Dean Runyan Associates

The Economic Significance of Cycling on Oregon Scenic Bikeways, 2014

June 2015

Prepared for
Travel Oregon and
State Parks and Recreation Department

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Preface

The Oregon Scenic Bikeways program is a result of a partnership between the Oregon Parks and Recreation Department, Travel Oregon, Oregon Department of Transportation and Cycle Oregon. In 2014, the state Scenic Bikeways Committee, apprised of these founding partners and others determined by the direction of Oregon State Parks and Recreation Dept. and its Oregon Administrative Rules (OAR) 736-009-0015 through 736-009-0030, identified a key strategic goal to: ***Conduct and report economic impacts resulting from Scenic Bikeways.*** As a result, Travel Oregon and Oregon Parks and Recreation Dept. commissioned Dean Runyan Associates to prepare this study to document the economic significance of bicycle recreation for Oregon's twelve designated Scenic Bikeways, in 2014.

Dean Runyan Associates has specialized in research and planning services for the travel, tourism, and recreation industry since 1984. Dean Runyan Associates also has extensive experience in project feasibility analysis, market evaluation, survey research, and travel and recreation planning.

In preparing this report, we have received essential guidance and assistance from numerous Travel Oregon staff, whom we thankfully acknowledge, especially Nastassja Pace, *Destination Development Specialist,* for serving as project lead and liaison. Alexandra Phillips, *Bicycle Recreation Coordinator,* with Oregon Parks & Recreation Department who provided valuable assistance. Sheila Lyons, *Pedestrian and Bicycle Program Manager,* with Oregon Department of Transportation, was instrumental in supporting this study. Ride with GPS, shared their bicycle rider volume data with us, and many others provided information and advice for this report.

With gratitude, we want to express our thanks for the cooperation to the many participating bicycle-related and regional destination travel organizations throughout the state. Also, individually, as well, to the over 1,000 participants who voluntarily provided detailed information about their bicycle recreation activity on Oregon's Scenic Bikeways.

Finally, special thanks are due to Todd Davidson, *Chief Executive Officer*, of Travel Oregon, and Scott West, *Chief Strategy Officer*, without their guidance and support, this project would not have been possible.

I. Introduction

The Oregon Scenic Bikeway program is a superb collection of cycling routes that inspires people to experience Oregon's natural beauty and cultural heritage by bicycle, and that offers economic and social benefits to the state's communities and residents. Bikeway routes are proposed by local cyclists and selected for their scenic quality, road conditions and general riding enjoyment. Proposed routes are carefully reviewed and ridden, with only about half meeting the criteria for designation. Once designated, directional signs are installed along the route and printable maps showing the route and elevation profiles, services and points of interest are posted online along with lots of information needed to plan a trip on the Bikeways.

The state's Scenic Bikeways contribute to significant expenditures made within the local areas for lodging, dining, groceries, and other retail goods. This report describes the economic significance of Oregon Scenic Bikeways, documenting the magnitude and distribution of economic impacts throughout the state.

Based on the results reported from a detailed online survey, our findings show that in 2014 cyclists rode all twelve of the Oregon Scenic Bikeways, making both overnight and day trips. Cyclists who rode Oregon Scenic Bikeways spent nearly $12.4 million in 2014 - representing about 3 percent of all bicycle-related travel in the state (reference to The Economic Significance of Bicycle-Related Travel in Oregon, 2012).

Detailed trip characteristics and demographics for the Scenic Bikeway riders is also included, providing information such as the purpose and length of the trips, distance traveled, travel party size, as well as other demographic and associated trip-related characteristics are shown in Appendices.

Objectives

This study represents a comprehensive effort by Travel Oregon and Oregon State Parks and Recreation Department to document the economic significance of Oregon Scenic Bikeways, providing a detailed description of the volume rides taken, characteristics of cyclists, and the economic significance of cycling activity along each of Oregon's twelve Scenic Bikeways, in 2014.

Survey findings were used to characterize cycling activity on each Scenic Bikeway route, including the volume of rides taken, participant breakouts with respect to travel party characteristics and accommodations, visitor origin and other trip-related data. Economic impacts are based on expenditure data collected as part of the study: *The Economic Significance of Bicycle-Related Travel in Oregon, 2012*. These data are reliable and their use allowed for a simpler survey data collection process.

The findings describe the primary Oregon Scenic Bikeway related economic impacts, including:

- Expenditures made by cyclists while riding Oregon Scenic Bikeways, and the associated earnings, employment and tax receipts.
- Distribution of these impacts throughout the state (by Oregon Scenic Bikeway).

Oregon Scenic Bikeway Estimates of Number of Rides Taken

This study estimates the number of rides taken on each of Oregon's twelve Scenic Bikeways in 2014. Estimates are based on a variety of data gathered, including:

- Oregon Dept. of Transportation Line Strip Counts
- Oregon Dept. of Transportation Strava Volumes
- Oregon Dept. of Transportation Video Counts
- Ride with GPS Volumes
- Volunteer Counts

In addition, survey results provide a distribution of total rides taken by Scenic Bikeway. The distribution of rides for this sample of cyclists, weighted by the population distribution of Oregon residents, was used to estimate the number of rides for each Scenic Bikeway. In terms of the distribution of rides, the survey results were geographically consistent with the overall volume data gathered by the Oregon Dept. of Transportation, Ride with GPS volumes, and volunteer counts.

Survey Outreach

An online survey was distributed through a variety of sources in order to accurately assess the incidence and economic significance of Oregon Scenic Bikeways related impact during 2014.

The survey link was accessible from these websites:

- OregonScenicBikeways.org
- RideOregonRide.com
- TravelOregon.com (cycling page)
- Industry.TravelOregon.com
- Adventure Cycling Association Bike Bits
- Statesman Journal
- Portland Tribune

The survey announcement was sent directly to:

- 300 businesses recognized in Oregon's Bike Friendly Business program
- 3000 travelers who ordered Scenic Bikeway Maps via Travel Oregon in past year
- 75 local Scenic Bikeway Proponents
- 200 past Oregon Bicycle Tourism Studio workshop attendees
- 284 members of the Oregon Bicycle Tourism Partnership
- Travel Oregon's Industry eNewsletter (2500 statewide email contacts)
- Oregon's 7 Regional Destination Marketing organizations
- OPRD Twitter (22.6K followers)
- Industry Travel Oregon Twitter (2300 followers)

Other organizations that sent the survey through their communication channels:

- Bicycle Rides Northwest
- Adventure Cycling Association
- BikePortland.org
- Bicycle Transportation Alliance
- Clackamas County Bike Tourism Initiative
- Co-Motion
- Cycle Oregon
- Dark 30 Sports
- Gresham Area Chamber of Commerce Bike Tourism Initative
- Heppner Chamber
- Intertwine Alliance
- Oakshire Brewing
- Oregon Bicycle Racing Association
- ODOT
- OR Bike
- PathlessPedaled
- Pedal Bike Tours
- Portland Bike Tours
- Velo Cult
- Washington County Visitors Association

Survey postcards (approximately 5000) were mailed to the following places to be distributed to travel consumers:

- 150 Businesses along and near the Scenic Bikeways
- 21 Chambers and Visitors Associations on and near Scenic Bikeways
- 9 Oregon Welcome Centers

Overall, more than 1,000 participants provided information about their Scenic Bikeway activity and recreation experience in Oregon.

Average Trip Expenditures

The scope of the economic impact analysis includes all expenditures made while cycling on Oregon Scenic Bikeways - rides made on overnight and day trips. Expenditures include lodging accommodations, campground fees, restaurant and bars, groceries, fuel and other transportation costs, bicycle repairs and related clothing and gear, event fees, all types of recreation, and other retail. Travel expenditures, based on average expenditures per travel party per trip, are shown in Table I-1 below.

