

**Greater Oakridge Rural Tourism Studio
Interim Baseline Assessment
November 2009**



RURAL TOURISM STUDIO

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Greater Oakridge Rural Tourism Studio Baseline Assessment Contents

I. Introduction	3
II. General community profile and context	3
III. Qualitative assessment of starting point for RTS	4
A. Planning	
B. State of tourism and implementation activities	
C. Community involvement and partnerships	
IV. Quantitative assessment of starting point for RTS	7
A. Visitor volume	
B. Seasonality	
C. Visitor profile	
D. Businesses	
E. Other data	
V. Appendix: Additional regional and county level data	11

I. Introduction

This report includes qualitative and quantitative baseline information for the greater Oakridge area as it begins working with Travel Oregon on the Rural Tourism Studio (RTS) Project.

The Rural Tourism Studio program aims to stimulate new tourism development activities that generate business revenue, jobs, entrepreneurial opportunities, and revenue for public services over time. The RTS workshops are designed to help the community learn about and organize around key sustainable tourism products, services and markets; connect with new partners and resources for implementation; and generate local momentum for action.

This information will be combined with business surveys, workshop participant surveys, and key stakeholder interviews data to assess the value of the RTS program approach for increasing beneficial tourism in Oregon’s rural communities.

II. General community profile and context

Oakridge is located in eastern Lane County, in the western foothills of the Cascade Mountains. Westfir is a small incorporated community immediately to its west. Together, the two municipalities have a population of nearly 4,100 people. The area’s population is growing faster than that of Lane County or the state of Oregon.

Population Change, 1990-2008

	1990	2000	2008	%change 2000-2008
Oakridge	3063	3148	3745	2.3%
Westfir	278	276	340	2.6%
Lane County				1.3%
Oregon				.9%

Source: 1990 and 2000, U.S. Census; 2008, Portland State University Population Research Center

Located in the ancestral territory of the Kalapuya and Molalla Indians, Oakridge was settled by non-Indian pioneers as a railroad town. Over time, it evolved into a timber town with a vibrant history. Westfir was incorporated as a separate municipality in 1979. The area was hard hit by the decline of the timber industry in the 1980’s and 1990’s, and still is more economically distressed than the state or county.

Oakridge/Westfir is surrounded by the Willamette National Forest and its world-class natural assets and recreational areas, including Waldo Lake, Salt Creek Falls, and the Willamette Pass ski area. It is approximately 45 minutes east of the Eugene/Springfield metropolitan area and one hour from the Eugene Airport, which offers direct connections to many western cities. It is also located on a primary highway route from the Willamette Valley to Crater Lake National Park.

Over the past 10 years, the area has been gaining recognition as a mountain biking destination, and the City of Oakridge has adopted “Mountain Biking Capital of the Northwest” as a brand. Tourism development is a key economic development strategy for the area: the main product is four-season outdoor recreation, with mountain biking as the leading attraction. The Oakridge City Council has designated the Oakridge-Westfir Area Chamber of Commerce as its tourism development arm.

Travel Oregon approached the community about this project in early 2009. As one of three pilot communities for the RTS program, community leaders did not have to make formal application or meet specific readiness criteria. However, RTS program staff considered the following characteristics in selecting the greater Oakridge area:

- Strong local leadership and willing partners in the tourism industry;
- Strong potential for growth in cycling tourism and geo-tourism; both areas targeted by the State’s tourism development and marketing organization
- Timely opportunity: the Oakridge area has been designated by the International Mountain Biking Association as one of its first Ride Centers. The community is at the top of U.S. Representative Peter DeFazio’s list for receiving \$400,000 appropriations request to help fund the Ride Center
- Broad capacity; community has completed the first round of leadership training as part of the Ford Institute Leadership Program
- Economic hardship; this program could bolster local efforts to increase employment opportunities and income levels.

A 10 person steering committee representing city and county government, the chamber of commerce, businesses and banking worked with Travel Oregon staff to customize RTS workshop offerings and to spearhead community outreach. The first workshop of the RTS program was held in October 12-13, 2009 and drew 25 participants. The workshop series will continue monthly through January, 2010.

III. Qualitative assessment of “starting point” for RTS

Immediately prior to the start of the RTS workshops, steering committee members responded in writing to seven open-ended questions related to local planning, the state of the local tourism sector, and implementation activities. The RTS program manager provided additional insight from her initial meetings with the steering committee. I also reviewed plan documents and updates as available from the City, Chamber of Commerce, and regional planning organizations.

