



Bikes in Beds

**How to maximize bicycle
tourism in Haywood County
and Western North Carolina**

March 2015

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Maggie Valley | Waynesville | Lake Junaluska | Canton | Clyde

Haywood County
Tourism Development Authority



SOUTHWESTERN COMMISSION

Southwestern Commission



Blue Ridge
Bicycle Club
Western North Carolina

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Bikes in Beds

How to maximize bicycle tourism in Haywood County

Executive Summary
March 2015

This report summarizes the results of *Bikes in Beds: How to maximize bicycle tourism in Haywood County and Western North Carolina*, an effort funded by the Haywood County Tourism Development Authority and Southwestern Commission. BicycleHaywoodNC—a local advocacy council of the Blue Ridge Bicycle Club—obtained the grants to better define the potential for increased bicycle tourism. This study is an extension of the 2011 Haywood County Comprehensive Bicycle Plan, which included recommendations for a more detailed study on the economic impacts of bicycling.

While focusing on Haywood County, this study provides an overview of bicycle tourism opportunities for all of the Southwestern Commission's area. This includes Cherokee, Clay, Haywood, Jackson, Graham, Macon and Swain Counties.

Changing Dynamics

Bicycling is rapidly changing and growing in the United States. More and more people are participating in it for recreation and transportation. The Outdoor Foundation's annual Outdoor Participation Re-

port for 2013 found that more than 91 million Americans participate in some form of bicycling. Bicycling is more popular among Americans than hiking, canoeing, kayaking and golfing combined.

The Region's Potential

This report is intended to summarize and frame the likely impacts of increased investment in and promotion of bicycling in Western North Carolina. It projects potential economic impacts of investing in a variety of bicycling facilities. It defines the many types of bicycling tourists to help educate leaders and service sector businesses who may not be familiar with diversity among bicyclists.

It also outlines programs in other states, particularly Oregon, where Scenic Bikeway programs, bicycle-friendly business promotion, and bicycling-specific marketing are yielding incredible results. The beauty of these programs is that the promotional efforts are geared toward promoting economic development in small towns and rural areas. It is a model for Haywood County and the rest of the region to replicate and create their own successes.



Photo: Don Kostelec

The Bicycling Tourist

What is a “bicycling tourist”? When asked that question many default to the spandex-clad cyclist that climbs steep mountain roads for the fun of it. Others may think about the dirt-covered mountain biker. Some view a bicycling tourist as a group or family that just wants to ride a few miles on a greenway or trail as part of their vacation.

All of these depictions are correct. The challenge when it comes to attracting bicycling tourists is understanding the unique needs of each type and the resources available in your community to meet those needs. Their needs are as varied as the type of bicycle they ride and the type of clothing they wear. At right are images of the different types of bicycling tourists for Bikes in Beds. They are:

- **Recreational Bicyclist:** These bicyclists enjoy long-distance day rides or loops and seek scenic routes that allow them to avoid heavy traffic. They enjoy Western North Carolina’s country loops and sweeping views.
- **Touring Bicyclist:** The touring bicyclist enjoys multi-day excursions and seeks scenic routes. They may carry their gear or be accompanied by a support vehicle. The Blue Ridge Parkway is a popular touring route.
- **Event Bicyclist:** This type of bicyclist rides on long-distance routes for special events such as the Blue Ridge Breakaway. They enjoy multi-day events to maximize their travel and seek events where they vacation.
- **Mountain Biker:** This breed of bicyclist looks to escape the confines of roads and paved trails. They generally drive to their trail but do enjoy non-motorized routes to get there. They enjoy campgrounds near trails.
- **Low Stress Bicyclist:** This bicyclist seeks off-road greenways or trails that are conducive to a slow-paced ride with family or others seeking to get away and relax. They bring their bike on vacation in hope of finding recreational trails.

Communities in Western North Carolina have varied advantages and opportunities when seeking to attract these types of bicyclists. All counties have the ability to attract recreational, touring and event bicyclists. Communities near the Jackrabbit Mountain Trails, the Tsali Mountain Bike Trails and Hanging Dog Trails attract many mountain bikers. While there are no greenways in Western North Carolina that have the same draw as the Virginia Creeper Trail in Virginia or Swamp Rabbit Trail in South Carolina, there is some potential to attract low stress riders. Each community should work toward developing facilities and strategies to attract all types while capitalizing on their unique attributes for specific bicyclists.

Recreational Bicyclist



Touring Bicyclist



Event Bicyclist



Mountain Biker



Low Stress Bicyclist



Measuring Economic Impact

Based on local tourism expenditure data and visitor profiles for Western NC, it is estimated that bicycle tourism accounts for roughly 2% of total trips to Haywood County and generates more than \$3 million in annual expenditures by visitors.

This study estimates the Blue Ridge Breakaway generates roughly \$150,000 to \$170,000 in visitor spending. The Lake Logan Triathlon attracts over three times as many participants over several days and could have an economic impact of more than \$500,000.

A greenway connecting Waynesville to Canton could attract thousands of visitors to Haywood County each year and generate up to \$1 million in annual tourism expenditures. It would serve as a regional attraction for visitors. Families and other groups looking for low-stress cycling excursions without strenuous climbs or vehicle traffic would enjoy the trail. The construction of a greenway across Haywood County could also result in a one-time increase in property values within a quarter mile of the facility. The cost of constructing the proposed Haywood County greenway is estimated at \$9 million.

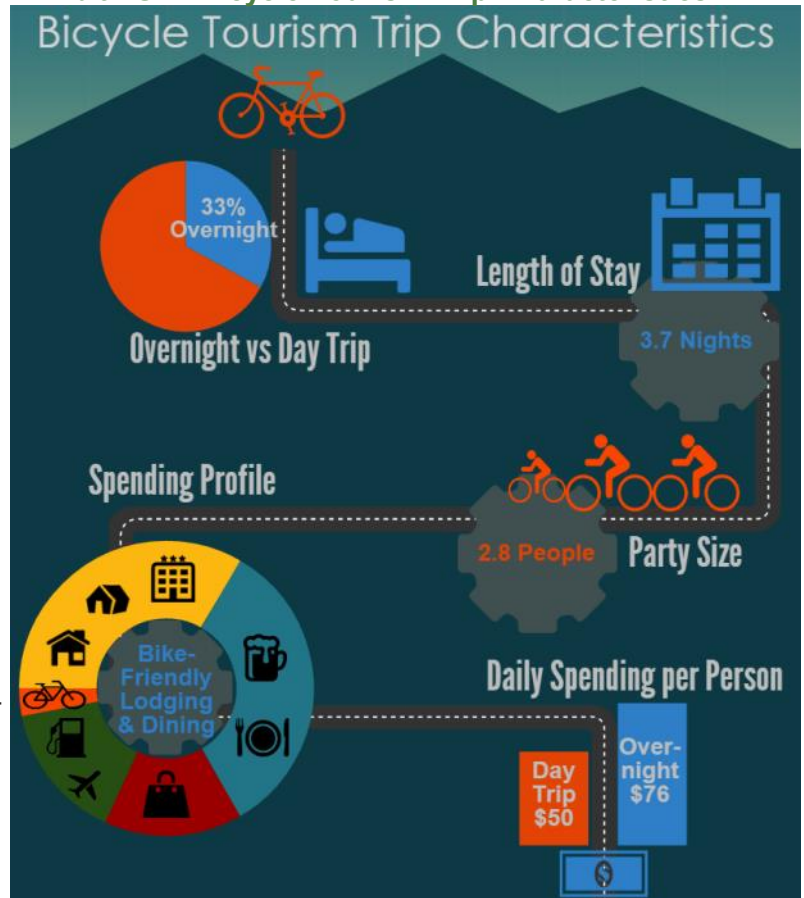
The mountainous terrain and large amount of public land in Haywood County provide potential for the development of additional high quality trails that can attract visiting mountain bikers. There is a large network of Forest Service roads in the region that could be promoted to attract the growing number of cyclists looking for gravel road rides and gravel grinder events.

Scenic Bikeways

The study recommends Haywood County, along with other WNC communities, pursue establishment of a Scenic Bikeways program to fuse recreation, transportation, and the economic benefits of bicycle tourism. The program can be modeled after similar programs in Vermont and Oregon, which have been wildly successful in bringing new life to small towns and promoting economic development. A Scenic Bikeway is defined as “a signed bike route on existing roads and paths that provide access to national, state, or regional resources of superlative quality and scenic splendor. The route is on public lands, rights-of-way, or on existing easements on private property. The route is open to the public.”

Oregon defined the stated benefits of designation as providing a unique cycling experience that creates lasting memories identifying the best bike rides in Oregon, attracting tourism dollars, and providing additional value to the neighboring communities.

Exhibit ES-1: Bicycle Tourism Trip Characteristics



Branding Pillars

Exhibit ES-2 illustrates the programs and investment Haywood County and other Western North Carolina communities can develop to increase bicycle tourism. The primary focus areas prioritize information for tourists and the hospitality industry in addition to promoting the area through branding, social media and special events. These focal points can be directly influenced by the Tourism Development Authorities and similar organizations.

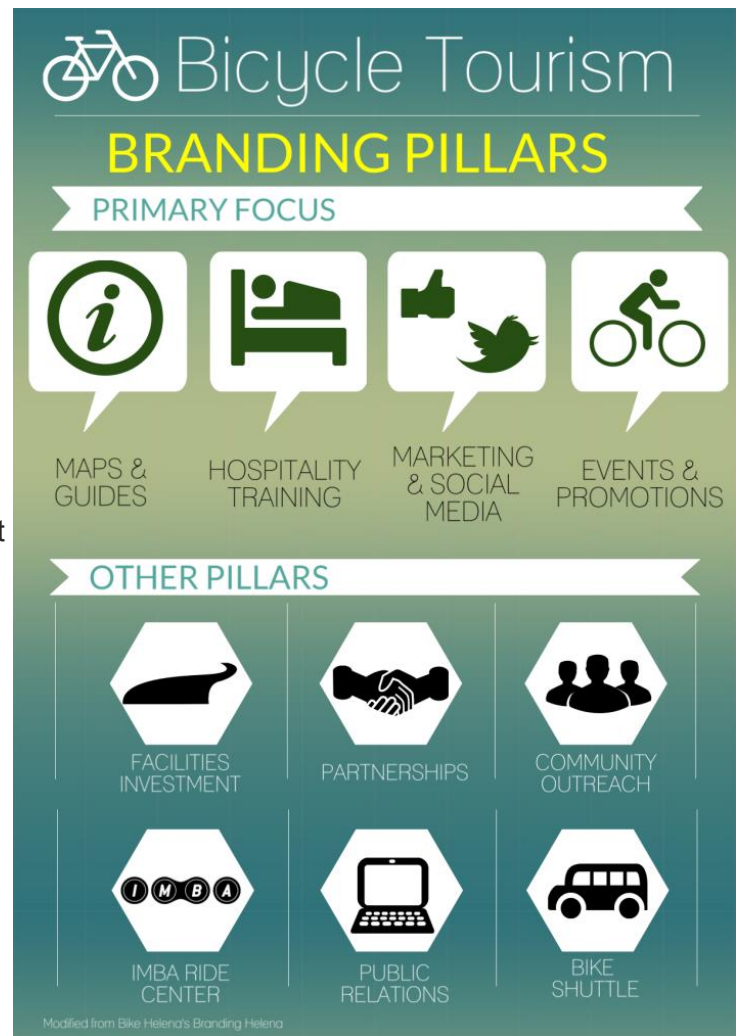
The other pillars are also important but may require additional partners, more investment and more opportunities to develop. The most expensive investment is in new facilities. Building a 10-mile long greenway or constructing bicycle lanes along several miles of street can take lots of time and money. Community education and public relations are also a component of building a bicycle tourism brand for a region. Other endeavors, such as becoming a community designated as a “Ride Center” by the International Mountain Bicycle Association (IMBA) can take time but are achievable for the region. Once bicycle tourism is successful it breeds other businesses, which could include shuttles to the Blue Ridge Parkway or to other destinations for bicyclists traveling without their vehicles or other support.

