

Clackamas County Bicycle Tourism Studio Baseline Assessment November 2011



BICYCLE TOURISM STUDIO

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Besides the written documents cited within, the following people provided helpful background information for this report: Danielle Cowan, Jeannine Breshears and Jae Heidenreich of Clackamas County Tourism and Cultural Affairs; Scott Hoelscher, Clackamas County Planning; Kathleen Walker, United States Forest Service; Adam Milnor, Bureau of Land Management; Petr Krakes, Mount Hood Ski Bowl; Phil Lingenbach, Estacada; Scott Lazenby, Sandy; Mary Stewart, Agritourism consultant; Chris Bernhardt, International Mountain Biking Association; Jerry Nordquist, Cycle Oregon; Doug LaPlaca, VisitBend; Scott Bricker and Kristin Dahl, Travel Oregon.

I. Introduction

This report includes qualitative and quantitative baseline information for Clackamas County at the start of its work with Travel Oregon on the Bicycle Tourism Studio (BTS) Project in November 2011.

The Rural/Bicycle 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 BTS 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.

The data will be combined with business surveys, workshop participant surveys, and ongoing key stakeholder interviews data to assess the value of the BTS program approach to catalyze more sustainable tourism in Oregon's communities. The baseline report is intended as a resource for the host community, so that participants have a common base of information and can compare their progress over time to conditions at the start of the BTS work.

Highlights of the assessment include:

- There is potential for bicycle tourism to generate positive economic benefit for Clackamas County, given the county's topographic assets and gateway location for Portland area residents as well as out-of-state travelers.
- Visitors to the area have significantly higher income than the Oregon visitors as a whole, which represents potential market for more value-added products and services. Average daily spending by overnight visitors is currently well below the state average, however.
- Product development is needed in some places, but equally important are strategies to package existing bicycle attractions as an integrated destination, and better connect bicycle tourism with local businesses and communities.
- Bicycle tourism is not well integrated with other tourism draws in the region, such as arts and heritage attractions that could encourage longer stays and increased daily spending.
- The BTS is well-timed to inform and influence several upcoming tourism and transportation planning deadlines.

II. General community profile and context

Clackamas County is located in the Portland Metropolitan Statistical Area as the easternmost Oregon county so designated. Although it is part of an urban region and is very urbanized in parts, it is utter wilderness in others. Most of the population (375,992 people according to the 2010 census) lives in the northwestern part of the county which along either side of Interstate 205. Nearly half of the county's 1,868 square miles of land is publicly owned. This includes the Mount Hood National Forest and the western flanks of Mount Hood, the world's second most-climbed mountain and the dominant landmark of the region. Oregon City, the final terminus of the Oregon Trail, is also located in Clackamas County.

Clackamas County markets itself under the brand "Mount Hood Territory." Tourism development and marketing are managed directly by county government (which is uncommon) through the Clackamas County Department of Tourism and Cultural Affairs (CCTCA). It's guided by an advisory board called the Tourism Development Council.

In terms of the structure of Travel Oregon's network of official regional destination marketing organizations (RDMOs), the county's communities are distributed among three different RDMOs. As a result, Travel Oregon's regional tourism data is not aligned with the county's political boundaries. Local planning officials look to the visitor profile data from one of the RDMOs, the Mt. Hood and Columbia River Gorge Tourism Alliance, as most typical of Clackamas County visitors, and particularly its rural visitors.

The City of Portland is world-renowned as a bicycle friendly city for residents and visitors. Several communities and organizations within Clackamas County have actively cultivated bicycle tourism. However, there are limited opportunities to draw city residents and tourists for *overnight multi-day trips* to biking adventures in the surrounding metropolitan area, as noted in this report. Converting day trippers and pass through travelers to overnight or multi-day visitors represents new economic opportunity for the county's more remote communities.

When visitors to Clackamas County come from 50 miles away *or* stay overnight, they count as tourists in terms of Travel Oregon's benchmarking. A key goal of the Bicycle Tourism Studio is to help local and regional partners "connect the dots" to build a more complete and accessible bicycle tourism destination, that fits the character of each host community, and links with other compatible tourism assets in Clackamas County.

A. History and geography

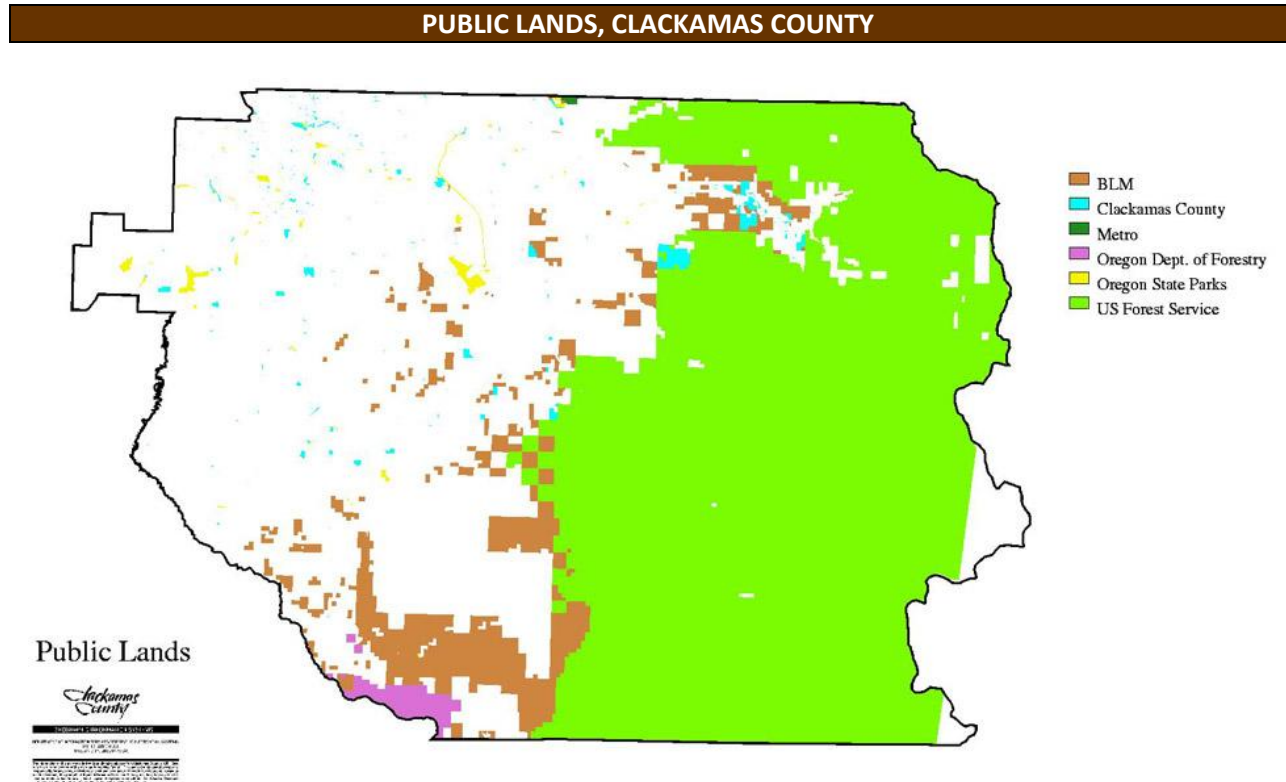
Clackamas County is located in the ancestral territory of many tribes, including the Clackamas for whom the county is named, the Kalapuya, and the Molalla Indians. The Willamette or Wy'East Falls, on the Willamette River at Oregon City, was a major gathering place for these and other tribes, but illness decimated their ranks in the mid-19th century. Descendants of the native people of Clackamas County are affiliated with today's Confederates Tribes of the Grande Ronde Reservation.

Clackamas County also has a large role in the history of pioneer settlement in the West. It was one of the four original districts created by Oregon's Provisional Legislature in 1843, and was established as county in 1845. The Barlow Trail, the last leg of the Oregon Trail, runs through Clackamas County and terminates in the county seat, Oregon City. Oregon City was the first incorporated city west of the Rockies, and it was the first capital of the Oregon Territory.

Since the arrival of pioneers, Clackamas County has been historically a center of transportation and then water-powered manufacturing, as well as agriculture. There are many surviving pioneer trails and pioneer homesteads accessible to visitors. Oregon's first national historic district is also located in Clackamas County, in Aurora. Timberline Lodge, on the south side of Mount Hood, is a National Historic Landmark building constructed during the Great Depression as a Works Projects Administration project.

The topography of the county is varied, including low valleys, high river bluffs, and rolling agricultural fields in the west to vast timber stands and nearly inaccessible mountain wilderness. There are many rivers in addition to the Willamette, including the Sandy, Clackamas, Molalla, Pudding, and Salmon Rivers. It includes parts of two National Forests, the Mount Hood National Forest and the Willamette National Forest. The crown jewel of the county's topography is Mount Hood, whose 11,239 foot high summit is actually in neighboring Hood River County. Mount Hood has year round snow coverage and is skied year-round.

Clackamas County encompasses 1,868 square miles: unlike most counties in metropolitan areas, a significant amount of its land (48%) is publicly owned. As is clear in the map below, public lands are concentrated in the rugged eastern half of the county.



Source: Clackamas County website

In many ways, Clackamas County has extraordinary access to transportation options to support tourism in the region. The western part of the county is located along Interstate 5 and its circumferential bypass, Interstate 205. I-5 is the major north-south highway for the West Coast of the United States, and bicycle-friendly Portland International Airport is just a few miles north of the Clackamas county boundary. Furthermore, Interstate 84, the state's busiest east-west highway, also passes just north of the county.