Process learning: For future communities, it would be useful to conduct personal interviews with steering committee members to increase participation: just 3 of the steering committee’s 10 members submitted written comments for this community. It would also be useful to develop some closed questions asking respondents to rank the current level of, and importance of, key factors for success. Although different people may respond to the same questions over time, the inclusion of some ranking questions to supplement open ended interviews will make it easier to compare results over time.

This is a community that has done a good deal of recent planning focused on tourism. It does not, however, have an overarching “tourism development strategy”: its planning has been focused on specific sectors or uses.

Leaders in Oakridge/Westfir have begun implementing some of those plans as noted below. As a result, it will be difficult to attribute project identification and early development to the RTS “intervention”. However, it appears that stakeholder engagement, resources for project implementation, and business health are all somewhat weak now, and are areas where observed changes in the future may be directly related to what RTS is offering. Future stakeholder interviews will include questions to assess how causal effects are perceived.

A. Planning

The City of Oakridge has undertaken significant local planning related to tourism and economic development. In terms of regional planning, Oakridge is represented on the Lane Economic Commission, which in turn is represented on the Cascades West Economic Development District, which covers Lane, Linn, Lincoln and Benton Counties. CWEDD is responsible for regional economic development planning as an affiliate of the U.S. Economic Development Administration, and it coordinates access to some economic development project funding. Tourism is one of many goals identified in the current “Comprehensive Economic Development Strategy.”

From 2004 to 2008, a volunteer committee developed the “Oakridge-Westfir Community Trails Plan”, with funding support from the National Park Service Rivers, Trails and Conservation Assistance Program. The plan was adopted by the Oakridge City Council, and several projects within are already in the early stages of implementation as noted in the next section.

The planning committee has now combined with the volunteer group “Greater Oakridge Area Trail Stewards” (GOATS) to become a chapter of the non-profit International Mountain Biking Association, which will give it a non-profit structure for funding. The new group is called the “Oakridge Area Trails Alliance.”

In January 2009, the Oregon-based consulting firm Total Destinations Management prepared a Visitor Readiness Report based on community visits/observation, interviews, marketing materials analysis and industry expertise. This report included recommendations on branding and marketing communications, some of which have already been implemented.

Other current planning efforts focused on Oakridge/Westfir include:

- Because of its small size, the City of Oakridge is not required to have an updated Comprehensive Master Plan. It does specialized planning as needed to update the last comprehensive plan which was completed in 1980.
 - Beginning a master plan update for its water supply/distribution system
 - Beginning a master plan update for its parks
- Highway 58 Corridor Planning (State Department of Transportation) is ongoing. It is in the design criteria stage. Construction is several years away.
- New façade improvement program in the Uptown business district as part of the City’s participation in the Oregon Main Street Program as a “Transforming Community”
- Seeking funds to update its plan for further development of the Oakridge Industrial Park

The Strategic Plan for Travel Oregon, the state’s official tourism development arm, includes a focus on cycling and geotourism markets, which are present and have potential for further growth in the Oakridge area.

B. State of tourism and implementation activities

Tourism development is a priority activity for the City and the Chamber, and local planning is closely connected with tourism. The City has adopted a brand that clearly centers on tourism: “The Mountain Biking Capital of the Northwest”.

While there are many active volunteers as noted below, capacity for expanding tourism is limited by lack of accessible visitor information. There is no *year round* visitor center except for an unmanned, spottily maintained kiosk in Greenwaters Park. The Forest Service Visitor Center has seasonal hours of operation from Memorial Day to Labor Day, and from Thanksgiving to Christmas. The Chamber of Commerce has

no office or staff: it currently operates out of the living room of its volunteer president. Until recently, the Chamber had an office in City Hall, but that is no longer the case.

Furthermore, the Total Destinations Management report notes that signage to guide visitors is confusing and/or lacking altogether. The City of Oakridge is currently pursuing a federal appropriation for funding to implement a number of the signage-related recommendations.

According to the Chamber of Commerce, between 59% and 68% of its current members have businesses that are connected with tourism markets (see quantitative assessment below for more information). The 2009 Mt Bike Oregon event was the largest in its five year history, which created a boost for many local businesses, according to Chamber President Randy Dreiling.

