



EAST LANE COUNTY BICYCLE TOURISM STRATEGY

April 2017



TRAVEL  OREGON

Product of the East Lane County Bicycle Tourism Studio

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This project was funded by Travel Oregon and supported by communities throughout the East Lane County region.

EXECUTIVE SUMMARY

The purpose of the Bicycle Tourism Studio is to create a more focused marketing approach for mountain, gravel, and road bike tourism in East Lane County. As the goal is to increase cycling tourism in East Lane County, then investment should be made in areas that will provide the greatest return while building out the regional vision of connected communities.

In Oregon generally, and in the Willamette Valley region specifically, the most valuable cycling visitors are those whose primary activity type is defined vaguely as “recreational activity” (Dean Runyan Associates, 2013). While these visitors don’t spend the most money per day (\$131 compared to a maximum of \$168), they are the largest percentage of overnight visitors (148,000 annual trips) and spend the second highest amount per activity type on taxable lodging (an average of \$1,127 per night).

In Oregon, the split between cycling tourists is approximately 63% road riding to 37% mountain biking (Dean Runyan Associates, 2013). Gravel riding is too new to show in any relevant statistical studies but interviews with bicycling industry representatives indicate that it is likely 1% of the road riding market. This market share information is modified by knowledge that mountain biking continues to see growth while road riding is flat or declining (Outdoor Foundation, 2016).

One approach to implementation would be to make investments proportionate to the estimated types of riding. An additional, and concurrent, approach would be to invest in strategies that apply broadly to all modes as these will reap a return no matter what direction the cycling market takes. These investments will, in many cases, also benefit the cycling community in general.

Based on the information above information and in this report, the work completed over four workshops and many hours of analyses by the regional steering committee, Travel Oregon staff and project consultant, this report details out recommended strategies for early implementation because they are either cost-effective (low investment with at least moderate return or moderate investment with high return) and/or because they apply to all three riding types (road, gravel, and mountain biking).

You can find the “Key Strategies Compiled in Detail” in Appendix C, starting at page 25 of this report.

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INTRODUCTION

The purpose of the Bicycle Tourism Studio is to create a more focused marketing approach for mountain, gravel, and road bike tourism in East Lane County. Over the past several years, Travel Oregon, working closely with its regional partners, has promoted cycling tourism. Flush with natural assets and an outdoor recreation culture, cycling tourism is a natural fit for the state.

The competitive landscape is in East Lane County's favor. As a draw for riders, the area has a treasure trove of natural wonders with easily accessible old-growth forests, clear lakes, rushing rivers, waterfalls, hot springs, and spectacular mountain vistas. This is balanced by the cultural and culinary amenities that come from having the second-largest metro area in the state as well as vibrant rural towns full of murals, covered bridges, breweries, and open countryside that are a delight for cyclists. The moderate climate of the Willamette Valley allows for year-round cycling.

For the road and gravel riding market there is the potential to connect miles of routes between destinations, opening opportunities for economic development in the mostly rural communities in East Lane County. Routes that loop, smoothly transition from one road surface to another, have easy access to and from destinations, and inspire rider types to sample other styles of riding will ease barriers to use and participation. Connectivity enhancements will reduce uncertainty among users, develop relationships between places, create unique marketing products for the region, and present niche opportunities for intermodal economies such as shuttle services.

A submarket of road and gravel riding is the designation of family-friendly routes that have the lowest barrier to entry and the greatest separation from motor vehicle traffic. Anchored by communities that provide amenities for the whole family (ice cream, anyone?), these routes can help expand the region's appeal as a cycling destination and broaden the base of visitors.

East Lane County is currently an internationally recognized mountain bike destination, anchored by Oakridge, the West Coast's only IMBA Ride Center. The backcountry singletrack emanating from the nearby towns of Westfir and McKenzie Bridge is bolstered by the strong riding community in the Eugene/Springfield metropolitan area. The drift, loamy descents that are easily accessed in the foothills of the Oregon Cascades are in short supply elsewhere in the continent, making a good ride a truly memorable experience.

MARKET AND TRENDS ANALYSIS

A 2013 study commissioned by Travel Oregon and completed by Dean Runyan Associates found that people traveling in Oregon participated in a variety of bicycling activities throughout the state, spending nearly \$400 million in 2012, which represented about 4.4 percent of the direct travel spending in the state for that year. This equates to about \$1.2 million in bicycle-related travel spending per day.

The same study showed that bicycle-related travel also generates other economic impacts such as employment. In 2012, bicycle-related travel spending directly supported over 4,000 jobs with earnings of approximately \$102 million. Bicycle-related travel spending also generated local and state tax receipts of nearly \$18 million, all of which support local communities.

ROAD

MARKET

According to the most recent use statistics from the Outdoor Foundation (2016), road biking continues to be the largest portion of the recreational cycling market. It dominates all other types of riding, being four times larger than mountain biking and 14 times as popular as BMX riding. Unfortunately, participation remains flat whereas other markets continue to grow, a trend sometimes attributed to the slow deflation of the U.S. road cycling bubble that grew during the end of the previous century. Destination road cycling is a well-established market that offers everything from self-guided tours through remote landscapes to fully supported outings with gourmet meals, high-end demo bikes, and deluxe accommodations.

INTERNATIONAL TRENDS

Road cycling tourism is prevalent in Europe, the Americas, and Asia, and, to a lesser extent, Africa, although most of the offerings are targeted at European or North American clientele. The variety of offerings continues to expand as vendors exploit niche markets to meet the experience objectives and budgets of a wide range of riders. Offerings are as diverse as tours through the Australian Outback to rides through Old Europe along the Danube River.

In the past, the majority of international road cycling destinations have not been created as much marketed, with the packaging of routes, lodging, amenities, and cultural experiences for a designated submarket. Investment in road cycling tourism in Europe, specifically, does not focus as much on the creation of destinations but more on advertisements and promotions of events/races.

Europe in particular leads the world in road cycling tourism participation, which is not surprising considering it is the birthplace of recreation riding, is a huge part of European sporting culture, and has superior cycling infrastructures compared to other parts of the world. In addition, eBike tours, which make riding more accessible, are seeing growth in Europe. This trend follows the aging demographic that participates in destination road cycling.

