a limiting factor in calling at Clarkston.



Source: Port of Clarkston.

Opportunity/Gap Analysis

The study identified the following **constraints** on growing and accommodating the riverboat industry in the Lewis Clark Valley.

- **Capacity:** Dock capacity is already strained on peak days, and traffic is expected to grow significantly over the next several years. Regional capacity is also a concern, as infrastructure needs to be developed in tandem with other ports on the Columbia/Snake system.
- **Waterway navigability:** The possibility of the dams being breached in the future (in effect ending the riverboat industry) could discourage investment in future growth. Dredging is also a potential limiting factor if it is not conducted regularly where riverboats operate.
- **Hotels and flights:** The limited hotel and flight options represent significant barriers to more passengers extending their stay in the region before or after their cruise.
- **Low destination awareness:** The Lewis Clark Valley is not well known among the general U.S. traveling population. Nearly all pre-trip information about the destination communicated to passengers is provided by the cruise lines – and cruise lines are (understandably) focused on selling their cruises, rather than destinations.
- **Cruise line priorities:** Cruise lines are not incentivized to offer extensions unless the experience fits with their brand and will enhance the passenger experience, while also being profitable.
- **Passenger demographics:** Because of their high average age (early to mid-70s according to cruise line contacts), most Columbia/Snake riverboat passengers tend to have less energy for tours (especially active tours), shopping, and overnight extensions when compared to the overall cruise market.
- **Dock locations:** Cruise line representatives report that riverboat passengers appreciate ports where they can disembark and walk to shops, restaurants, and attractions. The current cruise docks offer few retail opportunities or attractions in their immediate vicinities (none in the case of the 14th Street dock).
- **Transportation to downtown Lewiston and Clarkston:** Even though Downtown Lewiston is less than a 10-minute drive from the two cruise docks, and downtown Clarkston even closer, few passengers use taxis to access these areas. While the shuttle provided by American Queen Steamboat Company (AQSC) includes stops in downtown Lewiston, there are many other stops on the tour competing for passengers' attention.
- **Tour and onboard scheduling:** Riverboat passengers have many demands on their time and attention while their vessel is in port, some of which are already included in their package price: onboard meals, cocktail hours, lectures, entertainment, for example. Those participating in tours like the jetboat excursion have little energy for additional activities.
- **Jetboat tour:** The success, popularity, and (relatively) high price of the jetboat tour disincentivizes cruise lines from offering additional tours.



Source: Snake River Adventures.

With these barriers in mind, the Lewis Clark Valley also boasts a number of **advantages** with regard to the riverboat industry.

- **Embarkation/disembarkation port:** Besides Portland/Vancouver, Clarkston is the only other port on the Columbia/Snake itinerary where guests have the option of extending their stay.
- **Appealing assets for the river cruise market:** The Lewis Clark Valley has many attractions and activities that are well matched to riverboat passengers, including Hells Canyon, Nez Perce culture, Lewis and Clark history, a charming, walkable downtown (Lewiston), and viticulture, among others.
- **Cruise Boat Dock:** The 7th Street dock is in good repair, allows access to jetboats, and can fit two vessels at a time. Its location is advantageous in several ways, being adjacent to the Holiday Inn and close to provisioning sources like Costco and Albertson's.
- **Visit Lewis Clark Valley:** Having an effective Destination Marketing Organization (DMO) is a key advantage, allowing a one-stop shop for riverboat-related activities: for example, providing visitor information to passengers, organizing volunteer greeters, liaising with cruise line representatives, and organizing familiarization tours.
- **Community engagement:** By engaging with this study effort, the Ports of Lewiston and Clarkston, along with other funders and local stakeholders, are demonstrating their commitment to learn about the cruise industry and how they can best accommodate it.

Action Plan

The following action plan reflects information gathered throughout the course of this study and builds on momentum already created by the Ports and local stakeholders in accommodating the riverboat industry. These steps are designed to maximize the economic benefits of riverboats, while enhancing the experience for cruise lines, passengers, and local businesses. Each action plan item is discussed in more detail in the body of the report.

MARINE INFRASTRUCTURE

- Develop additional docking capacity to accommodate projected demand.
 - Explore potential port development and expansion projects, including Hells Canyon Marina Redevelopment and Port of Lewiston Riverfront Plan.
 - Pursue public/private partnerships with cruise lines to fund infrastructure investments.
 - New moorage should incorporate a floating dock with minimum 14 feet of water depth, 900+ feet of linear moorage, access to fuel, trash/recycling service, security, and paved access for ground transportation (including motorcoaches).
 - Incorporate the needs of the yacht market future moorage facility design.
- Dredge the area of the 7th Street Dock to 14 feet.
- Formalize moorage contracts.

ADVOCACY

- Coordinate with other Columbia/Snake cruise ports.

- Share COVID (or future pandemic) preparation and Best Practices.
- Establish regional objectives.
- Coordinate promotion to potential additional riverboat lines.
- Share information on infrastructure improvements, rates, crisis management (such as lock closures), etc.
- Advocate for navigable waterways.
 - Continue to advocate against dam-breaching.
 - Continue to advocate and seek funding for maintenance dredging of areas frequented by riverboats.

HOTEL AND AIRLIFT GAPS

- Engage airlines about initiating flights between Lewiston and Portland.
- Support new hotel properties or renovations that appeal to the cruise market.

COMMUNICATION WITH CRUISE LINES

- Create a directory of cruise line representatives.
- Keep cruise line contacts apprised of new or updated attractions, tours, hotels, and services.
- Showcase new tours and attractions that could be included in port calls and overnight packages.
- Review cruise line promotional materials regularly.
 - Offer suggestions and corrections where warranted.
 - Provide access to current and high-quality images for brochures and websites.
- Prepare a community directory for each vessel featuring local services, tours, accommodations, and transportation.
- Periodically ask cruise line representatives for feedback from passengers and crew.

ENGAGING THE LOCAL BUSINESS COMMUNITY

- Create an attractive and easy-to-read cruise ship calendar.
 - Post on websites of Port of Clarkston, VLCV, and Lewis Clark Valley Chamber of Commerce.
 - Distribute paper copies to local merchants and post on bulletin boards.
- Educate local retailers about riverboat passengers including their retail interests and accessibility needs.
- Create a visitor-oriented map of downtown Lewiston and Clarkston.
- Invite cruise line representatives to speak at local business events.
- Encourage local transportation providers to explore the idea of a shuttle between the cruise dock(s) and downtown Lewiston and/or Clarkston.
- Create a COVID-19 response effort to encourage and promote responsible reopening of the community to visitors.

Readers are encouraged to review the accompanying Economic Impact report, which includes information on historical traffic trends, passenger activity and spending patterns, spending by passengers, crew, and cruise lines, and economic impacts of the industry. It is available at www.portofclarkston.com and www.portoflewiston.com.

Introduction and Methodology

Introduction

The river cruise industry brings a significant number of passengers and vessels to the Lewis Clark Valley annually – 19,000 passengers and 72 port calls in 2019, according to the recent economic impact analysis.¹ Spending by passengers, crew, and cruise lines creates approximately \$4 million in annual economic activity.

This report represents the next phase of a broader study of the industry: a needs assessment. The needs assessment helps provide a common understanding of the situation and a roadmap for what needs to be accomplished to maximize the economic potential of river cruises and large passenger vessels calling in the region.

Key questions in the assessment include: What is the outlook for the region's river cruise industry? How well does the Lewis Clark Valley meet the needs of passengers and vessels? Are there facility, service, or collaboration gaps that should be addressed to remain competitive or increase the sector's economic footprint in the region? What is the potential community benefit, including job growth? How should the project partners prioritize actions to maximize results?

The Ports of Clarkston and Lewiston, with support from stakeholder institutions, commissioned McDowell Group to conduct this analysis, organized into the following sections:

- River Cruise Market Assessment
- Cruise Line Promotion of the Lewis Clark Valley
- Destination Assessment
- Case Studies
- Opportunity/Gap Analysis
- Yacht Market: Supplemental Analysis
- Action Plan

Methodology

The study team conducted the following tasks in the preparation of this report.

- Analysis of the *Cruise Industry News: 2021 USA River Market Report* and industry trade publications.
- A site visit by the project manager in 2020 that included visits to the 7th Street dock, 14th Street dock, downtown Lewiston, Newberry Square, Nez Perce County National Historical Society and Museum, Bridalbluk House, Clearwater Snake National Recreation Trail, Nez Perce National Historical Park, Clearwater Casino and Lodge, Hells Gate State Park, Holiday Inn Clarkston-Lewiston, Lindsay Creek

¹ *Lewis Clark Valley Cruise Industry Economic Impact Assessment*, conducted by McDowell Group for the Ports of Clarkston and Lewiston, October 2020.

Vineyards, and Red Wolf Golf Club, as well as a jetboat tour of Hells Canyon with Snake River Adventures.

- Interviews with over 20 contacts including representatives of cruise lines, local tour businesses, Visit Lewis Clark Valley, Port of Clarkston, Port of Lewiston, Nez Perce Tribal Enterprises, and case study river ports. A list of contacts is provided in the Appendix.
- Compilation and analysis of online cruise line promotion of the Lewis Clark Valley.

Additional sources included Port of Clarkston cruise schedules, American Cruise Line schedules and presentations, the *Visit Lewis Clark Valley Visitors Guide*, and the *Port of Lewiston Confluence Riverfront Master Plan*, and recent McDowell Group studies concerning river cruising and small cruise lines.

A supplemental analysis of the yacht market involved interviews with local marinas, marine suppliers, Port staff, and Northwest yachting experts; an inventory of yacht moorage facilities; and a review of articles in yachting magazines.

A Steering Committee provided guidance throughout the project; a list of committee members is provided in the Appendix.

A full list of funders is also provided in the Appendix.

River Cruise Market Assessment

This chapter provides an overview and outlook for the river cruise industry, from both a nationwide and regional perspective.

U.S. River Cruise Industry

Overview

The U.S. river cruise industry consists of five lines: American Cruise Line (ACL), American Queen Steamboat Company (AQSC), Blount, Lindblad, and UnCruise. Together, these lines represent 20 ships, over 3,000 berths, and a total capacity of nearly 90,000 passengers.

The two major players, accounting for a combined 97% of capacity, are ACL and AQSC; these two lines operate almost exclusively on rivers, while UnCruise and Lindblad focus more on the oceangoing market. Note that size of ship can greatly influence market share: while AQSC has only four ships and ACL 10, AQSC represents more passengers (50% versus 47%) due to the larger size of their vessels. Number of voyages also plays a role: Lindblad has three ships in the river market, but only operates on rivers a few months out of the year; these vessels are usually sailing ocean itineraries.

Table 1. U.S. River Cruise Market, 2020 (Pre-COVID)

	Total Ships	U.S. River Ships	River Berths	River Capacity	River Market Share
American Queen Steamboat Co.	4	4	1,071	44,786	50%
American Cruise Line	13	10	1,575	41,931	47%
UnCruise	9	1	86	1,118	1%
Lindblad	15	3	228	907	1%
Blount Small Ships	2	2	200	800	1%
Total	43	20	3,160	89,539	100%

Source: Cruise Industry News: 2021 USA River Market Report,

U.S. river cruises are focused in three main areas: the Mississippi, Columbia/Snake, and Ohio/Tennessee, with the bulk (60%) occurring on the Mississippi. Additional river cruises occur in Florida and the Erie Canal, but account for a small fraction of total capacity.

Table 2. River Cruise Sailing Regions and Capacity, 2020 (Pre-COVID)

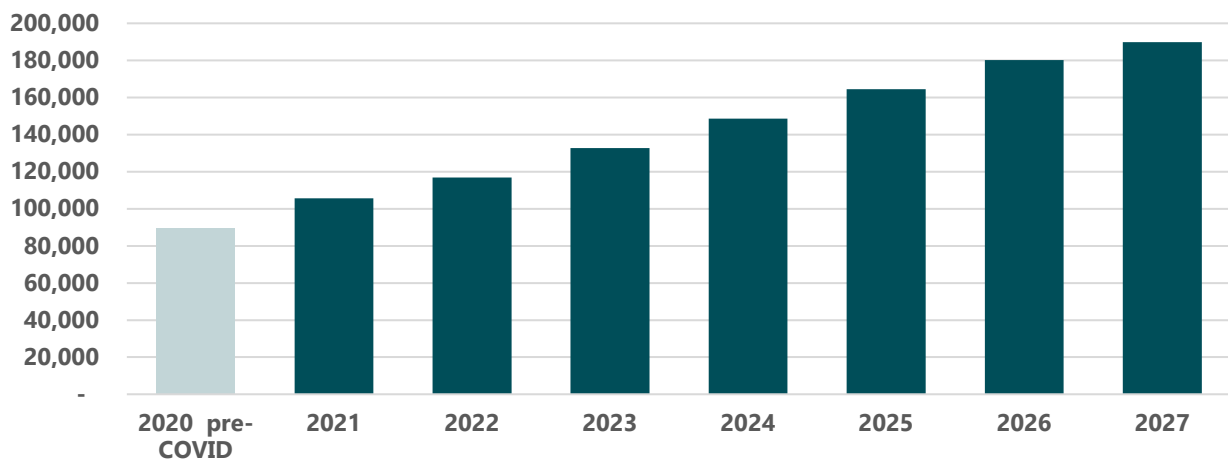
	% of Total Capacity
Mississippi	60%
Columbia/Snake	30%
Ohio/Tennessee/Cumberland	7%
Hudson/Erie Canal	3%
Florida	<1%

Source: Cruise Industry News: 2021 USA River Market Report.

Outlook

The U.S. river cruising industry is projected to more than double its capacity between 2020 (pre-COVID estimate) and 2027, growing from around 90,000 to 190,000 passengers. The growth is based largely on Viking River Cruises entering the market. Viking will start cruising the Mississippi with one ship in 2022 and is expected to add a ship to the U.S. market each subsequent year through 2026. (Viking vessels tend to be larger than other U.S. river vessels; their 2022 ship will carry 386 passengers.) ACL is also contributing to the growth projections: they are planning two additional vessels (one in 2021 and a second in 2022, with passenger capacities around 200). The other four river cruise lines have not announced any plans to add vessels.

Chart 1. U.S. River Cruising Market Capacity, 2020 (pre-COVID) to 2027



Source: Cruise Industry News: 2021 USA River Market Report

COVID essentially canceled the 2020 domestic river cruise season after February. As of this report publication, all U.S. river cruise lines are planning to operate in 2021, as originally scheduled. ACL has reiterated its plans to add two new vessels in the coming years, and Viking has not announced any schedule or deployment changes due to COVID.

Even if the 2021 season is delayed or canceled by the pandemic, the industry is very likely to rebound. Throughout the pandemic, cruise trade publications have noted an uptick in interest in small ship and/or river cruising, due to a higher confidence in the safety of smaller versus larger vessels. These positive market signals are amplified by significant momentum in the river market before COVID hit:

"River cruising is hot, and U.S. river cruising is heating up the sector even more..."²

"River cruising has been booming the last few years."³

"With eight new river ships launching in 2019 alone, river cruise companies are driving the market forward."⁴

² <https://www.travelweekly.com/Strategic-Content/USRiver-Cruises>, "U.S. River Cruises Are a Hot Market," September 30, 2019.

³ <https://magazine.northeast.aaa.com/magazine/travel/ocean-cruises/cruising-trends/>, "Cruising Trends for 2020", August 25, 2019.

⁴ <https://www.ship-technology.com/features/river-cruise-industry-trends/>, "The Rise of the River Cruise Market, October 10, 2019.