There are transportation challenges, however, that particularly impede tourism development. The primary east-bound gateway to the county and Mount Hood, U.S. Highway 26, is often congested close to Portland: then as it rises in elevation toward the mountain, it is subject to severe winter weather. Local planners believe this is one obstacle to attracting overnight visitors from the Portland metropolitan area, and are working on expanding alternate transportation options.

The appendix contains a map of the main cities and highways in Clackamas County.

B. Demographics

Clackamas County has a mix of quite urban communities such as Milwaukie and Oregon City, suburban settings such as Wilsonville and West Linn, small natural resource dependent communities surrounded by farmland or forest such as Molalla and Estacada, and tiny settlements such as Colton and Zig Zag. The

total population of the county increased by 11.1% between 2000 and 2010, and now comprises of 375,992 people. The county's growth rate is slightly less than the 12% growth rate for the state as a whole.

The average age of the population, 39.4 years, is older than the statewide average of 37.7 years. The percentage of population with at least a bachelor's degree is much higher in Clackamas County (31.5%) than in the state as a whole (28.3%). Clackamas County is less ethnically diverse than the state: its population is 88.2% white.

C. Economy

Tourism employs 4,700 people in Clackamas County, which is a significant number of jobs, though it still represents just a small percentage (2.2%) of jobs in Clackamas County as a whole. In the past ten years, the percentage has remained relatively constant. This data is not available at the municipal level, but given the geographic distribution of economic activity, it is likely that tourism is a much more significant part of the local job count in more rural communities, especially those near Mount Hood.

TOURISM SECTOR JOBS, CLACKAMAS COUNTY: 1990-2009							
Year	1991	2001	2003	2005	2007	2009	2010p*
Tourism Jobs**	3910	4460	4320	4640	5010	4780	4700
Total Jobs***		197197				219208	
Tourism jobs as a percentage of total jobs		2.3%				2.2%	

* 2010p = preliminary estimates for 2010

**Source: Oregon Travel Impacts- 1991-2009p, Dean Runyan Associates for Travel Oregon

*** Source: Bureau of Economic Analysis, Regional Economic Data

There is no *local* data on the impact of bicycle tourism, but Longwoods International recently developed [estimates for Travel Oregon of the statewide impact of bicycle tourism](#). Key findings include:

- 1.3 million people *included bicycling as an activity during their trip* to Oregon in 2009. Of these trips, 78% included an overnight stay.
- Those with an overnight stay spent \$198.9 million (average of 2008 and 2009 totals), and those on a daytrip spent \$24.2 million.
- The average per person daily expense for overnight trips that included bicycling was \$194. The data does not specify how significant bicycling was as a trip activity for these visitors.

Related data from other communities that have undertaken measurement suggests that the economic impact of increased bicycle tourism could be substantial. For example:

- A [1999 economic impact study of Maine's bicycle tourism](#) concluded that the state's 2 million bicycle tourists contributed \$66.8 million in direct and indirect economic benefits. This amounts to expenses, or an average of \$34 per person. The vast majority of visitors were day trip cyclists, who averaged \$25/day if from out of state and \$4/day if in-state. However, the 2% of bicyclists on guided tours (self-guided or guided) accounted for 17% of the economic benefits, spending \$55 and \$115 per day respectively. This underscores the importance of developing value-added services and overnight lodging to the bicycle tourism mix in order to generate economic benefits.
- A [2004 study of the economic impact of bicycle tourism in the outer Banks of North Carolina](#) in the Outer Banks of North Carolina concluded that each visitor who reported bicycling while in the region spent \$88, which, for 680,000 visitors adds up to \$60 million per year. Bicycle

tourism at this scale also generated 1,400 jobs, or 1 job for every 486 bicycle-related visits. As context for local comparison, infrared sensors at the newly opened Sandy Ridge Trail System counted 10755 “passes” (bikes passing by) in a six month period last year. Assuming conservatively that each bicyclist passes the sensor twice on a trip, that’s still over 5000 bicycle visits just for a single brand new trail system for part of a year.

- In [Quebec, a 2005 study](#) found that bicycle tourists spent \$83/day on average, which was 24% higher per day than the overall average for tourist spending.
- A [2009 study of the impact of bicyclists using Minnesota’s trail system](#) found that trail riders spend \$481 million annually related to this activity, supporting 5,880 jobs and \$40.6 million in state and local taxes.
- A [2010 study of the economic impact of Wisconsin’s bicycle tourism](#) estimated the average daily expenditures of different types of bicyclists. Trail riders generated the smallest economic impact (\$17.99 in daily expenses if a resident, \$33.95 if a non-resident) and riders on multi-day tours generated the highest economic impact (\$80.84 per day)
- A [2009 study of the economic impact of a multi-day championship cyclocross event in Bend, Oregon](#) found that the contestant/traveling party expenditures per person per day averaged \$72.80 per day. The total contestant related travel spending was \$847,000. Non-contestants (vendors, spectators, etc) generated another \$228,576 in expenditures, so the total economic impact of a single 3 day event was \$1.08 million. 86% of visitors came from outside Oregon, which is a much higher percentage than the 60% average for all Bend’s tourism. Surprisingly, when visitors were asked about their interest in moving or buying real estate in Bend as a result of their visit, 10% answered “definitely yes”, suggesting a potential longer term multiplier effect on the local economy.
- Another [2010 study of the economic impact of a specific bicycle event](#) in Menomonie, Wisconsin found that *spectators* for the professional road race each spent an average of \$47 on refreshments, souvenirs.
- There are also a number of studies that specifically highlight the favorable cost-benefit of bicycling infrastructure investments compared with other transportation and public infrastructure investments. Research also addresses the impacts of bicycling beyond economics, including health, environmental and community well being factors. The Bikes Belong Coalition has an extensive [listing of bicycling research](#).

With its status as the country’s first major city to receive the American League of Bicyclist’s platinum level certification as a “bicycle-friendly community”, The City of Portland’s efforts to increase bicycling among its residents should generate additional interest in recreational biking for the entire metropolitan region. As noted in the implementation section of this report, there are many regional projects underway to better connect existing trails, particularly those that link “urban to nature”. This should be a driver for increased bicycle related tourism opportunities in Clackamas County.

Furthermore, according to Chris Bernhardt of the International Mountain Biking Association, while Portland is known for being bicycle-friendly, the scale and scope of what is available for recreational biking in the Portland metropolitan area is very limited given the number of local bicyclists. In particular, greater Portland has little to offer mountain bikers as a destination, even though the state of Oregon is one of the top three mountain-biking destinations (along with Colorado and Utah) in the country. According to Bernhardt, Clackamas County has the varied topography and “gateway to Oregon” to fill this gap and create a new economic driver for its communities as well.

D. Why this region has been selected for Bicycle/Rural Tourism Studio

Travel Oregon selected Clackamas County for the program because of a confluence of factors creating tremendous, time-sensitive opportunity for building a tourism product of statewide significance that also benefits rural communities. Specifically,

- Clackamas County has several new and/or large scale trail development projects, including the Sandy Ridge Trail System on USDA Bureau of Land Management holdings and the Rose City to Mount Hood corridor development project to link urban Portland with the natural areas of eastern Clackamas County.
- There are many strong partners in place to assist including the Northwest Trails Alliance, an active chapter of the International Mountain Biking Association; Portland Metro, the regional governance body which has a strong commitment to bicycle driven economic development, including tourism; Cycle Oregon, BLM and the U.S. Forest Service who have been collaborating to increase bicycle tourism; private operators such as Mount Hood Ski Bowl and Timberline Lodge, who are working to expand summer season attractions through bicycle tourism development, and more.
- There is strong political leadership at county level to support bicycle tourism, and an increased focus by the county's tourism department, Clackamas County Tourism and Cultural Affairs, on developing new resources for outdoor recreation.
- The county is preparing to update its master plan for tourism, and the region is preparing to update its regional transportation plan (including bicycle/pedestrian planning), so this is an opportune time to influence future strategies
- Bicycle tourism is a major niche focus for Travel Oregon's statewide tourism promotion and development.

Clackamas County's Department of Tourism and Cultural Affairs is the point organization for partnering with Travel Oregon on this project. Participating communities have designated community liaisons. Several other key stakeholders also have formal liaison relationships. Liaisons include:

Angie Lehnert, Canby	Scott Lazenby, Sandy
Phil Lingenbach, Estacada	Steve Kruse, Timberline Lodge
Connie Redmond, Estacada Chamber	Kathleen Walker, United States Forest Service
Shane Potter, Molalla	Zach Pelz, West Linn
Petr Krakes, Mount Hood Ski Bowl	Jennifer Johnson, Wilsonville
Gale Yazzalino, Historic Oregon City	Betsy Labarge, Villages of Mount Hood
Rocky Smith, Oregon City	

The Clackamas Bicycle Tourism Studio kicks off on November 8, 2011 and the first of five community based workshops will be held on November 29. The program is expected to be complete in March 2012.

III. Qualitative assessment of "starting point" for BTS

Overall, bicycle transportation, including bicycle tourism, is a major planning priority for Portland Metro, the metropolitan region's joint planning and governance body. It is a more recent priority for the Clackamas County Tourism and Cultural Affairs Department, in part as a result of the regional planning

focus. In terms of site specific planning, the USDA Bureau of Land Management and U.S. Forest Service/Mount Hood National Forest in particular have been pro-active in planning for bicycle tourism.

The nonprofit International Mountain Biking Association and its local affiliate, the Northwest Trails Alliance, have provided trail development assistance and volunteers for bicycling product development. The Barlow Trail Association has been a key connector for tourism planning in the small communities east of Sandy.

Many trails are newly developed or in development. Still, local stakeholders believe that the county is far from tapping as many overnight visitors (vs. day trippers) as it could if trails were better connected, better marketed, and better coordinated with other local support businesses and community events.