NATIONAL TRENDS

The flattening, and even potential contraction, of the road cycling market in the U.S. is corroborated by interviews of U.S. cycling industry representatives. While this impacts the market it does not necessarily affect the development of road cycling destinations because, as noted earlier, little road cycling destination development occurs. Some notable examples of recreational cycling infrastructure do exist, particularly rails-to-trails. The Katy Trail in Missouri is commonly held up as providing economic benefits to restaurants, lodges, and bike shops along its route. Closer to home, the Columbia River Historic Highway draws a range of recreational riders to Mosier, The Dalles, Hood River, and now Cascade Locks.

Interviews with cycling industry stakeholders and an analysis of Oregon-based research in the state suggest that trends in Oregon mirror those at the national level with most road riding being individual day trips (non-destination) (Dean Runyan Associates, 2013). This is unfortunate as overnight visitors spend significantly more money and are therefore more valuable to destinations. Destination trips, which can be categorized as either solo or group (the latter including events such as Cycle Oregon) account for less than a quarter of the recreational riding in Oregon.

GRAVEL

What, exactly, is gravel riding? While the activity has various monikers it is generally considered the use of primarily low-traffic, unpaved roads that are most efficiently and pleasurably traversed using terrain-specific bikes and cycling gear. The activity highlights adventure and solitude in a largely car-free environment.

MARKET

Sales growth indicates a small but enthusiastic market of riders. Unfortunately, no long-term analysis exists on the growth of this market as it is still emerging. Interviews with cycling industry representatives reveal that the growth in this market is likely at the expense of the road cycling market. While it does not represent an overall growth in cycling tourism it does represent a shift in the market that can be beneficial to communities with significant gravel mileage and the attendant backcountry exploration that is a part of the experience.

INTERNATIONAL TRENDS

It is difficult to discern any trends in gravel riding destination development as the market is too new. Regardless, the development of destinations will likely follow the trend established by road cycling destinations that focus on marketing and packaging of existing infrastructure. A review of offerings of gravel tours shows a more adventurous inclination, perhaps allowed by the primitive roads that a gravel-specific bike can travel.

NATIONAL TRENDS

Some locations within the U.S. have begun to advertise themselves as gravel-riding destinations, focusing on the tens of thousands of miles of unimproved, low-traffic roadways in the country. The consumer clearly has the advantage in this instance because, like road cycling and in contrast to mountain biking, gravel riding routes are well dispersed throughout the landscape. The greatest competitive advantage for a community that promotes gravel riding is therefore proximity to major population centers. Locations further away from major population centers must rely on other amenities or unique experiences in order to draw riders.

Anecdotal evidence suggests there is growth opportunity for destinations with gravel riding. Sales of gravel bicycles and accessories are growing and gravel-specific events such as the Oregon Outback and rides/races in the Midwest have proven effective at bringing in visitors. Appealing to gravel riders is clearly become part of a well-rounded cycling tourism strategy and communities with good riding are working to make sure that their unique offers are marketing to the this growing market.

MOUNTAIN BIKING

MARKET

Mountain biking first became popular in the 1980's and grew rapidly in the 1990's. Approximately 3.8% of the U.S. population now mountain bikes and the sport continues to enjoy modest but sustained growth (The Outdoor Foundation, 2016). A prominent portion of mountain biking enthusiasts travels once a year specifically to go mountain biking (International Mountain Bicycling Association, 2015) and the demand for destination trails outstrips supply.

INTERNATIONAL TRENDS

In Europe there is a more comprehensive approach to mountain bike tourism that integrates services, transportation, trails, and allied infrastructure. Of course, the greater density and volume of tourists makes investment more feasible.

On the continent there is also a focus on converting wintertime infrastructure into summertime use to balance seasonal spikes in tourism revenue as ski lifts and lodges sit largely empty for at least half the year. In the U.K., investment in destination trails has been undertaken on industrial forestlands to moderate the boom-bust cycle of resource extraction.

NATIONAL TRENDS

The past decade has seen a growth in the number of mountain bike destinations, both in traditional locations such as the Intermountain West, as well as Midwest and Southern states that are closer to population centers on the East Coast. Competition is heating up but it is expensive to develop quality trails and some key facets, such as topographic relief, are not distributed evenly across the landscape.

The Bureau of Land Management and the United States Forest Service manage large, contiguous land areas making comprehensive trail development difficult in many locations. Even when these efforts are undertaken there is a lack of coordinated investment in services to support new trail networks. To foster economic development, federal legislation was passed in 2011 to streamline summertime use area permits (<https://www.congress.gov/112/plaws/publ46/PLAW-112publ46.pdf>) although the results have been mixed.

COMPONENTS OF A CYCLING DESTINATION



The five primary components that comprise a cycling destination are:

- Routes and Trails
- Lodging
- Business Services
- Transport
- Bike Culture and Events

ROUTES/TRAILS

This is the key component. Quite simply, without quality routes/trails there is no cycling destination. The most successful riding facilities are designed and/or managed for a target audience; for example, a road ride for enthusiasts is different than one for families. A good route is:

- 1) Consistently managed towards an identified experience. This experience is based on the desire for physical or technical challenge, a feeling of escape, connection to nature, playfulness, socializing, etc.
- 2) Based around, and preferably connected to, services needed by cycling visitors: provisions, food, lodging, shuttle services, guiding services, bike shops, etc. The most scenic ride in the world, if isolated, will never be the complete experience people seek.
- 3) Located in proximity to other destination-worthy routes. This is the “agglomeration” argument: the more good riding you have the more reasons for people to come and stay.



LODGING

To be successful, lodging must be geared towards cyclists to maximize revenue. This is critical because the statewide lodging tax is what supports investment in the tourism offerings of local communities. The best cyclist-friendly lodging provides secure bike storage, tools and a floor pump, bike wash, overnight laundry services, and a welcoming and informed staff.



BUSINESS SERVICES

Great rides are the core of any experience but good services amplify the quality of the experience. Critically, this is how local communities earn money from riders, as accessing routes and trails is typically free of charge. Shops, restaurants, guiding services, and laundry facilities geared towards cyclists will maximize tourism revenue.