The *2021 USA River Market Report* (published in July 2020) was optimistic about the future of domestic river cruising, even taking the pandemic into account:

*An aging yet affluent U.S. population combined with geopolitical fears, COVID-19 and the hassle of air travel could help the market surge... Close-to-home cruising...and exciting new capacity, plus marketing muscle, should lead to a healthy future for domestic U.S. cruising.*⁵

Columbia/Snake Region

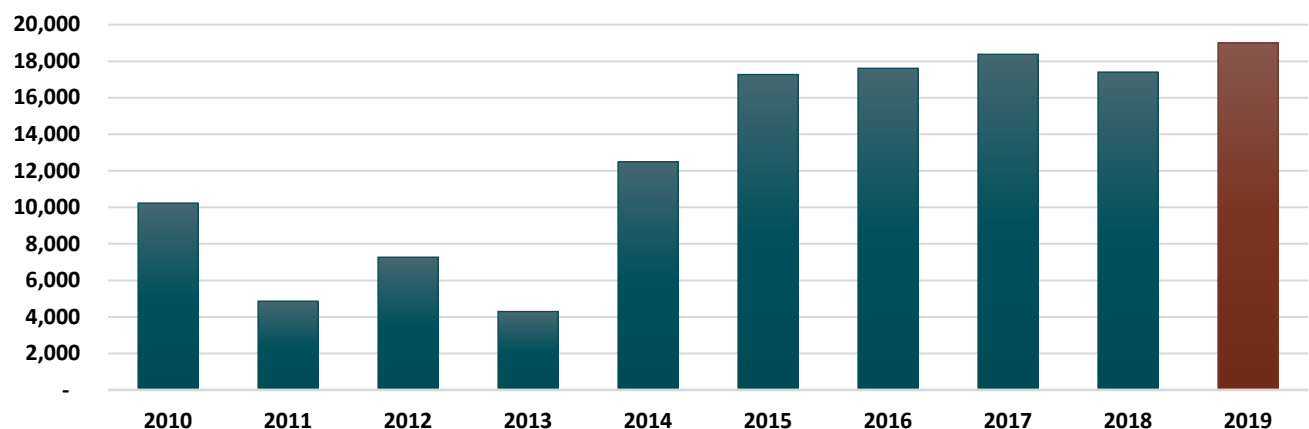
Overview

The Columbia/Snake region accounts for nearly one-third (30%) of total U.S. river cruise capacity. Four lines operate in the region: AQSC, ACL, UnCruise, and Lindblad. Columbia/Snake cruises are generally seven to nine days long, traveling between the embarkation and disembarkation points of Vancouver/Portland and Clarkston, with a side journey to Astoria either at the beginning or end of the voyage. Following is a list of common eastbound port calls, with the westbound itineraries visiting them in reverse order:

- Vancouver/Portland
- Astoria
- Stevenson
- The Dalles
- Richland/Tri-Cities
- Clarkston

While cruise passenger traffic to Clarkston fluctuated in the early 2010s, the last five years have been consistently high, growing from 17,200 in 2015 to 19,000 in 2019.

Clarkston Riverboat Passenger Traffic, 2010-2019



Sources: Port of Clarkston and cruise lines. 2010-2018 traffic based on passenger capacity and number of calls; 2019 traffic based on data provided by cruise lines.

⁵ *2021 USA River Market Report*, published by Cruise Industry News, July 2020.

In 2019, nearly all cruises in the region included Clarkston in their itinerary, and nearly all of those used Clarkston as a turnaround port. There are two exceptions.

- Several UnCruise voyages per year (those operated by the travel company Road Scholar) used Clarkston as a port of call rather than a turnaround port. These voyages sailed round-trip from Portland. (Starting in 2021, Road Scholar will be chartering AQSC vessels instead and following their usual itinerary.)
- Several Lindblad and AQSC voyages per year skip the Snake River portion of the cruise and operate round-trip from Portland.

The below table shows traffic to the Port of Clarkston in 2019 (adapted from the *Economic Impact Assessment*, conducted as the first phase of this project). That year, seven vessels called at the Port of Clarkston a total of 72 times, representing 19,000 passengers.

Table 3. Port of Clarkston Riverboat Traffic, 2019

	Number of Vessels	Passenger Capacity	Number of Port Calls	Number of Cruises	Total Passengers
American Cruise Line	3	453	45	86	11,000
American Queen Steamboat Co.	1	230	18	36	7,000
Lindblad Expeditions	1	176	5	10	750
UnCruise Adventures	2	162	4	5	350
Total	7	1,021	72	137	19,000

Sources: Visit Lewis Clark Valley, cruise lines, online calendars. Passenger numbers have been rounded.

Outlook

The Columbia/Snake region is expected to see significant growth in cruise traffic in the next several years due to two additional ACL ships, doubling their passenger volume from 2019 levels. The following information was reported by ACL in October 2020, after impacts from the pandemic were taken into account. (ACL has also provided the Port of Clarkston dock schedules for 2022-2026; however, these preliminary schedules do not yet account for a fifth vessel.)

Table 4. ACL Traffic on Columbia/Snake, 2019-2022

	2019	2020	2021	2022
Number of vessels	3	-	4	5
Number of cruises	84	-	126	157
Number of passengers	11,000	-	20,160	25,370

Source: American Cruise Lines; *Economic Impact Assessment*.

The other three lines did not report any plans to increase the number of vessels on the Columbia/Snake in the foreseeable future. Likewise, *Cruise Industry News* does not project any additional new vessels for the region. However, Lindblad is planning to increase their number of Columbia/Snake voyages between 2021 and 2022 (from 10 to 12). And, UnCruise is changing their itineraries for the 2021 season to sail round-trip Portland, turning at the confluence with the Palouse River, rather than using Clarkston as an embarkation port as they have in the past.

Taking all this into account, cruise traffic to the Port of Clarkston is projected to increase from 19,000 in 2019 to 33,000 in 2022, a growth of 76%. Port calls are expected to increase from 72 to 106 over the same period. Traffic is projected to level out in 2023, as no lines have announced adding capacity in the region that year.

Table 5. River Cruise Traffic to Clarkston, 2019-2023

	2019	2020	2021	2022	2023
Number of vessels	7	-	8	9	9
Number of port calls	72	-	90	106	106
Number of passengers	19,000	-	28,000	33,500	33,500

Source: McDowell Group estimates.

It is important to note that projecting more than a couple of years out in the cruise industry is challenging. Cruise lines can move their assets (vessels) wherever the market demands, sometimes with less than a year's notice, and they often change schedules and itineraries year-to-year. Unforeseen events such as the Bonneville Lock closure can also impact traffic levels.

COVID has created an extra layer of uncertainty – several (overseas) cruise lines have declared bankruptcy in the wake of the pandemic, and it is possible that the 2021 Columbia/Snake River season could be delayed or canceled. On the other hand, new lines could enter the U.S. market on the heels of Viking, and/or Viking could decide to enter the Columbia/Snake market. As the Lewis Clark Valley considers how it will accommodate the industry now and into the future, stakeholders are encouraged to track both regional and nationwide river cruise industry news.

Cruise Line Promotion of Lewis Clark Valley

To assess needs and opportunities for the cruise sector in the Lewis Clark Valley, it is important to understand how cruise lines currently promote the region: What information are passengers receiving about the Valley when they are planning their trip? What are they expecting to see and experience? And, are there any gaps in this information?

American Cruise Lines

As noted in the previous chapter, ACL is the driver of growth in cruise traffic to the Lewis Clark Valley. They are also responsible for the vast majority of overnights in local lodging.

ACL's website describes Clarkston as follows:

Nestled at the convergence of the Snake and Clearwater Rivers in southeast Washington, Clarkston is the gateway to North American's deepest gorge, Hells Canyon. Named for William Clark of the historic Lewis and Clark Expedition, the town features beautiful scenic vistas, year-round recreation, and an inland seaport rich in history. Follow the footsteps of the pioneers before us as you explore Clarkston's natural bounty and small town charm.



Source: www.americancruiselines.com.

There are four photos associated with the Clarkston port call on the website, including one for each of the tours (see next page). There are no photos of the towns of Clarkston or Lewiston either on the cruise overview panel of photos, nor for the day in Clarkston; the photo associated with "Last Day" along with the text "Explore the scenic city of Clarkston at your leisure" appears to be a second photo of Hells Canyon (see above).

In past years, ACL has included Spokane on its itinerary map, connected by dotted line to Clarkston; as seen below, Spokane has been removed from the map.



Source: www.americancruiselines.com.

Shore Excursions

The website features two optional shore excursions in Clarkston: the Hells Canyon Jetboat Adventure, and Echoes from Our Ancestors. Both tours are offered as a stand-alone day tour to passengers ending their cruise in Clarkston, and as part of a Clarkston overnight package to passengers beginning their cruise in Clarkston.

The Jetboat Adventure, offered by Snake River Adventures, is a six-hour long tour that was participated in by around 40% of ACL guests in 2019. It is promoted as follows:

We have chartered the Hells Canyon Jet Boat to take you through the deepest canyon in America. After breakfast, the jet boat will meet you at the ship for an afternoon of adventure. Here, you will explore places most boats cannot reach on the river and witness the amazing transformation in geography from high desert to alpine forests. View ancient rock formations and native pictographs while your local Clarkston guide provides interesting stories about the region's history and canyon formation. Enjoy a catered luncheon at the exclusive Garden Creek Ranch before heading back to the ship, where we will celebrate your return during our nightly cocktail hour.



Source: www.americancruiselines.com.

Echoes from Our Ancestors is a new tour in 2021, offered by Nez Pierce Tourism. It will offer guests a shorter jetboat experience (three hours) as well as cultural content.

Join a Nimippuu (Nez Perce) guide on a fascinating jet boat ride up the Snake River into Hells Canyon. Listen to ancient legends of these native people and explore the places their ancestors called home. Learn the importance of "Tsceminicum" (She-mi-ni-cum), where the waters meet, and why water is considered sacred. Explore sites where Nimiipuu encampments were once located, and visit fishing, hunting, gathering places. Along the rocks of Buffalo Eddy, view ancient messages left in the petroglyphs. End your amazing journey with a Pow Wow dance and drum performance by the native Nimippuu, which celebrates the sacred landscape and echoes the voices of their ancestors.



Source: www.americancruiselines.com.

Bus Tours

ACL offers an optional bus tour to the Nez Perce National Historic Park as part of its cruise package:

Led by an expert guide, take a narrated tour of this historic park. Hear stories of the Nez Perce tribe, best remembered for having saved the Lewis and Clark Expedition Team from starvation following their journey through the Bitterroot Mountains. Witness preserved sites, stories, and artifacts associated with the Nez Perce tribe.

For 2021, ACL is developing an additional “hop-on, hop-off” (HOHO) bus tour similar to that offered by AQSC (see next section). The itinerary is in the planning stages, but an ACL representative reported it would include the Nez Perce County Historical Society & Museum, the Lewis-Clark State College Center for Arts & History, the First Territorial Capitol Interpretive Center, the Port Drive shopping area near the Holiday Inn, and “strategic locations that best highlight the local shops of Beautiful Downtown Lewiston.” Currently there is no information on this bus tour on the company’s website.



Source: www.americancruiselines.com.

Extensions

ACL offers passengers an optional pre-cruise option of staying at the Holiday Inn, adjacent to the cruise dock, for one or two nights before they embark. The package includes hotel (which includes breakfast) and the jetboat excursion. There is generic information about the package on the ACL website but nothing specific to Clarkston.

Columbia & Snake River Pre-Cruise Hotel Stay

Each Columbia and Snake Rivers itinerary comes complete with a Complimentary Pre-Cruise Hotel Stay, providing you with a seamless way to board the ship and explore the local area. Arrive the day before your scheduled cruise date and American Cruise Lines will handle the rest. The package includes a premium hotel stay, where you can enjoy the city at your leisure. On the morning of the cruise, meet in the hotel lobby after breakfast and we will transport you to the ship to begin your cruise. All luggage will be brought directly from the hotel and placed in your stateroom aboard the ship.

[< Previous Day](#)

[Next Day >](#)

Source: www.americancruiselines.com.

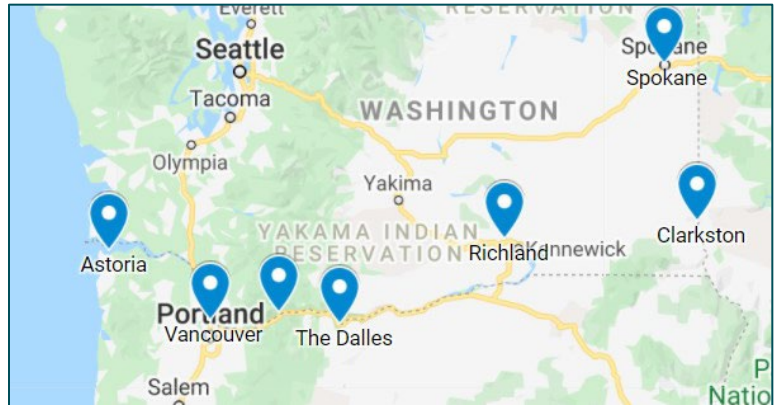


American Queen Steamboat Company

AQSC offers two cruises that call at the Port of Clarkston: the "Pacific Northwest Splendor" (29 scheduled for 2021) and "Wine Cruise" (3 scheduled; October/November only).

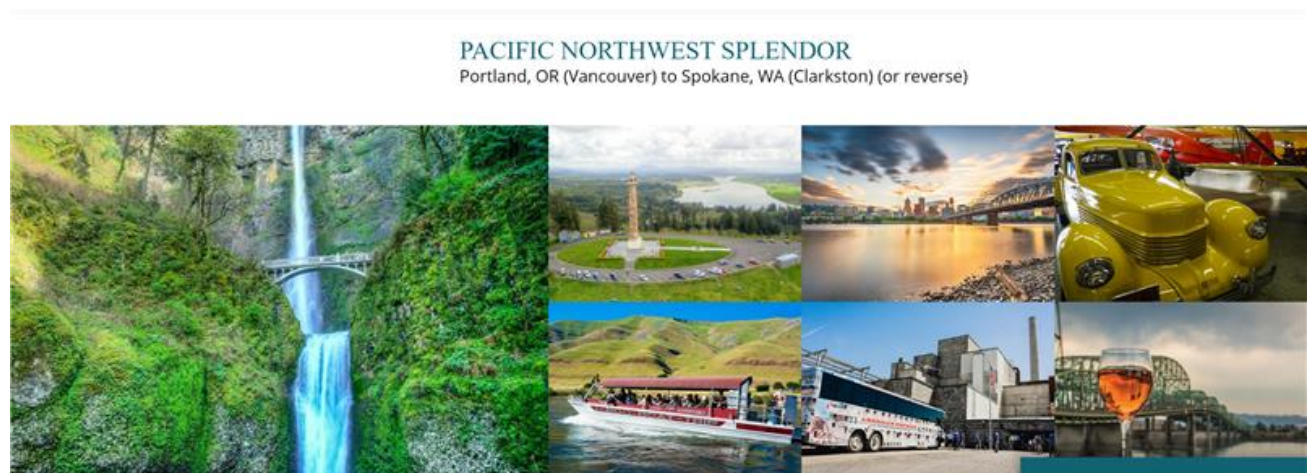
AQSC's website tends to feature Spokane more prominently than other lines, at least in part because they offer a pre- or post-cruise stay in Spokane. For example, they describe their eastbound itinerary as "Portland, OR (Vancouver) to Spokane, WA (Clarkston)."

AQSC changed its map for 2021, it is now an interactive Google map (see screenshot at right).



Source: www.americanqueensteamboatcompany.com.