Where do we go from here?

In March 2015 it was announced that Waynesville will be the starting point for the annual Cycle North Carolina Mountains to Coast Ride. The ride takes place every September and brings nearly 1,100 bicyclists from 37 states for the journey. This makes the Bikes in Beds study timely in terms of taking advantage of this opportunity to tout Western NC as a bicycle tourism destination. It also means that quick action is required to help inform local businesses on how to accommodate bicyclists.

On the next page are several implementation steps contained in this report. A unique finding in this study was how several communities across the United States are actively engaging their local representatives in the hospitality industry to educate and build understanding of bicycle tourism. Each year Bentonville, AR, business leaders gather their tourism bureau, the chamber of commerce and hospitality industry for a day-long training on bicycle tourism. They teach the attendees about the different needs of bicyclists and emerging trends in bicycling so they can better serve this growing sector of the tourism industry.

Exhibit ES-2: Bicycle Tourism Branding Pillars



Kostelec 
PLANNING
 BICYCLIST PLANNING

Kostelec Planning of Asheville, NC, was the lead consultant for *Bikes in Beds*. Chiple Consulting of Asheville and The Path Less Pedaled of Portland, OR, also contributed to the report.

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10 Action Steps for Implementation of Bikes in Beds

1

Organize a Workshop on Bicycle Tourism for Hospitality Industry

- Conduct a two-hour or half-day workshop for businesses
- Emphasis should be on basic needs and desires of bicycling tourists
- Consider expanding to other counties or other business sectors



2

Develop a Regional Strategy to Promote Existing Assets

- Include bicycling information on all visitor-oriented websites
- Brand the region for these existing assets and opportunities
- Work with Canton on Rough Creek Watershed access

3

Get Ready to promote Western North Carolina for Cycle NC

- Determine how to provide promotional materials to registrants
- Organize special events leading up to Cycle NC for local businesses
- Invite participants back to enjoy WNC's other features and bicycling routes



4

Collect Additional Data on Bicycle Tourism in Western NC

- Add questions to Blue Ridge Breakaway & other event surveys
- Conduct participant survey at Jackrabbit, Tsali and Hanging Dog Trails
- Determine percentage of tourists who come to WNC for bicycling purposes

5

Convene NCDOT & other stakeholders on Scenic Bikeways

- Identify most likely routes and profiles
- Evaluate potential level of investment (signage, maps, promotion)
- Package Scenic Bikeways for special promotion



6

Reach out to Bike Tour Guides to Promote the Region

- Gather a group of bike tour guides from the region
- Contact Adventure Cycling Association about WNC potential
- Identify a regional multi-county bike touring route

7

Gather Information on Blue Ridge Parkway Usage

- Collect information on bicyclists and conduct intercept survey
- Station someone on the Parkway on a summer weekend to count
- Work with Eastern Band of Cherokee Indians on BRP integration



8

Expand the Region's Bicycle Friendly Business Program

- Use Bicycle Friendly Outpost in Haywood County as example
- Develop standards for being a bicycle friendly business
- Suggest ways (meals, amenities) to be more bicycle friendly

9

Install Bike Racks and Fix-It Stations in Towns & at Businesses

- Identify prominent locations for fix-it stations (bike shops, greenways)
- Install bike racks at popular lodging and recreation destinations
- Work with artists to identify creative themes for bicycle parking

10

Catalog and Curate Bicycling Assets

- Log all paved roads, gravel roads, mountain bike trails into one database
- Gather electronically-mapped routes (Strava, RideWithGPS.com, MapMyRide)
- Curate these into the top 5 or 10 signature rides to promote to visitors

1. Introduction

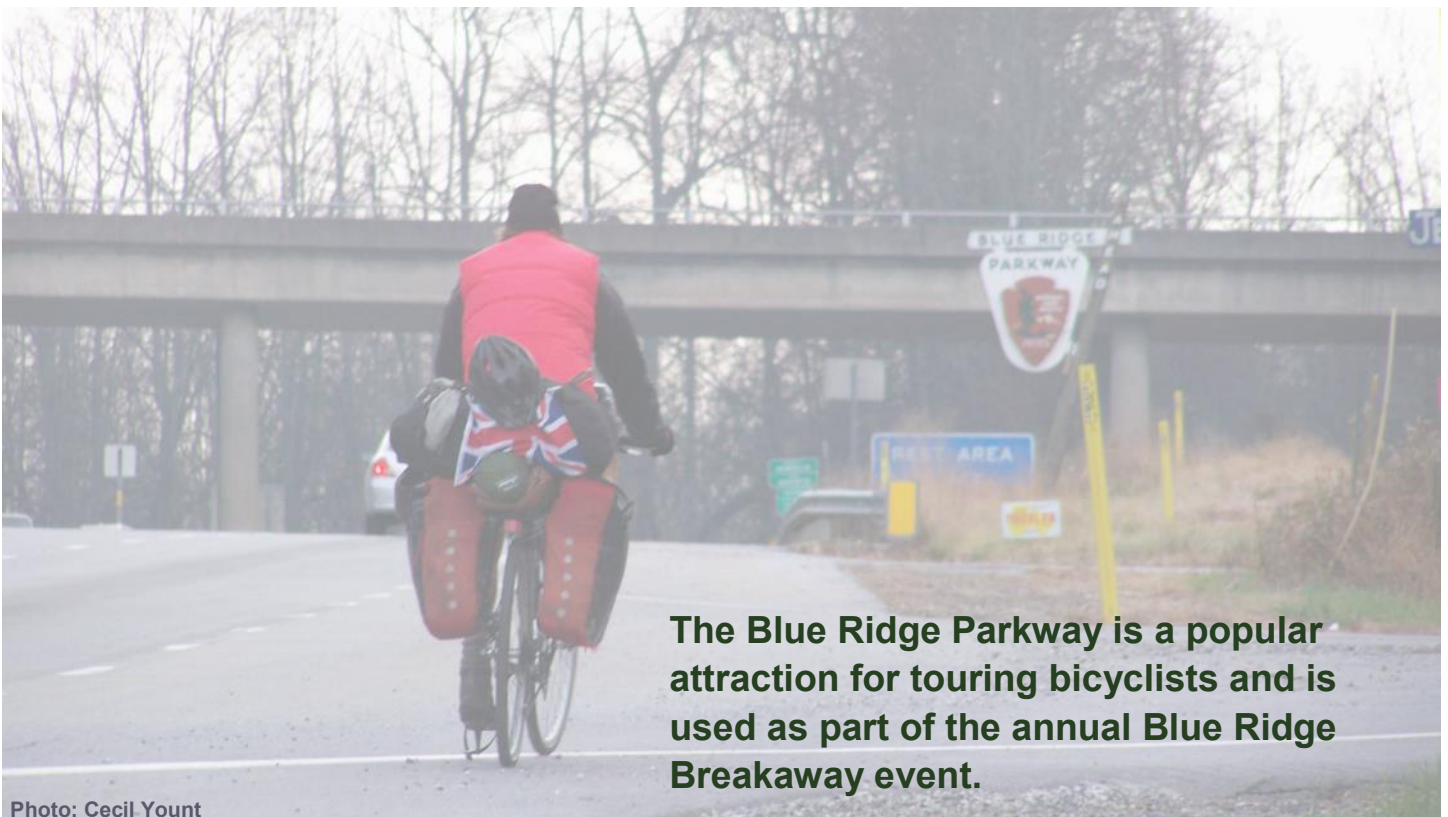
Western North Carolina and Haywood County have been a tourism destination since the 1800s. The two greatest assets of the region remain the natural beauty of the mountains and the small town charm of its small towns. The region also desires to stay at the forefront of emerging trends in tourism as competition among different regions of the Southeast remains fierce.

BicycleHaywoodNC—a local advocacy council of the Blue Ridge Bicycle Club—through a grant from the Haywood County Tourism and Southwestern Commission sought to better define the potential for bicycle tourism. This study is an extension of the Haywood County Comprehensive Bicycle Plan, which was adopted in 2011 by the Board of Commissioners and included a recommendation for a more detailed study on the economic impacts of bicycling.

While focusing on Haywood County, this study is intended to provide an overview of bicycle tourism opportunities for the entire Southwestern Commission region. This includes Cherokee, Clay, Haywood, Jackson, Graham, Macon and Swain Counties.

Tourism Development Authorities (TDAs) throughout the region use the common mantra: “We’re interested in putting butts (or heads) in beds” as the lodging taxes they manage are generated from overnight stays. Since bicycling tourists stay longer than average tourists (3.7 nights on average compared to regional rates of 2.5 nights), the region stands to benefit from promotion of bicycling assets.

Throughout the seven counties there are a variety of bicycle tourism opportunities. Some are very similar, such as recreational loops for road bicyclists, while others are unique to a particular community,



The Blue Ridge Parkway is a popular attraction for touring bicyclists and is used as part of the annual Blue Ridge Breakaway event.

Photo: Cecil Yount

such as the Jackrabbit Mountain Hiking and Biking Trails in Clay County and the Little Tennessee River Greenway in Macon County.

The Blue Ridge Parkway meanders through much of the region and offers the potential to attract more long-distance touring bicyclists. It is also along the 100-mile Century ride as part of Haywood County's annual Blue Ridge Breakaway.

Growing Market

Bicycling is rapidly changing and growing in the United States. More and more people are participating in it for recreation and transportation. The Outdoor Foundation's annual Outdoor Participation Report for 2013 found that more than 91 million Americans participate in some form of bicycling.

While traditional activities such as golfing and fishing have declined in popularity nationally since 2006, participation in bicycling has increased. Overall, bicycling is more popular among Americans than hiking, canoeing, kayaking and golfing combined.

Mountain biking has increased in popularity more than 14 percent in that timeframe. New off-road and hybrid bicycling activities have emerged as fat bikes and gravel bikes allow riders to explore areas previously viewed as inaccessible by bike.

All of this means there is increasing potential to capture bicycling tourists and invite them to come to Haywood County and Western North Carolina to ride and enjoy the scenery.