TRANSPORT

Cyclists, like other tourists, need efficient and cost-effective transportation to and around a destination. This allows people to more quickly and easily access quality routes, lodging, business services, and events. Efficiency is key as it figures into the cost-benefit analysis of a ride: no one wants to drive four hours for a one-hour ride. Transport covers inter- and intra-regional travel, shuttle services for point-to-point rides, and lift access for mountain bikers. These services can be public or private.



BIKE CULTURE/EVENTS

Cyclists, like other tourists, want to feel welcome when they visit a destination. Also referred to as “scene”, “buzz”, and “vibe”, this results from a combination of physical improvements (bike racks and lanes, signs) and intangible aspects such as a welcoming attitude towards cyclists. Events and races can be a good way to create a cycling-friendly reputation as they usually highlight the best rides, services, and transport.

GAP ANALYSIS

A gap analysis identifies the current assets and deficits for each of the cycling tourism categories. This was determined by visiting the study area, interviewing local and regional stakeholders, and reviewing crowd-sourced information. The current conditions were then measured against regional and international destinations. The results speak generally to the overall impression of the current conditions; there are always exceptions. Details for each mode and component can be found in *Appendix A – Detailed Gap Analysis*.

OVERALL ASSESSMENT ROAD & GRAVEL

The overall assessment of East Lane County shows that it has low-to-moderate assets for road and gravel cyclists. While the area scores moderately well in the most important category of Routes/Trails there is little competitive advantage for the region because many other U.S. destinations have as good or better riding closer to major population centers. This requires East Lane County to capitalize on the quality riding “scene” but also be competitive in the other categories for which it does not score particularly well.



OVERALL ASSESSMENT MOUNTAIN

The overall assessment of East Lane County shows that it has low-to-moderate assets that appeal to mountain bikers. Even with this rating the area is above average for most U.S. trail destinations, comparing unfavorably only to European and Canadian destinations. Of particular note are the high-quality trails, as this category is the most difficult and costly to develop and East Lane County lends itself naturally to this strength.



STRATEGY

Road and gravel riding facilities are primarily determined by motorized transportation needs. While bike lanes can enhance the riding experience and closed doubletrack roads can provide a car-free environment, these are but modifications to existing infrastructure. Cycling tourism proponents should therefore ally themselves with non-motorized transportation advocates to encourage the development of cycling infrastructure that benefits both transportation and recreation.

The first part of a successful road and gravel strategy, however, is that which can be most readily obtained: the identification of quality routes. For road and gravel routes the Lane County cycling community, through the Project Steering Committee, developed the following criteria:

ROAD

- Distance:** 20 - 50 miles
- Elevation:** 2K' - 4K' climbing
- Origin/Dest:** Start and end in a hub (not necessarily the same hub); have reasonable shuttle/public transportation return
- Surface:** Max. 2% unpaved

GRAVEL

- Distance:** 20 - 40 miles
- Elevation:** 1K' - 3K' climbing
- Origin/Dest:** Start and end in a hub (not necessarily the same hub); have reasonable shuttle/public transportation return
- Surface:** At least 50% gravel

For mountain biking, East Lane County must move past current practices that simply promote existing assets while leaving the creation and management of these assets to either nature or other parties such as land managers or trail stewards. The most successful biking destinations use an integrated approach of fostering and funding public-private partnerships to develop high-quality infrastructure that draws visitors.

Given the above information the following actions are proposed to improve destination cycling tourism in East Lane County.

STRATEGY



ROUTES/TRAILS

All priority routes and trails should be developed for consumers. Steps include:

- a) Ride and input routes into ridewithgps.com, creating a multi-format digital format;
- b) Upload to RideOregonRide.com (work with Travel Oregon) and regional/local web pages, including Eugenecascadescoast.org (Travel Lane County);
- c) Develop ride cue sheets and/or brochures;
- d) Develop and install wayfinding signs to that easily identify routes for riders and connects routes to towns.

The specific routes identified for verification and marketing are:

ROAD

- 1) Verify the condition of and market the following road routes:
 - a) East Lane Circuit (Oakridge to McKenzie Bridge)
 - i. Aufderheide.
 - ii. McKenzie Bridge to Aufderheide.
 - b) McKenzie Pass Scenic Bikeway
 - c) Willamette Valley Scenic Bikeway
 - d) Larison to Brice Creek
 - e) Mt. June to Bear Creek
 - f) Poodle Creek to Junction City
 - g) Wolf Creek to Territorial Road
 - h) Ham Loop

GRAVEL

- 2) Verify the condition of and market the following gravel routes:
 - a) Blue River North
 - i. Blue River North Ridge Top.
 - ii. Blue River North Reservoir.
 - b) Mineral Run
 - i. Quartz Creek to Fall Creek.
 - ii. McKenzie Bridge to Oakridge/Westfir.
 - iii. Hills Creek Reservoir: East Side to Warner Lookout.
 - iv. Canton Creek to Diamond Peak.
 - c) Lowell/Winberry
 - i. Rd. #5824 to Rd. #18 (to Oakridge).
 - ii. N. Shore Rd. (to Eugene/Springfield).
 - d) Oakridge to Goddard's Grove (Salmon Creek)

For both gravel and road routes:

- a) Rate routes for difficulty and elevation criteria
- b) Develop materials that show a progression from easier to harder rides, tying them to local amenities (e.g., covered bridge ride, waterfalls ride)

- c) Evaluate infrastructure gaps; integrate into jurisdiction's transportation planning as needed
 - i. Focus on connections to population centers/hubs to facilitate access from town to identified starting/ending point.
 - ii. Locate interpretive kiosks/maps into key connection points between routes (to facilitate integration across routes).
- d) Identify routes that can be shuttled and those that can be looped, directionally for difficulty progression
- e) Verify the condition of and market the following family-friendly routes:
 - i. Covered Bridge Scenic Bikeway – Row River Trail.
 - ii. McKenzie Pass Scenic Bikeway (when road is closed).