AQSC's overview page of the Pacific Northwest Splendor cruise features one photo of the Lewis Clark Valley, of the jetboat tour (see below screenshot). The Wine Cruise does not feature any Valley photos



Source: www.americanqueensteamboatcompany.com.

AQSC's description of Clarkston (for both cruises) is as follows, and is accompanied by the jetboat photo at right:

Nestled at the union of the Snake and Clearwater Rivers in southeast Washington, Clarkston is the gateway to North America's deepest gorge – Hells Canyon – on the Snake River. Picturesque vistas, year-round mild climates and a deep history make this scenic inland port a desirable stop. Spend the day enjoying Clarkston, Washington and neighboring Lewiston, Idaho while tracing the legacy of the journey of Meriwether Lewis and William Clark – for whom the cities are named.



Source: www.americanqueensteamboatcompany.com.

Clarkston, WA (Disembark): As the journey concludes, there are other opportunities for you to take in the town. Enjoy the city at your leisure, or consider a post-cruise premium experience with airport transfer.

AQSC is offering one (add-on) shore excursion in 2021, the *Hells Canyon Scenic Jetboat Experience*. They are not offering *The Complete Lewis Clark Valley Wine Tour* in 2021, although they did offer it in 2019 (see next chapter). The website does not provide much detail on the jetboat tour beyond the text quoted above; once guests make a reservation, they are given more information on shore excursion options. One example of this information can be seen in the 2019 brochure given to guests, incorporated into the bus tour description; information on the two excursions (jet boat and wine tour) can be found on the second page.

AQSC includes a hop-on, hop-off (HOHO) bus tour in all its ports. Three buses circulate around major attractions in Clarkston/Lewiston, as seen in the below map. Their website notes the bus generically but does not provide details on the specific bus route for the Valley. Again, guests may have to book their cruise before getting more detailed information. Their 2019 brochure is copied below.



At Clarkston, we find ourselves at the confluence of the Snake and Clearwater rivers, more than 450 miles from the sea. The name Clarkston is in reference to William Clark and is located directly across the river from Lewiston, Idaho, which is named for Meriwether Lewis, though neither of them ever traveled to the Clarkston side of the river.

Travel by comfortable jet boat into one of North America's most scenic spots, spectacular Hells Canyon. For a short period each spring, the canyon is full of vibrant greens and colorful flowers. The 125-mile long canyon was carved by the waters of the Snake River and at 7,993 feet is North America's deepest river gorge—most of it inaccessible by road. The earliest known settlers in the canyon were the Nez Percé tribe and, as you travel up the river, look to the hillsides and see remnants of their ancestral horse trails along with pictographs and petroglyphs on the rock formations. In the afternoon, join your fellow travelers in the lounge for songs and stories by a local Nez Percé storyteller.

This evening, enjoy the company of a local winemaker onboard and sip their wines while you hear about how the geology of the area surrounding the Lewis-Clark Valley AVA, the newest Viticultural Area in the United States, affects the flavors of their wines. (B,L,D)

(next day)

After breakfast this morning transfer to the airport for your connecting flights home. Choose to fly from nearby Lewiston, Idaho, or travel through the picturesque landscapes of the Palouse to Spokane, Washington, located two hours away. (B)



Source: www.expeditions.com.

Extensions

Lindblad did not offer pre- or post-cruise packages in the Valley in 2019 but is currently promoting both in 2021. The pre-cruise package ("Lewiston History & Wine Pre-Voyage Extension") includes two nights at the Hells Canyon Grand Hotel (formerly Red Lion Lewiston) and visits to several vineyards. The "historic and culinary adventure" is described as follows, accompanied by the photos below:

Venture into the United States' newest-designated wine region nestled in the Lewis-Clark Valley to try some award-winning vintages on a historic and culinary adventure. Designated in just 2016, these 306,658 acres of picturesque, rolling vineyards are the valley's third appellation and Washington State's

14th. Throughout, you'll be joined by a local sommelier who also happens to be a historian and is ideally suited to illuminate all you see—and sample.

Day 1

Arrive Spokane, WA

Transfer by private vehicle to the Red Lion Hotel Lewiston to check-in. Enjoy the remainder of the afternoon to explore on your own or relax. (D)

Day 2

Lewiston History and Wine Tour



Source: www.expeditions.com.

Meet your private guide in the hotel lobby for a day of exploration of the Lewis-Clark Valley. Begin with a visit to the Nez Perce National Historic Park to learn about the traditional home of the Nimiipuu (Nez Perce) people and how they continued their ways of life during the European settlement of the United States. Continue to the Nez Perce County Historical Society and Museum where you will learn about the area's history, including the Nez Perce, the Lewis and Clark Expedition of Discovery, the Camas Prairie Railroad, and river navigation.

Enjoy an olive oil and vinegar tasting experience followed by lunch at Ampersand Oil and Vinegar Taphouse. After lunch, cross the street to Vine 46, where a group of friends established a tasting room in an old service station located in downtown Lewiston. Sample their eclectic variety of red wines and small sampling of whites. Good to the last drop, every one of their wines submitted to the 2018 Cascadia Wine Competition won a medal.



Source: www.expeditions.com.

Continue to Clearwater Canyon Cellars, a vital part of the wine culture of the region. Their wine maker, Dr. Coco Umiker, Ph.D., is known throughout the industry, and has been invited to judge the prestigious Cascadia Wine Competition each year. Housed on Umiker Estates—owned by the Umiker/Nichols family who have farmed these lands for the last 100 years—the wines at this vineyard will not disappoint.

The remainder of the evening is on your own. Return to the Red Lion Hotel or take a complimentary hotel shuttle to enjoy downtown Lewiston. (B,L,D)

Day 3

Embark

Enjoy the morning at leisure before transferring to the National Geographic Quest in time for embarkation.

The post-cruise extension description matches the pre-cruise description, but it includes only one night at the Hells Canyon Grand Hotel (referred to as the Red Lion Lewiston in the above passages).

Summary

To provide context, the following table shows how the three lines compare in terms of length of cruise, season, tours, and pre-/post-stay offerings.

- All three lines offer similar length cruises (8-9 days) on the Columbia/Snake. Only AQSC offers a wine-themed cruise (three out of 29 cruises).
- ACL plans to offer by far the largest number of cruises in 2021 at 117; this compares with AQSC's 32 and Lindblad's 10. AQSC and ACL operate most of the year, while Lindblad only sails in April, September, and October.
- ACL will offer two (complimentary) bus tours in 2021, in addition to two optional add-on tours. (The HOHO bus tour is in development and has not yet been added to the website.) AQSC will offer its usual HOHO bus tour, and only the jetboat tour as an optional add-on. Lindblad offers no add-ons but includes the jetboat tour in its package. (Additional detail is provided in the following chapter.)
- ACL will continue to offer an overnight add-on package to passengers starting their cruise in Clarkston; they do not have an equivalent package for those ending their cruise. Lindblad has not historically offered pre- and post-packages but will start in 2021. AQSC does not offer any local extensions.

Table 6. Clarkston River Cruises by Line, 2021

	ACL	AQSC	Lindblad
Name of cruise(s)	<i>Columbia and Snake Rivers Cruise</i>	<i>Pacific Northwest Splendor; Wine Cruise</i>	<i>Columbia and Snake Rivers Journey</i>
Length of cruise	8 days	9 days	8 days
# of vessels	4	1	2
# of cruises advertised	117	29; 3	10
Months	Mar-Nov	Apr-Oct; Oct-Nov	Apr; Sept-Oct
Included excursions	Bus tour (2)	Bus tour	Jetboat
Optional excursions	<i>Hells Canyon Jetboat Adventure;</i> <i>Echoes from our Ancestors</i>	Jetboat	None
Valley pre- or post- stay	Pre only	None	Pre and Post

Source: Cruise line websites.

Cruise line websites further reveal the following:

- All three cruise lines emphasize Hells Canyon prominently in descriptions of the Clarkston port call. There are also references to Lewis and Clark, Nez Perce culture and sites, and wine.
- There is little to no reference, in photos or in text, to the towns of Clarkston or Lewiston; one exception is in the following description by ACL: *The town features beautiful scenic vistas, year-round recreation, and an inland seaport rich in history. Follow the footsteps of the pioneers before us as you explore Clarkston's natural bounty and small town charm.*
- A photo accompanying a description of Clarkston (labeled "Hells Canyon") appears to be from a different region.
- A photo advertising the wine tour features wines from a Willamette Valley winery.

It is important to note that cruise lines have a limited amount of space and budget for promotion of individual ports. It is not the cruise line's job to promote a destination; they are in the business of selling cruises, and they will use images and descriptions that will most appeal to passengers. With this in mind, it is also important to recognize that the current promotion may not cause passengers to be interested in exploring the towns Clarkston or Lewiston whether while in town for the day or by extending their visit; most of the emphasis is on Hells Canyon.

Destination Assessment

This section assesses Lewis Clark Valley as a destination for cruise passengers and lines. What are the region's primary assets, and how well do they align with the river cruise market? This section also addresses the region's infrastructure for cruise vessels and passengers in terms of docks, hotels, and airlift.

Lewis Clark Valley Assets

The region's assets with relevance to the cruise industry include Hells Canyon, Lewis and Clark history, Nez Perce culture, wineries, downtown Lewiston, scenic waterfront, fishing, golf, and Clearwater River Casino and Lodge.

Hells Canyon

Located south of the Lewis Clark Valley along the Snake River, Hells Canyon is the deepest gorge in North America and arguably the region's biggest draw for visitors. The easiest way to access the canyon is via the Snake River, and jetboat tours are available from Clarkston. Jetboat tours are generally six hours and include one or two stops where passengers can eat, use the restroom, take walks, and view wildlife.



Source: U.S. National Forest Service.

In addition to the stunning scenery, jetboat tours are fully guided by captain and crew who share information on the local geology, Lewis and Clark history, and Native American history and culture.

CRUISE MARKET MATCH

As noted previously, the Hells Canyon jetboat tour is the most popular activity among cruise passengers in the Lewis Clark Valley, with about 40% participating in 2019. The tour is generally highly rated and matches well with the riverboat market's areas of interest, particularly history and Native American culture. Indeed, a crew member reported that the riverboat passengers distinguish themselves from other passengers in their curiosity and tendency to ask more questions. It is also very convenient for cruise passengers at the Port of Clarkston Cruise Dock to board the jetboats at the same dock. (Cruise passengers at the 14th Street Dock are bussed to the jetboat dock.) Lindblad is particularly focused on the jetboat tour in their Clarkston port call: it is included in the price of the cruise and fits well with their emphasis on nature/outdoor adventure.

According to interviews, the six hours can be long for some of the more elderly passengers, but it would be difficult to shorten the tour due to the location of the most scenic areas, as well as the need for stops along the way. However, ACL will offer a shorter, three-hour tour in 2021 ("Echoes of Our Ancestors") in addition to the standard six-hour version; this may be a perfect alternative for less hardy passengers.

Snake River Adventures (the operator of all jetboat tours offered to cruise passengers in 2019) reported that they will most likely be able to accommodate ACL's planned additional vessels, depending on the schedule; it

is more challenging to meet demand when two ships are visiting at the same time. They may need to add a vessel to their fleet if this becomes the norm. Permitting is not a limiting factor.

Lewis and Clark History

As a campsite of the Corps of Discovery Expedition, the Lewis Clark Valley is an area of national historic interest. Lewiston is one of the final stops on the Lewis and Clark National Historic Trail, a self-guided tour route from Pennsylvania to Oregon designed to help visitors follow the expedition's path. Clarkston and Lewiston are listed in several of the Historic Trail's suggested itineraries.

Several local attractions directly address or include information about the Lewis and Clark expedition, including the Lewis and Clark Discovery Center, the Lewis and Clark Interpretive Center, and the Lewis and Clark Timeline. The jetboat tour also provides information on the explorers.



Source: National Park Service.

CRUISE MARKET MATCH

The area's connection to the travels of Lewis and Clark feature prominently in cruise line promotion of Columbia/Snake cruises as well as of Clarkston as a port call, as noted in the previous chapter. Passengers are reportedly very interested in this facet of the Lewis Clark Valley, in keeping with their high education levels and interest in local history. Promotional materials include phrases like "Embrace your inner pioneer as you travel along the epic route forged by Lewis and Clark more than 200 years ago" (ACL) and "Spend the day enjoying Clarkston, Washington and neighboring Lewiston, Idaho while tracing the legacy of the journey of Meriwether Lewis and William Clark" (AQSC). Lewis and Clark history is incorporated into onboard lectures and tour narration (such as on the HOHO and jetboat tours). Cruise line representatives emphasized passengers' interest in the subject, but did not express the need for additional Lewis and Clark-related tours; one representative noted a need for more local historians.

Nez Perce Culture

The Lewis Clark Valley is home to the Nez Perce Tribe, a federally recognized tribe headquartered in Lapwai, Idaho. The Tribe's rich history in the area and connection to the Lewis and Clark expedition are an important part of the Valley's assets. Tribal culture is expressed to visitors through art, regalia,



Source: Visit Lewis Clark Valley.

storytelling, singing, and dancing demonstrations. Local museums showcase historical photos and cultural artifacts, and parks feature interpretive signage, sculpture, and cultural attractions such as tipis.

Operated by the National Park Service, Nez Perce National Historical Park is a collection of 38 sites with significance to the Nimiipuu (Nez Perce) people. The park headquarters and visitor center are located a short drive east of Lewiston. Activities available around the visitor center include interpretive trails, historic structures, a museum, and showing of the park film, *Of One Heart*.



Source: National Park Service.

CRUISE MARKET MATCH

Cruise passengers are reportedly very interested in learning about Nez Perce culture while on their Columbia/Snake cruise. Photos of Nez Perce tribal members in regalia are featured prominently in cruise promotional materials. Nearly all cruise passengers are exposed to Nez Perce culture through onboard lectures by tribal members and/or a visit to the Nez Perce National Historical Park, which is provided by AQSC on their HOHO tour, and ACL as a standalone excursion (at no extra charge). As noted above, ACL is offering a Nez Perce-themed tour for the first time in 2021, combining a jetboat tour of the Snake River with Nez Perce storytelling and dancing. There are also opportunities to purchase Nez Perce art, jewelry, and clothing at the Newberry Square shopping center (see Downtown).

Nez Perce Tourism (a private company owned by a tribal member) is currently promoting several additional day and overnight options to cruise lines in partnership with Visit Lewis Clark Valley and other area providers. Suggested day tours include the above jet boat tour in addition to white water rafting, horseback riding, a dinner with tribal members, an arts workshop, and van rental. They are also promoting overnight extensions combining several of these activities in a two or three-night package including hotels, meals, transportation, and tours.

Cruise line representatives emphasized passengers' interest in Tribal cultural content, but did not express a great need for more such content. However, if ACL's "Echoes from Our Ancestors" tour is successful, other lines may consider adding it, and Nez Perce Tourism's current promotional efforts may yield results.

Wineries

With a long history of growing grapes, the Lewis Clark Valley is home to 16 vineyards and ten wineries. In 2016, the Valley became an American Viticultural Area (AVA), a federal designation indicating a specific grape-growing region which can be listed on wine labels. The Lewis-Clark Valley Wine Alliance promotes the wineries and vineyards located in the AVA and operates a website listing each



Source: Lewis Clark Valley Wine Alliance.

member organization, regional information, and links to travel resources.

Seven of the nine wine tasting rooms are located in Lewiston or Clarkston, including one within walking distance of the docks (Basalt Cellars). Nearby wineries that offer tours and tastings include Lindsay Creek Vineyards, Clearwater Canyon, and Vine 46. A local operator, Twisted Vine Wine Tours, offers a variety of wine tours including day-only and multi-night packages.