The Region's Potential

This report is intended to summarize and frame the likely impacts of increased investment in and promotion of bicycling in Western North Carolina. It projects potential economic impacts of investing in a variety of bicycling facilities. It defines the many types of bicycling tourists to help educate leaders and service sector businesses who may not be familiar with diversity among bicyclists.

It also outlines programs in other states, particularly Oregon, where Scenic Bikeway programs, bicycle-friendly business promotion, and bicycling-specific marketing are yielding incredible results. The beauty of the program in Oregon is that the promotional efforts are geared toward promoting economic development in small towns and rural areas.

This context aligns directly with Western North Carolina communities. An advantage that WNC has over Oregon is its proximity to markets up and down the east coast where there is a larger population base. Nearby in Asheville and Brevard there is an emerging bicycling culture similar to what has occurred in Portland, Oregon.



Newer bicycle tourism attractions in the region, such as the Santeetlah Lake Trail in Graham County, will need volunteer efforts to keep the trails in good condition while marketing and branding efforts help build a critical mass of riders.

Photo: Don Kostelec

2. Bicycling in Western North Carolina

The Bikes in Beds study represents the next step in a series of plans and study of bicycling in Haywood County and Western North Carolina. Over the past four years the county and region have developed several plans aimed at better defining needs for bicycling on areas roadways and through new greenways.

These past studies emphasized infrastructure investment as well as programs and policies to improve conditions for bicyclists. They help set the basis for Bikes in Beds, which is the first in-depth analysis that looks specifically at economic return on investments.

Plans in the Area

Haywood County Comprehensive Bicycle Plan. Completed in 2011, the county's bicycle plan was one of the first countywide plans in North Carolina. It examined route needs on a variety of roadways throughout the county. A primary recommendation of the plan was establishment of the "Haywood Hub" route—consisting of both on- and off-road facilities—to link Waynesville, Lake Junaluska, Clyde and Canton. The Plan also recommended an economic study.

Southwestern Commission Regional Trails Plan. This regional trails plans, completed in 2013, focused primarily on off-road opportunities for hiking and biking throughout the seven-county Region A area. The plan profiled attractions throughout the region, including the Mountains-to-Sea Trail (hiking only), the WCU Trails, the Little Tennessee River Greenway and the Jackrabbit Mountain Trails.



The Cherohala Skyway is one of Western North Carolina's premiere bicycle tourism assets.

Photo: The Path Less Pedaled

Blue Ridge Bicycle Plan. This regional Bike Plan covered seven mountain counties, including Haywood, Jackson and Swain Counties in Region A. It provides a vision and goals for regional bicycle infrastructure, analysis of current conditions, a map of prioritized regional corridors for bicycle improvements in the future, and a list of policy recommendations.

Far Western Regional Bicycle Plan. In 2015, the Southwestern Commission is embarking on a regional bike plan to address the four remaining counties in the western mountains not covered by the Blue Ridge Bicycle Plan (Cherokee, Clay, Graham and Macon). The plan will identify priority routes and develop ideas for promoting bicycling in the far western counties.

On-Road Bicycling Routes

Blue Ridge Parkway. Approximately 60 miles of the 469-mile scenic highway wind through Haywood, Jackson and Swain Counties between Asheville and Cherokee. The Parkway is a popular route for recreational and touring bicyclists. Haywood County's Blue Ridge Breakaway utilizes the Parkway as part of its 100-mile century ride.

Cherohala Skyway. The Cherohala Skyway is a national scenic byway linking Tellico Plains, Tennessee to Robbinsville along a 40-mile route. It was opened in 1996 as a two-lane road with elevations ranging from 900 feet to 5,400 feet. The annual Cherohala Challenge bicycle ride, which originates in Merrillville, TN traverses the Skyway.

North Carolina Bike Route 2—Mountains to Sea. From Murphy in the mountains to Manteo on the coast, this 700-mile state bicycle route traverses the state from west to east. It follows state highways, state secondary routes and the Blue Ridge Parkway on its route through Western North Carolina in Cherokee, Macon, Jackson and Haywood Counties.

Local Bicycle Routes. Various road bicycling routes are identified in Clay, Macon and Haywood Counties in addition to State Bike Route 2. The degree to which these are marked or promoted is based on local conditions. Macon County's routes have state route designation while those in Haywood County are promoted as road bicycling routes after identification in the county's bicycle plan.

Mountain Bike Trails

Jackrabbit Trails. The Jackrabbit Trails are 14.5 mile stacked loop mountain biking and hiking network located in Clay County near the Georgia state line. The trails are on US Forest Service land in the Nantahala National Forest, adjacent to Lake Chatuge. These trails attract 12,500 mountain bikers and hikers a year and are becoming an increasingly important element of the area's tourism economy



A touring bicyclist snaps a photo of motorcyclists at Richland Balsam along the Blue Ridge Parkway.

Photo: VeloGirl Rides

Tsali Recreation Area Trails. Designed for hikers, mountain bikers and horseback riders, Tsali’s 4-loop, 42-mile system offers a variety of landscapes along peninsulas near Fontana Lake on the border of Swain and Graham Counties.

Hanging Dog Trails. These trails are located near Murphy and are a destination for mountain bicyclists along the shores of Hiwassee Lake. Known as the Ramsey Bluff Mountain Biking system, there are approximately 10 miles of trails.

Rough Creek Watershed. The Rough Creek Watershed north of Canton offers more than 10 miles of mountain bike and hiking trails on three separate routes. A challenge for the watershed area, which is owned by the Town of Canton, has been access from a suitable trail head.

Western Carolina University Trail System. The WCU Trail System is a multi-use, on-campus network designed for mountain bikes, hiking and trail running, and consists of 7 miles of single track, primitive surface trail. The trail system can be easily accessed by bike from the WCU campus and Cullowhee.

“Graham County could be the road cycling mecca of the Southeast!”



**Jim Richards,
Cherohala
Challenge Event
Director**

The Tennessee-based Cherohala Challenge brings bicyclists through Graham County on its annual ride along the Tail of the Dragon and Cherohala Skyway. It draws more than 300 riders from 17 states.

Exhibit 2-1: Existing Bicycle Tourism and Related Assets in Western North Carolina



Greenways & Other Trails

Waynesville Greenway. Waynesville's greenway system is still being developed along Richland Creek. It is a combination of off-road routes and sidewalks linking the town to Lake Junaluska. Sections of off-road facilities are constructed near the Waynesville Recreation Park and Waynesville Recreation Center and between Waynesville's Industrial Park and Lake Junaluska.

The Little Tennessee River Greenway. The greenway cuts a meandering path of nearly 5 miles through Franklin. Visitors experience wetlands, stroll through two railroad cuts left behind by the Tallulah Falls Railroad, wander alongside an old pasture, catch sight of the desert agave, and experience the upland woods. The greenway connects to the 2.6-mile Lewis Soles Memorial Mountain Bike Trail.

Murphy RiverWalk. The Murphy River Walk and Canoe Trail follows the Valley River and the Hiwassee River surrounding Murphy's town center. The 2-mile greenway includes a center loop at the confluence of the two rivers. When the lake and river waters rise during the summer, the canoe trails are extended by a series of inlets. When waters recede, the Confluence Road, which includes part of the old Tennessee Street road surface, can be enjoyed by walkers.

Oconaluftee River Trail. The trail travels 1.5 miles one-way from the Oconaluftee Visitor Center to the outskirts of the city of Cherokee, NC. It is relatively flat, but does have a few small hills. The trail runs through the forest along side the Oconaluftee River and offers beautiful views of the river. The trail is planned to extend several miles to further link the Visitor Center to the heart of Cherokee.

Job Creation

While Bikes in Beds is focused on economic impact of bicycling as it relates to tourism and tourism-based jobs, there is also a growing set of data and analysis on the overall employment impacts from transportation investments.

In 2013 North Carolina enacted a new law that requires a data-driven process to identify transportation projects across all modes through NCDOT's programs. A key element of this data-driven process is the job creation potential of projects.

For this type of analysis, the evaluation involves estimating direct jobs that results from construction of the project. A missing element of the state's analysis is a job creation metric for non-motorized transportation facilities like bike routes, greenways and sidewalks.

In 2012 the American Association of State Highway and Transportation Officials (AASHTO) produced a report evaluating the job creation data from the thousands of projects funded through the American Reinvestment and Recovery Act (aka "The Stimulus Package"). This report offered one of the few apples-to-apples comparisons of job creation across several types of traditional highway investments. (Exhibit 1-2)



Bicyclists enjoy a moment along the greenway in Recreation Park in Waynesville.

The illustration below depicts the findings of that AASHTO analysis, which indicates investments in non-motorized transportation infrastructure creates roughly 50% more jobs per million dollars spent than any other investment. This information is included to provide perspective on local economic development for the region as it embarks on a variety of transportation investments.

Safety

The topic of safety is ever-present when it comes to bicycling. Those who do not ride regularly or are not comfortable on the roads see bicycling as a dangerous endeavor. Bicycling is a very safe activity in many areas of North Carolina.

Winding mountain roads as well as lower travel speeds and traffic volumes create good conditions for on-road bicyclists, particularly those recreational riders and touring bicyclists who are most comfortable. Exhibit 1-3 on the following page compares Haywood County and its bicycle crash data (1997-2012) with counties of similar population in North Carolina. Mountain counties are shown in blue.

Haywood County has the fewest overall bicycle crashes and lowest rate of crashes per 100,000 population among its peer counties across the state.

Exhibit 2-2: Job Creation Estimates for Various Transportation Investments (per million \$ spent)