MOUNTAIN AND DIRT

- 3) Broaden trail offering around existing mountain bike destinations of Oakridge/ Westfir and McKenzie Bridge
 - a) Develop/open trails that appeal to enthusiast/expert riders and enhance the region's reputation for providing high-quality backcountry singletrack that can be shuttled
 - i. Develop Larison Rock trails network.
 - ii. Open historic trails within the Willamette National Forest, particularly those that provide for shuttle-accessed singletrack descending and/or connect to existing/proposed trails. Historic trails are those that have fallen into disuse but can be reactivated with minimal permitting.
 - iii. Pursue opportunities to develop lift-accessed trails at Willamette Pass that connect to system trails in the Willamette National Forest.
 - iv. Add a leg of the Oregon Timber Trail that connects Oakridge/Westfir to McKenzie Bridge.
 - b) Develop trails for riders with low-intermediate technical skills to broaden the appeal of the region, particularly for people who could be transitioning into enthusiast riders
 - i. Develop Larison Rock trails network.
 - ii. Develop low-intermediate technical skill routes close to Oakridge/Westfir and McKenzie Bridge. Routes should have moderate grades and be shorter loops (6-8 miles); some gravel road climbs are acceptable.
- 4) Add new trails/street improvements to connect trails to existing mountain bike destinations
 - a) Oakridge/Westfir
 - i. Improve shoulders, striping, natural-surface connectors within the road right-of-way, and wayfinding and safety signs (per the Oakridge Area Wayfinding Plan report) from Greenwaters Park into downtown Oakridge.
 - ii. Improve shoulders, striping, ROW trail routes, and wayfinding and safety signs (per the Oakridge Area Wayfinding Plan report) from the Salmon Creek trailhead into downtown Oakridge.
 - iii. Improve shoulders, striping, ROW trail routes, and wayfinding and safety signs (per the Oakridge Area Wayfinding Plan report) between Westfir and Oakridge.



- b) McKenzie Bridge
 - i. Improve shoulders, striping, ROW trail routes, and wayfinding and safety signs from the lower McKenzie River trailhead into McKenzie Bridge.
 - ii. Improve shoulders, striping, ROW trail routes, and wayfinding and safety signs from the Kings Castle and Olallie trailheads into McKenzie Bridge.
- 5) Develop high-quality trail systems in the foothills of the Willamette Valley that will bring visitation to local communities as well as “feed” riders into existing mountain bike destinations
 - a) Willamalane RMA/Thurston Hills
 - i. Develop proposed singletrack system (approximately 20 miles) off Highway 126 at the east end of Springfield. This network will feed people to McKenzie Bridge.
 - b) South Eugene-Springfield
 - i. Identify and develop a trail system (approximately 10-15 miles) at the south end of the Eugene-Springfield metropolitan. This network will feed people to Oakridge/Westfir.
 - c) WhyPass – provide resources for additional trail development (Disciples of Dirt) and marketing material to enhance access and ridership. Proximity of this network to the Metro area and smaller communities in South Lane County can create the desired “feeder” system to bigger riding in Oakridge/McKenzie.
 - d) Family-friendly trails
 - i. Identify and develop beginner-level trail systems in connection with tourism destinations in the Willamette Valley (e.g., Cottage Grove and/or Creswell). Trail systems should be shorter (6 – 10 miles), have minimal elevation change, and connect to family-friendly road riding opportunities.

LODGING

- 1) Develop and enhance lodging to better meet the needs of visiting cyclists. Lodging should cover a range of styles from low-budget “glamping” to historic lodges but investment should be focused on businesses that pay the transient lodging tax (e.g., not campgrounds on federal land).
 - a) Provide more bike-specific amenities such as:
 - i. Secure indoor bike storage. Options can include card-lock storage rooms with hooks, lock options, and security cameras.
 - ii. Indoor bike maintenance area with floor pump, bike workstand, and basic bike-specific tools that can be checked out at the front desk.
 - iii. Outdoor bike washes with hanging racks, improved surface, drain, and hoses with adjustable-spray nozzles.
 - iv. Overnight laundry (fee- or self-service) with drying racks or hanging lines.
 - v. Integration with shuttle service providers if no centralized transportation hub exists.
 - vi. People and gear transport from transit stops to lodging.
 - b) Have hotels and lodges create outdoor post-ride “chill zones” that welcome riders
 - i. Chill zone should be situated in amenable/comfortable location and have tables, chairs, and sun/rain cover.
 - ii. May be situated near bike wash.
 - iii. May include fixed outdoor bike workstand.



BUSINESS SERVICES

- 1) Develop food offerings that appeal to enthusiast cyclists. Focus these efforts in Junction City, Veneta, Creswell, Cottage Grove, Lowell, and the existing mountain bike destinations of Oakridge/Westfir and McKenzie Bridge
 - a) Create menu items that offer a healthy balance of protein, carbohydrates, and roughage made of high-quality ingredients and prepared fresh
 - i. Have quick, simple menu items available in the morning for shuttle riders (e.g., breakfast burritos to go).
 - b) Consider non-traditional establishments such as food carts.
 - i. Food carts may be integrated into the proposed Bike Hubs (see below).
- 2) Develop and enhance fee-based guide services to ensure that visitors have a high-quality riding experience suited to their needs
 - a) Offer a range of guided rides, from introductory tours to all-day adventures
 - i. Combine guided rides with shuttle services.
 - b) Utilize guides who are cross-trained in fitness or skills development (e.g., race training, mountain bike techniques) so they can also provide clinics
 - i. Target clinics at specific sub-markets such as beginners, advanced riders, women, racers, etc.
 - ii. Integrate skills clinics into annual events (see below).
- 3) Enhance existing and develop new bike rental fleets in Junction City, Veneta, Creswell, Cottage Grove, Lowell, and the existing mountain bike destinations of Oakridge/Westfir and McKenzie Bridge
 - a) Bike rental fleets must meet the following criteria:
 - i. Current-year models from popular manufacturers.
 - ii. Mid-range or better model with front and rear suspension for mountain bikes.
 - iii. Regularly maintained.
 - iv. Include sizes from small to large; a few extra-large models are encouraged but not required.
 - b) Rental fleets should be augmented with the following gear for rental or purchase:
 - i. Helmets.
 - ii. Mini toolkit.
 - iii. Protective gear (pads, gloves) with mountain bike fleets.
- 4) Enhance Travel Oregon and Travel Lane's presence in smaller communities through educational series related to bicycle tourism
 - a) Integrate with existing events to promote destination cycle tourism
 - b) Build a "tool-kit" of options (both physical and best practices) to help local economies "retool" for cycle tourism needs
 - c) Provide scholarships for businesses seeking to improve their bike-friendliness through regional workshops