CRUISE MARKET MATCH

Cruise passengers are reported to be interested in and appreciative of local wines on Columbia/Snake cruises. Photos of vineyards and wines are featured in cruise promotional materials, local wines are served onboard, and viticulturalists provide onboard lectures and tastings.

As noted previously, there have been wine tours offered by cruise lines to passengers calling at Clarkston. AQSC offered an optional excursion in 2019 called “The Complete Lewis-Clark Valley Wine Tour.” While the tour was highly rated by passengers, volume was not large enough, and transportation costs too high, to justify continuing the tour in 2021. Lindblad will offer their optional pre- and post- wine tours in 2021, although volume will be very low considering Lindblad’s limited schedule (only 10 cruises in 2021).



Source: Lewis Clark Valley Wine Alliance.

Cruise line representatives explained several limitations on the market for wine-related tours in the Valley. Passengers’ time is limited by other tour participation (HOHO bus, jetboat tour). The fact that wine-tasting is strictly an afternoon/evening activity precludes the possibility of offering a morning tour. There are also other opportunities to visit vineyards on the Columbia/Snake cruises, such as Maryhill Winery near The Dalles, offered by ACL; AQSC advertises the local wine experiences for several of their port calls including Stevenson, The Dalles, and Richland. Cruise lines tend to avoid offering too many of the same type of tours on their cruises. One representative further explained that winery tours are “capacity-controlled”: wineries can only accommodate a limited number of guests at a time, which is sometimes challenging for lines to plan around.

Another indicator of “cruise market match” is the low volume of cruise customers at Basalt Cellars, located within a five-minute walk of the Port of Clarkston Cruise Dock. The business reported very low visitation by cruise guests in 2019, less than one-half of 1% of total passenger volume. This may be partly due to their limited operating hours; they are closed on Sundays, which is when many cruise passengers have free time. AQSC noted that Basalt Cellars used to be included in their HOHO tour, but the Sunday closure caused them to discontinue.

A Twisted Vine representative, the operator of the AQSC wine tour as well as the upcoming Lindblad tour, reported that passengers who want wine tours find his business through online searches and set up tours on their own, without cruise line referral.

Downtown Lewiston

Downtown Lewiston is a charming, walkable, well maintained historic area with restaurants, cafés, and some shopping opportunities. The downtown area is home to several historic buildings and storefronts, including the Nez Perce County Historical Society and Museum which is housed in Heritage House, a home built in 1898. A “public art zone” runs along 5th Street. The historic Bridelblik House offers tours. The recently opened Newberry Square offers retail opportunities including a bakery/ice cream shop, a record store, and a shop offering Nez Perce jewelry and clothing (among other locally produced items). The downtown area also includes Brackenbury Square, which has a stage for public events, a fountain, and picnic tables, and the Roxy Theater. While several businesses in downtown Lewiston are open daily, many are closed on Sundays.



Source: Beautiful Downtown Lewiston.

CRUISE MARKET MATCH

Downtown Lewiston holds significant appeal for Columbia/Snake cruise passengers: it is walkable, well-maintained, historic, and offers opportunities to visit museums as well as shops and cafes. AQSC’s HOHO tour makes several downtown stops (see previous chapter). With ACL planning a similar bus tour starting in 2021, downtown Lewiston should expect to see many more cruise passengers in coming years. (Lindblad passengers, nearly all of whom participate in the jetboat tour, do not generally visit downtown Lewiston.)

The largest barrier to more cruise passengers visiting downtown Lewiston is transportation. While it is only a five to ten minute drive (about 1.5 miles) between the cruise docks and downtown, unless passengers are on the HOHO tour, they rarely make the trip, which requires calling a rideshare or taxi service. The HOHO tour allows passengers to choose their length of time (pickups occur every 30 minutes); however, with so many other stops on the tour, passengers may not feel they have time to explore downtown. Sunday shop closures present a barrier to passenger visitation and spending in downtown Lewiston. The popularity of the jetboat tour is another constraint, according to cruise line contacts. The large volume does not leave many passengers available for other activities.

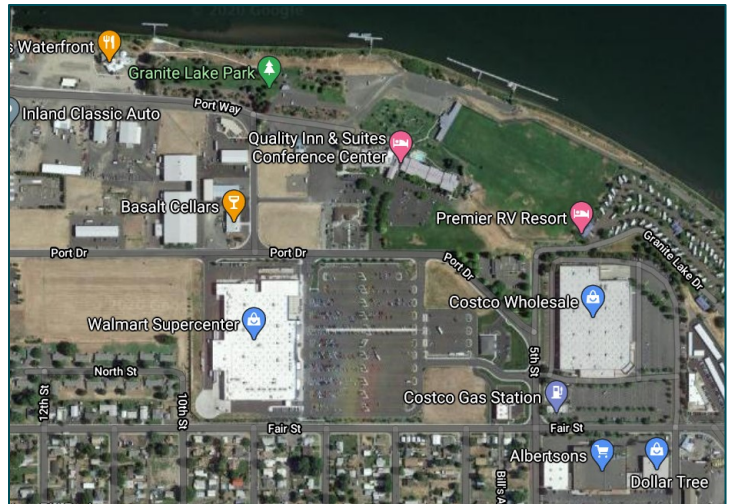
Note that the Bridelblik House may discontinue their tours for cruise passengers. While it would remove a significant attraction from the tour, it may allow more time at the downtown shopping stop, or an opportunity to add a new stop.

Clarkston

Clarkston has two areas with current and/or potential connection to the cruise market: the retail area adjacent to the dock (see map at right); and the downtown retail area south of the dock. (The waterfront area of Clarkston is addressed in the following section.)

In the immediate area surrounding the dock (within walking distance), are several major retail outlets including Costco, Walmart, and Albertson's.

Clarkston's downtown area is a little over one mile (and a five-minute drive) south of the docks and consists of several blocks with a variety of dining and retail opportunities. Highlights include an old-fashioned soda fountain at Wasem's Pharmacy, wine tasting at Parejas Cellars, gourmet dining at Saute on 6th, and the Valley Art Center offering workshops and gallery shows.



Source: Google Maps.

CRUISE MARKET MATCH

Cruise passengers and crew members already use the retail area around the 7th Street dock: ACL passengers and crew often walk there, and it is a stop for passengers on the AQSC HOHO tour. ACL indicated the "Port Drive shopping area" was a potential stop on their planned bus tour. It is particularly convenient for vessel provisioning, as well as for passengers and crew needing a pharmacy, toiletries, and/or clothing.

Few cruise passengers patronize downtown Clarkston due the walking distance and relatively limited historic sites, museums, and boutiques. Downtown wine tasting and dining options could appeal to passengers on pre-cruise overnight packages.

Scenic Waterfront

One of the main draws of the Clarkston/Lewiston area is the waterfront, offering scenic vistas of the Snake and Clearwater rivers and surrounding hills. The Clearwater Snake National Recreation Trail offers nearly 30 miles of paths ideal for walking, running, and biking. Attractions along the waterfront of possible relevance to cruise passengers include Granite Lake Park, Rooster's (restaurant), the Greenbelt Ramp and surrounding park, and the Lewis & Clark Center. (The Gateway Golf Center is addressed in the Golf section.)



Source: Visit Lewis Clark Valley.

Hells Gate State Park offers campsites and cabins; hiking, biking, and horse trails; a boat launch and marina; and other infrastructure. The park marina includes space for tour boat parking. The park is home to the Lewis and Clark Discovery Center and the Jack O'Connor Hunting Heritage and Education Center.

CRUISE MARKET MATCH

There are several good fits with the cruise market along the waterfront. The walking path is wide, relatively flat, and wheelchair-accessible. It is accessible right from the 7th Street dock. Granite Lake Park provides six acres of waterfront pathway and park within a few minutes' walk from the cruise dock. Just beyond Granite Lake Park, Rooster's is reportedly popular among both passengers and crew, offering outdoor seating and lovely views of the river. Even though all onboard meals are included in the cruise package price, many passengers reportedly appreciate the opportunity to dine off their ship. Slightly farther from the dock, the Greenbelt Ramp area offers a scenic, riverfront outdoor experience with plenty of parking and boat launch.

There are also some limitations. The walking path is not within (reasonable) walking distance of the 14th Street dock. Many cruise passengers do not have the time for a walk, depending on the bus and/or jetboat tour schedule. A cruise line representative said there was "only a little" demand for walking and biking options. It is telling that despite the immediate accessibility of the path to cruise passengers at the 7th Street dock, few passengers currently take advantage of it. (Crew members sometimes use the path for jogging or biking.) A cruise line representative specifically stated they look for activities that "don't require a lot of walking." There is little signage or wayfinding markers along the walking path. The Lewis & Clark Center across the river (featuring the "Tscemicum" sculpture and interpretive signage) may hold some appeal but is in need of upgrades. Finally, a walk along the waterfront may enhance the passenger experience but offers no financial incentive to cruise lines or local operators unless a tour is developed, and it likely does not hold enough appeal to warrant a standalone tour.

AQSC carries bicycles on-board, which could be used by guests to explore the waterfront paths, provided the vessel resumes calling at the 7th Street dock; the 14th Street dock is not as accessible to the paths.

Fishing

The Snake and Clearwater rivers are home to a variety of fish species, including rainbow trout, steelhead, smallmouth bass, sturgeon, and chinook salmon. Species availability varies by month, but opportunities are generally available throughout the cruise season. Several sportfish guiding companies operate in the area, with excursions leaving from Clarkston and Lewiston. Most excursions require a full day, with limited opportunities for half-day fishing trips.



Source: Idaho Fish and Game.

CRUISE MARKET MATCH

Cruise lines reported mixed success with fishing excursions in the past and low interest in exploring this further. While there are certainly fishing enthusiasts among passengers, cruise line representatives did not see this as a viable tour option for Clarkston. One barrier is that these passengers tend to travel in couples, and participate in tours as couples, and fishing is far more likely to appeal to men. Another barrier is that the Lewis Clark Valley is not widely known for its fishing among the general population, and thus is not part of cruise passengers' expectations for their cruise. Volume is likely too low to warrant a cruise line-sponsored excursion. However, cruise lines should be provided information on local operators and offerings in case passengers make a special request.

Golf

The Lewiston Clarkston area is home to four 18-hole golf courses and a stand-alone driving range (Dave's Golf Center) located directly across from the cruise dock. The Lewis Clark Valley generally has mild winters allowing courses to remain open year-round. While two courses are part of private clubs, both allow unaccompanied guests when space is available.



Source: Red Wolf Golf Club.

CRUISE MARKET MATCH

Cruise passengers would appear to be a good match, demographically, with golf. A small number of passengers do take advantage of the driving range at Dave's Golf Center while staying at the Holiday Inn. However, like fishing, there is low awareness of the area's golf offerings among passengers; it is not part of passengers' expectations of what they will experience in the region. Cruise line representatives were skeptical of the viability of a golf-oriented experience. One noted, "Golf doesn't go over well with our guests." Another said, "We don't get a lot of interest in golf...the only place we're successful with golf is at premier golf courses like Hilton Head or Savannah." However, lines could be provided with information on local golf courses for special-interest passengers. (The visibility of Dave's Golf Center and its adjacency to the Holiday Inn will ensure continued use by a small number of enthusiasts.)

Clearwater River Casino and Lodge

The Clearwater River Casino and Lodge in Lewiston is owned and operated by the Nez Perce Tribe. The casino offers slot machines and bingo events, but no table games. In addition to gaming and accommodations, the lodge offers dining options and has an event space which hosts concerts, conferences, and other events. The lodge is unique in the area in offering three-star accommodations.



Source: Clearwater River Casino and Lodge.

CRUISE MARKET MATCH

None of the cruise line representatives contacted saw a match between their passengers and a casino experience. While these same passengers might be interested in gambling while on the Mississippi River, or a trip to Las Vegas, gambling is part of the history and culture of those destinations. The limitation of the casino to slot machines and bingo presents another barrier. The lodge's 3.5-star status may be of interest to passengers seeking higher-end accommodations, although it might be a challenge to communicate the option to passengers without cruise line buy-in.

Lewis Clark Valley Infrastructure

Infrastructure in the region related to the cruise sector includes docks, hotels, and airlift.

Cruise Docks

The Port of Clarkston has two docks used by riverboats, the Cruise Boat Dock (also known as the 7th Street Dock) and the 14th Street Dock.



Source: Google Maps.

CRUISE BOAT DOCK

The 580-foot Cruise Boat Dock is the primary facility used by cruise lines and can accommodate two vessels simultaneously. It is the primary docking facility for ACL and Lindblad. AQSC's vessel has at times been unable to dock there due to draft restrictions; however, maintenance dredging will soon solve that issue.



Source: Snake River Adventures.

The Cruise Boat Dock is preferred by cruise lines for many reasons: it is a well maintained, floating dock; able to accommodate two cruise vessels at once (depending on length); adjacent to the Holiday Inn (used by ACL and Lindblad); located near Costco and Albertsons (convenient for provisioning); and accessible by jetboats heading up to Hells Canyon.

The Cruise Boat Dock has some drawbacks for the cruise market. While the backdrop of the hills across the river is scenic, there is little visual appeal in the dock's immediate uplands area. Beyond the driving range are big box stores and large parking lots. Cruise line representatives noted the lack of (appealing) retail options in the immediate area. In addition, the incline leading up from the cruise dock can be challenging for more infirm passengers.

Passengers do have the option of walking along the waterfront to Rooster's restaurant (about 10 minutes), immediately west of the dock, and some walk to Wal-Mart and Albertson's to pick up supplies and souvenirs (about 10- and 20-minute walks from the dock, respectively). While the walk to Rooster's traverses a pleasant park, the walks to Wal-Mart and Albertson's are less appealing.

Representatives of Lindblad, AQSC, and UnCruise commented that low water levels around the 7th Street dock are challenging for their vessels, and maintenance dredging is desired. The ACL representative did not believe dredging was required for their vessels. (Dredging to 14 feet at the confluence of the Snake and Clearwater rivers and the Port of Clarkston berthing areas was last completed by the US Army Corps of Engineers in 2015.)

The Port of Clarkston reports additional constraints at the Cruise Boat Dock. The limited space in the uplands area at the dock landing creates a bottleneck for tanker trucks, tour buses, service delivery, trash pick-up, and public parking. They further noted that "since this location is in a recognized Archaeological Site, expansion of the service pad is a near impossibility."

Visit Lewis Clark Valley runs a group of volunteers that meet and greet each cruise vessel. They wear bright yellow vests, hold welcome signs, answer questions, and direct passengers to a sign/kiosk for those interested in free maps.

14TH STREET DOCK

The 14th Street Dock is designed as a freight dock but has also been used for cruise ship moorage due to low water levels and capacity constraints at the Cruise Boat Dock. The dock is 260' long, with dolphins extending an additional 160' feet.



Source: Port of Clarkston.

The 14th Street Dock is currently less preferable as a cruise passenger entry point due to its industrial appearance and location. A crane dating from 1938 is the most prominent feature of the dock (see photo at right). There is nowhere for passengers to walk or shop in the immediate vicinity. Because the dock is presently too tall for river jetboats, passengers must be bussed to the other dock; this ties up AQSC's buses.

However, a new project that is fully permitted and out to bid will solve the jetboat issue: an auxiliary float will be attached to the western-most dolphin, allowing jetboat access. The project is scheduled to be completed in December 2021.

The Port of Clarkston reports that beyond the draft issue, it is more efficient to have AQSC use the 14th Street dock because it is challenging to fit a second vessel alongside AQSC's at the 7th Street dock. They also note that it is the preferred fueling location by providers because there is more space, and allows fuel lines to be placed well away from passengers and crew.