Steering committee members perceive that “biking” as an economic driver is becoming accepted by the community as a viable strategy to complement other business development efforts. It is no longer seen as a competing, or unworthy, alternative to other strategies. As a result of the Community Trails Plan and the formation of the Oakridge Area Trails Alliance, work to improve three high priority multi-use trails began this year.

The Oakridge-Westfir Area Chamber of Commerce and its partners have built a strong relationship with the International Mountain Biking Association (IMBA). The IMBA has prioritized this community as one of just six IMBA Ride Centers in the United States. This partnership will develop state-of-the-art mountain biking facilities and services in the greater Oakridge area, and increase its reputation as a destination for bicycle tourism.

In addition to mountain biking focused projects, Oakridge participated actively in the development of a geo-tourism map for the region through the National Geographic Central Cascades Geotourism MapGuide Project.

An expressed concern is that as tourism grows in Oakridge, more non-local businesses will be drawn to the community, offering a homogenized product that competes directly for visitor dollars. Part of a sustainable tourism strategy will require exploring how to help grow unique local businesses that have worked hard to establish the market, while also attracting new investment and new jobs from outside the community.

C. Community involvement and partnerships

The City of Oakridge and the Oakridge-Westfir Area Chamber of Commerce have shared goals and a strong connection. This connection is visible in the explicitly shared community “brand” and in the City Council’s designation of the Chamber as its tourism development arm. The City of Oakridge provided funding support for the recent “Mt Bike Oregon” event.

Besides the Chamber of Commerce, and in cooperation with the Chamber, there is an association of businesses operating in the “uptown” neighborhood, which is actually the downtown, located just off Highway 58. Several new businesses are in the process of opening in this area. The Uptown Business Revitalization Association is a resource for business involvement. For approximately three years, the city provided partial funding for a Sirolli Institute Enterprise Facilitation program to help entrepreneurs. That award-winning program, called UPBEAT, was discontinued due to budget cuts this past summer.

The City and Chamber have an existing relationship with Travel Oregon as a result of the niche market opportunities for mountain biking that are both local and state priorities. As noted above, Oakridge also participated in the recent National Geographic Central Cascades Geotourism MapGuide project, which was coordinated by Travel Oregon. The community has also built a strong relationship with the International Mountain Biking Association, which can expand market connections and bring resources for projects as noted above.

The community also has a strong relationship with Travel Lane County (TLC), the county-level destination marketing organization. Travel Lane County has provided funding for the Mt Bike Oregon event as well as the January 2009 Visitor Readiness Report by the Total Destination Management consulting firm. TLC is also represented on the RTS program steering committee. In terms of strengthening this partnership, the TDM study recommends that county, regional, and state marketing language related to Oakridge/Westfir be more specific and more linked with the community's competitive advantage for mountain biking.

The U.S. Forest Service, as represented by the Middle Fork Ranger District of the Willamette National Forest, is a critical, appreciated partner. A cadre of active volunteers assist the Forest service in maintaining its trail system, and advocate for additional trail projects: the Greater Oakridge Area Trail Stewards (GOATS), as well as the Disciples of Dirt, Eugene-based mountain biking group.

Other volunteer, planning and public lands management organizations are also connected through the Oakridge Community Trails Plan development from 2004 to 2008. As noted above, the Community Trails Plan advisory committee has spun off and affiliated with a 501(c)(3) nonprofit to lead implementation of the plan's recommendations.

As in many communities, the active local stakeholders indicate that there are not enough active residents and businesses. In this particular community, which has a recent history of economic decline and increasing poverty, stakeholders sense not only a lack of activism, but a pervasive "victim mentality".

Steering committee members cite several immediate opportunities to strengthen partnerships:

- There is a Community Festivals Association which sponsors an annual tree-planting festival with mixed recent success. It is rethinking its priorities and represents an organization that could be more engaged in future tourism development work.
- Willamette Pass- strengthen cross-marketing opportunities
- Eugene based events and facilities (e.g. Olympic Trials, Airport) for cross marketing and packaging opportunities
- Many specific promotional opportunities contained in the Visitor Readiness Report

A weekly news update on the City of Oakridge website, as well as a monthly newsletter that is mailed with utility bills, aids in communications about projects and volunteer opportunities.

IV. Quantitative assessment of "starting point" for RTS

There are many types of data that can measure progress in developing a more robust, sustainable tourism sector. There are, however, limited sources of quantitative information available at the *community* level. Because the combined population of Oakridge and Westfir is just over 1% of the

county population, county and regional data will not pick up community level trends, except to the extent that the larger regional trends are mirrored locally.