Table I-1. Average Trip Expenditures while Cycling on Oregon Scenic Bikeways, 2014

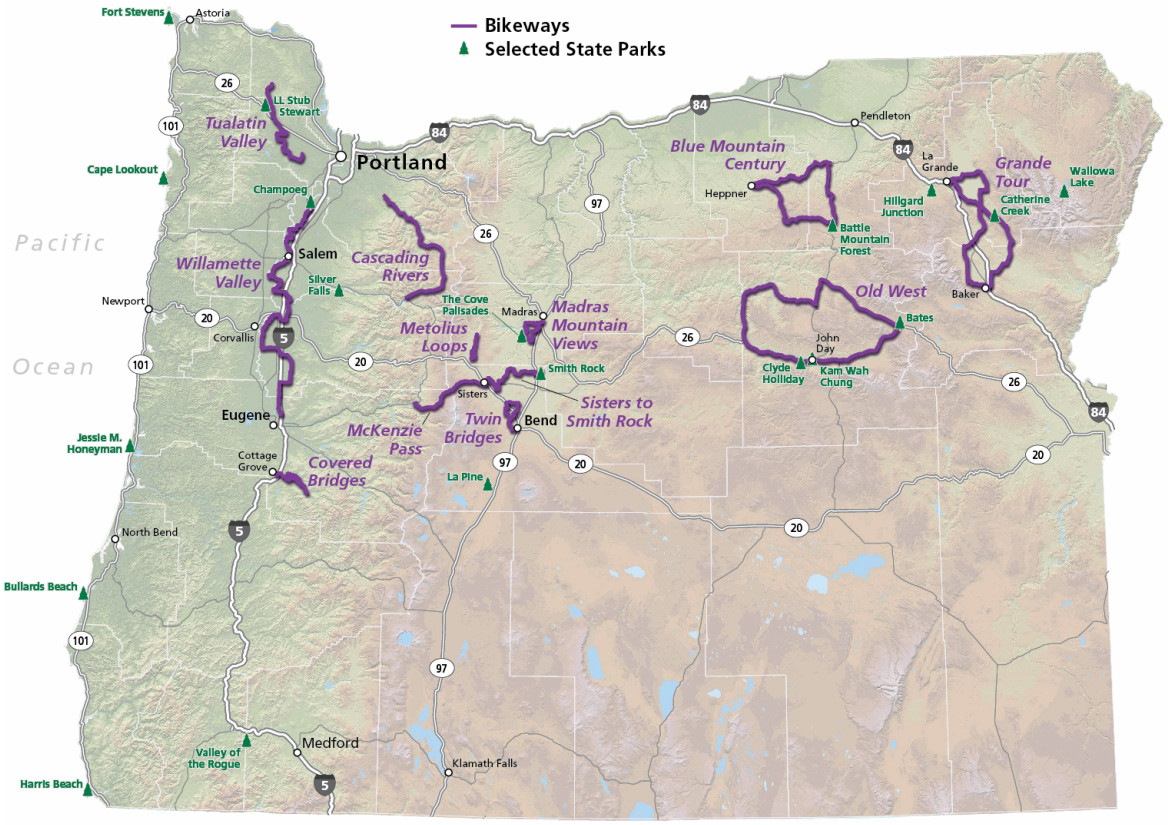
	Average Per Party for Overnight Trip	Average Per Party for Day Trip	
Type of Expenditure	Overnight ($/Trip)	Day (50+mi) $/Trip	Local (< 50 mi) $/Trip
Accommodations	$225	$0	$0
Restaurants/Bars/Lounges	$193	$32	$0
Groceries/Snacks	$107	$15	$15
Fuel/Gas/Transportation/Parking	$109	$26	$0
Bicycle Related Repairs/Clothing/Gear	$17	$10	$2
Recreation and Entertainment	$9	$1	$1
All Other Retail	$32	$3	$2
Overall Bicycle Trip Average	**$693**	**$98**	**$19**
All Oregon Travel*	**$644**	**NA**	**NA**

* All Oregon Travel expenditures based on Oregon Travel Impacts, 1998-2014p (statewide preliminary estimates).

Notes: Day trips include travel to the Scenic Bikeway 50 miles or more from home (one way) or local trips often made completely on bike.

Source: Dean Runyan Associates.

II. Oregon Scenic Bikeways: Statewide Summary, 2014



Map Source: Oregon State Parks and Recreation Dept.

Oregon Scenic Bikeway Rides

In 2014, cyclists made approximately 79,000 rides on Oregon Scenic Bikeways. These rides taken on Oregon Scenic Bikeways were made while on overnight trips, and while on day excursions. Survey respondents reported cycling activity for each of Oregon's twelve Scenic Bikeways, highlighting the geographic range and diversity of bicycle recreation throughout the state.

Scenic Bikeway rides generate economic impacts -- spending, earnings, employment, and tax receipts - all of which supports local communities. Tables II-1 and II-2 show the number of rides for each Scenic Bikeway and by trip type.

Economic Impacts of Oregon Scenic Bikeway Rides: A Summary

- Cyclists who rode Oregon Scenic Bikeways made expenditures of approximately $12.4 million in 2014.

- More specifically, cyclists who rode on Oregon Scenic Bikeways spent $6.9 million on accommodation and food services, $5.3 million on retial, including snacks and groceries and trip-related motor fuel, and about $182,000 on arts, entertainment, and recreation, including bicycle/cycling event fees.

- In addition, this spending by cyclists who rode on Oregon Scenic Bikeways directly supported over 150 jobs with earnings of approximately $3.4 million.

- This spending also generated local and state tax receipts (lodging taxes, motor fuel, and travel-generated business and personal income tax) of approximately $450,000.

Detailed economic impacts by Oregon Scenic Bikeway are provided in Table III-3 that

Table II-1. Number of Rides Taken on Oregon Scenic Bikeways, 2014

Oregon Scenic Bikeway	Total	on Overnight Trips	Day Rides
Willamette Valley	18,700	9,800	8,900
Tualatin Valley	12,200	2,600	9,600
McKenzie Pass	11,300	6,000	5,300
Covered Bridges	8,400	3,700	4,700
Twin Bridges Loop	7,300	3,200	4,100
Sisters to Smith Rock	6,600	4,700	1,900
Metolius River Loops	4,500	2,900	1,600
Cascading Rivers	2,900	1,500	1,400
Madras Mountain Views	2,400	1,200	1,200
Old West	2,300	2,200	*
Grande Tour	1,800	1,500	*
Blue Mountain Century	800	600	*
Total	**79,200**	**39,900**	**39,300**

* Number of rides taken are fewer than 500.
Source: Dean Runyan Associates.

Figure II-1. Number of Rides Taken on Oregon Scenic Bikeways, 2014

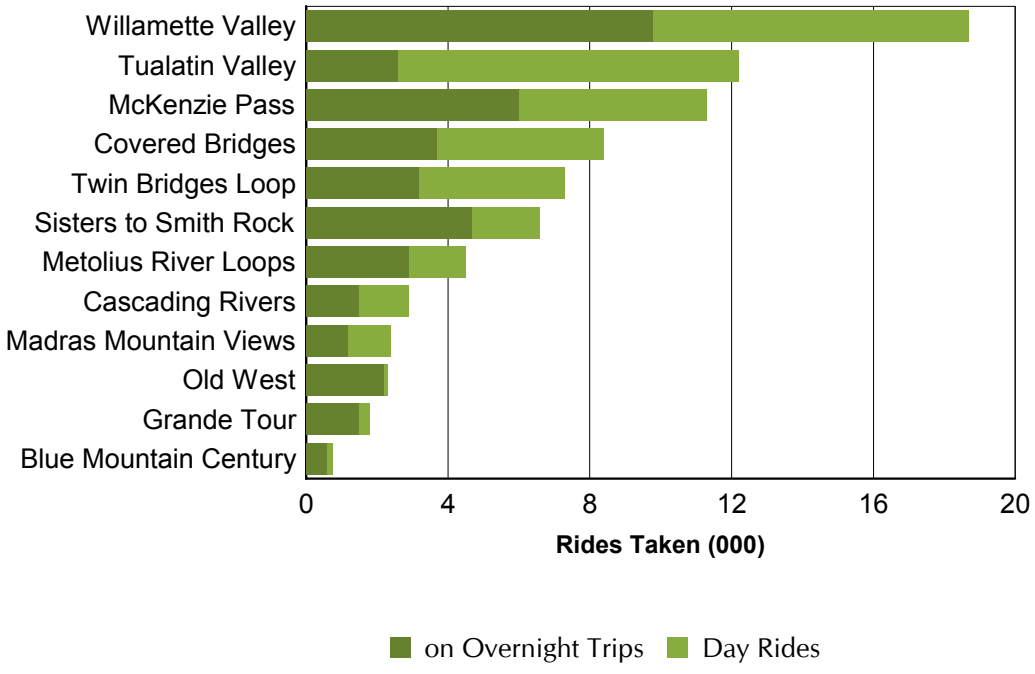


Table II-2. Number of Rides Taken on Oregon Scenic Bikeways by Trip Type, 2014

Type of Bicycle Activity	Total	on Overnight Trips	Day Rides
Independent bicycling (solo or with family/friends)	67,100	33,300	33,776
Organized non-competitive group ride	8,300	4,000	4,390
Other cycling event	1,900	1,100	775
Organized group tour	1,800	1,500	*
Total	**79,100**	**39,900**	**39,200**

* Number of rides taken are fewer than 500.

Source: Dean Runyan Associates.