An additional consideration for the 14th Street dock is the planned redevelopment of the Hells Gate Marina (see following section), which is one-half mile away.

Visit Lewis Clark Valley also sends volunteers to greet passengers at the 14th Street Dock. Recent efforts to make the site more visually appealing include the addition of ten potted trees.

VESSEL SIZE

Vessel size is an important factor in dock capacity. The table below shows the size of vessels planning to dock at Clarkston in 2021. The American Empress is longest at 360 feet, followed closely by the newer ACL vessels, the Harmony (345 feet) and the Song (328 feet). Note that the 7th Street dock can accommodate two vessels even if their combined length exceeds the length of the dock.

Table 7. Port of Clarkston Vessels Scheduled, 2021

Company	Vessel	Length (feet)
American Cruise Line	Queen of the West	230
	American Pride	295
	American Song	328
	American Harmony	345
American Queen Steamboat Co.	American Empress	360
Lindblad Expeditions	Quest	240
	Sea Lion	164

Sources: American Cruise Line, American Queen Steamboat Co., Lindblad Expeditions.

DOCK CAPACITY

The table below shows the number of “moorage days” used by cruise vessels in 2018 and 2019. A moorage day represents a partial or full day by one vessel; for example, a call from the AQSC vessel would represent three moorage days as they spend two overnights on each port call.

Usage of the 7th Street dock shows higher usage than the 14th Street dock, more so in 2018. As noted, only AQSC regularly uses the 14th Street dock. Moorage days were heaviest in October in both 2018 and 2019, at 31 and 27, respectively. (Note that the Bonneville dam closure significantly impacted 2019 usage, with a decrease from 29 to 8 September moorage days between 2018 and 2019.)

There appears to be significant capacity to accommodate additional vessels; even the heaviest month (25 moorage days at the 7th Street dock in October 2018) could have accommodated double the traffic, as it has space for two vessels.

Table 8. Cruise Vessel Moorage Days at Port of Clarkston Docks, 2018-2019

	April	May	June	July	Aug	Sept	Oct	Nov
2018								
Moorage Days	10	14	14	17	16	29	31	5
7 th Street Dock	4	8	8	9	10	23	25	2
14 th Street Dock	6	6	6	8	6	6	6	3
2019								
Moorage Days	13	19	19	20	21	8	27	5
7 th Street Dock	7	13	12	12	15	2	21	2
14 th Street Dock	6	6	7	8	6	6	6	3

Source: Port of Clarkston, McDowell Group calculations.

However, there is much less capacity than appears due to the ships' schedules: in 2018 and 2019, nearly all vessels called between Fridays and Tuesdays. This is due to passengers' preference to begin and end their cruise on or around weekends. The Port of Clarkston reported anticipating a bottleneck in 2019, which was only relieved by the dam closure. The following table shows a "peak week" schedule in September 2018. (The dam closure in 2019 makes that year less useful as an example.)

Table 9. Peak Week Cruise Vessel Traffic, September 21-25, 2018

	DOCK	Friday	Saturday	Sunday	Monday	Tuesday
American Pride	7 th Street	Arrive 11am	Depart 1:30pm			
Quest	7 th Street		Arrive	Depart		
Wilderness Discoverer	7 th Street			Arrive 6:30am; Depart 6pm		
American Empress	14 th Street			Arrive 11am		Depart 3pm

Source: Port of Clarkston. Quest arrival/departure times not available.

All cruise lines expressed a concern about dock capacity in the coming years. The availability of the 14th Street dock as a backup for ACL and Lindblad likely ensures that these lines would not cancel a voyage if the 7th Street dock were already occupied by two vessels. However, the general unsuitability of the 14th Street dock – and, to a lesser extent, the 7th Street dock – for cruise vessels and passengers does indicate the desirability (if not outright need) for a third moorage option.

Hotels

The Lewis Clark Valley has 14 lodging properties with at least 30 rooms. The largest properties have ratings between 2 and 3.5, with only three properties with at least 3 stars: Hells Canyon Grand Hotel (formerly known as the Red Lion Lewiston), Holiday Inn Clarkston Lewiston, and Clearwater River Casino & Lodge.

Table 10. Hotels in Lewis Clark Valley

	Number of Rooms	Rating
Hells Canyon Grand Hotel	179	3 stars
Hampton Inn Lewiston	100	2.5 stars
Holiday Inn Express Lewiston	100	2.5 stars
Holiday Inn Clarkston-Lewiston	97	3.5 stars
Motel 6	85	n/a
Best Western Plus The Inn at Hells Canyon	84	2.5 stars
Fairbridge Inn & Suites Lewiston	74	2 stars
Rivertree Inn	61	n/a
Super 8 by Wyndham Lewiston	61	2 stars
Inn America Lewiston	61	2 stars
Comfort Inn Lewiston	52	2.5 stars
Clearwater River Casino & Lodge	50	3.5 stars
Golden Oaks Inn	39	n/a
Seaport Inn and Suites	34	2.5 stars

Sources: Lewis Clark Valley Visitor Guide; ratings from hotels.com. Ratings and number of rooms not available for all properties.

The primary hotel used by cruise passengers is the Holiday Inn Clarkston-Lewiston, used by ACL for overnight packages and by Lindblad for hospitality suites. It was recently remodeled and is a convenient option for cruise lines due to its proximity to the 7th Street dock. A Holiday Inn representative reported that there were a few nights in 2019 when they did not have capacity for all ACL guests; overflow was sent to the Red Lion Lewiston (now the Hells Canyon Grand Hotel). Lindblad plans to use the Hells Canyon Grand Hotel for its 2021 Wine and History Tour.



Source: Holiday Inn Clarkston.

Representatives of AQSC reported that they would not consider offering pre- or post- tours in Clarkston or Lewiston due to the limitations of local hotels. They require “at least a four-star” hotel with a capacity of 110 rooms. In addition, they offer overnight add-ons in Spokane, where the Historic Davenport Hotel provides a good fit for their guests. UnCruise and Lindblad also reported that the hotel options in Clarkston presented a barrier to their guests staying in the area.

In addition to the hotel nights arranged by cruise lines, some passengers make their own travel arrangements for extending their stay, renting cars and staying in local hotels.

Airport

The Lewiston-Nez Perce County Regional Airport is located about a 15-minute drive from the cruise dock and is served by two daily non-stop flights to/from Salt Lake City on Delta/SkyWest. This level of flight service is down significantly from previous years: Horizon flights were suspended in August 2018, eliminating 60% of the airport’s commercial passenger flights.⁶

AQSC reports that at least 95% of their passengers use the Spokane Airport. A Lewiston-Portland air connection could potentially be used by their guests, but there is less incentive because of their traditional Spokane extension, and unwillingness to use local hotels.

ACL provides information on both the Lewiston and Spokane airport to guests, but 70% use the Spokane connection due to their better hotel options and more frequent flights. Lindblad similarly reported that 80% of their guests use the Spokane airport.

An UnCruise representative noted that Alaska Airlines discontinuing their service to Lewiston was a major factor in deciding not to continue their Clarkston calls. They would be motivated to return if there were a Lewiston-Portland air connection as it would make transportation simpler and lower cost for the passengers. (Lewiston-Seattle is not nearly as desirable since passengers begin/end their cruise in Portland.)

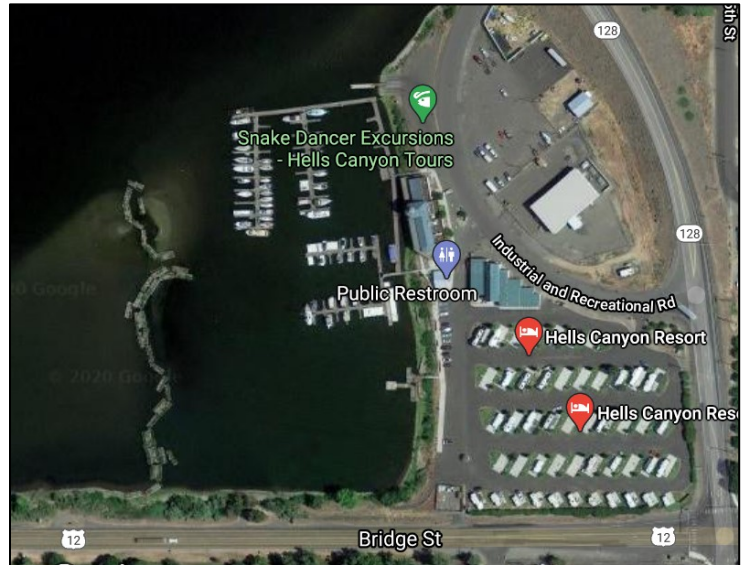
⁶ www.spokesman.com; “Lewiston Airport grapples with loss of Horizon Air,” August 26, 2018.

Potential Infrastructure Developments

Two potential developments are described below. There is unlikely to be sufficient demand from river cruise vessels in the near term to warrant both developments.

HELLS CANYON MARINA REDEVELOPMENT

Hells Canyon Resort is located near the Red Wolf Bridge. The marina features 120 slips, fuel service, electricity, water, and a boat ramp, among other amenities. Hells Canyon Resort currently leases the property from the Port of Clarkston, and the lease ends November 11, 2021. The marina is currently in disrepair: it needs dredging, and the docks need to be replaced. Uplands facilities also require renovation.



Source: Google Maps.

A concept being discussed currently is Nez Perce Tribal Enterprises purchasing the property (which includes both the RV park and marina) and redeveloping it, potentially to accommodate cruise vessels, among other users. It is a natural fit for the Tribe, which recently purchased the Red Wolf Golf Club right across the street from the property and is interested in expanding their hospitality sector.

A third cruise dock would certainly ease the expected bottleneck at the current cruise docks when ACL introduces their fourth and fifth vessels in the coming years. It is also a more desirable location than either of the other current docks:

- It is a more scenic location.
- There are restrooms and other visitor amenities.
- There appears to be sufficient bus parking.
- The building located at the top of the pedestrian ramps could serve as a welcoming center for passengers (although it requires renovation). It could potentially offer visitor information services, a tour center, and dining and retail opportunities. These amenities could also serve passengers who arrive at the nearby 14th Street dock.

The site would have its drawbacks; its location puts it slightly farther from the Holiday Inn, the Wal-Mart/Albertson's area, and downtown Lewiston. One cruise line representative expressed doubt that there was sufficient space for adequate cruise vessel moorage. The redevelopment is also likely to take several years.

PORT OF LEWISTON WATERFRONT DEVELOPMENT

The Port of Lewiston owns two developable land parcels along the north bank of the Clearwater River directly across from downtown Lewiston (see map). In 2019, the port commissioned a master plan effort related to

parcel development, which evaluated site development concepts and prepared a feasibility analysis for a range of improvements. Included in the efforts were a cruise ship dock facility to accommodate two large vessels and enhanced access to the Confluence Habitat Management Unit (HMU) for recreation access.

Confluence Riverfront Plan Site



Source: Port of Lewiston Confluence Riverfront Master Plan.

Specifically, the plan states:

To meet this growing demand that includes opportunities for new, purpose-built river cruise facilities, the Port of Lewiston may develop a new vessel homeport with onshore experiences. This will complement the Port of Clarkston's facilities by providing additional capacity for the ongoing river cruises while creating new attractions that generate increased interests by cruise ship operators to expand their overall number of deployments to the Confluence Riverfront.

To do this, the Port's waterfront and adjacent shoreline areas will be developed and revitalized with moorages capable of ultimately accommodating up to two large vessels simultaneously. In addition, new upland features will be introduced to the site that contribute to an overall quality guest experience while effectively meeting the logistical homeporting needs of riverine ships.⁷

The long-term vision for the plan includes the following elements:

- Easy jetboat access for Hells Canyon tours.
- Water taxis that would bring cruise passengers to other docks in the area, facilitating access to various destinations including downtown Clarkston, downtown Lewiston, Hells Gate State Park, and the Lewis and Clark Interpretive Center.

⁷ Port of Lewiston Confluence Riverfront Master Plan, prepared by David Evans & Associates for the Port of Lewiston, April 2019.

- Recreational infrastructure including nature trails and fishing docks.
- Onsite amenities such as restaurants, wine tasting rooms, shops selling souvenirs and local products, jetski/kayak rentals, and/or a bait and tackle shop (for passengers interested in fishing in the immediate dock area).

According to the Port of Lewiston, this plan is presently conceptual. The Port is investigating the cost and feasibility of infrastructure development such as water, power, and wastewater systems. It is the intent of the Port Commission to develop the property in a manner that will serve riverboat and other visitors to the valley as well as local residents who use waterfront amenities year-round. The Port will also consider the findings of this report, including market outlook and needs.

Cruise line representatives reported mixed views on the concept. The development would certainly benefit the industry by providing needed moorage space as traffic grows. It would also have the advantage of being purpose-built for river cruise vessels. It would not have the immediate access to a hotel that the 7th Street dock currently offers.

This section provides information about other U.S. ports serving riverboats and small cruise ships. The information can help generate ideas for project partners regarding infrastructure development, increased economic development, and community engagement.

Along with river cruise growth, there is also a blurring line between river cruises and small-scale expedition cruises. Several cruise lines are developing vessels and itineraries tailored for river cruise markets. Expedition cruises tend to have flexible itineraries and an emphasis on adventure-oriented activities, while river cruises tend to be more structured and place a greater emphasis on activities and tours in ports. Both attract well-traveled passengers and charge premium rates. It is important to monitor trends in the market to meet industry needs and guests' expectations.

Columbia and Snake River Area

Astoria

Cruise line representatives praised Astoria as a model port due to the proximity of attractions near the dock, including a maritime museum and a popular restaurant selling fish and chips. The dock area was described as clean and well-maintained. Passengers also enjoy seeing Coast Guard vessels docked next door. Lines calling in Astoria include ACL, AQSC, Celebrity Cruises, Princess Cruises, Oceana Cruises, Holland America, Crystal Cruises, and Regent Cruises.

In fall 2019, the City of Astoria leased the east end of the 17th Street Dock to ACL for a 26-year period. ACL represents about two-thirds of dock usage. Other dock users include AQSC and the U.S. Coast Guard. The dock is adjacent to the Columbia River Maritime Museum.



Source: UnCruise.

ACL will pay \$80,000 annually for the first three years. In subsequent years, the line will pay an additional \$400 per vessel above 110 calls (payments will be adjusted annually for inflation). While ACL gets priority docking rights, the lease includes competitive protections to ensure access for AQSC (who was unsuccessful in the negotiation).⁸ ACL is responsible for scheduling and upfront costs for dock improvements, including eventual expansion to accommodate two vessels. The City will reimburse ACL for repairs and improvements.

⁸https://www.dailyastorian.com/news/local/astoria-reaches-deal-with-river-cruise-lines-on-17th-street-dock/article_8a6b08b4-ea4a-11e9-9f21-ab00e16efa0b.html

When the 17th Street Dock is not available, vessels dock at other piers owned by the Port of Astoria. Dockage rates at Piers 1 and 2 are generally between \$474 and \$1,991 per day for ships in the river cruise category.⁹

Astoria offers a Cruise Host program with approximately 150 volunteers who welcome passengers and answer questions. Both AQSC and ACL operate shuttle service or HOHO tours to several sites including the historic Flavel House, the Heritage Museum, the Columbia River Maritime Museum, and the Astoria Column. Optional premium excursions include Cape Disappointment State Park, Fort Clatsop, and a zipline tour.