TRANSPORT

- 1) Increase efficiency of shuttle services to take riders from Junction City, Veneta, Creswell, Cottage Grove, Lowell, and the existing mountain bike destinations of Oakridge/Westfir and McKenzie Bridge
 - a) Create centralized shuttle pick-up locations tied to Bike Hubs (identified below)
 - i. To be served by public and private transportation operators.
 - ii. One each in Junction City, Veneta, Creswell, Cottage Grove, Lowell, Oakridge, Westfir, and McKenzie Bridge.
 - b) Create standardized shuttle pick-up schedule
 - i. Standard departure times on a seasonal weekday and weekend schedule.
- 2) Increase scope of shuttle services
 - a) Origins
 - i. Junction City, Veneta, Creswell, Cottage Grove, Lowell, Oakridge/Westfir, and McKenzie Bridge.
 - b) Destinations
 - i. Junction City, Veneta, Creswell, Cottage Grove, Lowell.
 - ii. The highest possible point on the trails.
 - iii. Provide return service from the bottom of trails that are not close to Oakridge/Westfir or McKenzie Bridge.
 - iv. Willamette Pass.
 - v. To new routes/trails as they are opened.
 - c) Between existing mountain bike destinations
 - i. To and from Oakridge/Westfir and McKenzie Bridge (if not covered by public transportation).
 - ii. Enhanced hours of public transit operation for cycle tourism on a seasonal basis among small cities and to key cycle destinations.
- 3) Increase efficiency of public transportation
 - a) Inter-regional
 - i. From the Portland metropolitan area (specifically the Portland International Airport) to the Eugene/Springfield metro area.
 - ii. Through Salem.
 - b) Intra-regional
 - ii. From the Eugene/Springfield metropolitan area to Junction City, Veneta, Creswell, Cottage Grove, and Lowell.
 - i. From the Eugene/Springfield metropolitan area to the existing mountain bike destinations of Oakridge/Westfir and McKenzie Bridge.
 - c) Logistics
 - i. Develop coordinated ticket purchases (e.g., one ticket purchase for multiple transportation providers).
 - ii. Synchronize timetables to optimize connection times, especially between Amtrak and Lane Transit Districts buses.
 - d) Equipment
 - i. Outfit buses/vans with additional luggage and bicycle carriers (must be able to transport mountain bicycles; tandem and recumbent transport not expected).



- 4) Develop lift-accessed riding at Willamette Pass
 - a) Provide uplift services for mountain bikes to access summertime trails.
 - i. Undertake concurrently with the development of new trails and the redevelopment of existing trails to provide a unique riding experience.
 - ii. Undertake concurrently or prior to the development of a Bike Hub at Willamette Pass (see below).
 - iii. Undertake concurrently with the use of Willamette Pass to host races and events (see below) because of the flexibility of the operator's lease conditions.
 - iv. Develop interim solution to use shuttle vehicles to access the summit.

BIKE CULTURE/EVENTS

- 1) Create Bike Hubs that act as easily identifiable meeting points for visiting cyclists. Bike Hubs automatically enhance the bike culture by making riders feel like welcomed guests to a community
 - a) Bike Hubs should include the following amenities and services:
 - i. Parking (preferably adjacent but within one block).
 - ii. Shuttle and public transportation pickup/dropoff.
 - iii. Food and drink for purchase, possibly from food carts.
 - iv. Purchase of basic bike gear, possibly from food carts.
 - v. Bike wash station.
 - vi. Maps and informational signs.
 - vii. Bike racks.
 - viii. Wayfinding signs.
 - ix. Benches and picnic tables.
 - x. Water fountain and water spigot.
 - xi. Restrooms.
 - xii. Changing rooms.
 - xiii. Sun/rain shelter.
 - xiv. Iconic signs or artwork for selfies.
 - xv. Pump track and/or skills area in mountain bike destinations.
 - b) Locations
 - i. Junction City, Veneta, Creswell, Cottage Grove, and Lowell.
 - ii. Oakridge (either along Highway 58 or in downtown).
 - iii. Westfir.
 - iv. McKenzie Bridge.
 - v. Willamette Pass.
- 2) Hold annual events/races that promote the quality trails and amenities in the region
 - a) Encourage races (competitive events) that establish the area's reputation for providing high-quality, physically and technically challenging riding.
 - i. Support race promoters.
 - ii. Base races out of Junction City, Veneta, Creswell, Cottage Grove, and Lowell.
 - iii. Base races out of the existing mountain bike destinations of Oakridge/ Westfir and McKenzie Bridge.
 - iv. Base races out of Willamette Pass because of the amenities (parking, lodge, uplift) and because of the flexibility of the operator's lease conditions.

- b) Encourage events (non-competitive gatherings) that have a broad appeal to biking enthusiasts
 - i. Support event promoters.
 - ii. Base races out of Junction City, Veneta, Creswell, Cottage Grove, and Lowell.
 - iii. Base events out of the existing mountain bike destinations of Oakridge/ Westfir and McKenzie Bridge.
 - iv. Base events out of Willamette Pass because of the amenities (parking, lodge, uplift) and because of the flexibility of the operator's lease conditions.
 - v. Promote ancillary experiences (e.g., socializing, eating/drinking, live entertainment) to encourage broader exploration of the region.
- c) Encourage the development of mountain bike skills clinics to enhance the region's reputation as a mountain biking destination
 - i. Utilize guide personnel (see above) who are also trained in providing skills instruction.
 - ii. Facilitate the use of local public open spaces (e.g., Greenwaters Park) for skills clinics; utilize guiding permits if skills clinics take place on National Forestlands.
 - iii. Develop "package deals" to facilitate the efficiency and economy of skills clinics.