Figure II-2. Number of Rides Taken on Oregon Scenic Bikeways by Trip Type, 2014

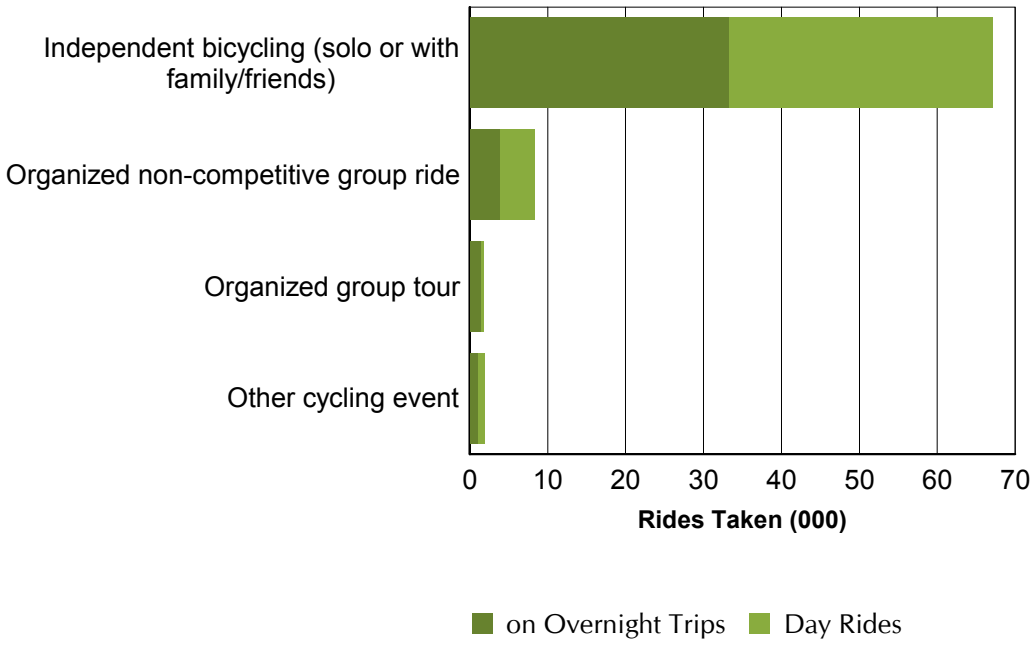


Table II-3. Oregon Scenic Bikeway Detailed Economic Impacts, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$10,765
Day Rides	$1,622
Total	**$12,387**
Bicycle-Related Travel Expenditures By Type of Activity	**($000)**
Independent bicycling (solo or with family/friends)	$10,385
Organized non-competitive group ride	$1,247
Organized group tour	$422
Other cycling event	$333
Total	**$12,387**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$6,918
Arts, Entertainment & Recreation	$182
Retail	$5,287
Total	**$12,387**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$2,892
Arts, Entertainment & Recreation	$66
Retail	$435
Total	**$3,394**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Accommodation & Food Services	133
Arts, Entertainment & Recreation	4
Retail	19
Total	**156**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$219
State Tax Receipts	$235
Total	**$454**

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Figure II-3. Oregon Scenic Bikeway Expenditures by Type of Activity, 2014

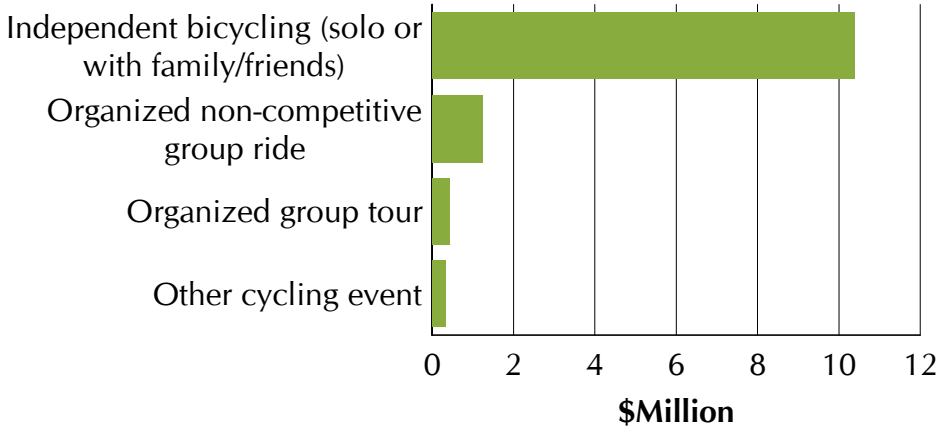
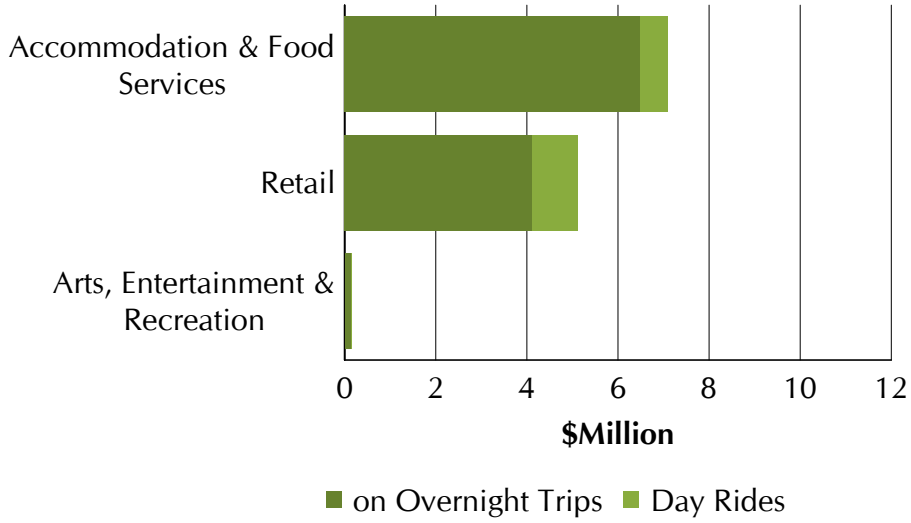
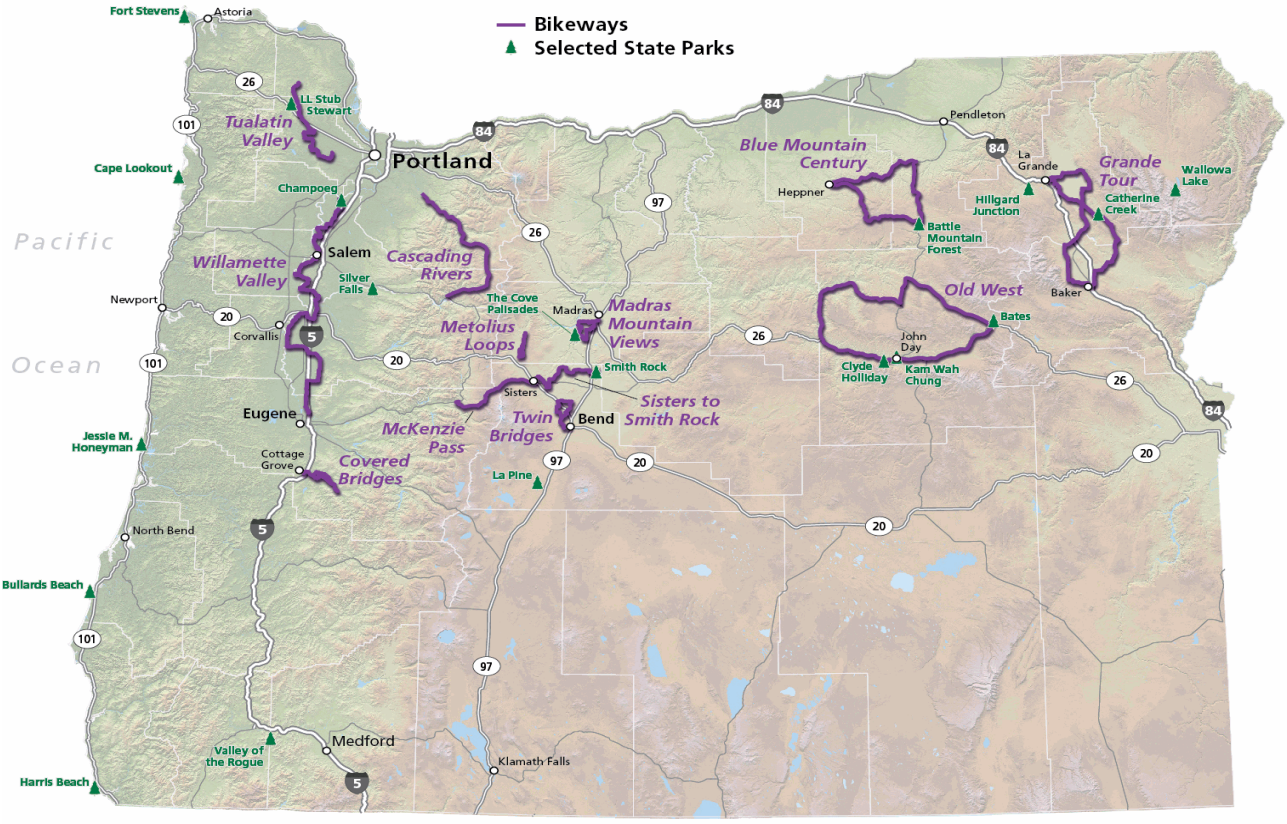


Figure II-4. Oregon Scenic Bikeway Expenditures by Commodity Purchased, 2014



III. Oregon Scenic Bikeways: Detailed Economic Impacts, 2014



Source: Oregon State Parks and Recreation Dept.