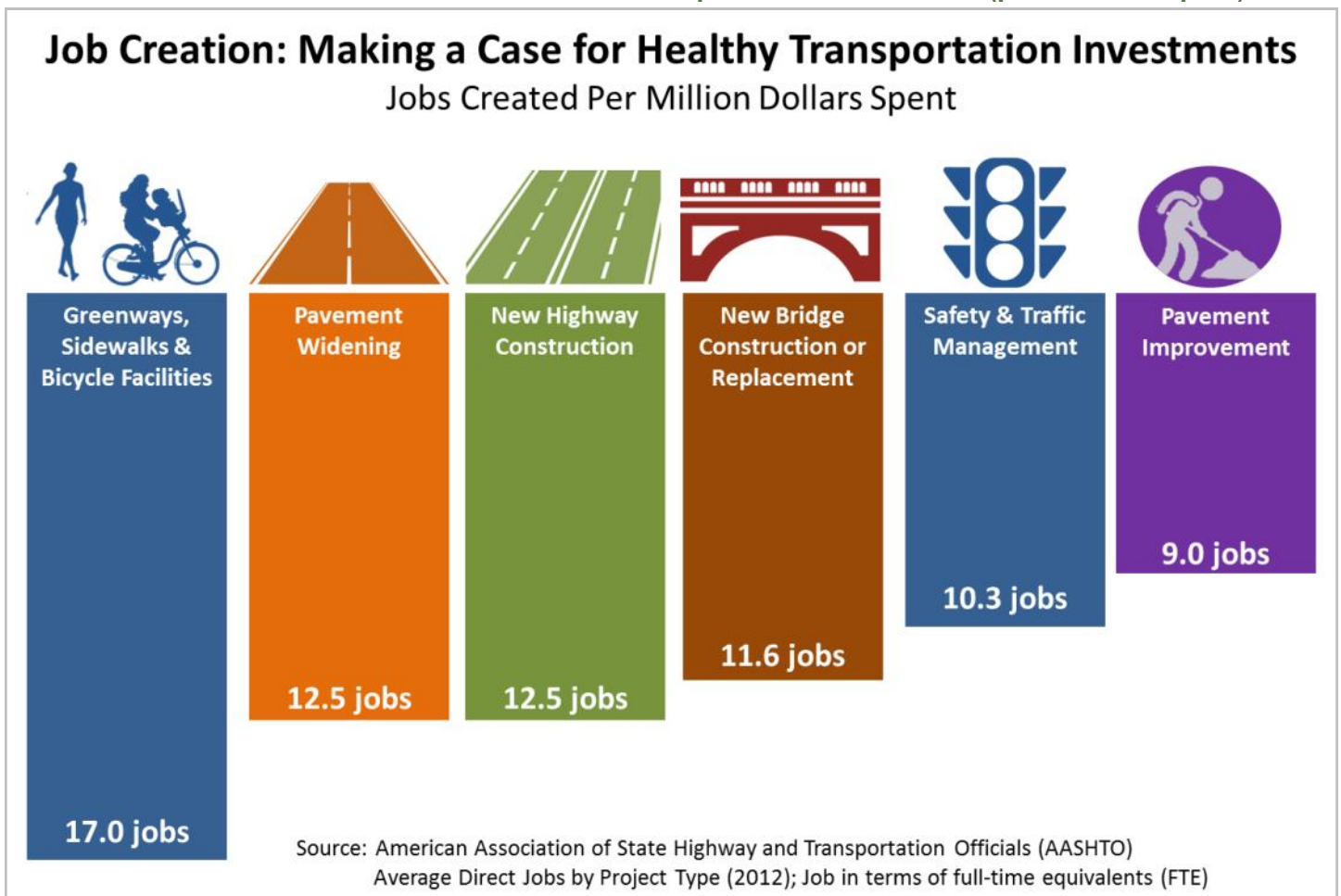


Exhibit 2-3: Bicyclist Crash Analysis for NC Counties with Population between 50,000 to 70,000

Data suggests bicycling in Haywood County is safe for those who are comfortable riding along roads without shoulders or bicycle lanes. While that is not for everyone and many other bicyclists enjoy off-road experiences, it is important to not project bicycling as a dangerous endeavor when promoting tourism. The table below shows the total number of bicyclist crashes and bicyclist crash rates per 100,000 population for all counties in North Carolina with population between 50,000 and 70,000. Haywood County has both the lowest number of overall crashes and lower rate of crashes by population.

County	Total Bicyclist Crashes (1997-2012)	Population (2013 est.)	Crashes Per 100,000 Population
Edgecombe	246	55,700	441.7
Lenoir	228	59,100	385.8
Carteret	207	69,300	298.7
Halifax	153	53,700	284.9
Watauga	95	52,600	180.6
Columbus	101	57,500	175.7
Lee	82	59,300	138.3
Stanly	66	60,600	108.9
Sampson	69	64,300	107.3
Hoke	52	50,678	102.6
Chatham	69	67,600	102.1
Duplin	58	60,100	96.5
Pender	51	55,600	91.7
Granville	49	57,900	84.6
Rutherford	54	67,800	79.6
Franklin	44	62,700	70.2
Wilkes	37	69,800	53.0
Haywood	26	59,600	43.6

3. Bicycle Tourism Markets

What is a “bicycling tourist”? When asked that question many default to the spandex-clad cyclist that climbs steep mountain roads for the fun of it. Others may think about the dirt-covered mountain biker. Some view bicycling tourists as a group or family that just wants to ride a few miles on a greenway or trail as part of their vacation.

All of these depictions are correct. The challenge when it comes to attracting bicycling tourists is understanding how they are unique and how they are different. Their needs are as varied as the type of bicycles they ride and the clothing they wear. The following profiles of major bicycle tourism markets include their characteristics, needs and challenges in attracting them to Western North Carolina. The content of these typologies was generated, in part, from a fall 2014 bicycle tourism workshop in Waynesville. Exhibit 3-1 depicts these types of bicycling tourist markets, their overlaps and their preferences for on- and off-road riding.

Communities in Western North Carolina have varied advantages and opportunities when seeking to attract these types of bicyclists. All counties have the ability to attract recreational, touring and event bicyclists. Communities near the Jackrabbit Mountain Trails, the Tsali Mountain Bike Trails and Hanging Dog Trails attract many mountain bikers. While there are no greenways in Western North Carolina that have the same draw as the Virginia Creeper Trail in Virginia or Swamp Rabbit Trail in South Carolina, there is some potential to attract low stress riders. Each community should work toward developing facilities and strategies to attract types while capitalizing on their unique attributes.

Exhibit 3-1: Bicycle Tourism Markets

This study identified five primary bicycle tourism markets with each riding type having its own characteristics and needs as well as challenges Western North Carolina faces in attracting each type.



Recreational Bicyclists

Characteristics

- Enjoy day rides ranging from 30 to 100 miles and may do this with a group, a spouse/partner or friends.
- Seek scenic routes and try to avoid high stress routes in urban areas.
- Bring their bike with them on vacation in hopes of finding recreational loops.
- Will seek cue sheets from local bike clubs to identify rides.
- May pick destinations along the route to see, eat or recreate.



Existing Assets in WNC for Recreational Bicyclists:

- Blue Ridge Parkway
- Cherohala Skyway
- Rural roads
- Lake Logan area
- Haywood/Madison Loop
- Route maps/cue sheets



Success Stories Beyond WNC:

- NC Outer Banks
- Cades Cove
- Lake Norman Bike Route
- Oregon’s Scenic Bikeways
- Carolina Thread Trail (Charlotte)
- American Tobacco Trail (Durham)
- Virginia Creeper Trail (Abingdon)
- Swamp Rabbit Trail (Greenville)

Challenges for Recreational Bicyclists in WNC:

- Lack of bike lanes/shoulders
- Lack of signage/wayfinding
- Terrain
- Water access on Parkway

What can you do now?

- Create a local/regional brand for promotional purposes
- Identify Scenic Bikeways, work with DOT
- Develop education campaign for hospitality industry and motorists
- Identify/promote bicycle-friendly businesses

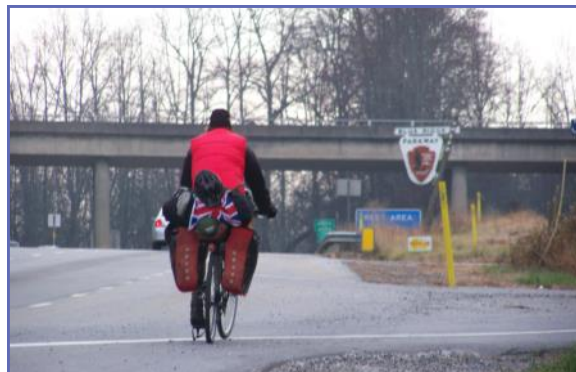
What do Recreational Bicyclists Need?

- Maps & cue sheets (online/phone)
- Pre-planned rides
- Convenient access
- Diverse lodging options
- A safe, dry place to store their bike overnight
- Healthy breakfast at lodging
- Scenic vistas or routes
- Unique places to eat and drink
- Bike shop for repair or rental
- Shuttle to Blue Ridge Parkway
- Other outdoor activities

Touring Bicyclists

Characteristics

- Ride on multi-day trips from point to point or in large loops (hundreds of miles)
- Seek scenic routes and try to avoid high stress routes in urban areas.
- Generally travel by car, train or plane to reach a starting point before embarking on a multi-day trip.
- May ride with a “support vehicle” or in a group with support.
- Some companies organize bicycle touring vacations and excursions.



Existing Assets in WNC for Touring Bicyclists:

- Blue Ridge Parkway
- Cherohala Skyway
- State Bike Route 2
- Hyder Mountain Loop
- Heintooga Ridge
- Adventure Cycling Assn.



Success Stories Beyond WNC:

- NC Outer Banks
- Cycle NC
- Skyline Drive (VA)
- Ride Across Georgia
- Cades Cove
- Lake Norman Bike Route
- Oregon’s Scenic Bikeways
- Lake Champlain Bike Route (VT)

Challenges for Touring Bicyclists in WNC:

- Lack of signage/wayfinding
- Some DOT routes prohibit bikes
- Water access on Parkway
- Places to replenish supplies

What can you do now?

- Create a local/regional brand for promotional purposes
- Identify Scenic Bikeways, work with DOT
- Develop education campaign for hospitality industry and motorists
- Identify/promote bicycle-friendly businesses

What do Touring Bicyclists Need?

- A safe, dry place to store their bike overnight
- Camping near popular routes
- Maps via digital means
- Wayfinding
- Healthy breakfast at lodging
- Water source in remote areas
- Showers
- Scenic vistas or routes
- Cool places to eat and drink
- Maps and wayfinding
- Bike shop for repair or rental
- Other outdoor activities

Event Bicyclists

Characteristics

- Ride on 30-, 50-, or 100-mile single-day or multi-day organized events and may do this with a group, a spouse/partner or friends.
- Seek scenic areas or locations that offer some type of “reward” in terms of scenic beauty or historic value.
- May seek these events in places where they are also planning a vacation.
- Will identify pre-event ride cue sheets from local bike clubs to scout the route.
- Find events that contribute to a charity that matches their values.



Existing Assets in WNC for Event Bicyclists:

- Blue Ridge Parkway
- Blue Ridge Breakaway
- Tour de Cashiers
- Lake Logan Triathlon
- Other event rides
- Jackrabbit Trail events



Success Stories Beyond WNC:

- Cycle to Farm (Black Mountain)
- Hilly Hundred (Indiana)
- Ride Across Georgia
- Cycle NC
- Seattle to Portland (STP)
- Cherohala Challenge
- Fletcher Flyer
- Oaks & Spokes Festival (Raleigh)

Challenges for Event Bicyclists in WNC:

- Lack of bike lanes/shoulders
- Lack of signage/wayfinding
- Terrain
- Limited published routes

What do Event Bicyclists Need?

- Well-organized events
- Convenient access
- A safe, dry place to store their bike overnight
- Healthy breakfast at lodging
- Camping near event start
- Scenic vistas or routes
- Cool places to eat and drink
- Maps or cue sheets
- Bike shop for repair or rental
- Other outdoor activities

What can you do now?

- Create a local/regional brand for promotional purposes
- Develop education campaign for hospitality industry and motorists
- Identify/promote bicycle-friendly businesses
- Cross-market with triathlons

Mountain Bicyclists / Cyclocross

Characteristics

- Look to escape the confines of roads and paved trails.
- Seek off-road, unpaved trails in mountainous areas.
- Generally reach their destination by motor vehicle but are seeking non-motorized pathways to travel from lodging/camping to the trail.
- May ride for several hours on mountain bike loops and on multi-day excursions.