To date, there have been many fruitful partnerships in place, but most are focused on localized projects vs. connecting local projects into a *county-wide* bicycle network. Existing plans, for the most part, also do not emphasize existing or potential connections between bicycle tourism development and other regional tourism assets. The BTS provides an opportunity to strengthen the positive impact of these projects by building relationships and knowledge to connect them as an integrated visitor experience.

A. Planning

There are many plans at the county and regional level that are relevant for the Bicycle Tourism Studio initiative. There are also master plans for the development of outdoor recreation, including bicycling opportunities, and for specific geographic areas.

Clackamas County Tourism and Cultural Affairs (CCTCA) Master Plan:

Clackamas County has had an organized tourism program since establishing a countywide transient room tax in 1991. It is governed by a Tourism Development Council appointed by the Clackamas County Board of Commissioners. The Department's activities are guided by a Five Year Tourism Master Plan last updated in 2007: the master plan will again be updated in 2012. Staff believe the new master plan will have an increased focus on bicycle and river-based tourism.

The existing master plan only mentions bicycle tourism as one of many elements of its outdoor recreation product. Key findings and recommendations of particular relevance for bicycle tourism include:

- Introduces the concept of geo-tourism, and recommended refocusing of outdoor recreation and agri-tourism offerings to fit this market
- Commends regional cooperation around tourism marketing under the banner of the "Mount Hood Territory" label, but also notes need to better link tourism product offerings into a seamless, experiential opportunity for visitors. Cited examples of Charlotte North Carolina's "world of outdoor adventure", Reno's "America's Adventure Place", Moline Illinois' agri-tourism linked with manufacturing heritage.
- Recommends orienting CCTCA as a "destination architect", more active in tourism product *development*.
- Cites the need for more quality lodging in rural areas
- Recommends continued focus on Pacific Northwest as the primary tourism market
- Recommends establishing a specific task force on tourism development to develop specific strategies for product integration.

In January 2009, this task force issued a “White Paper on Tourism Development.” The report includes a future vision for tourism in Clackamas County that has since been referenced in annual business planning for CCTCA. This vision includes three core visitor appeals that make it an ideal geo-tourism destination:

- Outdoor recreation, year round skiing and snowboarding, golf, cycling, water based sports
- Cultural heritage, Historic Oregon City,
- Rich agriculture, regionally distinctive good and wine

The white paper also specifically cites congestion and difficult winter travel conditions on U.S. Highway 26 as an impediment to attracting overnight visitors who are already in Portland, whether as residents or visitors from elsewhere. Among its specific recommendations related to bicycle tourism:

- Address land use and regulatory issues related to agri-tourism
- Encourage development of support services for outdoor recreation- gear purchase and rental, outfitters, guides, maps, signage, lodging, restaurants, transportation
- Increase campgrounds, well groomed trails and interpretive programs
- Coordinate lodging feasibility studies and work with interested developers, etc to develop high quality, unique lodging in rural areas, especially in Estacada/Molalla areas
- Financial incentives and technical assistance for guides/outfitters and other small businesses
- Inventory recreational resources, build support for signature events
- Conduct a Mt Hood multi-modal transportation study to develop alternate ways to get visitors to and from Government camp
- Coordinate with new scenic bikeway development projects (Mt Hood National Scenic Byway, West Cascades National Scenic Byway)
- Connect geo-tourism activities and related amenities and services

CCTCA’s tourism development work is currently guided by its 2011-2012 Business Plan for the Mount Hood Territory. This plan includes: hiring a dedicated staff position for *tourism* development, continuing work on an agri-tourism master plan and an outdoor recreation master plan, executing a new scenic byways grant, creating a mountain transportation task force, and more. The status of these activities is as follows:

- An existing CCTCA employee, Jae Heidenreich, will assume the position of tourism development manager on December 1st.
- The Master Plan for Agri-tourism is currently underway: it’s expected that a draft report will be ready for Tourism Development Council review in January. A parallel “agriculture investment strategy” is also under development, which will provide additional data to inform agri-tourism strategy choices.
- The outdoor recreation master plan has not started yet, but when the tourism development manager position is filled, this will be a priority activity.
- Clackamas County received grant from the Federal Highway Administration for “way finding and interpretation” along the existing Mt Hood Scenic Byway. Its application for a scenic bikeway designation of the “Canby Ferry Loop” was recently denied. Another scenic bikeway designation application, for the Two Rivers Estacada to Detroit Lake route, is pending. This follows part of the Western Cascades Scenic Bikeway.
- The referenced Mountain Transportation Task Force has not yet been activated, but it will build upon several other related planning efforts, according to CCTCA Director Danielle Cowan.

Pedestrian/Bicycle Master Plan and Regional Transportation System Plan

Clackamas County's Transportation Department created its first Pedestrian/Bicycle Master Plan in 1996, and then updated it in 2003 as part of the decennial regional Transportation System Plan (TSP) coordinated by Portland Metro. The process for updating the regional TSP has just begun, and will be completed in 2013. According to planning staff, the new update will include attention to active transportation, but the bicycle and pedestrian master plans will not undergo a full update.

Clackamas County Transportation Department created a countywide bicycling ["Bike It!"](#) map in 2008. This was the first updated bike map for Clackamas County in 14 years. Other bicycling maps have followed as noted in the "implementation" section.

Portland Metro Intertwine Alliance

Bicycling-related planning dates back over a century in Oregon: the first bike plan was developed in 1897. At the regional level, bicycle trail planning has been integrated first into open space planning, then transportation planning, and more recently, tourism planning. Portland Metro is the primary coordinative mechanism for this planning. The following plans have shaped what is now known as the [Intertwine Alliance](#), a partnership to facilitate cooperation in building a well-integrated regional parks and trails system.

- Metropolitan Greenspace Master Plan in 1992, which resulted in bond measures in 1995 and 2006 to acquire natural areas and develop appropriate recreational amenities
- Blue Ribbon Committee on Trails 2008 recommends ["Integrated Mobility Strategy"](#) with a strong emphasis on non-motorized transportation as a driver of regional vitality. Bicycle tourism is a small but delineated part of the strategy. The "Active Transportation Council" was established in 2008 to implement its recommendations
- In 2009, Portland Metro applied for federal stimulus funding for an "active transportation demonstration project" that would pass project development funds through to a variety of specific projects throughout the region. The application was not successful, but the planning leading up to it resulted in a long list of specific project opportunities. A map of the Clackamas County Active Transportation Projects is included in the Appendix. Several of Clackamas County's [local projects](#) have strong bicycle tourism connections, including:
 - Complete I-205 Multi-use Trail: Gives direct bicycle and pedestrian access to the light rail system.
 - Springwater Corridor and Cazadero Trail- The last 2.25 mile portion of the trail from the Clackamas County line to Boring completes an off-road bicycle trail from Portland.
 - Tickle Creek Trail- Off road bike and pedestrian access from the Cazadero Trail to Sandy parks, the Bull Run River and Mt Hood Recreation Area
 - Molalla River Pathway- multi-use historic "Molalla Logging Road" connects Molalla River State Park in Canby to the foothills of Cascades
 - French Prairie Bridge- connects the 152 mile long Willamette Valley Scenic Bikeway with the Portland metropolitan area
- [Intertwine Bi state Trails Plan](#)- April 2011
- Regional Active Transportation Plan to be developed in 2012

Other relevant plans

With respect to public lands with existing and potential bicycle tourism opportunities, there are a number of Master Plans, including:

- Sandy River Basin Vision Document (2008) and Integrated Management Plan (2009)

- Molalla River-Table Rock Recreation Area Management Plan (2010)
- Mount Hood National Forest Land and Resource Management Plan (1990)
 - Timberline Lodge and Mount Hood Ski Bowl, two private businesses operating within the National Forest, are subject to this plan. The Ski Bowl has been actively developing bicycling activities since at least 1998, and its Master Plan includes additional development of its recreational bike park facility. Timberline is applying for a permit to develop a bicycle park: the first hearing is expected in March 2012.

One of the largest bicycle tourism/active transportation projects in Clackamas County is the **Mount Hood to Rose City Trail and Greenway Corridor**, with the goal of linking the City of Portland with Timberline Lodge at Mount Hood. There is not a formal Master Plan for the project, but there is a coordinated multi-party effort to develop the missing segments as part of the region's "active transportation" strategy. The Appendix includes a map of the existing and planned corridor elements, as prepared by Kathleen Walker of the U.S. Forest Service in 2009.

B. State of tourism and implementation activities

Trail development

Bicycle tourism development efforts are concentrated in the northern part of Clackamas County between Portland and Mount Hood. This part of the county has the most diverse existing and potential bicycle tourism assets, from recreational trails to technical mountain biking and road biking. However, bicycle trail development that could be an asset for tourism development is happening county wide, including a loop trail around Oregon City, road biking events in Estacada and loop routes tied to agritourism in Molalla. Estacada is the northern terminus for a new proposed scenic bikeway to Detroit along what is already the West Cascades National Scenic Byway that runs to Oakridge, another major mountain biking destination in Oregon. Furthermore, the 132 mile Willamette Valley State Scenic Bikeway, the state's first such designated bikeway, starts at Champoeg State Heritage Area, outside the Clackamas County boundaries but close to the south county communities of Wilsonville, Aurora and Canby.

As noted in the prior section, one of the largest bicycle tourism/active transportation projects in Clackamas County is the **Mount Hood to Rose City Trail and Greenway Corridor**, an "urban to nature" off-road trail system with the goal of linking the City of Portland with Timberline Lodge at Mount Hood. The following information on the status of each Clackamas County segment is excerpted from two Forest Service briefing papers provided by USFS' Kathleen Walker.