Kalama

The Port of Kalama is developing its waterfront to better accommodate river cruises, in turn increasing guest satisfaction and local economic benefits. Plans include a dock and an adjacent shoreside facility combining lodging, dining, and a retail market. The development also incorporates lodging (a satellite facility to the existing McMenamins Harbor Lodge) as well as a new pub and distillery, creating synergies between the river cruise market, overnight travelers, and other clients.



Source: Port of Kalama.

ACL brought 11,000 passengers to Kalama in 2019. Prior to COVID, they anticipated increasing to 25,000 passengers by 2022. The dock represents a dramatic change in passengers' time on shore. ACL ships spend between 4 and 10 hours at

Kalama, depending on the voyage direction. Passengers spent very little time in community businesses due to the landing beach location and time spent on the Mount St. Helens tour.

With the dock, ACL anticipates increasing port time to 20-24 hours each call. The dock also places passengers in much closer proximity to spending opportunities including McMenamin's Kalama Harbor Lodge and new retail development. Cruise passenger spending was estimated to increase by \$450,000 in 2022, plus additional spending by the cruise line and crew.

Dock construction costs were estimated at \$2.3 million in early 2020. The Port signed an agreement with ACL to contribute to dock construction costs in return for preferential berthing and discounted docking fees.

⁹ Based on Port of Astoria tariff schedule effective July 1, 2020.

Richland (Tri-Cities)

This port call is often the final call before reaching Clarkston, or the first call after leaving Clarkston. On ACL cruises ending in Clarkston, staff of the Clarkston-based Echoes of Our Ancestors company embark in Richland and perform for passengers in the evening, overnighting on the vessel and disembarking in Clarkston.

Vessels use the city-run Lee Boulevard Dock, which is connected to the Howard Amon Park and greenbelt. The park has several amenities, including multi-use trails, a rock-climbing facility, and more. The dock is also within walking distance of the downtown Richland area. Visitors are bussed from the dock to most major Richland attractions.



Source: Tri-City Herald.

The cruise lines do not share a unifying theme in their promotion of Richland as a port call. One line prominently features the REACH Museum, another offers an excursion to nearby Pendleton, while another line highlights the city's history as a plutonium manufacturing center.

The Dalles

Vessels calling at The Dalles dock at the city-owned cruise ship dock, two blocks from the downtown area and on the Riverfront Trail, a ten-mile paved trail running from the Columbia Gorge Discovery Center to The Dalles Dam Visitor Center.



Source: The Dalles Chamber of Commerce.

The City contracts with a local organization, The Dalles Main Street, to greet each arriving vessel. Passengers are also greeted by the "Floozyies," a local volunteer group who dress in period costume to welcome visitors. Cruise line representatives report that passengers really enjoy this aspect and feel especially welcomed in The Dalles. Retail spending is encouraged by providing a complimentary gift bag to passengers upon arrival, and inviting passengers to experience the "Charm Trail" in which visitors purchase a bracelet and visit local businesses to buy charms. Several cruise lines visit The Dalles including ACL, AQSC, Lindblad, and UnCruise.

AQSC operates the HOHO tour at the port and ACL offers a complimentary excursion to the Columbia Gorge Discovery Center. Premium excursions include visits to local wineries, the Maryhill Museum of Art, and the Western Antique Aeroplane and Automobile Museum (with optional small airplane ride).

Mississippi River

Mississippi River cruising represents 60% of the U.S. river cruise market. Two lines have dominated the market: ACL and AQSC. Viking plans to begin sailings in 2022.

The 2,320-mile river flows through ten states. Sailings can last two to three weeks to experience the full river. Shorter sailings (three to eight days) feature upper or lower stretches of the river. Upper river cruises commonly feature Mark Twain and American heartland heritage. Lower Mississippi cruises focus on Southern culture including Civil War, plantations, mansions, and jazz, blues, and country musical heritage.

Cruise lines are entering longer-term and creative agreements with ports. As Viking prepares to enter the U.S. market, Natchez, MS and Vicksburg, MS signed agreements to lease city-owned riverfront property in exchange for dock development.



Source: American Cruise Line.

Another example is between ACL and Alton, Illinois, the embarkation port for St. Louis, MO. In 2019, the City of Alton signed a five-year priority docking agreement with ACL. The agreement includes a commitment by ACL to use Alton hotels as pre-cruise lodging and pay a passenger-based docking fee.

ACL also signed a 20-year priority docking agreement with the City of Vicksburg, MS under which the cruise line will pay a per passenger docking fee, make investments in the waterfront area, and transport passengers to local attractions.

Pre- and post-cruise packages often feature larger and more widely recognized locations, rather than the port. For example, passengers fly into St. Louis, MO, while the port is located 32 miles away in Alton, IL. Similarly, Minneapolis and St. Paul, MN are featured in cruise itineraries, when the port city is about 50 miles away in Red Wing, MN.

Alaska's Inside Passage

Juneau

There are many similarities between the small cruise lines sailing in Alaska's Inside Passage and river cruising. Small cruise ship passengers usually overnight on one or both ends of their cruise, creating higher per-passenger spending in the turnaround ports (Juneau, Ketchikan, and Sitka).

The small ship market has been growing in recent years, generating the need to understand market outlook and unique needs. In 2019, the City and Borough of Juneau commissioned a *Small Cruise Ship Infrastructure*

Master Plan which included market outlook, economics, and an analysis of proposed sites for new docks or expansion.

Eight cruise lines brought 21 vessels and 18,400 passengers to Juneau in 2019. Three Columbia/Snake lines sailed the Inside Passage in 2019 (ACL, Lindblad, and UnCruise), and the fourth (AQSC) is planning to enter the market in 2021. Peak dock demand is on weekends, reflecting travelers' preference for Saturday and Sunday departures, followed by Wednesdays.

A recent trend is lengthening the season with more ships calling in April. There is also an increase in mid-size, luxury cruises (including Hurtigruten, Viking, Silversea, and Seabourn).

They charge premium rates and attract a similar clientele to the small cruise lines (typically fewer than 350 passengers).



Source: UnCruise.

Juneau's challenges include insufficient dock space on peak days, some docks not suited to small ship needs, and hotels not meeting standards of clientele. A key advantage, however, is that passengers are able to walk right from the dock to a wide variety of attractions and retail opportunities.

To minimize the impacts of tourism growth on residents, Juneau developed a voluntary *Tourism Best Management Practices* program. To foster participation, cruise lines required participation from tour operators and other business partners. The program is monitored by Travel Juneau, the destination marketing organization, and receives some funding from the City to support operations.

Travel Juneau also coordinates a volunteer program with more than 130 residents to help staff visitor information centers and greet ships.

COVID RESPONSE

Travel Juneau, using CARES funding from the City and Borough of Juneau, created a new program to assure visitors and community residents that the destination is committed to reopening responsibly. Titled JuneauCares, the program has a website (<https://www.traveljuneau.com/juneaucares/>) with sections for businesses, residents, and visitors. The images and videos in the website are COVID-appropriate and everyone is masked.

There are five basic requirements for participating businesses, summarized as:

- Create a plan to mitigate transmission of COVID
- Train staff in the plan
- Implement the plan
- Make the plan available to guests and the public
- Maintain and update the plan as the situation evolves.

The program is open to all businesses in the community. There are approximately 60 participating businesses now and the JuneauCares logo is increasingly visible throughout town. The program can easily be tailored to issues that arise in the future.

Additionally, coordination is happening at several levels.

- Municipal leaders are coordinating with their department heads including health, transportation, public safety entities.
- Cruise lines are coordinating with each other and community leaders about federal guidance, best practices, and experiences in other destinations.
- Alaska Municipal League is similarly sharing information on its website for the public and its membership.

Implications for Lewis Clark Valley

- Ports and cruise lines are developing long-term agreements to facilitate dock development and increased economic benefits to port communities.
- Communities reflect their heritage and customer service through many creative ways including welcoming committees, onboard lectures, community shuttles, and other programs.
- Many successful ports offer retail and attractions within walking distance of the dock.
- Impacts on residents are addressed through programs like Juneau's Tourism Best Management Practices, which has been replicated in port communities throughout the U.S.
- Successful port communities monitor market trends, guest satisfaction, economic impacts, and resident support.
- Columbia/Snake River port representatives were unanimously interested in collaborating as a region.

Opportunity/Gap Analysis

This section synthesizes themes explored in previous chapters, including the region's constraints as well as advantages in serving the cruise industry. The analysis also explores a range of opportunities designed to address anticipated growth and enhance economic and employment benefits from the industry.

Lewis Clark Valley: Constraints as a Cruise Destination

The region's constraints on accommodating and growing the cruise industry are grouped into categories of increased cruise volume, extended stays, and passenger spending.

Barriers to Increased Cruise Volume

- **Dock capacity:** The Port of Clarkston already struggles to meet vessel demand on peak days, when several ships are in town at once. The projected increase in traffic over the next several years will be difficult to accommodate without additional moorage space.
- **COVID impacts:** The impacts of COVID on the cruise industry are continually evolving. While all Columbia/Snake lines are promoting 2021 cruises, the season may be delayed or even cancelled depending on nationwide infection rates as well as vaccine distribution. When cruises resume, the combination of pent-up demand and rescheduled guests will likely fill the vessels in the short-term. However, COVID may have longer-term implications for the travel market including the U.S. economic downturn and apprehension about the health and safety of cruise ships.
- **Regional capacity:** Considering longer-term growth of Columbia/Snake cruising, the overall capacity of the region's docks is of concern. These cruises stop at five to seven other destinations besides Clarkston; Clarkston cannot grow its cruise traffic unless other ports have the capacity to do the same. Interviews with other ports on the Columbia/Snake revealed that some ports only have space for one vessel at a time, and some are concerned they will not be able to accommodate increased traffic.
- **Waterway navigability:** The riverboat industry is dependent on the Columbia/Snake River system remaining navigable. The possibility of the dams being breached in the future (in effect ending the riverboat industry) could discourage investment in future growth. Another navigability issue is dredging. Regular dredging of the waterway is necessary for the riverboat industry to be viable.

Barriers to Extended Stays

- **Hotels:** The number one constraint on more passengers extending their stay in the region is the hotels. This is a constraint not only on the level of the cruise lines (three out of four lines cited this as a barrier to offering more extensions); it also may prevent passengers from independently booking stays in the area. Note that the Holiday Inn is given 3.5 stars by Hotels.com and consistently receives high ratings from guests. It is also scenically located and was recently remodeled. However, this particular market (who are paying \$5,000 to \$10,000 per person for their cruise) typically prefers higher-end lodging.
- **Flights:** Lewiston's lack of airlift is another major barrier to increasing passenger overnights in the area. Several cruise line representatives cited the two-hour bus ride to/from Spokane as a major drawback

to the overall itinerary; passengers are essentially forced to take this option because of the lack of flights to Lewiston. (AQSC is an exception because they offer an extension in Spokane.) Passengers considering extending their stay independently may change their mind once they see the lack of flight options from Lewiston; getting to the airport on their own presents an extra logistical challenge.

- **Low destination awareness:** While the Lewis Clark Valley has a multitude of visitor attractions, it is not well known among the general U.S. traveling population. Compare Clarkston to other river cruise turnaround ports like Portland, Louisville, Memphis, Cincinnati, St. Louis, or New Orleans. Most passengers are at least familiar with these cities. Destination awareness is something that takes years, if not decades, to establish. Unless passengers take the extra time to independently research the area, all pre-trip information about Lewis Clark Valley communicated to passengers is provided by the cruise lines – and cruise lines are (understandably) focused on selling their cruises, rather than destinations. This logic is applicable to the region's excellent golf and fishing opportunities too: passengers would have to first research the area in order to learn about them.
- **Cruise line priorities:** Cruise lines are not incentivized to offer extensions unless it fits with their brand and is guaranteed to enhance the passenger experience, while also being profitable. A related barrier to offering a post-cruise extension is the idea that the cruise line would cede control of the all-important last few days of the passengers' overall trip to an outside operator; "ending on a high note" is important.

Barriers to Increased Spending

- **Passenger demographics:** While river cruise passengers are desirable visitors in that they tend to be higher-income, retired, and interested in learning about local culture, many are limited by their high average age (early to mid-70s according to cruise line contacts). When comparing them to the overall cruise market, they have less energy for tours, activities, and shopping; and they are less physically active, limiting the opportunities for offering active tours like biking, rafting, and hiking. The age factor also limits the market for post-cruise extensions; some passengers simply do not have the stamina, and are reportedly exhausted at the end of their cruise. While there are some younger cruise passengers (including children), and UnCruise and Lindblad passengers tend to be more active, these groups represent a very small percentage of the total.
- **Dock locations:** The current primary cruise dock offers few retail opportunities or attractions in the immediate vicinity. While passengers can and do walk to the big box stores, these are less appealing to visitors who want to purchase local goods and experience regional culture. The 14th Street dock is even less appealing to passengers who wish to explore on their own; there are no retail options nor attractions within walking distance.
- **Transportation to downtown Lewiston and Clarkston:** Even though Downtown Lewiston is less than a 10-minute drive from the two cruise docks, and downtown Clarkston even closer, few passengers use taxis to access these areas. AQSC passengers who participate on the HOHO tour have the option to stop in downtown Lewiston, but there are many other stops on the tour competing for passengers' attention. This will be the case with the planned ACL HOHO bus, as well. Passengers seeking souvenirs have been reported to ask for them at Wal-Mart, the closest retail option; this points to a missed opportunity to connect passengers with local retailers.
- **Tour and onboard schedules:** The capacity to get more passengers visiting downtown Lewiston (or other areas) is somewhat limited by schedule. Those participating in the jetboat tour have very little

time to explore the area. There are also activities scheduled onboard such as meals, cocktail hours, entertainment, and lectures. With all these amenities included in their cruise package price, passengers have less incentive to venture into the community.

- **Jetboat tour:** The success and popularity of the jetboat tour disincentivizes cruise lines from offering additional tours. More tour options could result in fewer people signing up for the jetboat: a risk, unless the new tour is of comparable price (and profitability). While ACL is offering a second add-on tour option in 2021, AQSC is discontinuing its second tour option. Lindblad is not interested in offering any tours other than the jetboat, which is included in the cruise price.
- **Retail store hours:** Several contacts noted that Sunday closures of retail stores limited spending opportunities for passengers.

Advantages/Opportunities

While some of the barriers discussed above are very challenging, it is important to recognize the Lewis Clark Valley enjoys a number of advantages as a cruise destination. There are also a number of potential opportunities to better accommodate and encourage the growth of the industry.

Advantages

- **Embarkation/disembarkation port:** As the “end of the road” (or start), Clarkston is the only other port on the Columbia/Snake itinerary, besides Portland/Vancouver, where guests have the option of extending their stay.
- **A range of appealing assets for the river cruise market:** As described in the “Destination Assessment” section, the Lewis Clark Valley has many attractions and activities that appeal to river cruise passengers: Hells Canyon, Nez Perce culture, Lewis and Clark history, a charming, walkable downtown (Lewiston), and viticulture, to name a few.
- **Cruise Boat Dock:** The 7th Street dock is in good repair, allows access to jetboats, and can fit two vessels at a time. Its location is advantageous in several ways, being adjacent to the Holiday Inn and close to provisioning sources like Costco and Albertson’s.
- **Visit Lewis Clark Valley:** Having an effective Destination Marketing Organization (DMO) is a key advantage; many ports rely on their Chamber of Commerce, port agency, or municipal organization to deal with cruise-related issues. These include providing visitor information to passengers, organizing volunteer greeters, liaising with cruise line representatives, organizing familiarization tours, and answering questions from residents, among others.
- **Community engagement:** By commissioning this study, the Ports of Lewiston and Clarkston are demonstrating their commitment to learn about the cruise industry and how they can best accommodate it – and encourage its growth, if desired. There are also a number of local organizations and businesses involved as stakeholders, tour providers, and volunteers. One cruise line representative commented that they had never seen the level of community engagement as when they did a series of presentations in the area.