PRIORITY IMPLEMENTATION

If the goal is to increase cycling tourism in East Lane County as a mechanism to enhance tourism revenue then investment should be made in areas that will provide the greatest return. In Oregon generally, and in the Willamette Valley region specifically, the most valuable cycling visitors are those whose primary activity type is defined vaguely as “recreational activity” (Dean Runyan Associates, 2013). While these visitors don’t spend the most money per day (\$131 compared to a maximum of \$168), they are the largest percentage of overnight visitors (148,000 annual trips) and spend the second highest amount per activity type on taxable lodging (an average of \$1,127 per night).

In Oregon, the split between cycling tourists is approximately 63% road riding to 37% mountain biking (Dean Runyan Associates, 2013). As noted earlier, gravel riding is too new to show in any relevant statistical studies but interviews with bicycling industry representatives indicate that it is likely 1% of the road riding market. This market share information is modified by knowledge that mountain biking continues to see growth while road riding is flat or declining.

One approach to implementation would be to make investments proportionate to the estimated types of riding. An additional, and concurrent, approach would be to invest in strategies that apply broadly to all modes as these will reap a return no matter what direction the cycling market takes. These investments will in many cases also benefit the cycling community in general.

Given the above information the following strategies are recommended for early implementation because they are either cost-effective (low investment with at least moderate return or moderate investment with high return) and/or because they apply to all three riding types (road, gravel, and mountain biking).

ROUTES/TRAILS: 1, 2, 3, 4, 5.a.ii, 5.b.ii, 7.a

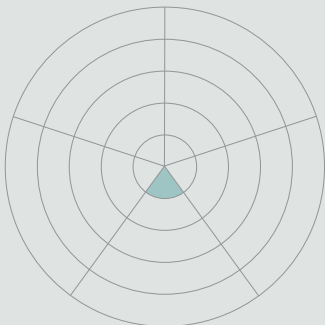
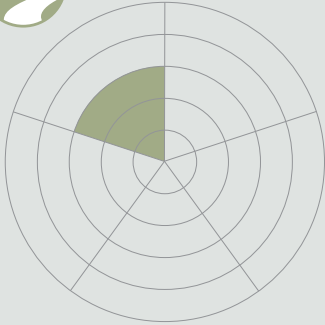
LODGING: 1.a

BUSINESS SERVICES: 1, 2.a

TRANSPORT: 1, 2

BIKE CULTURE/EVENTS: 2

APPENDIX A DETAILED GAP ANALYSIS



The following detailed gap analyses are the foundation for the overall assessments of each mode.

ROAD & GRAVEL

ROUTES/TRAILS

ROAD & GRAVEL

- + Some existing routes are amazing and are already well known.
- + Three Oregon Scenic Bikeways designated within the study area.
- + Variety of experiences, scenery, and technical and physical challenge.
- + Ability to connect with services at multiple communities along a route.
- Mostly roads; not a lot of separated facilities such as rails-to-trails.
- Riding, while good, is not unique (lots of communities in the West have similar riding).
- While there are low-elevation routes that are open nearly year-round much of the iconic riding (e.g., the Aufderheide) is seasonal.

LODGING

ROAD & GRAVEL

- + Options vary from camping and historic lodges to recognized brand hotels with a variety of personalities and bike-friendly amenities.
- + Visitors pick what best suits their budget and desired experience.
- + Some lodging is bike-friendly and integrated with other services (e.g., shuttles, other recreation activities).
- + 15 properties in Lane County are currently identified as Bike Friendly through Travel Oregon's Bike Friendly Business program. These can be linked together by touring cyclists.
- Much of the lodging in the Willamette Valley is generic.
- Few lodging options cater to cyclists with amenities such as bike washes, secure bike storage, and overnight laundry service.
- Minimal integration among lodging partners across the region that could otherwise provide for a seamless lodging experience.



BUSINESS SERVICES

ROAD & GRAVEL

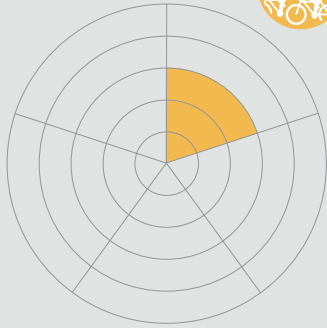
- + 48 Bike Friendly Businesses in Lane County.
- + Can get the basics: food, bike repair, gas.
- + There are quality bike shops in the Eugene/Springfield metro area, Oakridge, Cottage Grove, and McKenzie Bridge, as well as mobile bike services.
- Quality and availability of general services outside the Eugene/Springfield metro area varies greatly. In particular, quality food offerings and hours are limited.
- Few integrated offerings (lodging, bike rental, guides, shuttles, etc).
- Cell service is not prevalent in all locations throughout the study area.
- Guide and SAG services are not well developed.



TRANSPORT

ROAD & GRAVEL

- + Several shuttle companies operate in eastern part of the area.
- + Within the study area there is public transit with bike racks covering the Eugene/Springfield metro area, Oakridge, McKenzie Bridge, Lowell, Creswell, Cottage Grove, and Veneta. Service is also available to Coburg and Junction City.
- + Visitors can get from the Portland metro region (including PDX) to Eugene/Springfield on public transit.
- + Opportunities for crossover to other recreation shuttles (e.g., rafting and kayaking).
- The south and north valley of the study area is not served by a shuttle service.
- Most public transportation is not geared towards accommodating traveling cyclists (e.g., lack of luggage storage, bike trailers).
- Schedules and payments are not coordinated, and schedules typically favor weekday commuters rather than weekend visitors.



BIKE CULTURE/EVENTS

ROAD & GRAVEL

- + Long-standing iconic races bring people to the region on an annual basis while new events such as Oregon Gran Fondo and Blackberry Bramble expose a new generation of riders to the area.
- + South Willamette Valley has strong bike culture.
- + The Oregon Bicycle Racing Association has sanctioned races all year.
- + A handful of informal gathering spots exist.
- Most of the riding and events are geared towards enthusiast riders and therefore have limited general appeal.
- Bike culture in the Eugene-Springfield Metro area is much stronger than in other parts of the study area.