"The Mt. Hood to Rose City Trail Corridor is a conceptual (off-road) trail plan that stretches from the existing Springwater Trail Corridor in Portland to the iconic Timberline Lodge on Mt. Hood. Several trail segments already exist including the Springwater Trail from Portland to Boring, parts of the Tickle Creek Trail in the City of Sandy, and the Forest Service Trails that go from the western end of the Mt. Hood National Forest boundary to Timberline Lodge. Gaps in the trail are from Boring to the City of Sandy and from Sandy to the Mt. Hood National Forest boundary.

- *Springwater Corridor: Portland to Boring: Paved to Gresham. Gresham to Boring is funded to be paved, and Boring Trailhead construction is funded.*
- *Boring to Sandy: This section is conceptually aligned mostly on an existing sewer easement along Tickle Creek. Most of the preliminary trail corridor is planned along a City sewer easement but is under the agency jurisdiction of Clackamas County (unincorporated). The Cazadero-Springwater connection from Boring to Estacada is a higher priority (it connects with the*

proposed West Cascades Scenic Byway), but the Tickle Creek connection to the Springwater is close behind and could be accomplished in the next five years.

- *Sandy at 362nd (Fred Meyer) to Hwy 211 (Joe's Donuts): Tickle Creek Trail was 98% completed in fall, 2011. It is a 6 foot wide packed gravel trail open to pedestrians, mountain bikes, strollers, and ruggedized wheelchairs*
- *Sandy at Hwy 211 east to Brightwood: Conceptual locations include going down through the Sandy River Park and up Marmot Road to Brightwood. Other options include BLM lands. The BLM acquired 8,000 acres of land from PGE and Western River Conservancy along the Sandy River between Sandy and Brightwood. The Sandy Ridge Trail system was partially completed in 2011. These trails were designed more as downhill mountain bike trails running north-south. There are additional trail opportunities in the Marmot Dam area. There may be opportunities to provide more of an east-west linkage through the various BLM parcels.*
- *Brightwood to Rhododendron: No obvious conceptual routes have been identified but several options exist. Most of the trails would be located on private land R/W or along county and ODOT road easements. Acquiring easements across private lands will likely be challenging. An alternative trail may be possible to the north on mostly Forest Service and BLM lands, however these would require steep climbs and would not function as community trails. The Villages at Mt. Hood is an advisory board to the Clackamas County commissioners. The Barlow Trail Association is a local non-profit whose tagline is "Tying Together the Villages at Mt. Hood". Both these entities have an interest in developing community trail systems that link the villages and provide connections to key population centers and destinations in the communities. An inventory of the existing trail system was underway, but no progress reports have been made in the last two years*
- *Rhododendron to Timberline Lodge: These are all Forest Service trails. Pioneer Bridle has been reconstructed over about ¾ of the 8 mile length. The Crosstown Trail is in good condition. The Timberline to Town Trail was completed in 2011.*
- *Rhododendron to Government Camp - Pioneer Bridle Trail (Forest Service Trail): Part of the original Barlow Road, this hiker, mountain biker, equestrian trail links Government Camp to the village of Rhododendron. The trail had some flood damage in the last 5 years, and a stimulus contract repaired some of the worst damage on about 2/3 of the trail. The upper two bridges were also replaced. More work is needed on the upper 1/3 of the trail.*
- *Government Camp to Timberline Lodge – Government Camp Trails Project (Forest Service): Clackamas County has funded over \$400,000 for Trails Master Planning, NEPA (environmental documents), and trail construction of ten miles of new trails on National Forest lands around the newly renovated town of Government Camp. The trails will serve hikers, mountain bikers, and provide high quality groomed Nordic skiing and snowshoeing around the community and will link the town with new and existing trails to Timberline Lodge to the North, Trillium Lake to the South, and Rhododendron to the West. The Forest Service has provided over \$100,000 in matching funds/planning and construction support. Phase I and II have been completed. Phase III is nearly completed. The Timberline to Town Trail from Timberline Lodge to Government Camp is 98% completed as of 2011. The Timberline to Town Trail and the existing Crosstown Trail are the two highest links in the Mt. Hood to Rose City Trail while the other trails link these to community lodging, dining and other amenities.*

Other related trail planning along the Corridor:

- *Sandy River to Sandy – The City of Sandy acquired 125 acres of forested parklands between Bluff Road and the Sandy River. A Park Master Plan was completed in 2010 and some rough trail*

construction within the City owned lands. The trails plan calls for linking the river to the Jonsrud Overlook and to an area adjacent to the high school. Land acquisition and easements are needed some areas.

- *Sandy to Dodge Park: The City of Portland has expressed an interest in linking Dodge Park on the Sandy River to the City of Sandy's trail system in Sandy River Park. This would require a very long trail bridge over the Sandy River along with additional easements over private lands. The trail could be routed through the old Roslyn Lake property."*

Another major project close to this corridor is the **Sandy Ridge Trail System**, 15 miles of mountain biking trails on BLM land. All but 1.5 miles of trail are complete, and that last segment will be built in the spring on 2012. There is an infrared sensor on one of the trails which over time could provide one indicator of volume trends in mountain biking. Weekend use already doubled in 2011 as compared with the first year of operation, 2010. The International Mountain Biking Association, through its Trails Solutions Program, has been an active partner with BLM on bike trail development, and its Portland affiliate, the Northwest Trails Alliance, has been a source of volunteers and community outreach. According to BLM Project Manager Adam Milnor, volunteers will be even more important as the trail construction phase (and significant development funding) ends and ongoing trail maintenance and improvements are needed.

One of the issues for bicycle tourism in Clackamas County is that the various attractions are not physically connected. For example, the Sandy Ridge trail system is poorly connected to other trail systems in the area; in other cases, bikers must travel at times on narrow, poorly marked back roads or busy Highway 26 to get from one trail to another. BLM is working on improving access to Sandy Ridge through other lands it has recently acquired. For mountain biking in particular, longer continuous trails are the key to drawing overnight visitors. Presently, the major mountain biking opportunities are isolated from each other.

Marketing and promotion

Bicycling opportunities for visitors are prominent on the **Mount Hood Territory website**, which includes [descriptions and maps of many bike trails as well as a link to the Bikelt! map](#). If the map is updated, it should be noted that some large bike tourism assets, such as the Ski Bowl bike park, are not currently shown. Because Clackamas County is not a tourism destination in and of itself, the map should be evaluated to ensure it shows links to nearby bicycling assets that may be accessible from the county but technically outside county boundaries.

In addition to the county-wide map, CCTCA, through its Clackamas County Tourism Development Council, has provided funding support to Canby, Estacada and Sandy for development of **local bicycle maps**. Clackamas County is also supporting the development of **agri-tourism loop tours** which lend themselves to bicycling as well. Sandy and Molalla have farm loop tours and online maps in place. There are also loop tours being developed in the more developed communities such as Oregon City, which are intended to serve both as active transportation corridors for residents and as a new way of highlighting heritage resources for visitors. This type of cross-marketing and coordination is a potential area for more synergy in future bicycle tourism development.

With its very urban and very rural communities, Clackamas County faces a challenge in developing an overarching bicycle tourism strategy that is an authentic fit for the range of experiences. Certain bicycling attractions (e.g. the Sandy Ridge Trail system) may warrant specific branding as "signature"

destinations, but the criteria for such designation does not yet exist. Furthermore, the diversity of bicycle related recreation opportunities (beginner to expert, road biking, off road improved trails, mountain and downhill biking, cyclocross) in Clackamas County is also a challenge in terms of setting priorities for future development. For example, different types of bicyclists may prefer different types of amenities and services.

Coordination:

While there are physical gaps in the trail system, most stakeholders believe there are already opportunities to generate more economic benefits from existing bicycle trails and routes through better coordination and filling of gaps.

The 2008 Sandy River Basin Vision document includes an observation that “there is a lack of coordination between recreation providers and tourism promoters” in general. Bicycle events are an interesting example of this phenomenon that was cited by multiple stakeholders in Clackamas County. While the economic benefits of events are well-documented (some references included in the “economy” section of this report), such benefits only happen when there is good coordination and communication between event organizers, trail managers, tourism promoters, local communities and businesses. For example, an Estacada stakeholder notes that if organizations hosting events, such as the MS75/150 road bike ride, better coordinated with communities along its route, communities could provide more amenities for cyclers as they do now through Cycle Oregon. A number of interviewees in different communities noted the need for improvement in this area.

There are already a number of cycling events and regular rides that occur throughout Clackamas County, and stakeholders believe there is potential for more. With growing demand, what could be informally coordinated in the past may need more formal coordination. For example, on the Sandy Ridge Trail System, the demand for events is growing rapidly, and new event management strategies/permitting processes will likely be put in place.

Stakeholders generally perceive little coordination between bicycle tourism and other community attractions, including downtown events, heritage and cultural assets, and other outdoor recreation opportunities. If coordination is improved, bicycle oriented businesses could more easily broaden their markets (for example, Pedal Bike Tours is creating snowshoe tours to extend its season) and non-bicycle oriented businesses could attract bicyclists as customers.

Finally, a number of stakeholders spoke to the need to build overall community awareness of bicycling opportunities for residents and the potential benefits of developing more bicycle tourism. More engaged local community residents can be more effective ambassadors/referral sources for visitors, and more effective advocates for future investment in bicycling infrastructure.

C. Organizations and partnerships

There are many partner organizations for bicycle tourism development statewide and in the Portland metropolitan region. One challenge for the Clackamas County BTS is to build on the strength of several fairly independent local bicycle tourism development advocates and projects, while connecting them so that the sum benefit is greater than the parts across a large and diverse geography. Another key challenge is to integrate bicycle tourism development with other tourism draws (water sports, agri-tourism, arts and heritage for example) and the advocates for such draws.