Opportunities

The following opportunities are designed to address the region's constraints in accommodating and growing the cruise industry. Based on these opportunities, a comprehensive and detailed set of strategies will be developed in the next phase of the study, the *Community Action Plan*.

- **Increased cruise traffic; increased impacts:** With passenger capacity projected to increase by 76% in the next several years, the industry is poised for growth, along with passenger spending and associated impacts. The region has an opportunity to capitalize on the growth by encouraging extensions and maximizing spending opportunities.
- **Coordination and collaboration with other Columbia/Snake ports:** All cruise ports in the region could benefit from increased communication and information-sharing. The COVID pandemic has emphasized this need, with communities all along the river system in both states needing to stay on top of a variety of moving targets: shifting vessel schedules; cruise line health protocols; and pandemic-related regulations by various states, counties, and municipalities. Other relevant subjects for such a coalition could include dealing with unexpected events like the dam closure; dock capacity issues; and Best Practices. In addition, if the group agrees that increased river cruise traffic is desired, they could collectively promote the region to other cruise lines such as Viking.
- **Enhanced communication with cruise lines:** Several challenges were identified by local stakeholders in communicating with cruise lines, including frequent changeover in cruise line staff and corporate representatives not spending enough time in the local area. Moving forward, the region can be more pro-active in inviting cruise line representatives to visit, organizing familiarization tours, and ensuring that captain and crew members are also familiar with area attractions. If VLCV has the capacity to take on this role, it is recommended that there be one representative communicating with the cruise lines.
- **Better information provided to cruise lines:** In a related opportunity, VLCV could help ensure that information provided on cruise line websites is accurate and reflective of the region's best assets. VLCV may have access to photos, for example, that cruise lines would be interested in adding to their promotion of the cruise overall, and of Clarkston specifically. If passengers see compelling photos of the region beyond Hells Canyon, such as local vineyards or shops in downtown Lewiston, they may be more incentivized to shop downtown, sign up for an extension, or book an independent stay.
- **Suggestions of tours and extensions:** While cruise line representatives were not universally committed to adding tours or extensions to their offerings, all expressed an openness to new ideas. Local businesses with ideas for tours or overnight packages are encouraged to work with each other to create compelling packages, and to communicate their suggestions through VLCV. Cruise line representatives were consistent in preferring to receive such suggestions from one source.
- **Potential infrastructure development:** Both potential infrastructure projects, the Hells Gate Marina redevelopment and the Confluence Riverfront plan, merit further exploration, including potential partnerships to attract investment and increase community benefits.
- **Hotel-readiness:** The region should be poised to entertain interest from higher-end hotel chains who may be attracted by growth in the riverboat market. For example, a regional chain like McMenamins could increase overnights and reflect Lewiston's history and architecture.

- **Airline service:** Restoring the Portland-Lewiston flight as a charter to serve cruise demand has benefits for guests and local businesses. Charter flights are commonly used to address peak demand in other markets.
- **Downtown Lewiston promotion/coordination:** Downtown visitation and spending can be increased through promotion and coordination.
- **Sourcing of regional foods and other products:** Cruise lines could be encouraged to increase use of locally sourced items in onboard dining and guest amenities. Local wines are already served onboard vessels calling at Clarkston; there may be opportunities to increase sourcing of agricultural products and locally manufactured items.

Supplemental Analysis: Yacht Market

While yachts and riverboats represent different visitor markets, they share waterways and infrastructure. This analysis of the yacht market in the Lewis Clark Valley provides additional information for the Ports of Clarkston and Lewiston as they consider a path forward on potential marina and harbor development. For purposes of this analysis, yachts are defined as privately-owned pleasure craft at least 30 feet in length, and include both sailboats and motorized vessels.

Pacific Northwest Yacht Market

The Pacific Northwest is a natural fit for the yachting market: the area is home to endless protected, scenic waterways; it has extensive maritime infrastructure including provisioning, shipbuilding, and repair services; and it serves as a jumping off point for popular yachting destinations both near (San Juan Islands, for example) and far (British Columbia and Alaska).

According to two Puget Sound recreational boating experts, the regional pleasure boating industry has been booming in the past year. “Pleasure boating has increased significantly” in the COVID environment, said one. A major Seattle marina owner noted a “big increase in demand” in 2020. According to the Northwest Marine Trade Association, new powerboat registrations in Washington State between January and November 2020 were up by 11% over 2019 numbers.¹⁰ This reflects a nationwide trend, with January-October 2020 sales of powerboats already surpassing total 2019 sales, according to the National Marine Manufacturers Association.¹¹

Lewis and Clark Valley

The Lewis and Clark Valley reportedly receives little yacht traffic. The Port of Clarkston typically receives between one and three yachts annually at their facilities (although none visited in 2020), according to both current and former Port staff. Hells Canyon Marina staff reported a similar level of traffic at about two or three per year. These are the only three facilities currently used by yachts, according to contacts.

Yachting experts observed that there was little awareness of the Lewis Clark Valley as a yachting destination, that “it’s not promoted much.” They recognized the appeal of the area, including the



Port of Clarkston Transient Dock. Source: Port of Clarkston.

¹⁰ Provided via email by Peter Schrappe of NMTA.

¹¹ https://www.nmma.org/press/article/23519?utm_source=Currents&utm_medium=CurrentsEmail&utm_campaign=Currents_Dec21

"off-the-beaten-path" feel, scenery, and calm waters. They also noted what may act as barriers to yachters considering the region: four locks/dams on the Columbia and four locks/dams on the Snake (see map below).



Source: Seattle Times.

A Puget Sound representative of a company specializing in "super-yachts" (at least 200 feet) said the Columbia/Snake region would not hold appeal to that market, which is much more oriented toward oceans rather than rivers, and are seeking "remote, expedition-oriented destinations" such as Antarctica, Alaska, and the South Pacific.

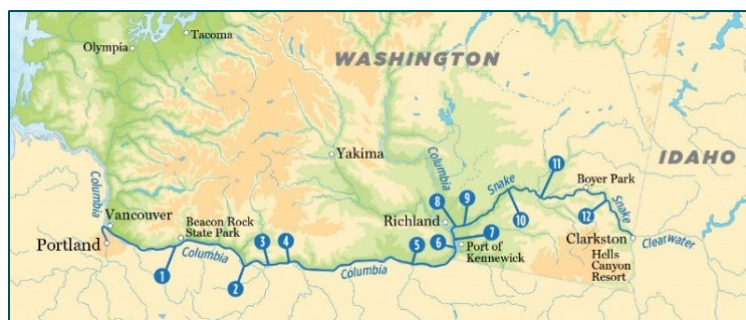
YACHTING ARTICLES

While awareness of the region as a yachting destination is generally seen to be low, two articles in yachting magazines in recent years may have helped raise the region's profile, in addition to offering insight into the yacht visitor's perspective.

An article in the magazine *Sea* released in January 2019 chronicled one couple's Columbia/Snake yachting journey.¹² (*Sea* is a quarterly magazine that bills itself as "The Voice of Pacific Coast boating since 1908.") Titled "Going Against (And With) The Flow," the article leads with the following statement:

Clarkston, Wash., doesn't seem to be a natural turnaround point for a cruising story on these pages, where locations such as Glacier Bay, the Inside Passage, the Sea of Cortez and even the South Pacific are more generally found. But that's where the adventure John and Tracey Cerul took last summer made its end.

It also includes the map, at right, showing Clarkston and noting Hells Canyon Resort. The article notes the vessel length at 47 feet and its homeport of Portland, convenient for a Columbia/Snake journey. About Clarkston, the authors noted "Although the marina in Clarkston left a bit to be desired — we personally repaired the dock — we visited the



Source: *Sea* magazine.

¹² <https://www.seamagazine.com/going-against-and-with-the-flow/>

Lewis and Clark Interpretive Center and enjoyed the jetboat tour with Snake Dancer Excursions." Regarding the challenge of locks and bridge lifts: "We did not practice, but we received advice from other mariners who have accomplished it. They also provided us with a spreadsheet of info for all eight locks: bridge lifts, VHF channels, call signs, mileposts and phone numbers. The info proved to be very helpful!"

Another article on cruising the Columbia/Snake appeared in November 2018, in *Northwest Yachting* magazine, entitled "Let the River Run: Cruising the Columbia," with the subtitle: "For the adventurous boater, a trip up the Columbia River has much to offer. Herein is a crash course to cruising up the river, from the infamous Columbia River Bar to Lewiston, Idaho."¹³ The author provides the following perspective on the Lewis Clark Valley:

Beyond the city of The Dalles and The Dalles Dam, the river can be characterized by calm winds and hot temperatures in the summer, perfect for water-based activities. For the very adventurous, one can get as far as Lewiston, Idaho, up the Snake River. The first four dams on the Columbia and the first four on the Snake sport locks to navigate. In researching this article, I learned that for this area, the holy grail of boating is to run as far up as Lewiston Idaho, on the Snake River...Even though the Snake is over one thousand miles long, only the first 141 miles to Lewiston can be safely navigated...One thing that needs to be said about this entire area is that moorage and fuel is very limited on the upper river. Careful planning and boat preparation need to be done for each night's stop, fueling up, and transiting the locks (i.e. plenty of fenders and lines).

Let the River Run

CRUISING THE COLUMBIA

For the adventurous boater, a trip up the Columbia River has much to offer. Herein is a crash course to cruising up the river, from the infamous Columbia River Bar to Lewiston, Idaho.

BY CAPTAIN CHRIS COUCH

As fate would have it, I started to write this article right when I booked a delivery from Seattle to Portland. Thanks to my career as a yacht delivery captain, this would be my 58th such trip across the entrance and transit of the Columbia River.

This time around, I tried to imagine what Bruno de Hebert, the first European to describe the Columbia River entrance in 1775, saw that day. For me, 243 years later, the wind is calm with a visibility of 30 miles on the day I cross the entrance. The water is glassy with a long-period six-foot swell out of the west. The sky is clear with a line of cumulus clouds forming over the shoreline. I am eight miles offshore, southbound 25 miles from the entrance to the river. With the lowlands of Long Beach and Willapa Bay to the north, the river delta to the south and east, and the high terrain of Cape Disappointment and North Head, first impressions are deceiving. The entrance is so wide and the lower river so expansive that, except for the challenges of crossing, it looks like a very large bay or inlet.

I was first introduced to the Columbia River back in the 1980s as a young chief petty officer in the U.S. Coast Guard (USCG). My first trip across the Columbia River Bar entrance was in a Coast Guard 44' Motor Lifeboat from the National Motor Lifeboat School in Ilwaco, Washington. The USCG National Motor Life Boat School was established in 1982 and teaches search and rescue boat crews from all over the world how to safely negotiate heavy surf conditions with "The Bar" as a classroom. I was very fortunate that I learned how to safely cross West Coast bar entrances from the experts, acquiring knowledge that would serve me well later as a West Coast delivery captain.

I would first cross the Columbia River entrance as a delivery captain in 1986, running inventory back and forth between Portland and Seattle for Ocean Alexander. Twenty-two years and 38 crossings later, I still get a little anxious before each transit.

CROSSING THE BAR

There is a reason the Columbia River entrance, The Bar, is called the Graveyard of the Pacific. Part of what makes that entrance so hazardous is the sheer volume of water flowing in and out. When an outgoing water current meets an incoming wave or swell, that wave is slowed down. When a wave slows down, it builds. So, on an ebb tide when the current is going out along with the natural river outflow, that current builds the incoming waves right at the entrance area. This is what happens at all bar entrances and wherever water current flows against a wave pattern.

As notorious as the West Coast bar entrances can be, especially the Columbia River, crossing them can be done safely each time by following a few simple rules:

- Rule #1:** Always plan to transit the area during a slack or flood tide. The incoming current helps to reduce the size of the waves at the entrance.
- Rule #2:** Always pick good sea conditions outside. The size of the waves at the entrance is directly related to the speed of the outgoing current.
- Rule #3:** Always transit in daylight.

Left: An 80-ft SE underway near Lewiston, Oregon (Photo: George Smith).
Below: An Ocean Alexander near Vancouver, Washington (Photo: Alan Kautler).

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Source: Northwest Yachting.

¹³ <https://www.nwyachting.com/wp-content/uploads/2018/10/NW-Yachting-November-2018-web.pdf>

The author recommends extensive research before venturing east of Portland, and directs readers to the Oregon State Marine Board and Columbia River Army Corps of Engineers websites for trip planning. The article closes with a strong endorsement of the journey:

As always, wherever you decide to go cruising proper maintenance, planning, and smart decision making are the keys to a good boating experience. Cruising up the Columbia River is a uniquely Pacific Northwest experience, a slice of that Lewis and Clark spirit set across Washington and Oregon's dramatic coastline all the way to the Wild West of the interior. If you've got the itch, do your homework, be safe, and go for it.

These articles point to the following observations about the yachting market for Lewis and Clark Valley:

- Yachting the Columbia/Snake is seen as a rarity.
- Sailing all the way to Lewiston is characterized as "for the very adventurous."
- Services on the upper river are described as "very limited."
- Extensive trip planning and research is recommended due to the complications of locks, bridges, and water levels, as well as limited services. (Note that the U.S. Army Corps of Engineers provides lockage schedules for recreational watercraft.)
- Hells Canyon Marina is described as less than desirable.

Current Yacht Infrastructure, Services, and Information

Port of Clarkston

The Port of Clarkston Cruise Dock (also known as the 7th Street Dock) is described in the "Infrastructure" section of this report. It offers the same amenities to yachts as riverboats including fuel (both diesel and gasoline), trash, water, electricity, and an adjacent loading area. Yachts pay variable fees to moor at the dock, depending on their needs. If they need services such as lighting, security, and/or fuel, they may be charged around \$25 to \$50 per night.



Port of Clarkston River Cruise Dock. Source: Port of Clarkston.

The Port of Clarkston also maintains a "Transient Dock" at Granite Lake Park. At 120 feet it can easily accommodate yachts, but does not provide any amenities or services such as lighting (for nighttime security), garbage, electricity, water, or fuel. One yacht recently used the dock and notified the Port, but because vessels are not required to register with the Port to use the transient dock (and there is no charge for up to 14 days), there may be additional yacht traffic that is unrecorded.

Port of Clarkston staff (both current and former) noted the following regarding yachts at the 7th Street dock:

- They typically get two or three yachts per year, with a length of stay of three to five days. Traffic has not changed in recent years, other than COVID-related cancellations.
- Most yacht passengers stay onboard, but on rare occasions will stay at the Holiday Inn.
- There are no provisioners for yachts in Clarkston.

- A yacht can share the dock with cruise ships by using the shore side of the dock, as shown in the above photo.
- While fueling is available, the \$800 set-up fee may be prohibitive. A yacht was recently able to take advantage of the cruise ship already being fueled at the time, so they didn't get charged for set-up. (The fee is charged by the fuel provider and is necessitated by environmental regulations on fueling over water including extra personnel and equipment in case of spills.)
- The 14th Street dock is also an option for yachts, although none have used it in the past.
- The Port has not had to turn away any yachts due to the dock capacity.