Blue Mountain Century
Distance: 109.4 mi (loop)
Season: summer & fall

Cascading Rivers
Distance: 69.6 mi
Season: summer

Covered Bridges
Distance: 37.8 mi (loop)
Season: year round

Grande Tour
Distance: 134.5 mi (loop)
Season: spring thru fall

Madras Mountain Views
Distance: 29.3 mi (loop)
Season: year round

McKenzie Pass
Distance: 36.1 mi
Season: summer & fall

Metolius River Loops
Distance: various
3.3-20 mi (loops)
Season: spring thru fall

Old West
Distance: 174.7 mi (loop)
Season: late spring thru fall

Sisters to Smith Rock
Distance: 36.9 mi
Season: spring thru fall

Tualatin Valley
Distance: 50.4 mi
Season: year round

Twin Bridges
Distance: 36.3 mi (loop)
Season: spring thru fall

Willamette Valley
Distance: 132 mi
Season: year round

Oregon Scenic Bikeway Expenditures

While bicycling on Oregon Scenic Bikeways, cyclists made expenditures for both overnight and day trips. Figure III-1 below shows the composition of overnight and day and expenditures within each Oregon Scenic Bikeway during 2014. Overall, the Willamette Valley, Tualatin Valley, and McKenzie Pass Scenic Bikeways had the highest amount of travel spending. It is also notable that travel spending for day trips is more significant as compared to the others, as well. For the Scenic Bikeways located in the Eastern region - Blue Mountain Century, Grande Tour, and Old West – travel spending was largely driven by overnight trips.

Figure III-1. Oregon Scenic Bikeway Expenditures by Trip Type, 2014

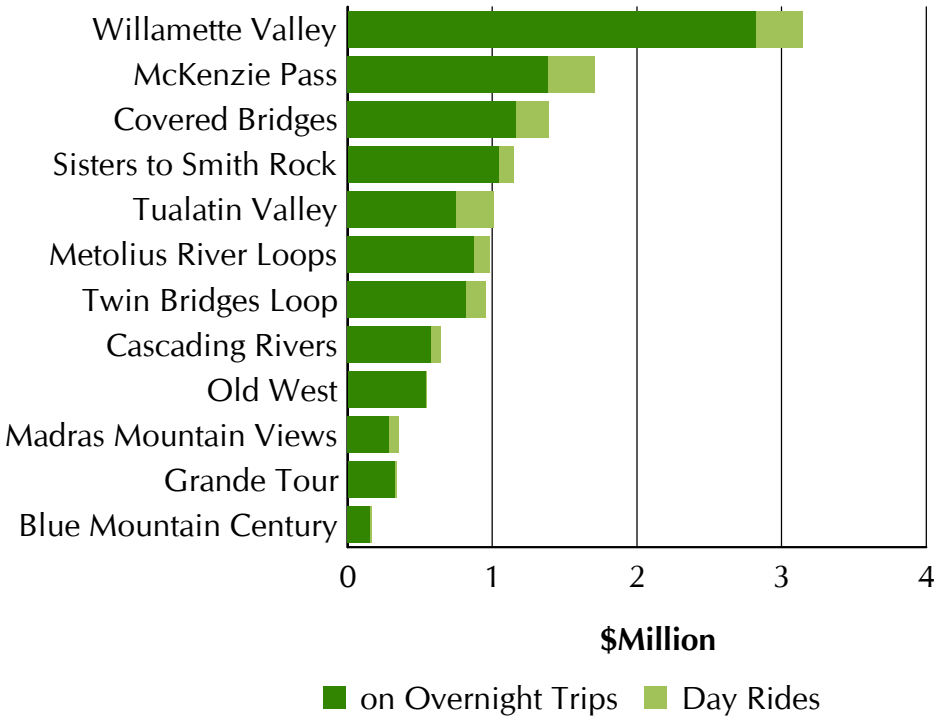


Table III-1. Oregon Scenic Bikeway Summary: Economic Impact, 2014

All Scenic Bikeways	
Expenditures ($000)	$12,387
Earnings ($000)	$3,394
Employment (Jobs)	156
State & Local Tax Receipts ($000)	$454
Blue Mountain Century	
Expenditures ($000)	$169
Earnings ($000)	$50
Employment (Jobs)	3
State & Local Tax Receipts ($000)	$8
Cascading Rivers	
Expenditures ($000)	$641
Earnings ($000)	$173
Employment (Jobs)	8
State & Local Tax Receipts ($000)	$31
Covered Bridges	
Expenditures ($000)	$1,390
Earnings ($000)	$382
Employment (Jobs)	18
State & Local Tax Receipts ($000)	$52
Grande Tour	
Expenditures ($000)	$339
Earnings ($000)	$100
Employment (Jobs)	5
State & Local Tax Receipts ($000)	$12
Madras Mountain Views	
Expenditures ($000)	$354
Earnings ($000)	$94
Employment (Jobs)	4
State & Local Tax Receipts ($000)	$12
McKenzie Pass	
Expenditures ($000)	$1,704
Earnings ($000)	$455
Employment (Jobs)	20
State & Local Tax Receipts ($000)	$55
Metolius River Loops	
Expenditures ($000)	$981
Earnings ($000)	$270
Employment (Jobs)	12
State & Local Tax Receipts ($000)	$34
Old West	
Expenditures ($000)	$550
Earnings ($000)	$165
Employment (Jobs)	8
State & Local Tax Receipts ($000)	$20
Sisters to Smith Rock	
Expenditures ($000)	$1,153
Earnings ($000)	$318
Employment (Jobs)	14
State & Local Tax Receipts ($000)	$41
Tualatin Valley	
Expenditures ($000)	$1,008
Earnings ($000)	$255
Employment (Jobs)	12
State & Local Tax Receipts ($000)	$34
Twin Bridges Loop	
Expenditures ($000)	$954
Earnings ($000)	$254
Employment (Jobs)	11
State & Local Tax Receipts ($000)	$32
Willamette Valley	
Expenditures ($000)	$3,145
Earnings ($000)	$878
Employment (Jobs)	42
State & Local Tax Receipts ($000)	$124

Source: Dean Runyan Associates.

Table III-2. Blue Mountain Century Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$160
Day Rides	$9
Total	**$169**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$99
Arts, Entertainment & Recreation	$2
Retail	$67
Total	**$169**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$43
Arts, Entertainment & Recreation	$1
Retail	$6
Total	**$50**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**3**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$3
State Tax Receipts	$6
Total	**$8**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-3. Cascading Rivers Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$577
Day Rides	$64
Total	**$641**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$366
Arts, Entertainment & Recreation	$9
Retail	$266
Total	**$641**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$147
Arts, Entertainment & Recreation	$3
Retail	$23
Total	**$173**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**8**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$13
State Tax Receipts	$19
Total	**$31**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-4. Covered Bridges Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$1,165
Day Rides	$225
Total	**$1,390**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$768
Arts, Entertainment & Recreation	$20
Retail	$602
Total	**$1,390**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$327
Arts, Entertainment & Recreation	$8
Retail	$47
Total	**$382**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**18**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$27
State Tax Receipts	$25
Total	**$52**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-5. Grande Tour Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$325
Day Rides	$14
Total	**$339**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$200
Arts, Entertainment & Recreation	$5
Retail	$134
Total	**$339**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$87
Arts, Entertainment & Recreation	$1
Retail	$12
Total	**$100**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**5**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$5
State Tax Receipts	$7
Total	**$12**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-6. Madras Mountain Views Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$287
Day Rides	$68
Total	**$354**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$194
Arts, Entertainment & Recreation	$5
Retail	$155
Total	**$354**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$79
Arts, Entertainment & Recreation	$2
Retail	$13
Total	**$94**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**4**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$6
State Tax Receipts	$6
Total	**$12**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-7. McKenzie Pass Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$1,385
Day Rides	$319
Total	**$1,704**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$941
Arts, Entertainment & Recreation	$24
Retail	$740
Total	**$1,704**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$384
Arts, Entertainment & Recreation	$9
Retail	$63
Total	**$455**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**20**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$27
State Tax Receipts	$29
Total	**$55**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-8. Metolius River Loops Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$873
Day Rides	$108
Total	**$981**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$564
Arts, Entertainment & Recreation	$13
Retail	$404
Total	**$981**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$231
Arts, Entertainment & Recreation	$5
Retail	$34
Total	**$270**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**12**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$17
State Tax Receipts	$17
Total	**$34**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-9. Old West Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$544
Day Rides	$6
Total	**$550**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$331
Arts, Entertainment & Recreation	$7
Retail	$212
Total	**$550**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$144
Arts, Entertainment & Recreation	$2
Retail	$19
Total	**$165**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**8**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$9
State Tax Receipts	$11
Total	**$20**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-10. Sisters to Smith Rock Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$1,050
Day Rides	$102
Total	**$1,153**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$666
Arts, Entertainment & Recreation	$16
Retail	$471
Total	**$1,153**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$272
Arts, Entertainment & Recreation	$6
Retail	$40
Total	**$318**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**14**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$20
State Tax Receipts	$20
Total	**$41**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-11. Tualatin Valley Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$750
Day Rides	$258
Total	**$1,008**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$488
Arts, Entertainment & Recreation	$19
Retail	$500
Total	**$1,008**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$208
Arts, Entertainment & Recreation	$7
Retail	$39
Total	**$255**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**12**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$16
State Tax Receipts	$17
Total	**$34**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-12. Twin Bridges Loop Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$821
Day Rides	$133
Total	**$954**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$522
Arts, Entertainment & Recreation	$15
Retail	$417
Total	**$954**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$213
Arts, Entertainment & Recreation	$5
Retail	$35
Total	**$254**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**11**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$16
State Tax Receipts	$16
Total	**$32**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

Table III-13. Willamette Valley Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	**($000)**
on Overnight Trips	$2,828
Day Rides	$317
Total	**$3,145**
Bicycle-Related Travel Expenditures By Commodity Purchased	**($000)**
Accommodation & Food Services	$1,778
Arts, Entertainment & Recreation	$46
Retail	$1,320
Total	**$3,145**
Earnings Generated by Bicycle-Related Travel Expenditures	**($000)**
Accommodation & Food Services	$757
Arts, Entertainment & Recreation	$17
Retail	$104
Total	**$878**
Employment Generated by Bicycle-Related Travel Expenditures	**Number of Jobs**
Total	**42**
Tax Receipts Generated by Bicycle-Related Travel Expenditures	**($000)**
Local Tax Receipts	$61
State Tax Receipts	$63
Total	**$124**

Details may not add to totals due to rounding.
Source: Dean Runyan Associates.