The Clackamas County Tourism and Cultural Affairs Department is perceived to be a fairly new “player” in the bicycle tourism arena, but a welcome one. Its member cities include: Canby, Clackamas, Damascus, Estacada, Gladstone, Happy Valley, Lake Oswego, Oregon City, Milwaukie, Molalla, Sandy, Villages of Hood and Government Camp, West Linn, and Wilsonville. Not every community has the same level of interest in bicycle tourism, and some member communities (for example, Happy Valley and Damascus) are not participating in the BTS as a result.

Mount Hood Ski Bowl and Timberline are both major businesses with a stake in bicycle tourism development and specific master plans to expand their offerings. Small businesses are not as strongly connected with the BTS regional effort as other stakeholders, although their input and actions will be crucial for development of a robust visitor experience that captures economic benefits for host communities.

At the metropolitan level, Portland Metro has prioritized bicycle tourism as part of its regional planning role. It is an active partner in developing the Intertwine Alliance and the Mount Hood to Rose City Trail Corridor. The Port of Portland has created secure bike parking and links to regional trail systems at the airport.

Key nonprofit partners include Cycle Oregon, the International Mountain Biking Association whose “Trails Solutions” program is based in Oregon, and its Portland based affiliate, the all-volunteer Northwest Trails Alliance, and the Barlow Trail Association which has contributed extensively on the Sandy River Basin planning. There are a number of active bicycling ride/event sponsor groups in the county, from Portland-based organizations like Oregon Bicycle Racing Association, Cross Crusade and the Portland Wheelman Touring Club to purely local riding groups.

State and federal agencies such as Oregon State Parks and Recreation Department and its Scenic Bikeways Program, United States Forest Service (Mount Hood National Forest), United State Department of Agriculture’s Bureau of Land Management (Salem District) manage land and infrastructure (such as parking and trails) that are integral resources for bicycle recreation and tourism. The Forest Service is generally viewed as the least “nimble” partner as a result of its highly regulated resource management requirements.

Of course Travel Oregon, Oregon’s state tourism development and marketing arm, is an active partner in planning and promoting bicycle tourism as a key niche opportunity, including development of the RideOregonRide.com website resource for bicyclists.

IV. Quantitative assessment of “starting point” for BTS

There are many types of data that can measure progress in developing a more robust, sustainable tourism sector. 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

This report summarizes existing data that addresses some, but not all of these categories. Where available, county level data has been used. In some cases, data is only available by official state tourism regions. In that case, data from the Mount Hood/Columbia River Gorge has been used as most relevant for understanding potential bicycle tourism trends and markets in Clackamas County.

Because the Bicycle Tourism Studio here is launching during a recession, *short term* trend data may be unreliable as indicators of project impact. In the longer term, however, this baseline data should prove useful as a benchmark for progress.

A. Visitor volume

There are several sources of potential visitor volume data:

- Transient lodging taxes can be used as a proxy for comparing visitor volume from year to year.
- Visitor expenditures by county as captured by Travel Oregon research
- Local visitor counts by key organizations and destinations

In Oregon, 83 cities and 15 counties levied locally administered transient lodging taxes. In Clackamas, the County levies a 6% transient lodging tax that is applicable county-wide. Four cities (Sandy, Lake Oswego, Oregon City and Wilsonville) also levy their own locally administered lodging taxes ranging from 3 to 6 percent.

LODGING TAX COLLECTED BY CLACKAMAS COUNTY, FY2007-2011	
Fiscal Year (July-June)	Total transient tax revenue*
FY2007	\$2,767,567
FY2008	\$3,059,162
FY2009	\$2,660,245
FY2010	\$2,249,194
FY2011	\$2,683,346

Source: Clackamas County Tourism and Cultural Affairs

* Gross, not including interest

Tourism spending declined more steeply in Clackamas County and the Mount Hood/Columbia Gorge Region than state as a whole between 2006 (when the economy was still strong) and 2009. However, tourism spending has begun to recover in 2010, and now exceeds 2006 levels at the county, region and statewide level.

TOTAL DIRECT TRAVEL SPENDING BY CALENDAR YEAR, CLACKAMAS COUNTY AND

MOUNT HOOD/COLUMBIA RIVER GORGE REGION						
	2006	2008	2009	2010	% change 2006-2009	%change 2009-2010
Oregon	8072	8602	8075	8706	0%	+ 7.8%
Mt Hood/Gorge Region	274.8	287.0	261.5	278.0	-4.8%	+6.3%
Clackamas County	397.2	429.1	378.5	410.8	-4.7%	+ 8.5%

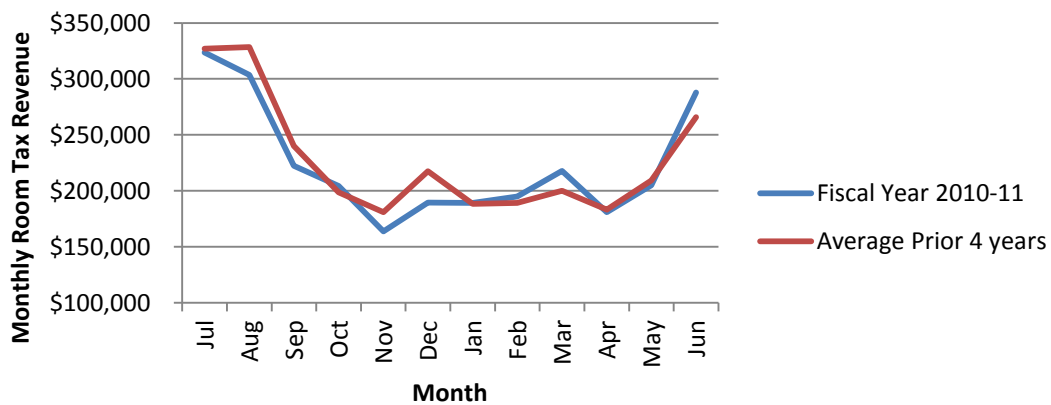
Source: Oregon Travel Impacts, 1991-2010p, Dean Runyan Associates for Travel Oregon:

** Visitor spending counted in millions of dollars

B. Seasonality

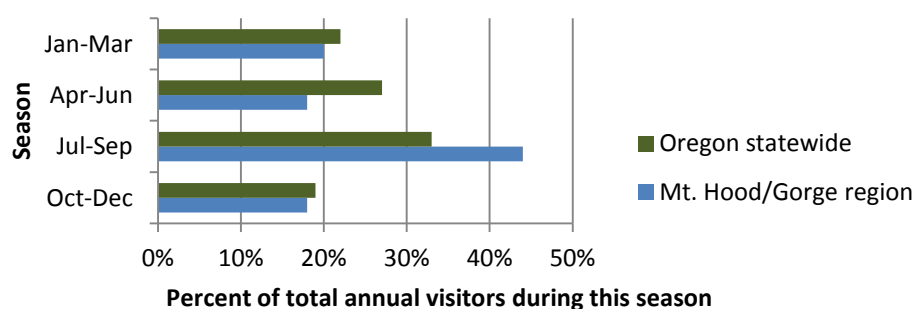
Based on the monthly distribution of transient room tax revenue, summer (June-August) is the peak season for travel in Clackamas County. This is consistent with Visitor Profile data for the Mount Hood/Columbia River Gorge Travel Region. The summer seasonal peak for this area is much more pronounced than for the state as a whole.

TRENDS IN CLACKAMAS COUNTY TRANSIENT ROOM TAX REVENUE: FY2011 VS. PRIOR 4 YEAR AVERAGE



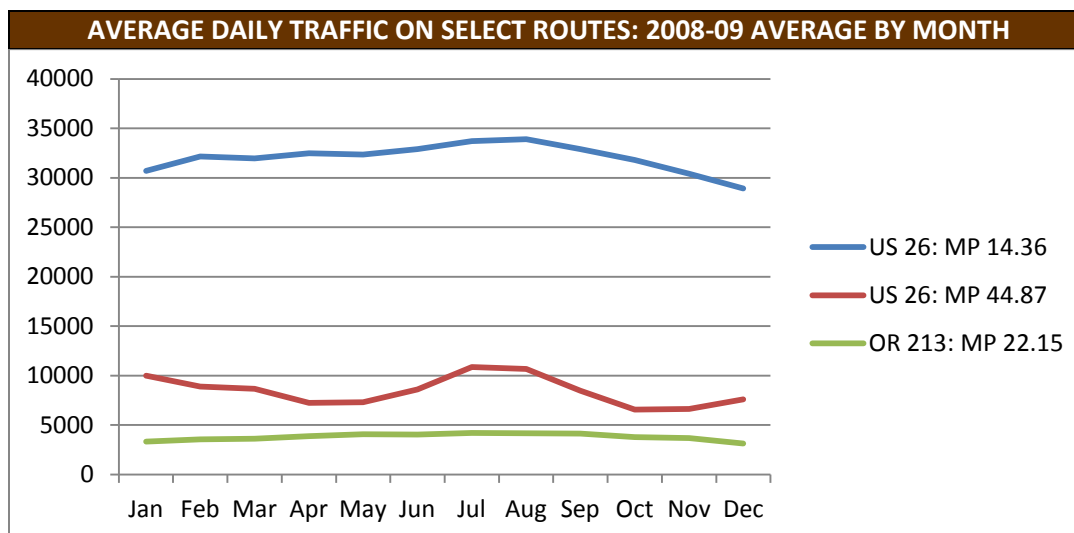
Source: Clackamas County Tourism and Cultural Affairs

VISITORS BY SEASON: % DISTRIBUTION FOR MOUNT HOOD/ GORGE REGION AND STATE OF OREGON



Source: Oregon 2009 Regional Visitor Research, Longwoods International for Travel Oregon

Overall traffic counts on a sample of major routes for which monthly data is available (U.S. Highway 26 and OR State Highway 213) show a similar peak in summer travel, though not as pronounced. On Highway 26 east of Gresham just north of the Clackamas County line (milepost 14.36), and on Highway 213 in Clackamas County (milepost 22.15) just north of the Marion County line, average daily traffic counts rise slightly in summer. On Highway 26 between Sandy and Government Camp (milepost 44.87), January traffic counts are almost as high as summer peak levels.