Existing Assets in WNC for Mountain Bicyclists:

- Tsali Recreation Trails
- Jackrabbit Mtn Trails
- Rough Creek Watershed
- WCU Trails
- Hanging Dog Trails
- Forest Service Roads

Success Stories Beyond WNC:

- Beech Mountain Trails, NC
- Moab & Park City, Utah
- Bend, Oregon
- Iron Mountain, Virginia
- Crested Butte, Colorado
- 24 hours of Old Pueblo (Tucson)
- NC Grand Prix (Hendersonville)
- Kingsport (TN) Cyclocross Cup



What do Mountain Bike & Cyclocross Bicyclists Need?

- Well-organized events
- A place to store their bike overnight
- Camping near trails
- Water at trailhead for drinking and cleaning
- Healthy breakfast at lodging
- Convenient access
- Scenic vistas or routes
- Cool places to eat and drink
- Maps and wayfinding
- Bike shop for repair or rental
- Other outdoor activities

Challenges for Mountain Bikers in WNC:

- Lack of signage/wayfinding
- Water access at trailheads
- Mileage, full network of trails
- Other places for family activities

What can you do now?

- Create a local/regional promotional campaign for the many trail networks
- Add water access at trailheads
- Develop education campaign for hospitality industry and motorists
- Develop brochure that includes other activities to do in region

Low Stress & Family Bicyclists

Characteristics

- Seek short- to medium-range riding distances (10 to 30 miles) for roundtrip, point-to-point or multi-day rides on multi-use trails.
- Seek scenic routes that offer separation from high stress or on-street facilities.
- Bring their bike with them on vacation in hopes of finding recreational trails and will ride with children, friends and family.
- May pick destinations or side trips along the route to see, eat or recreate.



Existing Assets in WNC for Low Stress Bicyclists:

- Lake Junaluska
- Waynesville Greenway
- Hazelwood area
- Little Tenn. River Greenway
- Jackrabbit Mountain Trails



Success Stories Beyond WNC:

- Virginia Creeper Trail (Abingdon)
- Swamp Rabbit Trail (Greenville)
- Carolina Thread Trail (Charlotte)
- American Tobacco Trail (Durham)
- Trail of the Coeur d'Alene (Idaho)
- York Rail-Trail (Pennsylvania)
- Tweetsie Trail (East Tennessee)
- C&O Canal Trail (PA, MD, DC)

What do Low Stress/Family Bicyclists Need?

- Well-maintained trails
- Maps, online/phone
- Rentals bikes & trailers, repair
- Ride-in, ride-out accommodations
- Bike-friendly merchants
- Diverse lodging options
- A safe, dry place to store their bike overnight
- Historic/cultural attractions
- Water access, bathrooms
- Cool places to eat and drink
- Shuttles to top of downhill rides
- Playgrounds, outdoor activities

Challenges for Low Stress Bicyclists in WNC:

- Lack of facilities/trails
- Conflicts with motorists
- Gaps in greenways
- Terrain & narrow roads

What can you do now?

- Study feasibility of a 10- to 15-mile multi use trail to attract low stress riders
- Travel to meet with Virginia Creeper & Swamp Rabbit Trail stakeholders
- Build/stripe bike lanes on in-town routes
- Develop a regional greenway strategy

4. Economic Potential

The economic analysis portion of this study attempted to estimate the likely present-day impacts of bicycle tourism on Haywood County and Western North Carolina. It also included an analysis of potential impacts. These estimates are derived from local data (where available) in combination with findings from past studies on the economic impacts of bicycle tourism.

The purpose of this economic analysis is to:

- Help County leaders make informed decisions regarding the funding and prioritization of tourism development;
- Identify gaps and information to be gathered in future studies and surveys;
- Create baselines and benchmarks to measure progress of tourism development efforts over time; and
- Identify best strategies to cater to bicyclist spending.

Summary of Findings

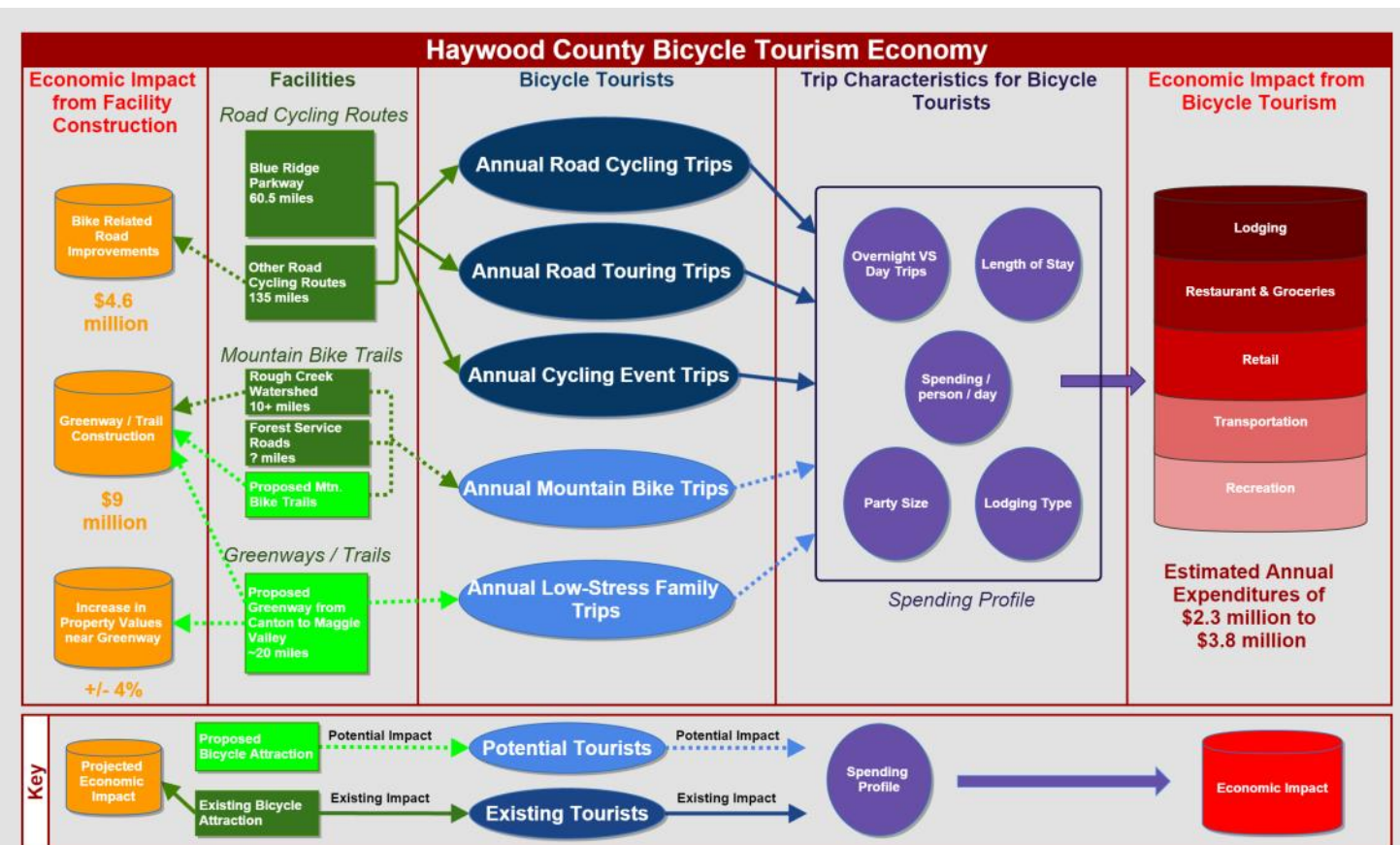
- Based on local tourism expenditure data and visitor profiles for Western North Carolina, it is estimated that bicycle-related travel could currently account for around 2% of total trips to Western North Carolina. This generates more than \$14 million in annual bike travel expenditures and supports 140 jobs.
- There are many miles of rural roads throughout WNC that are popular among local cyclists, but less well known to those outside the region. The number of visitors that currently come to



Haywood County for mountain biking or low-stress family cycling excursions is most likely marginal due to lack of facilities

- The overwhelming majority of existing bicycle tourists in Haywood County are most likely road cyclists that come for recreational day rides, multi-day tours, or events. Many visitors come specifically to ride the Parkway. Due to the distance of the Parkway from most establishments it is difficult to estimate what percentage of cyclists actually spend money in Haywood County.
- Estimating the actual number of bicycle-related trips to the study area is difficult, due to the lack of quantitative data. Additional data collection is needed in order to adequately measure the volume and average expenditures of bicycle-related trips.
- Trip characteristics documented in other bicycle tourism studies provide benchmarks that can be used to estimate existing and future spending impacts for various types of bicycling trips. Key trip characteristics needed to assess the economic impact of bicycle-related travel are shown in purple in Exhibit 4-1. A literature review of bicycle tourism and trail studies from across the county found that the median daily expenditure on overnight bicycle-related trips is \$76 per person.
- Registration and survey data can be used to estimate the volume and spending of visitors to cycling events. This study estimates the Blue Ridge Breakaway generates \$150,000 to \$170,000 in visitor spending each year. The 2014 Lake Logan

Exhibit 4-1: Estimating Economic Impacts of Bicycle Tourism in Haywood County



Triathlon attracted more than 1,300 participants and could have an economic impact of more than \$500,000.

- Bicycle-related on-road improvements will enhance the attraction of recreational road cycling in other areas of Haywood County. Short-term recommendations for shoulder widening, signage and climbing lanes on popular road cycling routes in the Haywood County Comprehensive Bicycle Plan have an estimated cost of \$4.6 million.
- The mountainous terrain and large amount of public land in Haywood County create the potential for additional high quality trails that can attract visiting mountain bikers. The large network of Forest Service roads in the County could also be promoted to attract the growing number of cyclists looking for gravel road rides and gravel grinder events.
- A greenway along the Pigeon River, Richland Creek and Lake Junaluska would connect Waynesville to Canton and serve as a regional attraction for visitors from outside the region, especially families and other groups looking for low-stress cycling excursions without strenuous climbs or vehicle traffic. The greenway could attract thousands of visitors each year and generate up to \$1 million in annual tourism expenditures. The construction of a greenway across Haywood County could also result in a one-time increase in property values within a quarter mile of the facility. The cost of constructing the greenway is estimated at \$9 million.



Each year the Chamber of Commerce surveys participants in the Blue Ridge Breakaway. This data was used as part of Bikes in Beds.

Methodology

Given limited resources and time constraints for this study, a representative survey of cyclists or visitors in Haywood County was not possible. As a result, this study relies heavily upon data and benchmarks from a variety of other bicycle tourism studies conducted in other regions and states. These benchmarks are adjusted where possible with the limited amount of existing information on local bicycle tourism, and using statistics on general tourism spending for Haywood County and Western North Carolina. The estimates developed in this study are often presented as broad ranges and intended to serve as a starting point for more in depth research of the regional bicycle tourism economy with more primary data collection.

Literature Review

Bicycle-Related Trip Characteristics. Information from bicycle tourism studies conducted across the country were compiled and reviewed for information on bicycle-related trip characteristics, including spending per person per day, share of overnight trips, length of stay, lodging type, and travel party size (Exhibit 4-1).