The types of information most of interest include:

- A. Volume of visitors
- B. Seasonality of visitors
- C. Visitor profile
 - Average spending/duration of visit
 - Key draws
 - Quality of experience
 - Where they have travelled from, and how they learned about the community
- D. Businesses related to tourism markets
 - Number of business establishments, and those within that relate to tourism
 - Mix of products and services offered to tourists
 - Diversity of business customer base
 - Growth/profitability of businesses
 - Jobs growth related to tourism markets
- E. New investments by public or private sector in tourism products
- F. Other improvements in community well-being due to sustainable tourism development

Given that the RTS project is launching during the worst economic recession since the Great Depression, the baseline information for 2009, as it becomes available, is likely to be especially low when compared with prior years. Thus, where possible, the baseline data includes multiple years to more accurately reflect trends before introduction of the RTS program.

A. Visitor volume

Annual transient lodging tax revenue can be used as a proxy for visitor volume. While lodging tax revenues county-wide increased modestly from 2007 to 2008, lodging tax revenue increased significantly in Oakridge over the same time period.

Lodging tax revenues for Oakridge and Willamette Valley Region

	2007	2008	% change 2007-2008
Oakridge	\$50,800	\$83,400	+64.2%
Westfir	\$9,600	\$9,200	-4.2%
Lane County	\$6,538,500	\$6,947,800	+6.3%

Source: Dean Runyan Associates for Travel Oregon

Monthly lodging tax data is available at the regional or state level only. Over the first 8 months of 2009, lodging tax revenues in the Willamette Valley tourism region were down 14.9%, from \$114,192,885 to \$97,991,702. Thus, it is likely that local and regional lodging tax revenues will be down for the whole year, given the recession.

B. Seasonality

Forest Service recreational use permits and parking passes are being used as a proxy for seasonality of visitors starting in 2010.

For comparison purposes, the Willamette National Forest experienced increased sale of forest passes between 2008 and 2009. This may reflect recreational visitors staying closer to home during the recession.

**Northwest Forest Passes-
Middle Ford Ranger District, Willamette National Forest 2008-2009**

Parking areas	2008	2009
Salt Creek	1692	2027
Waldo (N. Waldo and Shadow Bay)	475	700
Skookum Creek	82	104
Timponagas	16	48
Total	2265	2879

Source: Willamette National Forest

In terms of commercial permits, the number of recreational permits was down slightly in 2009 compared with 2008. This data over time will also be useful for depicting how the volume and *types* of recreational uses are changing over time.

**Commercial Permits
Middle Ford Ranger District, 2008 and 2009**

	2008	2009
Recreation events- (all but 1 between June and October)	11 (3 biking events)	8 (2 biking events)
Outfitters/guides- (all but 2 between June and October)	9 (4 biking)	8 (4 biking)
River guides		30*

*mostly for McKenzie River, with minor use of Middle Fork River

*Source: Willamette National Forest

C. Visitor profile

Between July 15 and September 9, 2009, the Oakridge-Westfir Area Chamber of Commerce conducted the first of four quarterly visitor surveys. Via a brief six question written survey administered at four different locations (Trailhead Coffeehouse, Chamber Cottage in Greenwaters Park, two community events), 259 people responded with information about:

- Key draws
- Duration of visit
- Quality of experience

Process learning: Visitor counts are not currently gathered by the Chamber of Commerce. I suggest the following for this community and for other RTS communities, unless they already have a process in place.

- Maintain a written log at Chamber of Commerce with four columns
 - Date
 - Home zip code (or country, if international)
 - Number of people in party
 - Expected length of stay: Passing through? Day trip? Overnight? More than one night?
- In the case of Oakridge, where there is no Chamber office, have this log at each of the local lodging places and compile quarterly

Key information from the survey includes:

1. Key draws

- 85% of respondents came to the area for recreation, and 99% of them included recreation as one of the reasons they were in the area
- Natural beauty was the key draw (66% of respondents)
- Visitors to Oakridge/Westfir enjoy outdoor recreation activities. When asked what outdoor recreational activities they enjoy (not specifically applying to their visit to the area), they noted (in order of popularity):
 - Hiking (53%)
 - Biking (44%)
 - Fishing and Hunting (38%): 22% and 16% respectively
 - Winter sports (33%) includes “winter sports” (12%) and “skiing/snowboarding” (11%)
 - Boating, including rafting and kayaking (20%),
 - Bird watching (15%)
 - And a range of other activities in smaller numbers, including camping, running, photography, ATV/OHV sports, etc

These results suggest complementary activities that might be packaged as part of the local experience.