APPENDIX A

Trip Characteristics by Oregon Scenic Bikeway

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Table A-1. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
ALL OREGON SCENIC BIKEWAYS

Purpose of Trip	Overnight	Day
Primary reason for trip	69.3%	83.6%
One of several reasons for this trip	27.2%	11.9%
An unplanned activity while on this trip	3.4%	4.5%
Total	100.0%	100.0%
Sample Size (n)	812	776

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	83.3%	86.0%
Organized non-competitive group ride	9.9%	11.2%
Organized group tour	4.0%	0.8%
Other cycling event	2.8%	2.0%
Total	100.0%	100.0%
Sample Size (n)	819	767

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	18.2%	65.2%
50-99 miles	16.9%	18.3%
100-199 miles	33.6%	12.1%
200 miles or more	31.3%	4.4%
Total	100.0%	100.0%
Sample Size (n)	806	767

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	49.6%	NA
Campgrounds/RV Park	36.5%	NA
Friends/Relatives	9.7%	NA
Second Home	1.6%	NA
Other (event accommodations, etc)	2.6%	NA
Total	100.0%	NA
Sample Size (n)	812	NA

Number of Nights	Overnight	Day
1 Night	29.3%	NA
2 Nights	32.4%	NA
3-4 Nights	24.7%	NA
5-6 Nights	6.8%	NA
7+ Nights	6.8%	NA
Total	100.0%	NA
Mean	2.6	NA
Sample Size (n)	819	NA

Average Party Size	Overnight	Day
Number of Adults	2.7	2.5
Number of Children	0.2	0.2
Sample Size (n)	804	763

Table A-1. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
ALL OREGON SCENIC BIKEWAYS (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	23.9%	32.2%
Motorized vehicle	66.9%	61.5%
Train	4.0%	1.0%
MAX Light Rail Service	2.1%	2.2%
Bus	1.0%	1.7%
Other	2.1%	1.3%
Total	100.0%	100.0%
Sample Size (n)	806	767

When did you take a trip	Overnight	Day
January	0.2%	0.9%
February	0.0%	0.4%
March	0.7%	1.0%
April	2.5%	4.0%
May	12.6%	13.9%
June	24.1%	26.8%
July	16.3%	21.6%
August	20.1%	15.2%
September	18.3%	11.3%
October	4.3%	4.0%
November	0.5%	0.5%
December	0.2%	0.4%
Total	100.0%	100.0%
Sample Size (n)	809	772

Source: Dean Runyan Associates.

Table A-2. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
BLUE MOUNTAIN CENTURY

Purpose of Trip	Overnight	Day
Primary reason for trip	82.6%	78.6%
One of several reasons for this trip	15.2%	21.4%
An unplanned activity while on this trip	2.2%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	14

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	65.2%	92.9%
Organized non-competitive group ride	26.1%	0.0%
Organized group tour	8.7%	7.1%
Other cycling event	0.0%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	14

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	0.0%	42.9%
50-99 miles	11.1%	28.6%
100-199 miles	48.9%	21.4%
200 miles or more	40.0%	7.1%
Total	100.0%	100.0%
Sample Size (n)	45	14

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	43.5%	NA
Campgrounds/RV Park	38.7%	NA
Friends/Relatives	8.1%	NA
Second Home	3.2%	NA
Other (event accommodations, etc)	6.5%	NA
Total	100.0%	NA
Sample Size (n)	46	NA

Number of Nights	Overnight	Day
1 Night	28.3%	NA
2 Nights	32.6%	NA
3-4 Nights	23.9%	NA
5-6 Nights	6.5%	NA
7+ Nights	8.7%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	46	NA

Average Party Size	Overnight	Day
Number of Adults	2.6	1.9
Number of Children	0.2	0.4
Sample Size (n)	45	14

Table A-2. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
BLUE MOUNTAIN CENTURY (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	8.9%	35.7%
Motorized vehicle	91.1%	64.3%
Total	100.0%	100.0%
Sample Size (n)	45	14

When did you take a trip	Overnight	Day
March	0.0%	7.1%
April	0.0%	0.0%
May	17.4%	28.6%
June	28.3%	14.3%
July	4.3%	21.4%
August	21.7%	21.4%
September	26.1%	7.1%
October	2.2%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	14

Locations stayed/visited during a trip	Overnight	Day
Heppner	45.0%	26.3%
Ukiah	18.3%	21.1%
Pendleton	20.0%	47.4%
Other	16.7%	5.3%
Total	100.0%	100.0%
Sample Size (n)	46	14

Source: Dean Runyan Associates.

Table A-3. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
CASCADING RIVERS

Purpose of Trip	Overnight	Day
Primary reason for trip	68.4%	78.3%
One of several reasons for this trip	31.6%	13.0%
An unplanned activity while on this trip	0.0%	8.7%
Total	100.0%	100.0%
Sample Size (n)	19	23

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	89.5%	87.0%
Organized non-competitive group ride	5.3%	13.0%
Organized group tour	5.3%	0.0%
Other cycling event	0.0%	0.0%
Total	100.0%	100.0%
Sample Size (n)	19	23

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	52.6%	60.9%
50-99 miles	10.5%	26.1%
100-199 miles	0.0%	4.3%
200 miles or more	36.8%	8.7%
Total	100.0%	100.0%
Sample Size (n)	19	23

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	43.5%	NA
Campgrounds/RV Park	34.8%	NA
Friends/Relatives	17.4%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	4.3%	NA
Total	100.0%	NA
Sample Size (n)	19	NA

Number of Nights	Overnight	Day
1 Night	68.4%	NA
2 Nights	21.1%	NA
3-4 Nights	10.5%	NA
5-6 Nights	0.0%	NA
7+ Nights	0.0%	NA
Total	100.0%	NA
Mean	1.5	NA
Sample Size (n)	19	NA

Average Party Size	Overnight	Day
Number of Adults	1.8	2.0
Number of Children	0.1	0.3
Sample Size (n)	19	23

Table A-3. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
CASCADING RIVERS (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	68.4%	21.7%
Motorized vehicle	21.1%	73.9%
Train	5.3%	4.3%
MAX Light Rail	5.3%	0.0%
Total	100.0%	100.0%
Sample Size (n)	19	23

When did you take a trip	Overnight	Day
April	0.0%	4.3%
May	5.3%	0.0%
June	15.8%	17.4%
July	26.3%	21.7%
August	31.6%	30.4%
September	21.1%	17.4%
October	0.0%	8.7%
Total	100.0%	100.0%
Sample Size (n)	19	23

Locations stayed/visited during a trip	Overnight	Day
Clackamas	0.0%	2.4%
Bend	6.7%	7.1%
Detroit	26.7%	19.0%
Estacada	0.0%	28.6%
Gresham	0.0%	4.8%
Portland	6.7%	16.7%
Salem	0.0%	4.8%
Sandy	0.0%	7.1%
Sisters	0.0%	2.4%
Troutdale	0.0%	2.4%
Mt Hood National Forest Campgrounds	46.7%	0.0%
Other	13.3%	4.8%
Total	100.0%	100.0%
Sample Size (n)	15	23

Source: Dean Runyan Associates.