Economic Impacts from Trails. A growing body of research on the economic impact of trail construction on tourism and property values

was reviewed to project the economic impact of a proposed greenway corridor in Haywood County.

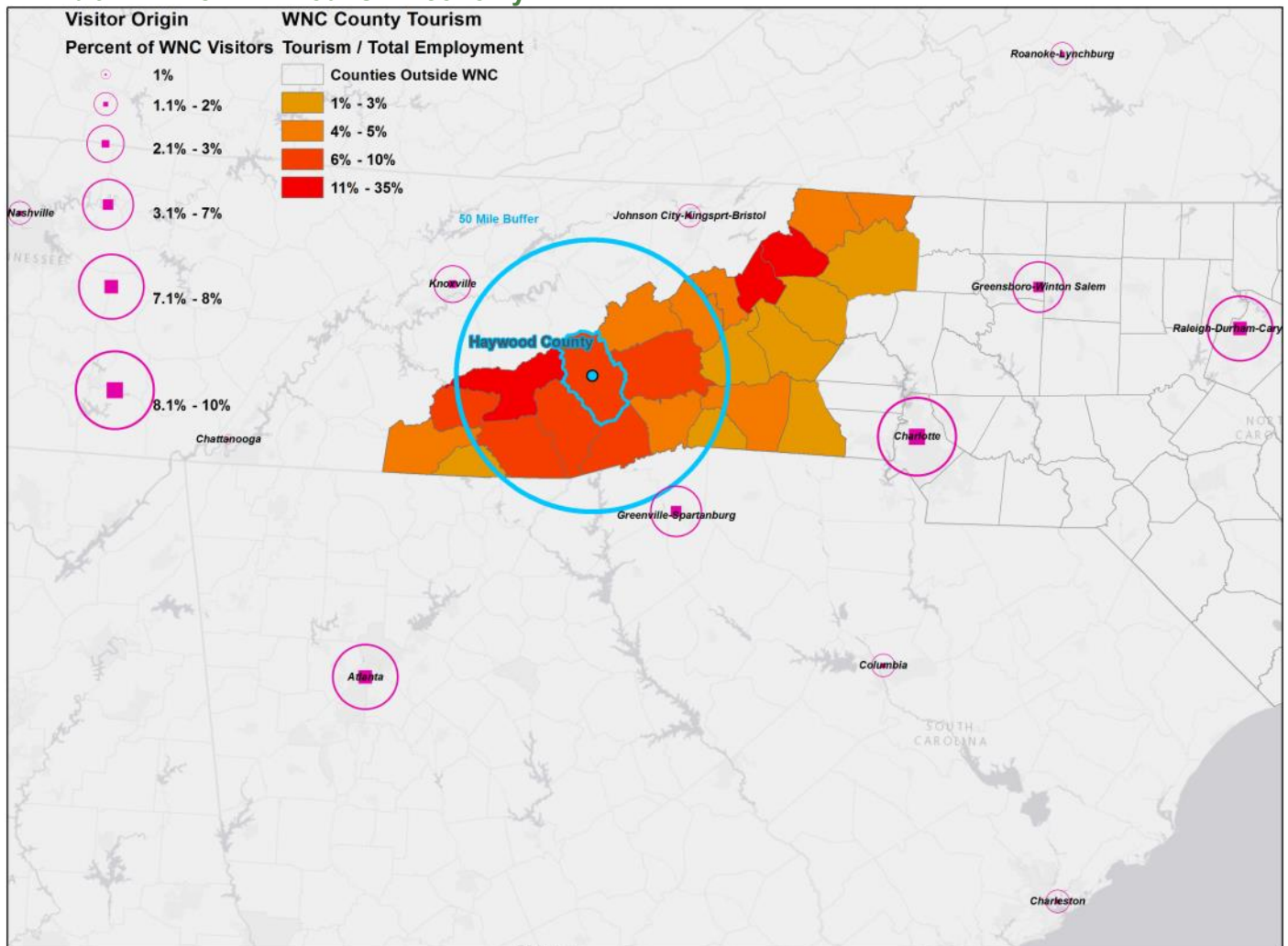
Local Data Collection

Local Tourism Economy. General Tourism Statistics for Haywood County and Western North Carolina provided local benchmarks to compare with trip characteristics from bicycle travel studies across the country. Statistics gathered for Haywood County and the region also provided important estimates of total tourism spending and the percentage of bicycle-related travel to the region (Figure 4-2).

Existing and Proposed Bicycle Facilities. Information on existing and proposed bicycle facilities in Haywood County was collected from the Haywood County Comprehensive Bicycle Plan, the Southwestern Commission Regional Trails Plan, and the Haywood County Parks & Recreation Master Plan.

Bicycle-Related Travel and Spending in Haywood County. While no data currently exists on the total number of recreational cyclists and their expenditures in Haywood County or the Western North Carolina region, interviews with National Park Service staff, local cyclists, and other local bicycle and tourism industry stakeholders were used to collect anecdotal evidence on the existing volume of cyclists and perceived changes over time.

Exhibit 4-2: The WNC Tourism Economy



Event Registration and Survey Data. Survey data from Blue Ridge Breakaway participants provided an excellent source of information on the volume and spending of visiting cyclists participating in this event. Registration data was also used to develop estimates for the economic impact of visitors participating in the Blue Ridge Breakaway and the Lake Logan Triathlon.

Bicycling as a Share of the Haywood Co. Tourism

Haywood County Tourism. Tourism has been an important industry in Haywood County and a mainstay of the local economy. For generations. In 2013 annual tourism related spending in Haywood County was estimated at over \$155 million, supporting roughly 1,610 jobs, which accounts for more than 6% of County employment (Exhibit 4-3). These jobs are primarily distributed across several industries that directly serve tourists: Accommodation & Food Services; Retail Trade; and Arts, Entertainment & Recreation. In addition to the jobs and income supported by the private sector, this economic activity also generates local and state tax revenue.

Tourists are generally defined as visitors that travel greater than 50 miles to a destination. The origins of visitors to Western North Carolina beyond this 50 mile buffer from Haywood County are shown in pink in Exhibit 4-2. Visitors from Charlotte make up roughly a tenth of all visitors to Western North Carolina. The metro areas of Raleigh-Durham-Cary, Atlanta, and Greenville-Spartanburg each make up around 8% of total visitors to the region. Significant markets of origin not shown in this map include Washington, DC, New York, and Orlando. More than 7 percent of total visitors to Western North Carolina are estimated to come from Florida.

Bicycle Tourism in Western NC. Bicycle-related travel makes up a small

Exhibit 4-3: 2013 Total Tourism Impacts in Haywood County & Southwestern Commission Area

2013 Tourism Impacts for Haywood County		Expenditures	Payroll	Jobs Supported	Local Tax Revenue
			\$155,380,000	\$31,480,000	1610
Percent of Visitors to WNC that cite bicycling as a purpose for the trip	1.5%	\$2,330,700	\$472,200	24	\$85,350
	2.0%	\$3,107,600	\$629,600	32	\$113,800
	2.5%	\$3,884,500	\$787,000	40	\$142,250

2013 Tourism Impacts for Southwestern Commission Area		Expenditures	Payroll	Jobs Supported	Local Tax Revenue
			\$721,630,000	\$154,410,000	7,120
Percent of Visitors to WNC that cite bicycling as a purpose for the trip	1.5%	\$10,824,000	\$2,316,000	107	\$498,000
	2.0%	\$14,432,000	\$3,088,000	142	\$664,000
	2.5%	\$18,041,000	\$3,860,000	178	\$831,000

but growing share of the tourism economy in Haywood County and the region. All stakeholders interviewed for this study noted a steady increase in cyclists on the road in Haywood County each year. State and regional research on tourism spending and activities allow us to develop a rough estimate for the upper and lower ends of the bicycle tourism impact in the Southwestern Commission Region (Exhibit 4-3). Based on tourism market research for Western North Carolina and the Asheville region, this study estimates that roughly 1.5% to 2.5% of trips to Haywood County are motivated, at least in part, by bicycling-related recreation. Assuming average bicycle-related trip spending differs only marginally from average spending on general tourism trips, the total annual expenditures resulting from bicycle tourism in Haywood County could range between \$2.3 million and \$3.8 million and between \$10.8 million and \$18 million for the region.

Trip Characteristics

Information from bicycle tourism studies conducted across the country were compiled and reviewed for information on bicycle-related trip characteristics including spending per person per day, share of overnight trips, length of stay, lodging type, and travel party size (Exhibit 4-4). These trip characteristics can serve as important benchmarks that can help us estimate the existing and potential economic impact of bicycle tourism in Haywood County and Western North Carolina.

Overnight Trips vs Day Trips

In a landmark study of bicycle tourism in Oregon, overnight trips made up just over a third of all bicycle-related travel in the state. Travel statistics for general tourism in Western North Carolina suggests a very similar split between overnight visitors and day visitors. When responses from the Oregon study are broken down by activity type, only bicycle touring differed significantly from this pattern, with overnight trips comprising 84% and 72% of independent and guided bicycle touring travel, respectively.

Exhibit 4-4: Bicycle Tourism Trip Characteristic

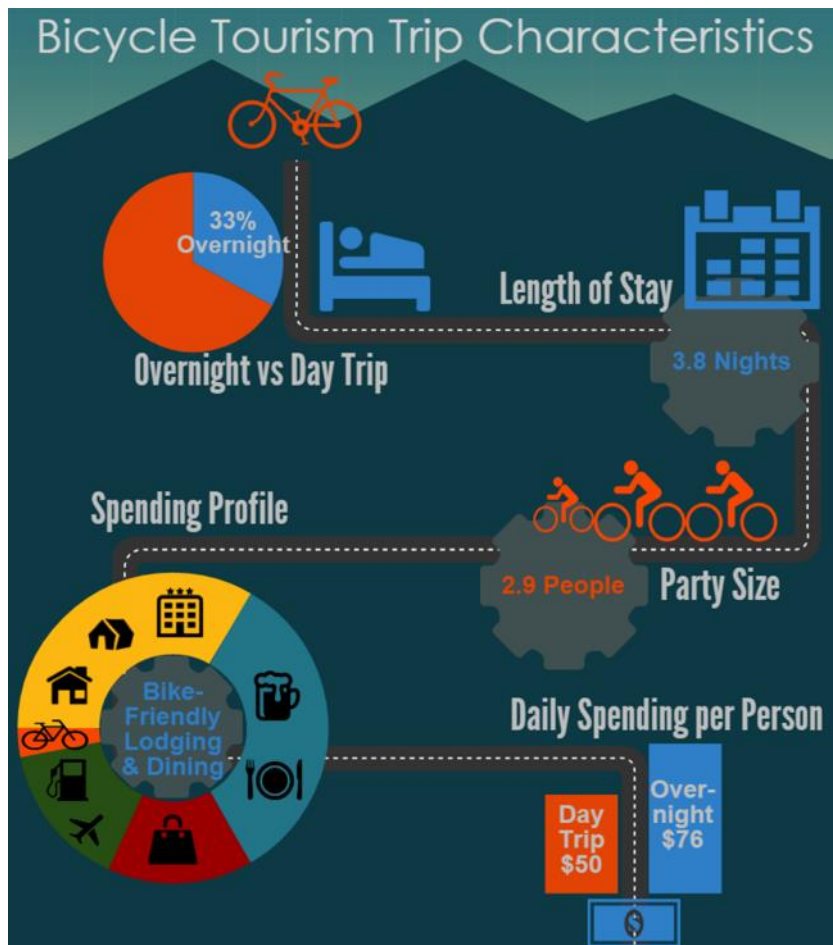


Exhibit 4-5: Average Party Expenditures Per Trip for Travel with Bicycle Activity in Oregon, 2012

	Day Trip	Overnight Trip			All Overnight	Length of Stay
		Hotel	Camp-ing	Private		
Bicycle Trip Average Expenditures	\$116	\$992	\$556	\$400	\$744	3.6
Bicycle Trip Average Expenditures, Comparison to All Overnight Trips (%)	52%	133%	75%	54%	100%	

Lodging Type

The Oregon Bicycle Travel study also documented a variation in trip expenditures based on lodging type. Travel parties that stayed in hotels spent 33% more than the overall average for overnight trips (Exhibit 4-5). Parties that were camping spent at 75% the rate of average overnight stays, and parties that stayed in a private homes spent just over half that amount. On a per day basis, parties on day trips also spend just over half the amount of parties on overnight trips.