MOUNTAIN

ROUTES/TRAILS

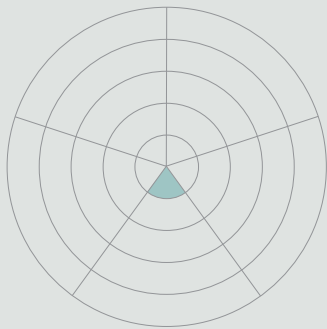
MOUNTAIN



- + The study area is flush with high-quality singletrack trails for riders.
- + Backcountry routes, mountainous terrain, prime soil, and beautiful forests make for some of the best mountain biking in the world.
- Experience, while deep, is not broad.
- Fairly monolithic and appeals to an enthusiastic, but limited, market.
- Currently available in a limited area, e.g., not around the communities at the west end of the study region.

LODGING

MOUNTAIN



- + Options vary from camping and historic lodges to recognized brand hotels with a variety of personalities and bike-friendly amenities.
- + Visitors pick what best suits their budget and desired experience.
- + Some lodging is integrated with other services, such as shuttles.
- + 15 properties in Lane County are currently identified as Bike Friendly through Travel Oregon's Bike Friendly Business program.
- Much of the lodging is generic; the quality of some of the offerings is marginal.
- Majority of lodging in Eugene/Springfield metro area is not near the trails.
- Few lodging options cater to cyclists with amenities such as bike washes, secure bike storage, and overnight laundry service.
- Minimal integration among lodging partners across the region that could otherwise provide for a seamless lodging experience.



BUSINESS SERVICES

MOUNTAIN

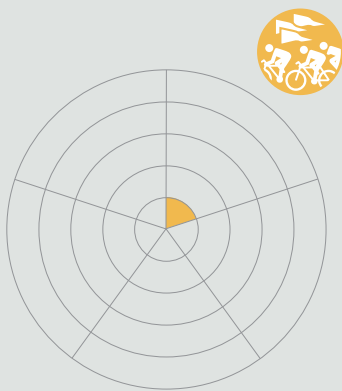
- + Can get the basics: food, bike repair, gas.
- + There are quality bike shops in the Eugene/Springfield metro area, Oakridge, and McKenzie Bridge.
- Quality and availability of general services outside the Eugene/Springfield metro area varies greatly. In particular, quality food offerings are limited.
- Guiding services are not well developed.



TRANSPORT

MOUNTAIN

- + Several shuttle companies operate in the area.
- + There is public transit from the Eugene/Springfield metro area to Oakridge and to McKenzie Bridge.
- + Can get from the Portland metro region (including PDX) to Eugene/Springfield on public transit.
- Most public transportation is not geared towards accommodating mountain bikers (e.g., lack of luggage storage, bike trailers).
- Schedules and payments are not coordinated.
- Shuttle service access is restricted and inefficient.
- No lift-accessed bike parks or trails.



BIKE CULTURE/EVENTS

MOUNTAIN

- + Iconic events/races such as Mountain Bike Oregon and Trans-Cascadia have built the area's reputation as a mountain bike destination.
- + A handful of informal gathering spots exist.
- No prevalent mountain bike culture.
- Mountain bike visitors are not left with the impression that they are valued guests.

APPENDIX B LESSONS LEARNED FOR LOCAL ACTION

The following information is available at <https://www.westernplanner.org/transportation-articles/2017/1/17/bicycle-tourism-in-rural-oregon>.

- **Identify a shared vision for bicycle tourism.** Rural residents need to see the benefits of bicycle tourism and receive the resources needed to address their concerns otherwise it may be difficult to get their support, especially in the rural urban-fringe.
- **Identify routes that promote rural economic development while minimizing impacts to rural residents.** It may be easier for small towns in the more rural areas of the state to appreciate the benefits of bicycle tourism. They have more capacity on the roads and greater economic need.
- **You don't need to reinvent the (bicycle) wheel.** Identify what you can leverage from existing programs and initiatives instead of doing it all yourself. For example in Oregon, Travel Oregon has set up a great foundation to tap into and as a way to promote individual communities.
- **Decide what you want to do then start telling people about it.** As a follow-up from the Rural Tourism Studio Workshop, Independence/Monmouth talked to the president of Oregon Bike Racing Association. This resulted in Cherry Pie Road Race moving its start location to Independence; 600 riders participated, and all the downtown restaurants ran out of food that day!
- **Work together to create “pre-packaged” opportunities and information ready for people.** It is important to show that the community is thinking about logistics from the bicyclist's perspective. Materials should be created in multiple formats: apps (e.g., Ride with GPS10), paper copies, partner brochure, and distributed through a range of partners (Chambers of Commerce, bike-friendly businesses, campsite, etc.)
- **Bike tourism is a relatively easy thing to promote and see success.** Bicycle tourism has a very low entry level barrier and relatively limited infrastructure needs – primarily you need a road to ride on and a bike. As Shawn Irvine advised, just tell people “here we are and we'd love to have you come visit!”

APPENDIX C EAST LANE COUNTY BICYCLE TOURISM - KEY STRATEGIES COMPILED IN DETAIL



Based on the information in this report and the work completed over three workshops and many hours of analyses by the regional steering committee, Travel Oregon staff and project consultant, the following strategies are recommended for early implementation because they are either cost-effective (low investment with at least moderate return or moderate investment with high return) and/or because they apply to all three riding types (road, gravel, and mountain biking).

ROUTES/TRAILS:

All priority routes and trails should be developed for consumers. Steps include:

- a) Ride and input routes into ridewithgps.com as Ambassador level routes, creating a multi-format digital format with featured content;
- b) Upload to Travel Oregon's RideOregonRide.com and regional/local web pages, including EugeneCascadesCoast.org (Travel Lane County);
- c) Develop printed promotional information such as ride cue sheets and/or brochures;
- d) Develop and install wayfinding signs that easily identify routes for riders and connects routes to towns.