Table A-4. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
COVERED BRIDGES

Purpose of Trip	Overnight	Day
Primary reason for trip	56.9%	79.3%
One of several reasons for this trip	38.5%	14.1%
An unplanned activity while on this trip	4.6%	6.5%
Total	100.0%	100.0%
Sample Size (n)	65	92

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	89.4%	88.0%
Organized non-competitive group ride	3.0%	10.9%
Organized group tour	3.0%	0.0%
Other cycling event	4.5%	1.1%
Total	100.0%	100.0%
Sample Size (n)	66	92

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	4.6%	57.6%
50-99 miles	24.6%	29.3%
100-199 miles	40.0%	8.7%
200 miles or more	30.8%	4.3%
Total	100.0%	100.0%
Sample Size (n)	65	92

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	56.5%	NA
Campgrounds/RV Park	37.7%	NA
Friends/Relatives	5.8%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	65	NA

Number of Nights	Overnight	Day
1 Night	47.0%	NA
2 Nights	36.4%	NA
3-4 Nights	9.1%	NA
5-6 Nights	3.0%	NA
7+ Nights	4.5%	NA
Total	100.0%	NA
Mean	2.0	NA
Sample Size (n)	66	NA

Average Party Size	Overnight	Day
Number of Adults	2.2	2.3
Number of Children	0.2	0.3
Sample Size (n)	65	92

Table A-4. Oregon Scenic Bikeway Travel Characteristics by Type of Trip, 2014: COVERED BRIDGES (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	12.3%	17.4%
Motorized vehicle	83.1%	76.1%
Train	1.5%	1.1%
Bus	3.1%	5.4%
Total	100.0%	100.0%
Sample Size (n)	65	92

When did you take a trip	Overnight	Day
March	1.5%	2.2%
April	1.5%	4.4%
May	6.2%	6.6%
June	18.5%	19.8%
July	23.1%	18.7%
August	23.1%	17.6%
September	13.8%	22.0%
October	7.7%	7.7%
November	3.1%	0.0%
December	1.5%	1.1%
Total	100.0%	100.0%
Sample Size (n)	65	91

Locations stayed/visited during a trip	Overnight	Day
Cottage Grove	58.8%	73.6%
Eugene	25.0%	37.4%
Other	16.2%	5.5%
Total	100.0%	116.5%
Sample Size (n)	66	91

Source: Dean Runyan Associates.

Table A-5. Oregon Scenic Bikeway Travel Characteristics by Type of Trip, 2014: GRANDE TOUR

Purpose of Trip	Overnight	Day
Primary reason for trip	80.0%	73.3%
One of several reasons for this trip	15.6%	6.7%
An unplanned activity while on this trip	4.4%	20.0%
Total	100.0%	100.0%
Sample Size (n)	45	15

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	60.9%	80.0%
Organized non-competitive group ride	21.7%	13.3%
Organized group tour	6.5%	6.7%
Other cycling event	10.9%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	15

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	11.4%	60.0%
50-99 miles	6.8%	26.7%
100-199 miles	25.0%	0.0%
200 miles or more	56.8%	13.3%
Total	100.0%	100.0%
Sample Size (n)	44	15

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	70.4%	NA
Campgrounds/RV Park	24.1%	NA
Friends/Relatives	5.6%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	0.0%	NA
Total*	100.0%	NA
Sample Size (n)	45	NA

Number of Nights	Overnight	Day
1 Night	15.2%	NA
2 Nights	30.4%	NA
3-4 Nights	41.3%	NA
5-6 Nights	10.9%	NA
7+ Nights	2.2%	NA
Total	100.0%	NA
Mean	2.9	NA
Sample Size (n)	46	NA

Average Party Size	Overnight	Day
Number of Adults	3.2	2.2
Number of Children	0.1	0.2
Sample Size (n)	44	14

Table A-5. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014: GRANDE TOUR (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	15.9%	66.7%
Motorized vehicle	81.8%	33.3%
Other	2.3%	0.0%
Total	100.0%	100.0%
Sample Size (n)	44	15

When did you take a trip	Overnight	Day
April	0.0%	6.7%
May	20.5%	0.0%
June	34.1%	46.7%
July	6.8%	13.3%
August	20.5%	13.3%
September	15.9%	13.3%
October	2.3%	6.7%
Total	100.0%	100.0%
Sample Size (n)	44	15

Locations stayed/visited during a trip	Overnight	Day
Island City	0.0%	13.8%
La Grande	26.3%	41.4%
Union	19.7%	24.1%
North Powder	5.3%	0.0%
Baker City	38.2%	10.3%
Other	10.5%	10.3%
Total	100.0%	100.0%
Sample Size (n)	47	16

Source: Dean Runyan Associates.

Table A-6. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MADRAS MOUNTAIN VIEWS

Purpose of Trip	Overnight	Day
Primary reason for trip	68.2%	90.0%
One of several reasons for this trip	27.3%	5.0%
An unplanned activity while on this trip	4.5%	5.0%
Total	100.0%	100.0%
Sample Size (n)	22	20

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	52.2%	95.0%
Organized non-competitive group ride	39.1%	0.0%
Organized group tour	8.7%	0.0%
Other cycling event	0.0%	5.0%
Total	100.0%	100.0%
Sample Size (n)	23	20

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	13.6%	45.0%
50-99 miles	13.6%	15.0%
100-199 miles	50.0%	30.0%
200 miles or more	22.7%	10.0%
Total	100.0%	100.0%
Sample Size (n)	22	20

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	29.2%	NA
Campgrounds/RV Park	70.8%	NA
Friends/Relatives	0.0%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	22	NA

Number of Nights	Overnight	Day
1 Night	21.7%	NA
2 Nights	43.5%	NA
3-4 Nights	17.4%	NA
5-6 Nights	8.7%	NA
7+ Nights	8.7%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	23	NA

Average Party Size	Overnight	Day
Number of Adults	2.9	2.4
Number of Children	0.6	0.1
Sample Size (n)	22	18

Table A-6. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MADRAS MOUNTAIN VIEWS (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	31.8%	15.0%
Motorized vehicle	59.1%	75.0%
Train	4.5%	0.0%
Bus	4.5%	0.0%
Other	0.0%	10.0%
Total	100.0%	100.0%
Sample Size (n)	22	20

When did you take a trip	Overnight	Day
March	9.1%	5.0%
April	4.5%	5.0%
May	9.1%	20.0%
June	18.2%	5.0%
July	13.6%	25.0%
August	4.5%	5.0%
September	40.9%	20.0%
October	0.0%	15.0%
Total	100.0%	100.0%
Sample Size (n)	22	20

Locations stayed/visited during a trip	Overnight	Day
Bend	10.0%	21.3%
Culver	10.0%	12.8%
Madras	46.7%	31.9%
Metolius	3.3%	8.5%
Redmond	10.0%	8.5%
Sisters	10.0%	8.5%
Sunriver	0.0%	4.3%
Other	10.0%	4.3%
Total	100.0%	100.0%
Sample Size (n)	23	22

Source: Dean Runyan Associates.

Table A-7. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MCKENZIE PASS

Purpose of Trip	Overnight	Day
Primary reason for trip	66.4%	90.3%
One of several reasons for this trip	31.4%	8.3%
An unplanned activity while on this trip	2.1%	1.4%
Total	100.0%	100.0%
Sample Size (n)	140	144

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	84.3%	89.4%
Organized non-competitive group ride	7.9%	8.5%
Organized group tour	2.9%	0.7%
Other cycling event	5.0%	1.4%
Total	100.0%	100.0%
Sample Size (n)	140	142

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	7.9%	39.4%
50-99 miles	26.4%	31.0%
100-199 miles	45.7%	26.1%
200 miles or more	20.0%	3.5%
Total	100.0%	100.0%
Sample Size (n)	140	142

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	51.4%	NA
Campgrounds/RV Park	35.3%	NA
Friends/Relatives	8.7%	NA
Second Home	4.0%	NA
Other (event accommodations, etc)	0.6%	NA
Total	100.0%	NA
Sample Size (n)	140	NA

Number of Nights	Overnight	Day
1 Night	25.7%	NA
2 Nights	37.1%	NA
3-4 Nights	22.9%	NA
5-6 Nights	7.9%	NA
7+ Nights	6.4%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	140	NA

Average Party Size	Overnight	Day
Number of Adults	3.0	2.6
Number of Children	0.3	0.1
Sample Size (n)	140	142

Table A-7. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MCKENZIE PASS (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	18.6%	12.7%
Motorized vehicle	77.9%	83.8%
Train	1.4%	1.4%
Bus	2.1%	2.1%
Total	100.0%	100.0%
Sample Size (n)	140	142

When did you take a trip	Overnight	Day
April	0.7%	3.5%
May	22.1%	22.2%
June	32.1%	54.2%
July	20.0%	9.0%
August	16.4%	5.6%
September	7.9%	5.6%
October	0.7%	0.0%
Total	100.0%	100.0%
Sample Size (n)	140	142

Locations stayed/visited during a trip	Overnight	Day
Bend	21.2%	12.7%
Eugene	9.8%	21.3%
Redmond	4.3%	2.7%
Sisters	35.3%	48.0%
Sunriver	3.8%	1.8%
Other	25.5%	13.6%
Total	100.0%	100.0%
Sample Size (n)	141	146

Source: Dean Runyan Associates.