Tourism statistics for Western North Carolina indicate that roughly 65% of all overnight visitors stay in commercial lodging, including 5% that stay at camp sites or RV parks. The remaining 35% stay in private homes with friends or family. Blue Ridge Breakaway survey data reveal a very similar split between lodging types for event participants.

Exhibit 4-6: Summary of Bicycle-Related Trip Characteristics

Metrics	Overnight Trip	Day Trip
Average Expenditures (per person per day)	\$84	\$50
Median Expenditures (per person per day)	\$76	\$50
Average Party Size	2.8	2.6
Average Number of Nights	3.7	0

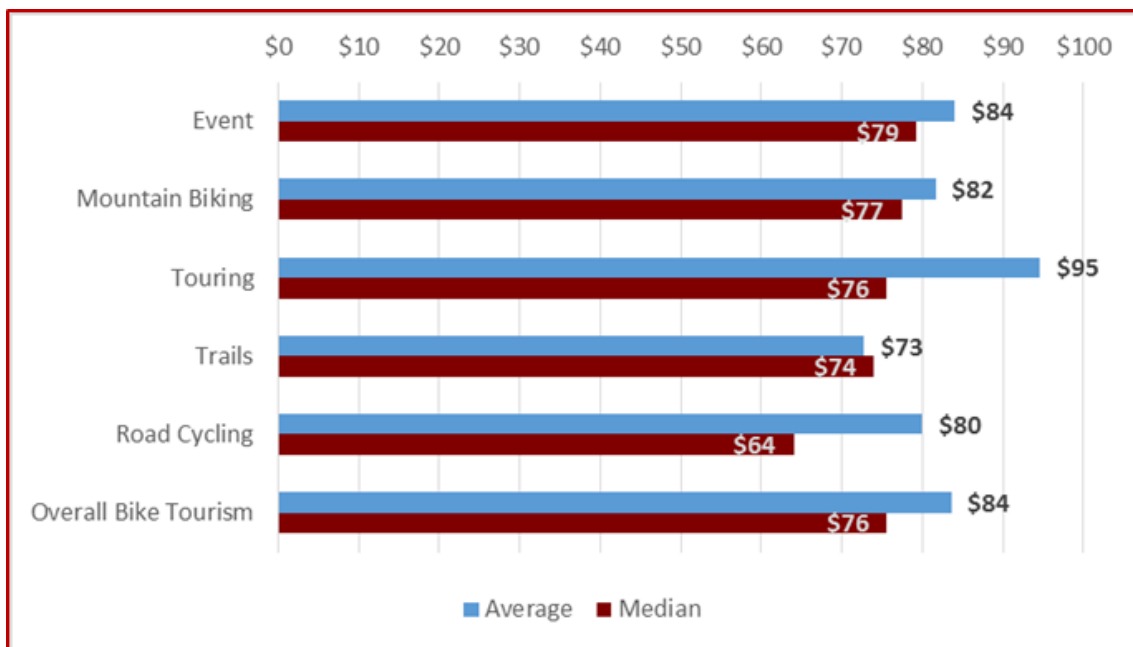
Length of Stay and Party Size

Other important benchmarks collected in the literature review include average nights per trip and average party size. Overnight bike-related trips had an average length of 3.7 nights compared to 2.7 nights for the average tourist. The average party size for bicycle-related trips was 2.8 people compared to 2.0 person for WNC. With these figures we can estimate that the average bike-related trip results in expenditure of \$870 per party. By comparison the average trip expenditure for overnight visitors to Western North Carolina in 2013 was \$577.

Spending per Person per Day

Bicycle tourism spending and tourism spending in general varies greatly depending on whether visitors stay at a destination overnight

Exhibit 4-6: Overnight Bicycling Tourist Spending, per dollar per day



and the type of lodging used. Overnight bike-related trips across 28 studies resulted in average expenditures of \$84 per person per day (Exhibit 4-6). In comparison, average expenditures on day trips averaged just \$50 per person per day.

The literature review was used to develop spending profiles for bicycle tourism trips, as well as spending profiles for specific bicycle tourist categories: Recreational Road Cycling, Touring, Mountain Biking, Trails, and Events. Differences in the average and median level of spending documented across bicycle tourism types were minimal (Exhibit 4-6). The median spending per person per day ranged between \$74 and \$79 for all types of overnight bicycle tourism, except for road cycling.

Lodging usually makes up around a third of total expenditures for overnight bicycle tourism trips. Restaurant, food and beverage expenditures can also make up a third of overnight trip expenditures on average and often exceed expenditures on lodging. Studies in Oregon have found that bicycle-related clothing and gear expenditures make up 15% of total expenditures on overnight bicycle related trips.

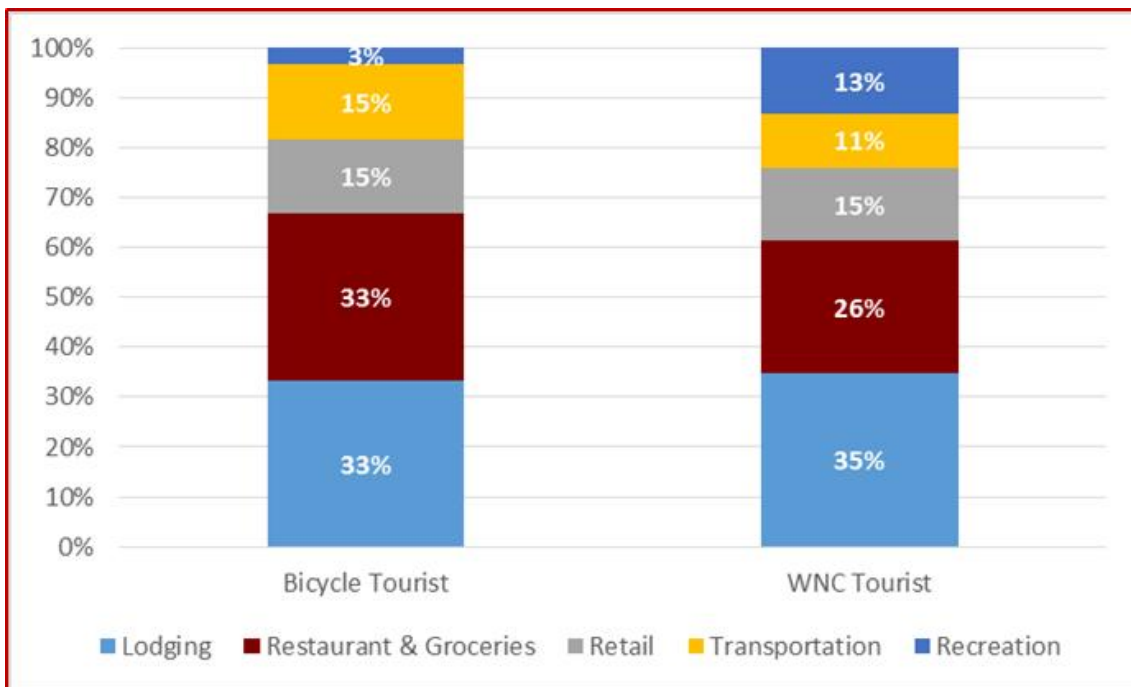
Compared with the average tourist to the WNC region, bicycle tourists tend to spend more on food, and less on recreation, unless they are participating in an event (Exhibit 4-7). These trends suggest that capturing the bicycle tourist dollar may rely heavily on catering to the dining (including breweries & wineries) and lodging preferences of cyclists.

The Bicycle-Related Travel in Oregon study also found that visitors on bicycle-related trips spent more than average visitor to Oregon and have higher incomes than the average tourist.

Recreational Road Cycling and Touring

Road cycling travel can be divided into recreational road cycling and bicycle touring. Recreational road cyclists tend to ride on 30 to 100

Exhibit 4-7: Overnight Trip Spending Breakdown by Bicycle Tourist & WNC Tourist



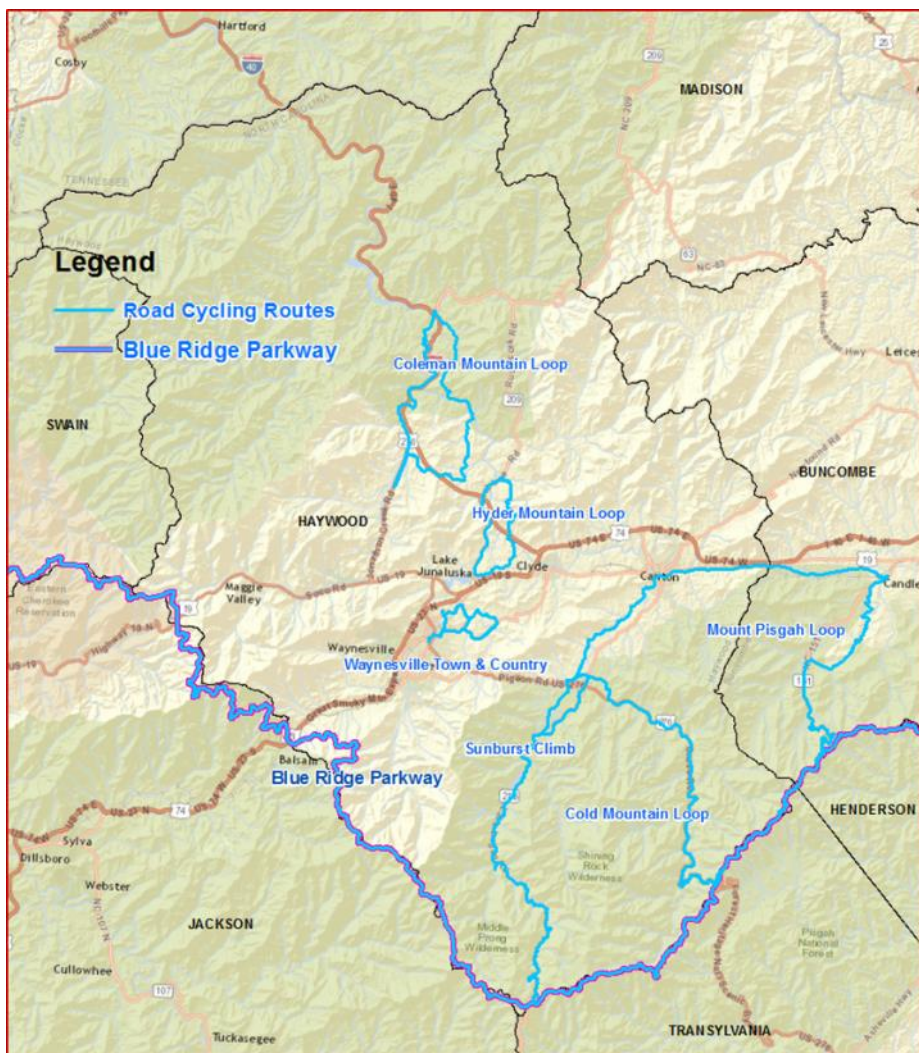
mile loops on scenic rural roads with low traffic volume. Recreational road rides are organized in small groups of two to four people as part of day trips or overnight trips.