Source: Oregon Department of Transportation, 2009 ADT Trends

C. Visitor profile

The visitor profile data is drawn from the Mount Hood/Columbia River Gorge regional profile data as most representative of the more rural, potentially bicycle tourism markets for Clackamas County.

In 2006, according to Longwoods International research for Travel Oregon, 55% of visitors to the region stayed overnight for at least one night, while 45% were pass-through or day-trippers. This is the most recent year for this particular data. However, a 2009 update of the state's regional visitor profiles reveal that in 2009, nine percent of the estimated 27.5 million overnight visitors to Oregon spent time in the Mt Hood/Gorge Region.

Most visitors to the region come from Oregon, and the Portland area in particular.

TOP 5 HOME STATES FOR MT HOOD/GORGE REGION, 2008-09 AVERAGE	
State	% of regional visitors from state
Oregon	33%
Washington	23%
California	17%
Idaho	5%

Source: Longwoods International for Travel Oregon

TOP FIVE URBAN ZIP CODES FOR MT HOOD/GORGE REGION, 2008-08 AVERAGE	
City	% of regional visitors from specific urban areas
Portland, OR	32%
Seattle-Tacoma, WA	13%
Los Angeles, CA	7%
Eugene, OR	4%
San Francisco/San Jose, CA	4%
Boise, ID	4%
Spokane WA/ID	4%
Salt Lake City, UT	4%
Yakima, WA	4%
Yakima WA	5%

Source: Longwoods International for Travel Oregon

This region has a greater percentage of visitors who are “marketable”, which means all leisure travelers except for those who are primarily visiting friends and relatives. Marketable visitors are more likely to be influenced by promotion and specific tourism attractions.

The primary activity of people coming to the Mt Hood/Gorge region is “outdoor recreation”. Forty seven percent of visitors cite this activity as the main purpose of their trip, far more than the state average of 24%. The second and third most popular reasons for traveling to the region are “touring” (23%) and “events” (13%). In terms of “activities of special interest” which may indicate niche market opportunities, the number one special interest of visitors to this region is “historic places”, followed by “cultural activities/attractions”, “eco-tourism” and “winery tours/wine tasting”. In each of these categories, the percentage of regional visitors with these interests exceeds the state average. Most notably, 45% of the region’s visitors are interested in “historic places”, compared with 32% of visitors to the state as a whole.

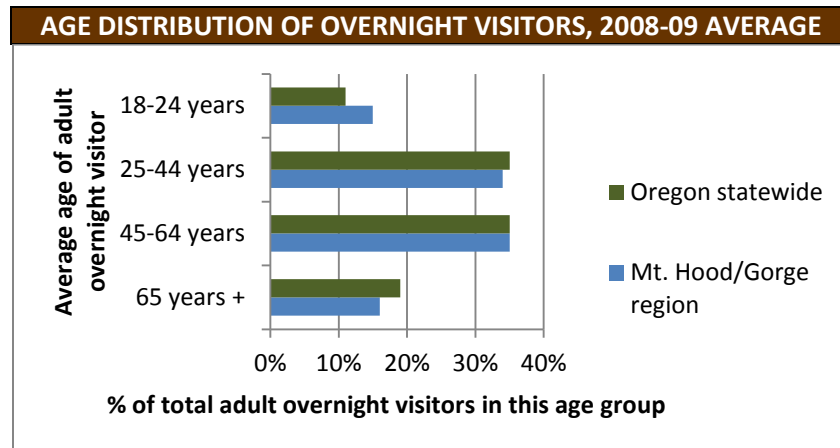
A [2009 visitor intercept study commissioned by VisitBend](#) in Central Oregon has interesting data that may also be relevant for Clackamas County, because like the Mount Hood/Gorge region, visitors to Bend share “outdoor recreation” as the primary reason for their visit. In terms of specific activities, the following were top choices:

- Hiking/trail running (63%)
- Dining (56%)
- Shopping (46%)
- Biking (36%)
- Brewery visit (28%)
- Arts and cultural (27%)

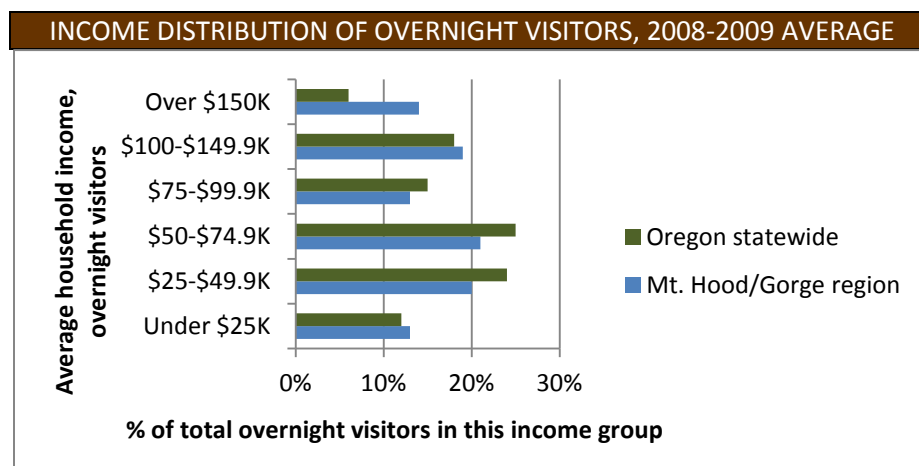
Local leaders in Bend were surprised to see that both bicycling and brewpubs were a far more frequent activity than some of the more traditional activities of golf, camping, fishing or water sports, for example.

Overnight visitors to the region spend an average of 2.8 nights here, slightly less than the state average of 3.3 nights. They are less likely to be traveling with children: 15% of visitors to the region are children,

while statewide, 20% of visitors are children. The region attracts more significantly more young adults in the 18-24 year age group. Fourteen percent of its overnight visitors have annual household incomes over \$150,000/year: this is more than double the percentage of high income overnight visitors to the state as a whole.

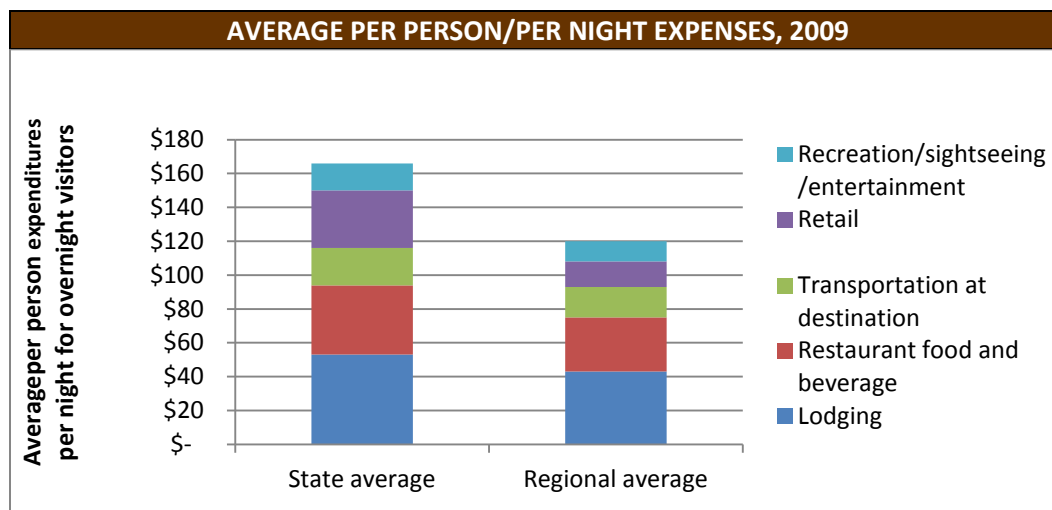


Source: Longwoods International



Source: Longwoods International

However, overnight visitors to the Mt Hood/Gorge region also spend significantly less per day (\$120) than the state average (\$166). This could be a result of the mix of activities and features that make the region attractive, but it also could reflect gaps in products and services that visitors might be willing to pay for if available. This is worth considering during the BTS product development process.



Source: Longwoods International

D. Businesses

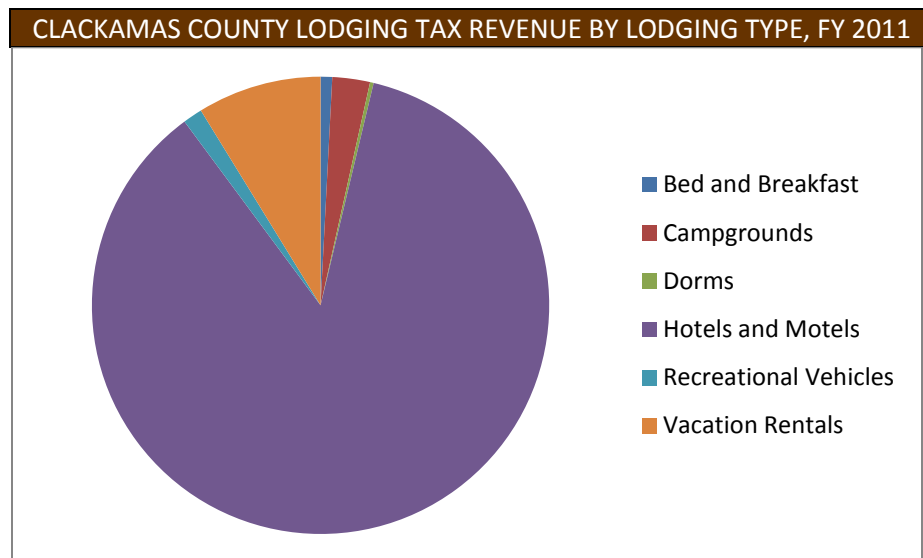
The distribution of tourism spending by category of expenditure indicates which *types* of businesses are currently generating revenue from tourism activities in the region. The largest category of visitor spending is restaurant food and beverage. The most volatile categories of spending are ground transportation/motor fuel and retail sales. Consistent with trends in transient room tax receipts, visitor spending increased in all categories between 2009 and 2010.