The specific routes identified for verification and marketing are:

ROAD

Verify the condition of and market the following road routes:

- a) East Lane Circuit (Oakridge to McKenzie Bridge)
 - i. Aufderheide.
 - iii. McKenzie Bridge to Aufderheide.
- c) McKenzie Pass Scenic Bikeway
- d) Willamette Valley Scenic Bikeway
- e) Larison to Brice Creek
- f) Mt. June to Bear Creek
- g) Poodle Creek to Junction City
- h) Wolf Creek to Territorial Road
- i) Ham Loop

GRAVEL

Verify the condition of and market the following gravel routes:

- a) Blue River North
 - i. Blue River North Ridge Top.
 - ii. Blue River North Reservoir.
- b) Mineral Run
 - i. Quartz Creek to Fall Creek.
 - ii. McKenzie Bridge to Oakridge/Westfir.
 - iii. Hills Creek Reservoir: East Side to Warner Lookout.
 - iv. Canton Creek to Diamond Peak.

- c) Lowell/Winberry
 - i. Rd. #5824 to Rd. #18 (to Oakridge).
 - ii. N. Shore Rd. (to Eugene/Springfield).
- d) Oakridge to Goddard's Grove (Salmon Creek *FAMILY FRIENDLY*)
- e) Covered Bridge Scenic Bikeway – Row River Trail
- f) McKenzie Pass Scenic Bikeway (when road is closed)

For both gravel and road routes:

- g) Rate routes for difficulty and elevation criteria
- h) Develop materials that show a progression from easier to harder rides, tying them to local amenities (e.g., covered bridge ride, waterfalls ride)
- i) Evaluate infrastructure gaps; integrate into jurisdiction's transportation planning as needed
 - i. Focus on connections to population centers/hubs to facilitate access from town to identified starting/ending point.
 - ii. Locate interpretive kiosks/maps into key connection points between routes (to facilitate integration across routes).
- j) Identify routes that can be shuttled and those that can be looped, directionally for difficulty progression
- k) Verify the condition of and market the following family-friendly routes:
 - i. Covered Bridge Scenic Bikeway – Row River Trail.
 - ii. McKenzie Pass Scenic Bikeway (when road is closed).

MOUNTAIN AND DIRT

Broaden trail offering around existing mountain bike destinations of Oakridge/Westfir and McKenzie Bridge

- a) Develop/open trails that appeal to enthusiast riders and enhance the region's reputation for providing high-quality backcountry singletrack that can be shuttled.
 - i. Open historic trails within the Willamette National Forest, particularly those that provide for shuttle-accessed singletrack descending and/or connect to existing/proposed trails.
- b) Develop trails for riders with low-intermediate technical skills to broaden the appeal of the region.
 - i. Develop low-intermediate technical skill routes close to Oakridge/Westfir and McKenzie Bridge.

Develop high-quality trail systems in the foothills of the Willamette Valley that will bring visitation to valley communities and "feed" riders into existing mountain bike destinations.

- c) Willamalane RMA/Thurston Hills – develop proposed singletrack system (approximately 20 miles) off Highway 126 at the east end of Springfield.



LODGING

Develop and enhance lodging to better meet the needs of visiting cyclists. Lodging should cover a range of styles from low-budget “glamping” to historic lodges; focus on businesses that pay the transient lodging tax.

- a) Provide more bike-specific amenities such as:
 - i. Secure indoor bike storage. Options can include card-lock storage rooms with hooks, lock options, and security cameras.
 - ii. Indoor bike maintenance area with floor pump, bike workstand, and basic bike-specific tools that can be checked out at the front desk.
 - iii. Outdoor bike washes with hanging racks, improved surface, drain, and hoses with adjustable-spray nozzles.
 - iv. Overnight laundry (fee- or self-service) with drying racks or hanging lines.
 - v. Integration with shuttle service providers if no centralized transportation hub exists.
 - vi. People and gear transport from transit stops to lodging.
 - vii. Maps and ride information at hotels



BUSINESS SERVICES:

Develop food offerings that appeal to enthusiast cyclists. Focus these efforts in Junction City, Veneta, Creswell, Cottage Grove, Lowell, and the existing mountain bike destinations of Oakridge/Westfir and McKenzie Bridge.

- a) Create menu items that offer a healthy balance of protein, carbohydrates, and roughage made of high-quality ingredients and prepared fresh.
 - i. Have quick, simple menu items available in the morning for shuttle riders (e.g., breakfast burritos to go).
- b) Consider non-traditional establishments such as food carts.
 - i. Food carts may be integrated into the proposed Bike Hubs (as in the full report).

Develop and enhance fee-based guide services to ensure that visitors have a high-quality riding experience suited to their needs.

- c) Offer a range of guided rides, from introductory tours to all-day adventures.
- d) Combine guided rides with shuttle services



TRANSPORT:

Increase efficiency of shuttle services to take riders from Junction City, Veneta, Creswell, Cottage Grove, Lowell, and the existing mountain bike destinations of Oakridge/Westfir and McKenzie Bridge.

- a) Create centralized transit and shuttle pick-up locations tied to Bike Hubs (longer-term concept defined in the report). – One each in Junction City, Veneta, Creswell, Cottage Grove, Lowell, Oakridge, Westfir, and McKenzie Bridge.
- b) Create standardized shuttle pick-up schedule.
 - i. Standard departure times on a seasonal weekday and weekend schedule.

Increase scope of shuttle services.

- c) Origins – Junction City, Veneta, Creswell, Cottage Grove, Lowell, Oakridge/Westfir, and McKenzie Bridge.
- d) Destinations
 - i. Road and gravel destinations and the highest possible point on the mountain bike trails.
 - ii. Provide return service for any routes and trails that are not close to a community or destination.
- e) Between existing bike destinations.
 - i. To and from Oakridge/Westfir and McKenzie Bridge (if not covered by public transportation)



BIKE CULTURE/EVENTS:

Hold annual events/races that promote the quality trails and promote ancillary experiences to encourage broader exploration of the region amenities in the region.

- a) Encourage races (competitive events) and support race promoters that establish the area's bona fides for providing high-quality, physically and technically challenging riding.
- b) Encourage events (non-competitive gatherings) and support event promoters that have a broad appeal to biking enthusiasts.
- c) Encourage the development of mountain bike skills clinics to enhance the region's reputation as a mountain biking destination.