Table A-8. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
METOLIUS RIVER LOOPS

Purpose of Trip	Overnight	Day
Primary reason for trip	34.2%	66.7%
One of several reasons for this trip	57.9%	28.6%
An unplanned activity while on this trip	7.9%	4.8%
Total	100.0%	100.0%
Sample Size (n)	38	21

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	92.1%	85.7%
Organized non-competitive group ride	5.3%	4.8%
Organized group tour	2.6%	4.8%
Other cycling event	0.0%	4.8%
Total	100.0%	100.0%
Sample Size (n)	38	21

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	10.8%	28.6%
50-99 miles	37.8%	19.0%
100-199 miles	37.8%	38.1%
200 miles or more	13.5%	14.3%
Total	100.0%	100.0%
Sample Size (n)	37	21

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	47.7%	NA
Campgrounds/RV Park	36.4%	NA
Friends/Relatives	11.4%	NA
Second Home	2.3%	NA
Other (event accommodations, etc)	2.3%	NA
Total	100.0%	NA
Sample Size (n)	38	NA

Number of Nights	Overnight	Day
1 Night	28.9%	NA
2 Nights	42.1%	NA
3-4 Nights	26.3%	NA
5-6 Nights	0.0%	NA
7+ Nights	2.6%	NA
Total	100.0%	NA
Mean	2.2	NA
Sample Size (n)	38	NA

Average Party Size	Overnight	Day
Number of Adults	2.3	2.4
Number of Children	0.4	0.1
Sample Size (n)	37	21

Table A-8. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
METOLIUS RIVER LOOPS (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	8.1%	14.3%
Motorized vehicle	91.9%	81.0%
Bus	0.0%	4.8%
Total	100.0%	100.0%
Sample Size (n)	38	21

When did you take a trip	Overnight	Day
March	0.0%	4.8%
April	0.0%	0.0%
May	2.6%	19.0%
June	23.7%	28.6%
July	10.5%	14.3%
August	26.3%	19.0%
September	26.3%	4.8%
October	7.9%	9.5%
November	2.6%	0.0%
Total	100.0%	100.0%
Sample Size (n)	38	21

Locations stayed/visited during a trip	Overnight	Day
Sisters	38.3%	58.3%
Bend	21.3%	25.0%
Madras	2.1%	4.2%
Redmond	6.4%	0.0%
Sunriver	8.5%	4.2%
Other	23.4%	8.3%
Total	100.0%	100.0%
Sample Size (n)	38	21

Source: Dean Runyan Associates.

Table A-9. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
OLD WEST

Purpose of Trip	Overnight	Day
Primary reason for trip	87.9%	100.0%
One of several reasons for this trip	11.0%	0.0%
An unplanned activity while on this trip	1.1%	0.0%
Total	100.0%	100.0%
Sample Size (n)	94	5

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	82.6%	100.0%
Organized non-competitive group ride	4.3%	0.0%
Organized group tour	10.9%	0.0%
Other cycling event	2.2%	0.0%
Total	100.0%	100.0%
Sample Size (n)	92	5

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	5.5%	40.0%
50-99 miles	7.7%	20.0%
100-199 miles	35.2%	20.0%
200 miles or more	51.6%	20.0%
Total	100.0%	100.0%
Sample Size (n)	91	5

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	45.4%	NA
Campgrounds/RV Park	43.1%	NA
Friends/Relatives	3.8%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	7.7%	NA
Total	100.0%	NA
Sample Size (n)	91	NA

Number of Nights	Overnight	Day
1 Night	13.0%	NA
2 Nights	28.3%	NA
3-4 Nights	37.0%	NA
5-6 Nights	12.0%	NA
7+ Nights	9.8%	NA
Total	100.0%	NA
Mean	3.3	NA
Sample Size (n)	92	NA

Average Party Size	Overnight	Day
Number of Adults	2.8	2.0
Number of Children	0.2	0.8
Sample Size (n)	90	5

Table A-9. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
OLD WEST (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	14.3%	40.0%
Motorized vehicle	85.7%	60.0%
Total	100.0%	100.0%
Sample Size (n)	91	5

When did you take a trip	Overnight	Day
January	1.1%	0.0%
February	0.0%	20.0%
March	2.2%	0.0%
April	3.3%	0.0%
May	15.4%	0.0%
June	24.2%	40.0%
July	12.1%	20.0%
August	18.7%	20.0%
September	14.3%	0.0%
October	8.8%	0.0%
Total	100.0%	100.0%
Sample Size (n)	91	5

Locations stayed/visited during a trip	Overnight	Day
Baker City	12.0%	16.7%
Bend	7.6%	0.0%
Canyon City	1.1%	0.0%
Dayville	21.7%	0.0%
John Day	51.1%	50.0%
Long Creek	37.0%	0.0%
Monument	20.7%	16.7%
Mt. Vernon	10.9%	0.0%
Prairie City	31.5%	16.7%
Other	23.9%	0.0%
Total	217.5%	100.0%
Sample Size (n)	92	5

Source: Dean Runyan Associates.

Table A-10. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
SISTERS TO SMITH ROCK

Purpose of Trip	Overnight	Day
Primary reason for trip	74.1%	66.7%
One of several reasons for this trip	25.9%	25.6%
An unplanned activity while on this trip	0.0%	7.7%
Total	100.0%	100.0%
Sample Size (n)	81	39

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	76.5%	87.2%
Organized non-competitive group ride	18.5%	7.7%
Organized group tour	1.2%	2.6%
Other cycling event	3.7%	2.6%
Total	100.0%	100.0%
Sample Size (n)	81	39

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	3.8%	48.7%
50-99 miles	10.0%	15.4%
100-199 miles	61.3%	30.8%
200 miles or more	25.0%	5.1%
Total	100.0%	100.0%
Sample Size (n)	80	39

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	51.0%	NA
Campgrounds/RV Park	35.4%	NA
Friends/Relatives	10.4%	NA
Second Home	3.1%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	81	NA

Number of Nights	Overnight	Day
1 Night	25.9%	NA
2 Nights	29.6%	NA
3-4 Nights	29.6%	NA
5-6 Nights	3.7%	NA
7+ Nights	11.1%	NA
Total	100.0%	NA
Mean	2.8	NA
Sample Size (n)	81	NA

Average Party Size	Overnight	Day
Number of Adults	3.1	2.2
Number of Children	0.3	0.0
Sample Size (n)	79	39

Table A-10. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
SISTERS TO SMITH ROCK (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	12.5%	25.6%
Motorized vehicle	86.3%	74.4%
Bus	1.3%	0.0%
Total	100.0%	100.0%
Sample Size (n)	80	39

When did you take a trip	Overnight	Day
January	0.0%	2.6%
February	0.0%	0.0%
March	0.0%	0.0%
April	1.2%	0.0%
May	9.9%	10.3%
June	22.2%	25.6%
July	18.5%	35.9%
August	19.8%	10.3%
September	27.2%	7.7%
October	1.2%	5.1%
November	0.0%	2.6%
Total	100.0%	100.0%
Sample Size (n)	81	39

Locations stayed/visited during a trip	Overnight	Day
Bend	26.0%	17.1%
Madras	6.0%	10.0%
Redmond	8.0%	11.4%
Sisters	38.0%	40.0%
Terrebone	7.0%	21.4%
Other	15.0%	0.0%
Total	100.0%	100.0%
Sample Size (n)	81	39

Source: Dean Runyan Associates.

Table A-11. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TUALATIN VALLEY

Purpose of Trip	Overnight	Day
Primary reason for trip	71.4%	89.7%
One of several reasons for this trip	22.4%	7.6%
An unplanned activity while on this trip	6.1%	2.7%
Total	100.0%	100.0%
Sample Size (n)	49	185

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	92.0%	83.8%
Organized non-competitive group ride	4.0%	14.1%
Organized group tour	0.0%	0.5%
Other cycling event	4.0%	1.6%
Total	100.0%	100.0%
Sample Size (n)	50	185

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	57.1%	88.6%
50-99 miles	12.2%	6.5%
100-199 miles	8.2%	3.2%
200 miles or more	22.4%	1.6%
Total	100.0%	100.0%
Sample Size (n)	49	185

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	26.9%	NA
Campgrounds/RV Park	61.5%	NA
Friends/Relatives	9.6%	NA
Second Home	1.9%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	49	NA

Number of Nights	Overnight	Day
1 Night	58.0%	NA
2 Nights	22.0%	NA
3-4 Nights	12.0%	NA
5-6 Nights	2.0%	NA
7+ Nights	6.0%	NA
Total	100.0%	NA
Mean	1.9	NA
Sample Size (n)	50	NA

Average Party Size	Overnight	Day
Number of Adults	2.4	2.7
Number of Children	0.4	0.2
Sample Size (n)	49	181

Table A-11. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TUALATIN VALLEY (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	36.7%	29.2%
Motorized vehicle	34.7%	60.0%
Train	4.1%	0.5%
MAX Light Rail	24.5%	9.2%
Bus	0.0%	1.1%
Total	100.0%	100.0%
Sample Size (n)	49	185

When did you take a trip	Overnight	Day
January	0.0%	1.1%
February	0.0%	0.5%
March	0.0%	0.5%
April	10.2%	4.9%
May	14.3%	10.4%
June	14.3%	17.0%
July	16.3%	26.4%
August	14.3%	20.9%
September	26.5%	12.1%
October	4.1%	4.9%
November	0.0%	0.5%
December	0.0%	0.5%
Total	100.0%	100.0%
Sample Size (n)	49	182

Locations stayed/visited during a trip	Overnight	Day
Banks	3.6%	24.7%
Beaverton	0.0%	8.0%
Forest Grove	9.1%	13.5%
Hillsboro	3.6%	12.5%
Portland	7.3%	7.2%
Tualatin	3.6%	4.7%
Vernonia	25.5%	27.7%
Other	47.3%	1.7%
Total	100.0%	100.0%
Sample Size (n)	50	186

Source: Dean Runyan Associates.