TOTAL TOURISM SPENDING IN CLACKAMAS COUNTY, 2006-2010			
Category of Visitor Spending	2010**	% change 2006-2009	% change 2009-2010
Accommodations	49.9	3.7%	4.2%
Food and beverage	76.4	-0.1%	5.4%
Food stores	24.9	4.3%	2.9%
Ground transport/motor fuel	34.8	-11.9%	20.4%
Arts/entertainment/recreation	36.7	-7.7%	2.5%
Retail sales	46.7	-12.6%	5.2%
Total Destination Spending	269.2	-4.0%	6.1%

Source: Oregon Travel Impacts, 1991-2010p, Dean Runyan Associates for Travel Oregon

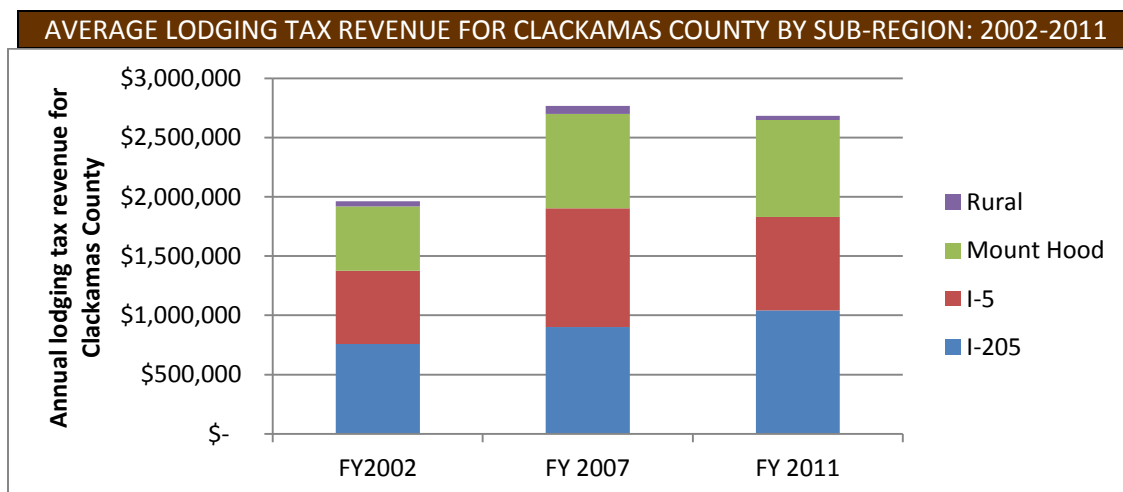
** Visitor spending counted in millions of dollars

In terms of the mix of lodging, hotels/motels are the primary source of lodging: over 85% of the county's lodging tax revenue derives from this lodging type. Over the past 10 years, vacation rentals have been the fastest growing category of lodging (+231.4%), and they now generate 8.8% of lodging tax revenue. Over this same time period, lodging tax revenue from bed and breakfast has declined by 12.7%.



Source: Clackamas County

Overall, lodging tax revenue has shrunk in rural areas outside of Mount Hood.



Source: Clackamas County

There is not a full inventory of bicycle-related businesses in Clackamas County, and that could be a useful short term project for local consideration. The Clackamas County [Bikelt! website](#) includes a list of some bicycle related businesses:

- 12 bicycle shops
- 4 bicycle rental companies
- 3 bike touring companies

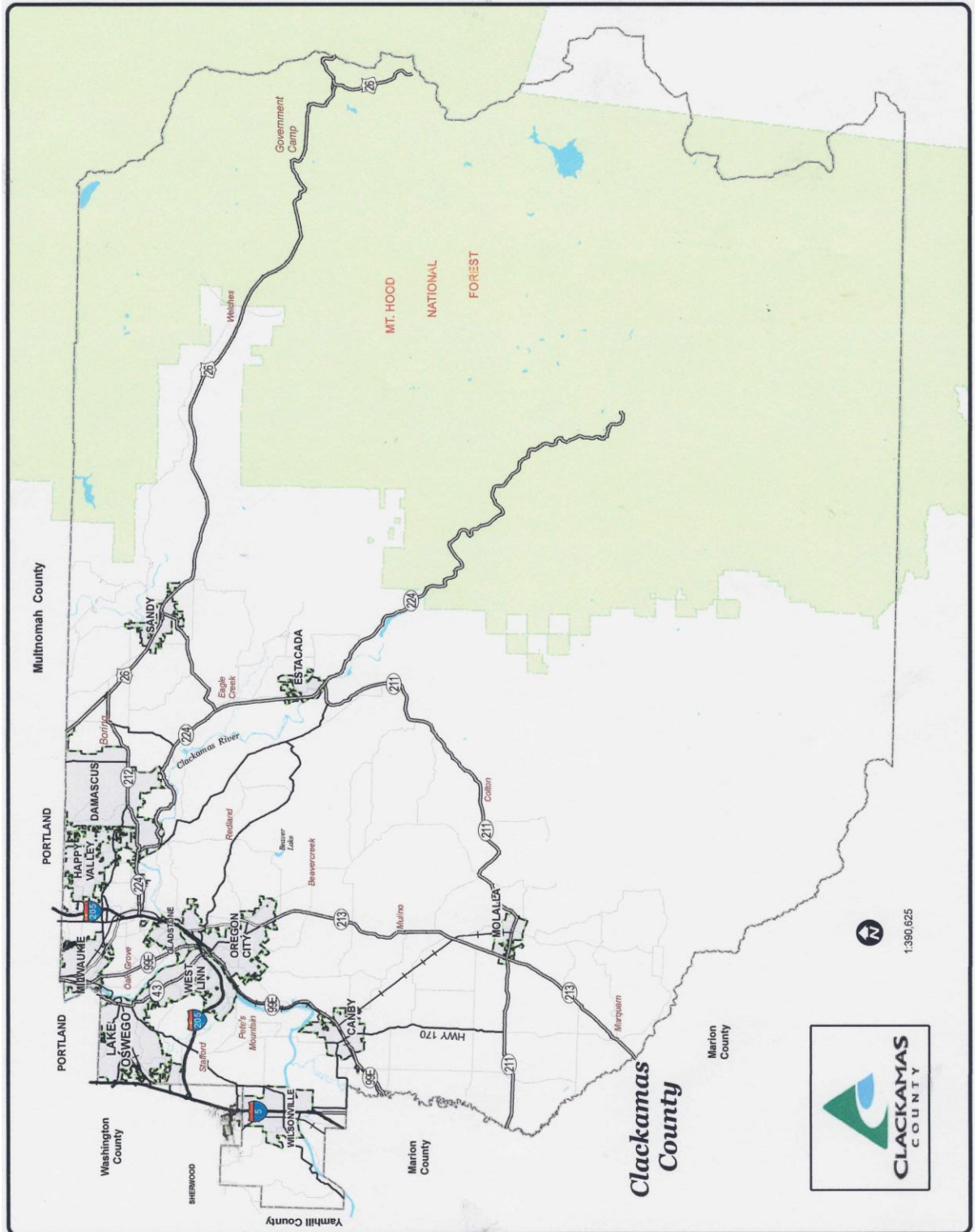
The [RideOregonRide](#) website for the state of Oregon, developed by a broad partnership of bicycling advocates convened by Travel Oregon, does list the following:

- 43 bike shops in the wider region surrounding Clackamas County, including 10 that appear to be located within the county itself. Four of the listed bike shops are in rural Clackamas County (Canby, Molalla, Sandy and ZigZag).
- 5 Portland based tour companies, and 4 Portland based shuttle services that can accommodate bikers
- Several brewpubs and wineries within the county (listed under “attractions”!)
- 7 bed and breakfasts, 15 vacation rentals, ten chain hotels, 5 independent motels, 3 resorts, and 3 camping/RVing options.