2. Duration of visit:

- The majority of surveys (237) were completed by attendees at the Mountain Bike Oregon Festival, and those respondents indicated that they were staying in the area for 3.5 days.
- 23 respondents indicated that they were staying 1-2 days, and the majority of these respondents indicated that they were just “passing through”
- Future quarterly surveys should give a more balanced sense of the average duration of stay (when a single major event is not the primary affiliation of respondents)

3. Quality of experience

- The survey includes some comments regarding the quality of experience for visitors, but not enough patterns to draw conclusions from.
- The survey elicited suggestions regarding what could be improved or added to the visitor experience, including improved signage/maps.

Process learning: I will suggest that future quarterly surveys include the following refinements:

- Differentiate on question # 3 between those visitors who are on a day trip vs. those who are spending at least one night
- Ask about approximate total expenditures in the community during their visit
- Ask a ranking question re quality of experience (dimensions e.g. welcoming, ease to get around, commercial services, etc)

Average daily expenditures by visitors are an important measure of economic impact. However, data is only available at the statewide level. For 2008, the average expenditure for overnight visitors was \$124 per day and \$331 per trip (source: Dean Runyan Associates for Travel Oregon). While average expenditure data gathered locally as part of future visitor surveys may not be scientifically rigorous, it will provide important insights regarding trends.

D. Businesses

The City of Oakridge requires all local businesses to be licensed. The record of business license applications provides useful data on new business formation, business dissolution, and business mix that

is not often available at the community level. Considering the high number of home based businesses, the Chamber of Commerce has an impressive number of total businesses as members.

Number of businesses in Oakridge, Oregon

Year	Business licenses	Chamber of Commerce members	Chamber member businesses with at least some tourism markets
2004	109		
2006	140		
h2007	129		
2008	126	73	42 yes/6 others possibly
2009	n/a	68	40 yes/6 others possibly

Source: City of Oakridge website, list of business licenses; Oakridge Chamber of Commerce

Process learning: The initial assessment of which businesses serve at least some tourism markets reflects a judgment call by Randy Dreiling, President of the Oakridge-Westfir Area Chamber of Commerce. For future RTS communities, it would be useful to ask the local chamber to survey its membership regarding how tourism relates to their business as part of the baseline assessment process. This will yield information that can be tracked more reliably over time.

The remaining business information will be estimated by annually surveying a sample set of Oakridge/Westfir businesses (interviews and written survey) about market, product, employment and revenue trends. The first such survey will be conducted in December 2009-January 2010.

E. Other Data

This will be gathered from open-ended survey questions with key stakeholders, businesses and partners over time. During the course of the pilot project evaluation design, I will also seek out locally available data with indicators of community well-being. To date, I have only found local data for a community of this size in the now outdated 2000 census: as noted earlier, more recent county level data is not useful for monitoring program impact since the target community represents just over 1% of the county population.

V. Appendix: Additional Regional and County Level Data

Home Zip Codes of Visitors, Willamette Valley Region 2004-2006

Top Five urban zip codes for Willamette Valley visitors, 2004-2006

City	% of W.V. visitors from urban areas
Seattle	27%
Portland	26%
Eugene	8%
San Francisco- Oakland- San Jose	4%
Spokane	4%

Source: Longwoods International for Travel Oregon

Top 5 home states for Willamette Valley visitors, 2006

State	% of W.V. Visitors from state
Oregon	35%
Washington	35%
California	11%
Texas	4%
Maryland	3%

Source: Longwoods International for Travel Oregon

Tourism Sector Jobs, Lane County 2007-2008

2007 jobs	2008 jobs	% change
7,890	8,010	1.52%

Source: Dean Runyan Associates for Travel Oregon

Business Revenue for Tourism Related Businesses, Lane County 2007-2008

Category	2007	2008
Accommodations	\$86 million	\$93.4 million
Food and beverage	\$133.2 million	\$137.1 million
Food stores	\$46.8 million	\$49 million
Ground transport/motor fuel	\$123.7 million	\$133.8 million
Arts/entertainment/recreation	\$70.1 million	\$71.2 million
Retail sales	\$72.9 million	\$71.2 million
Air transportation	\$6.6 million	\$7.1 million

Source: Dean Runyan Associates for Travel Oregon