Table A-12. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TWIN BRIDGES LOOP

Purpose of Trip	Overnight	Day
Primary reason for trip	30.8%	77.1%
One of several reasons for this trip	61.5%	12.5%
An unplanned activity while on this trip	7.7%	10.4%
Total	100.0%	100.0%
Sample Size (n)	27	48

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	96.3%	89.1%
Organized non-competitive group ride	3.7%	8.7%
Organized group tour	0.0%	0.0%
Other cycling event	0.0%	2.2%
Total	100.0%	100.0%
Sample Size (n)	27	46

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	7.7%	80.4%
50-99 miles	3.8%	6.5%
100-199 miles	42.3%	8.7%
200 miles or more	46.2%	4.3%
Total	100.0%	100.0%
Sample Size (n)	26	46

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	57.1%	NA
Campgrounds/RV Park	17.9%	NA
Friends/Relatives	17.9%	NA
Second Home	7.1%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	28	NA

Number of Nights	Overnight	Day
1 Night	14.8%	NA
2 Nights	55.6%	NA
3-4 Nights	11.1%	NA
5-6 Nights	7.4%	NA
7+ Nights	11.1%	NA
Total	100.0%	NA
Mean	2.9	NA
Sample Size (n)	27	NA

Average Party Size	Overnight	Day
Number of Adults	2.7	2.4
Number of Children	0.5	0.2
Sample Size (n)	26	47

Table A-12. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TWIN BRIDGES LOOP (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	34.6%	69.6%
Motorized vehicle	65.4%	30.4%
Total	100.0%	100.0%
Sample Size (n)	26	46

When did you take a trip	Overnight	Day
January	0.0%	2.1%
February	0.0%	2.1%
March	0.0%	2.1%
April	0.0%	2.1%
May	3.8%	6.3%
June	19.2%	18.8%
July	23.1%	37.5%
August	23.1%	16.7%
September	19.2%	8.3%
October	3.8%	2.1%
November	3.8%	0.0%
December	3.8%	2.1%
Total	100.0%	100.0%
Sample Size (n)	26	48

Locations stayed/visited during a trip	Overnight	Day
Bend	72.4%	53.8%
Madras	0.0%	3.8%
Redmond	10.3%	9.0%
Sunriver	6.9%	2.6%
Tumalo	0.0%	26.9%
Other	10.3%	3.8%
Total	100.0%	100.0%
Sample Size (n)	28	52

Source: Dean Runyan Associates.

Table A-13. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
WILLAMETTE VALLEY

Purpose of Trip	Overnight	Day
Primary reason for trip	70.3%	82.4%
One of several reasons for this trip	24.9%	13.5%
An unplanned activity while on this trip	4.9%	4.1%
Total	100.0%	100.0%
Sample Size (n)	185	170

Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	90.9%	81.8%
Organized non-competitive group ride	6.5%	15.2%
Organized group tour	2.2%	0.0%
Other cycling event	0.5%	3.0%
Total	100.0%	100.0%
Sample Size (n)	186	165

Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	39.3%	75.8%
50-99 miles	18.6%	15.8%
100-199 miles	14.8%	4.2%
200 miles or more	27.3%	4.2%
Total	100.0%	100.0%
Sample Size (n)	183	165

Type(s) of Accommodation	Overnight	Day
Commercial Lodging	51.2%	NA
Campgrounds/RV Park	30.2%	NA
Friends/Relatives	14.9%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	3.7%	NA
Total	100.0%	NA
Sample Size (n)	185	NA

Number of Nights	Overnight	Day
1 Night	31.2%	NA
2 Nights	26.3%	NA
3-4 Nights	27.4%	NA
5-6 Nights	8.6%	NA
7+ Nights	6.5%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	186	NA

Average Party Size	Overnight	Day
Number of Adults	2.4	2.4
Number of Children	0.1	0.1
Sample Size (n)	183	167

Table A-13. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014: WILLAMETTE VALLEY (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	38.8%	55.2%
Motorized vehicle	41.5%	39.4%
Train	14.2%	1.8%
MAX Light Rail Service	2.2%	0.0%
Bus	1.1%	1.2%
Other	2.2%	2.4%
Total	100.0%	100.0%
Sample Size (n)	183	165

When did you take a trip	Overnight	Day
January	0.5%	1.8%
February	0.0%	0.0%
March	0.5%	0.6%
April	4.3%	5.3%
May	8.7%	18.2%
June	20.7%	22.9%
July	17.4%	22.4%
August	23.4%	14.7%
September	17.9%	10.6%
October	6.5%	2.4%
November	0.0%	1.2%
Total	100.0%	100.0%
Sample Size (n)	184	170

Locations stayed/visited during a trip	Overnight	Day
Albany	16.1%	9.9%
Brownsville	5.9%	9.2%
Corvallis	11.6%	9.9%
Eugene	19.8%	9.6%
Gervais	0.3%	2.7%
Independence	5.1%	9.9%
Jefferson	0.8%	4.9%
Keizer	0.6%	6.3%
Monmouth	5.1%	7.0%
Salem	15.3%	14.3%
St. Paul	2.8%	5.8%
Woodburn	2.0%	4.9%
Other	14.7%	5.6%
Total	100.0%	100.0%
Sample Size (n)	188	169

Source: Dean Runyan Associates.

APPENDIX B

Demographics

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Table B-1. Demographic Characteristics of Oregon Scenic Bikeway Travelers, 2014

Comfortable level as a bicycle rider	***n = 1,035***
Comfortable riding only on paths away from cars	2.4%
Comfortable riding on paths and very low traffic roads with a wide shoulder	19.1%
Comfortable riding on roads with heavy traffic if there is a bike lane	28.5%
Comfortable riding anywhere (in traffic and without bike lanes or shoulders)	50.0%
Total	100.0%
Gender	***n = 1,035***
Male	65.3%
Female	34.7%
Total	100.0%
Age	***n = 1,015***
17 or younger	0.1%
18-20	0.2%
21-29	5.5%
30-39	13.3%
40-49	17.1%
50-59	28.2%
60 or older	35.6%
Total	100.0%
Education	***n = 1,009***
Some high school or high school diploma	3.1%
Some college or two-year degree	15.3%
Bachelor's degree	36.6%
Graduate degree	45.1%
Total	100.0%
Household Income	***n = 857***
Under $25,000	5.8%
$25,000 - $49,999	12.3%
$50,000 - $74,999	18.1%
$75,000 - $99,999	24.9%
$100,000 - $199,999	30.6%
$200,000 or more	8.4%
Total	100.0%
Origin of Residence	***n = 1,017***
Oregon	81.3%
Washington	6.0%
California	4.4%
Idaho	1.0%
Other US States	5.0%
Other Countries	2.3%

Source: Dean Runyan Associates.

APPENDIX C

Planning a Ride and Experiences on Oregon Scenic Bikeways

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Table C-1. Planning a Ride and Experiences on Oregon Scenic Bikeways, 2014

How did you hear about Oregon Scenic Bikeways?	***n = 1,091***
Scenic Bikeway Map Guide	16.2%
Ride Oregon website (RideOregonRide.com)	15.1%
While out riding and saw one of the Oregon Scenic Bikeway signs	13.1%
From a friend or relative	12.0%
Oregon State Parks and Recreation website	9.2%
Travel Oregon website (TravelOregon.com)	9.2%
Other (please specify)	8.0%
On social media (Facebook, Twitter)	5.2%
Oregon Visitor or Welcome Center	4.0%
Oregon Scenic Bikeway video on YouTube	3.5%
From a local business (at a restaurant or hotel, etc.)	2.7%
This survey is the first I've heard about Oregon's Scenic Bikeways	1.5%
From Trail Count volunteers while riding one of the Scenic Bikeways	0.3%
Total	100.0%
Did you use any of the Bikeway detailed printable PDF maps*?	***n = 1,089***
Yes	56.4%
No	43.6%
Total	100.0%
Did you find the maps to be useful?	***n = 615***
Yes	99.0%
No	1.0%
Total	100.0%
Did you use any of the Bikeway detailed printable PDF cue sheets*?	***n = 1,083***
Yes	36.3%
No	63.7%
Total	100.0%
Did you find the cue sheets to be useful?	***n = 393***
Yes	98.0%
No	2.0%
Total	100.0%
Did you use the directional Scenic Bikeway road signs along the route?	***n = 1,082***
Yes	77.8%
No	22.2%
Total	100.0%
Was there any point on the route where you felt a directional sign was missing?	***n = 842***
Yes	19.3%
No	80.7%
Total	100.0%

* Printable PDF maps and PDF cue sheets are found on Oregon State Parks and Recreation website or on RideOregonRide.com

Source: Dean Runyan Associates.