V. Appendices

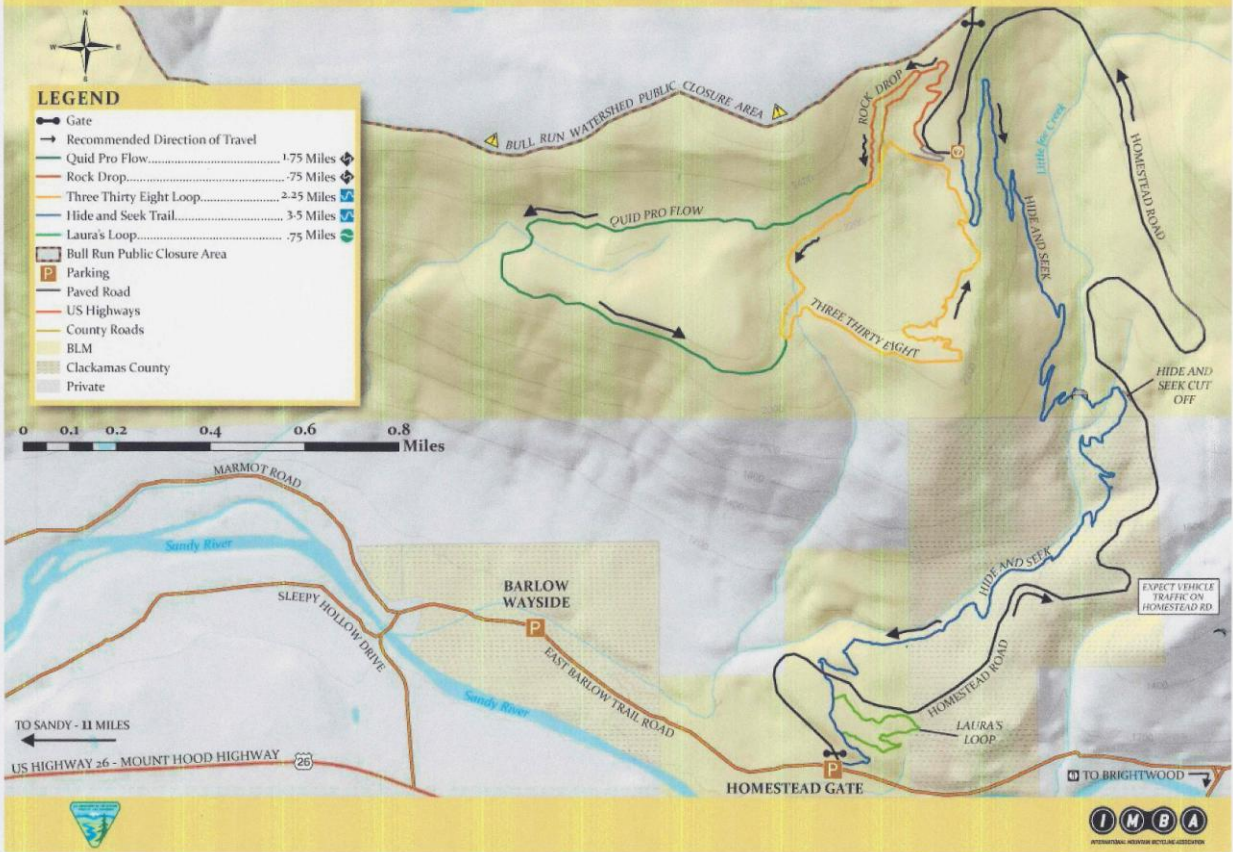
The appendices include four reference maps that are particularly relevant for bicycle tourism planning in Clackamas County. The maps are in the following order:

- A. Overall map of Clackamas County showing major highways and communities
- B. Active Transportation project map for “Connecting Clackamas” initiative
- C. Sandy Ridge Trail System
- D. Mount Hood to Rose City Trail Corridor project status



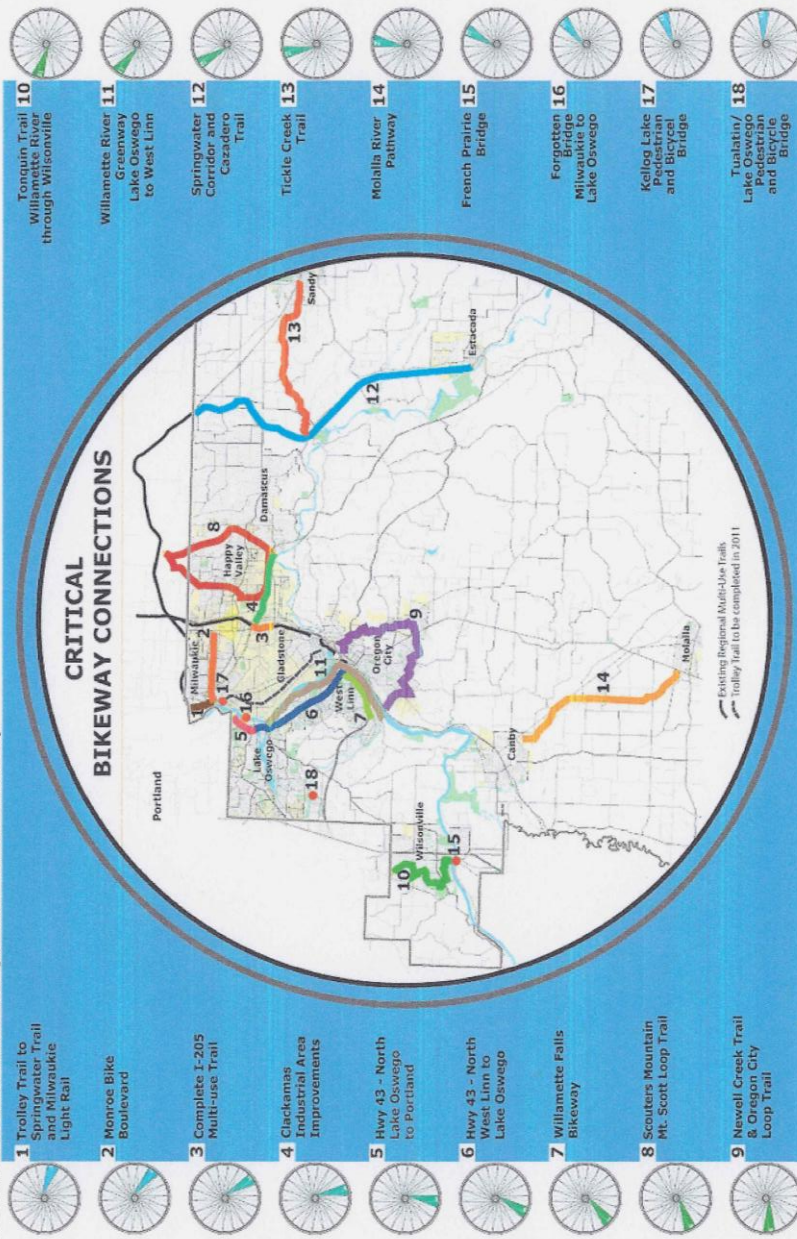
AUGUST 2011

SANDY RIDGE TRAIL SYSTEM MAP

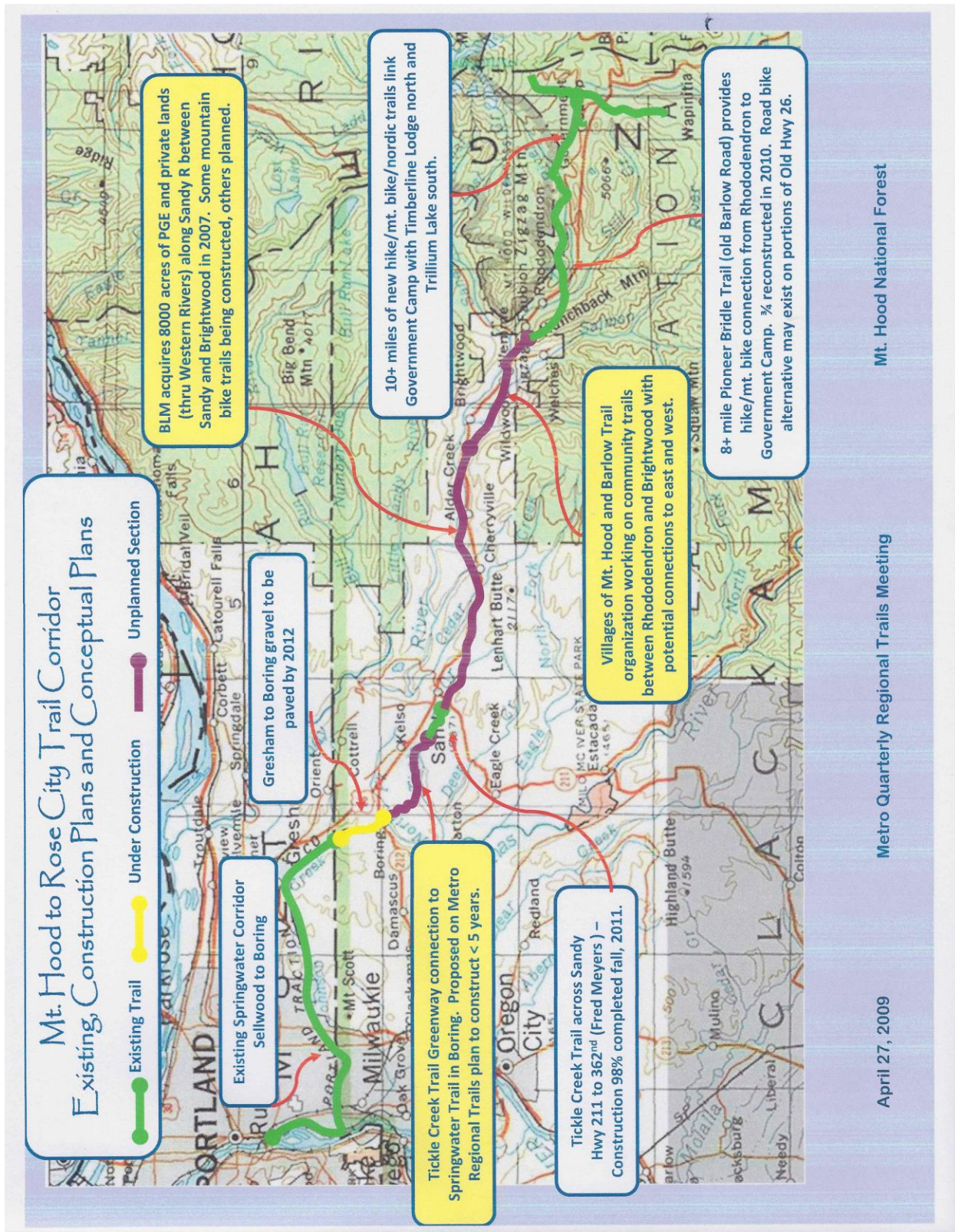


Connecting Clackamas

A Full Revolution for Active Transportation in Clackamas County



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Mt. Hood National Forest

Metro Quarterly Regional Trails Meeting

April 27, 2009