Hells Canyon Marina

Hells Canyon Marina is also described in the Infrastructure section of this report. In addition to moorage space, it offers the following amenities to the yacht market: electricity, water, utilities, laundry, convenience store, indoor pool, and trailer storage. They offer fuel, but only gasoline, not diesel. Rates for vessels 30 feet and longer are \$35 to \$40 per day. Discounts are offered for longer stays (30 days or more).¹⁴

Marina staff made the following observations about the yachts they serve:

- Yachts tie up on the perimeter next to their launch ramp, as the water is too shallow at the entrance to the marina for yachts.
- They see about two to three yachts per year. They have no trouble accommodating the few yachts they serve.
- The yachts are often based in Portland.
- They do not market to yachts.
- If they need diesel fuel, they are referred to the Port of Clarkston.
- Bigger sailboats can't access this area of the river due to their tall sails not fitting under bridges.
- The marina needs "lots of repair and some TLC."
- Yachts have never requested provisions or referrals for repairs.



Source: www.campgroundreviews.com.

Hells Gate Marina

Hells Gate Marina is located at Hells Gate State Park. It offers moorage and amenities to recreational vessels including 100 slips, power, a boat launch, convenience store, restrooms, and parking. With a water height of as low as two feet, and maximum length of vessel of 24 feet, the marina does not currently accommodate yachts.

¹⁴ <https://hellscanyon.net/rates/>

Provisions

Riverview Marina, located in Lewiston on the Snake River, sells boats and related maritime supplies.¹⁵ They also offer repair services. A representative reported that they only see one or two yacht visitors per year, and they are generally looking for items like ropes and fenders. They did not report any yachts needing repair, although they would be able to service them if under 35 feet. (Note that their location would also preclude some taller yachts from accessing their shop due to the height of the Highway 12 bridge.) They reported that they generally can provide whatever yachters need in terms of supplies.

Information Sources

The website of the Northwest Discovery Water Trail offers a planning tool for yachters traveling to the Lewis Clark Valley. The trail's website, funded by the National Park Service and managed by the Washington Water Trails Association, provides the following description:

The Northwest Discovery Water Trail is a 367-mile recreational boating route on the region's defining waterways. It begins at Canoe Camp on the Clearwater River in Idaho, follows the Snake River down to the Columbia River and ends at Bonneville Dam in the Columbia River Gorge.

The Northwest Discovery Water Trail connects you to nearly 150 sites to launch your boat, picnic, or camp along these rivers when you travel by motorboat, canoe, sailboat, or kayak. Whether you take a day trip or an overnight excursion, the Water Trail can link you to small riverside communities, wildlife refuges and parks, riverside trails, museums and visitor centers, as well as campgrounds and lodging. Following the paddle strokes of tribal cultures and explorers like Lewis & Clark, the Water Trail will guide you through a cross-section of the region's natural and cultural wonders.

The website offers extensive information for yachters addressing weather, safety, lockage schedules, lock and dam protocols, geology, history, and cultural attractions. There is little specific information about Clarkston or Lewiston, however. Its interactive map identifies Hells Canyon as the only marina in the area.

Visit Lewis Clark Valley is an additional resource for yachts interested in visiting the region, although VLCV reported receiving very few inquiries from yachters, in general. There were no other information sources identified by contacts that offer guidance to yachters in the Lewis Clark Valley.

Barriers and Opportunities

Research into the regional and local yacht market reveals the following barriers to growth:

- There is currently very little yacht traffic; at most five or six per year.
- There is low awareness of the Lewis Clark Valley in the yacht market.
- Most yachts are more focused on oceans than rivers.
- There are limited moorage and services for yachts.
- Locks and bridges present extra logistical challenges.

¹⁵ <https://boatingfun.com/>

- There are limited information sources for yachters interested in the Lewis Clark Valley.

The region also has several opportunities to attract more yachters:

- The yacht market is growing both in the Pacific Northwest and nationwide.
- The region is relatively close for a large base of yachters in the Northwest—especially when compared to popular destinations in Puget Sound, British Columbia, and Alaska.
- The Columbia/Snake has appeal for adventurous yachters.
- The area offers a wide variety of attractions to the yacht market: Hells Canyon, Lewis and Clark history, Nez Perce culture, world-class fishing, calm inland waters, and scenic beauty.
- A charter yacht company based in Portland recently contacted the Port of Clarkston to investigate the feasibility of bringing their 110-foot, 12-passenger yacht to Clarkston on a regular basis.

Contacts

Jennifer Bly, formerly of Port of Clarkston

Peter Butz, EYOS Expeditions

Danielle Conklin, Holiday Inn

Kasey Jackson, Snake River Adventures

Mindy Jay, Hells Gate State Park

Wanda Keefer, Port of Clarkston

Beth Larson, Port of Clarkston

Dwight Jones, Elliott Bay Marina

Michelle Peters, Visit Lewis Clark Valley

Peter Schrappen, Northwest Marine Trade Association

Susan Strange, Hells Canyon Resort

Cat Walden, Hells Canyon Resort

It is important to recognize the many actions the region has already taken to welcome and accommodate riverboats. These include, but are not limited to, improvement of dock areas; creating new tour concepts; organizing volunteers to welcome passengers; and commissioning studies to assess the industry's economic impact and needs.

The following actions will help project partners maximize economic benefits of the riverboat cruise industry. Anticipated benefits include more visitors to the region, longer visitor stays, enhanced visitor experiences, improved communication with cruise lines, better preparedness, and increased cooperation with other Columbia/Snake ports.

Align Marine Infrastructure with Market Needs

Develop additional docking capacity to accommodate projected demand. Note that detailed feasibility and cost analysis would be necessary before making final investment decisions.

- Continue exploring potential port development and expansion projects, including Hells Canyon Marina Redevelopment and Port of Lewiston Riverfront Plan. Next steps could include:
 - Determining the level of interest by the Nez Perce Tribe in redeveloping the Hells Canyon Resort site.
 - Estimating demand for each site by non-riverboat markets including RVs, recreational boaters, and local residents.
 - Gauging community support for each of the developments.
- Explore public/private partnerships with cruise lines to fund infrastructure investments. Solicit input from all lines to ensure facilities are appropriate for current and anticipated vessels.
- The following specifications should be considered when developing new docking facilities.
 - Floating (not fixed) dock with minimum 14 feet of water depth (the draft of the largest vessel, American Empress, is 12 feet 6 inches)
 - Enough linear feet of moorage to accommodate two vessels simultaneously (ideally 900+ feet)
 - Fuel access
 - Trash and recycling service
 - Security (lighting, cameras, gates)
 - Paved, clear access for ground transportation, including motorcoaches, at top of dock ramps.

Ensure current docking facilities can be used by all riverboat vessels.

- Dredge the area of the 7th Street dock to make it more accessible by AQSC and Lindblad vessels. (ACL did not report any depth problems for their vessels.)

Formalize moorage contracts.

- The Port of Clarkston is encouraged to establish more formal moorage agreements and rates; thus far it has been handled more informally.

Expand market and revenue potential of docks by incorporating yachts in design.

- The needs of yacht users should be considered when designing marine infrastructure. Yachts may be able to use the inside of a dock designed for larger cruise vessels with little extra investment, for example.
- Yachters are likely to require the following:
 - Water depth of at least six to eight feet
 - Enough linear feet of moorage to accommodate vessels up to 80 feet.
 - Water and electricity available at the dock
 - Fuel (both diesel and gas) available near the dock
 - Trash and recycling near the dock
 - Security (lighting, cameras)
 - Shower facilities.

Support Regional Growth and Advocacy

Coordinate with other Columbia/Snake cruise ports. To grow the market, ports should work cooperatively.

- We suggest starting with a special session at a WPPA or PNWA conference. Subjects could include:
 - COVID (or future pandemic) Best Practices
 - Shared objectives (Which river ports want more cruise traffic? How much?)
 - Regional visitation, capacity, and limitations
 - Communicating with existing cruise lines (Who has relationships at each cruise line? Who can represent the region's ports if a united front is warranted?)
 - Promoting to potential small cruise lines (Are there industry events where a Ports representative can learn about the industry and promote the Columbia/Snake region?)
 - Sharing information on Best Practices (Funding infrastructure improvements, dock design, dealing with crises such as the Bonneville Dam closure, encouraging shopping and tour purchases by passengers, etc.)
 - Communicating with the public (How do you convey economic benefits of cruise passengers to both local residents and policymakers? How do you solicit community input?)

Advocate for navigable waterways.

- The Ports of Lewiston and Clarkston are keenly aware of the potential impacts of dam-breaching; the survival of the riverboat industry is one more reason to keep the Columbia/Snake River system navigable, and could be incorporated into advocacy efforts.
- Continue to advocate and seek funding for maintenance dredging of areas frequented by riverboats.

Address Hotel and Airlift Gaps

Engage airlines about initiating flights between Lewiston and Portland.

- Convenient cruise/flight logistics could restore recently lost visitation and help attract new lines to the region.
- Streamlined logistics can also boost to pre- and post-stays.

Support new hotel properties or renovations that appeal to the cruise market.

- Be receptive to new lodging developments and readily supply information on the potential of the cruise market.
- A small-scale boutique inn could be a good fit for the smaller lines and/or passengers planning pre- and post-stays independently.
- While the current location of the Holiday Inn is an advantage for cruise lines and passengers at the 7th Street Dock, new properties do not need to be within walking distance of the cruise dock; many hotels used by riverboat passengers require transportation, such as the Hotel Davenport in Spokane.

Enhance Communications Between Cruise Lines and Businesses

Communicate regularly with key cruise contacts. Communication has improved over the course of this study and should continue.

- Create a directory of cruise line representatives, noting responsibility and contact information (shore excursions, pre- and post-tours, docking/moorage, invoicing, etc.)
- Keep cruise line contacts apprised of new or updated attractions, tours, hotels, and services. Also inform them of special events, concerts, and festivals that passengers may be able to attend while in the area.
- Showcase new tours and attractions that could be included in port calls and overnight packages.
 - Invite cruise line representatives to participate in familiarization ("FAM") tours on a regular basis.
 - Showcase dining and boutiques in addition to excursions.
 - Include captains and crew members, in addition to corporate staff, as they are important sources of referrals for passengers.
- Review cruise line promotional materials regularly.
 - Offer suggestions and corrections where warranted.

- Provide access to current and high-quality images for brochures and websites.
- Prepare a community directory for each vessel, potentially including:
 - Medical clinics and pharmacies
 - Personal care services such as hair salons and massage therapy
 - Tours and attractions not offered by cruise lines such as golf, sportfishing, and wineries
 - Recommended restaurants and cafes
 - Taxis and car rental agencies
 - Accommodations.
- Periodically ask cruise line representatives for feedback from passengers and crew on their Lewis Clark Valley experience.
 - Share with stakeholders at the end of every cruise season.
 - Include cruise passengers if conducting a broader visitor survey to capture local spending and satisfaction ratings.
 - Monitor new tours such as ACL's "Echoes of our Ancestors" and Lindblad's planned pre- and post- wine tour, so that any issues are addressed immediately.

Engage the local business community.

- Create an attractive and easy-to-read cruise ship calendar noting when ships will be in port, dock location, and number of passengers and crew. The calendar should be accompanied with the caveat that schedules are subject to change.
 - Post on websites of Port of Clarkston, VLCV, and Lewis Clark Valley Chamber of Commerce. Examples can be found at these links:
 - <https://thedalleschamber.com/cruise-ship-schedule/>
 - <https://skagway.com/cruise-ship-calendar/>
 - https://www.portofastoria.com/Cruise_Schedules.aspx
 - Distribute paper copies to local merchants and post on bulletin boards.
 - Use the calendar to encourage businesses to stay open when cruise ships are in port.
- Educate local retailers in what this market is most interested in buying: locally made items that can remind them of their trip.
 - It is important to offer souvenirs on the lower end of the price spectrum. This market also appreciates convenient shipping options.
 - Remind local business owners that these passengers sometimes require wheelchair accessibility.
- Create a visitor-oriented map of downtown Lewiston and Clarkston. The map should identify historical sites, attractions, retail, and dining options. (Note that the AQSC HOHO tour provides a good, close-up map of downtown Lewiston.)

- Consider providing passengers a shopping bag with a Lewis Clark Valley label/logo.
- Consider a program where cruise passengers and ship personnel receive a discount from local merchants.
- Invite cruise line representatives to speak at VLCV and Chamber meetings and other economic development forums.

Encourage local transportation providers to explore the idea of a shuttle between the cruise dock(s) and downtown Lewiston and/or Clarkston.

- Communicate with cruise lines about this idea, as their buy-in is necessary in order for them to recommend it to their passengers. They may be more receptive to this idea as traffic increases and they have to spread their passengers out more.

Create a COVID-19 response effort to encourage and promote responsible reopening of the community to visitors.

- Create a program similar to JuneauCares to assure residents and visitors that the destination is being proactive about ensuring the health and safety of both visitors and residents. (See case studies.)
- Use existing forums to share information with regional port communities and local businesses.

Target Yachts as a Complementary Market Segment

Maximize the potential for more yachts to visit the Lewis Clark Valley.

- Add information to the Port of Clarkston website about the 7th Street and Transient docks including rates, length of dock, services, parking, etc.
 - The page could feature links to the two yacht articles identified in the Yacht chapter.
 - VCLV could provide a link for yachters to the Port's page, or create its own resource page for yachters that includes the three docking options.
- The local business directory recommended for cruise vessels (above) could also be provided to yachts. The format could be modified to a simple PDF document with phone numbers and links to websites, rather than a binder with brochures. This could be posted on the Port and VLCV websites and/or emailed to yacht inquirers.
 - The yacht version should have a few additions, like where to find vessel supplies and repair, and Hells Canyon jetboat information.
 - Hells Canyon Marina (or the future operator) should be provided this information to pass on to their yacht customers.

List of Contacts

Scott Bauby, American Cruise Lines
Adam Beeman, UnCruise
Jaynie Bentz, Port of Lewiston
Dan Blanchard, UnCruise
Bret Bullock, American Cruise Lines
Garry Bush, Idaho History Tours
Peter Butz, EYOS Expeditions (formerly Lindblad)
Bruce Conner, Port of Astoria
Lisa Farquharson, The Dalles Chamber of Commerce
Gary Frommelt, American Queen Steamboat Company
Izetta Grossman, City of The Dalles
Shelly Hartfield, American Queen Steamboat Company
Clint Hoiland, Twisted Vine Wine Tours
Kasey Jackson, Snake River Adventures
Wanda Keefer, Port of Clarkston
Karen Kuest, Lindblad
Kermit Mankiller, Nez Perce Tribal Enterprises
Stacia Morfin, Nez Perce Tourism
Mike Olivo, American Cruise Lines
Michelle Peters, Visit Lewis Clark Valley
Savannah Saul, American Queen Steamboat Company
Wanda Scharfe, Port of Skamania
Paul Taiclet, American Cruise Lines
Christina Tasevoli, American Queen Steamboat Company
Nigele Williamson, Nez Perce Tribal Enterprises

Riverboat Study Steering Committee

Jaynie Bentz, Port of Lewiston
Matt Borud, Idaho Department of Commerce
Wanda Keefer, Port of Clarkston
Monika Lawrence, City of Clarkston
Kermit Mankiller, Nez Perce Tribal Enterprises
Susan Neilson, Washington Department of Commerce
Michelle Peters, Visit Lewis Clark Valley
Paul Taiclet, American Cruise Lines
Kathy Schroeder, City of Lewiston
Dawn Smith, Southeast Washington Economic Development Association
Deb Smith, Clearwater Economic Development Association

Project Funders

Beautiful Downtown Lewiston
Bridalblík House
City of Clarkston
City of Lewiston
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Idaho Departments of Tourism and Commerce
Idaho History Tours
Lewis-Clark Valley Wine Alliance
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Nez Perce County
Nez Perce Historical Society
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