Bicycle touring involves multi-day trips on scenic routes, riding from point to point for several hundred miles. Bicycle touring takes place as part of a guided tour or independently in a small group. Cyclists may spend \$2,000 to \$3,000 on guided tours, in addition to personal spending on alcohol, shopping and entertainment. Organized group tours generally include a larger number of participants than independent tours.

Popular road bicycling routes include:

- Blue Ridge Parkway.** The Blue Ridge Parkway is most likely the largest attractor of visiting road cyclists to Haywood County and the region, due to its scenic beauty, challenging and varied topography, and relatively low traffic volumes (Exhibit 4-8). The last 60.5 miles of the Blue Ridge Parkway run along the border of Haywood County, ending in nearby Cherokee.
- Other Popular Roads for Cycling.** Haywood County Bicycle Rides brochure highlights an additional 135 miles of high quality recreational road cycling.
- Regional Road Cycling Resources.** Many scenic and challenging, but lesser known road cycling routes can also be found west of Haywood County. Popular road cycling routes in the Southwestern Commission Region include the state designated Mountains-to-Sea bicycle route and many local cycling loops, such as the “Standing Indian” loop in Macon County.

Exhibit 4-8: Road Bicycling Routes in and around Haywood County



Road Cyclist Types and Volume

Based on limited available data and evaluation of assets, recreational road cyclists most likely make up the largest group of bicycle tourists. While we have some general ideas about the trip characteristics for road cyclists, limited information on the volume of total or visiting cyclists makes it difficult to estimate the economic impact of these visitors.

While the total number of cyclists on

the Blue Ridge Parkway or other popular cycling routes is unknown, National Park Service staff and local cyclists have both noticed an increase in the number of cyclists they have seen on these routes over the past five to ten years.

Opportunities to Increase Road Cycling Volume & Spending

Marketing Existing Road Cycling Attractions. Promoting the many miles of scenic road cycling in Haywood County that is less well-known to cyclists outside the region can attract a larger number of cyclists to Haywood County, and along routes that are much closer to local lodging and dining destinations than the Blue Ridge Parkway. A bike brochure has already been created to raise the profile of these routes. Several rural road cycling routes have also been suggested as candidates for scenic bikeway designation.

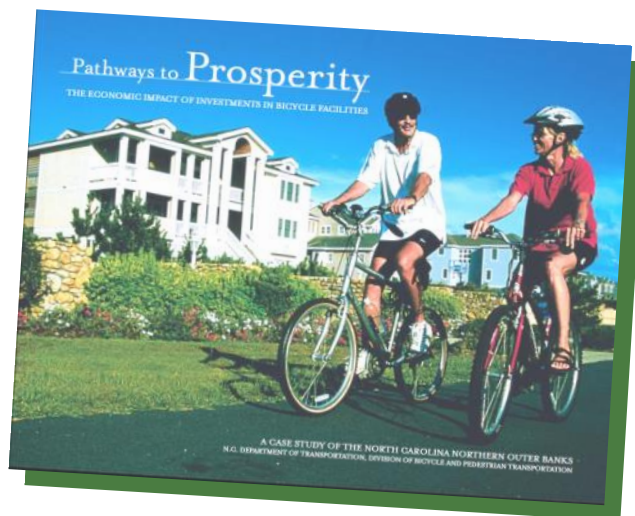
Amenities. While many cyclists may visit Haywood County for the great road rides or as part of a Blue Ridge Parkway tour, they may spend their money elsewhere if they find the local dining, lodging or entertainment options to be lacking. Many bicycle tour groups, for example, make accommodations in Asheville for the last night of their Blue Ridge Parkway tour, rather than Haywood County where the Parkway ends. Existing business can increase local spending by cyclists by offering authentic local lodging and dining options that cater to the needs of cyclists while providing an experience that is unique to Haywood County. Authentic local cuisine and breweries, along with bike-friendly lodging amenities such as secure bike parking and shuttles, have been suggested as strategies to increase local spending by visiting road cyclists.

Bicycle-Related Road Improvements. The road cycling routes and loops throughout the rural areas of Haywood County provide for some of the most scenic bicycle riding in North Carolina. Few of these roads, however, have shoulders or wide outside lanes to accommodate bicyclists. Adding shoulders, wide outside lanes and signage could help to broaden the appeal of these attractions for visiting cyclists.

Spending on Bike-Related Road Improvements

Adding shoulders or wide outside lanes to major corridors connecting the popular cycling routes in the county is highlighted as a priority in the Haywood County Bike Plan. Corridors identified in the Bike Plan for widened shoulders include NC 209, US 276, and NC 215. Federal regulations and designations associated with the Blue Ridge Parkway limit the feasibility of adding shoulders, bicycle lanes, or climbing lanes to the existing route.

The total cost of short-term bicycle facility recommendations on rural roads in the Haywood County Comprehensive Bicycle Plan is estimated at \$4.6 million. A study of bicycle tourism in the Outer Banks of North Carolina found that annual economic impact of cyclists was nine times greater than the one-time construction expenditure on



A study conducted by NCDOT and NC State University on the Outer Banks identified a 9-to-1 return on investment from bicycling-related facility investments.

bicycle facilities in the region.

Bicycling Events

Bicycling events attract all types of on- and off-road cyclists. Popular types of bicycle events include road races, gravel grinders, cyclo-cross events, greenway challenges, and triathlons. Many visitors stay overnight to make preparations for the event and attend related events such as awards ceremonies, dinners and other activities outside of the actual competition. Events can also attract spectators that come with participants or on their own, depending on the size of the event. Bike-related events also serve a marketing function by featuring cycling routes that attract participants back to the region for recreational road rides or tours. In comparison with other types of bicycle-related travel, event participants may spend more money at their destination on recreation in the form of event fees and related expenses.

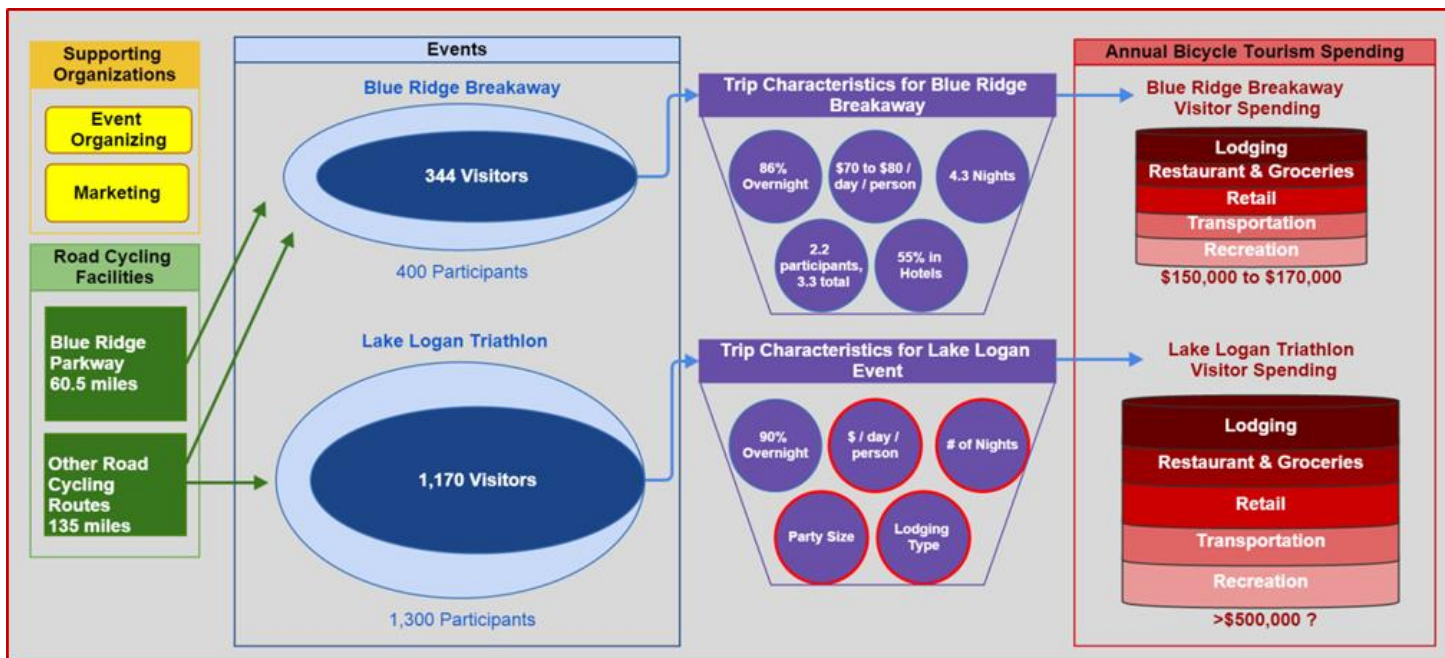
Existing Cycling Events

There are currently two bicycle-related events that take place in Haywood County, the Blue Ridge Breakaway and the Lake Logan Triathlon (Exhibit 4-9).

Blue Ridge Breakaway. The Blue Ridge Breakaway is an annual cycling event organized by the Haywood County Chamber of Commerce that features four routes of varying length and difficulty. All routes begin at the Lake Junaluska Conference and Retreat Center and feature some of the best cycling in Haywood County, with more challenging routes climbing all the way to the Blue Ridge Parkway.

We can estimate the economic impact of the Blue Ridge Breakaway with the help of registration and survey data. The Blue Ridge Breakaway attracts roughly 400 participants each year. Based on survey data collected from the 2010 Blue Ridge Breakaway, roughly 86% of

Exhibit 4-9: Estimating Visitor Spending at Bicycling Events in Haywood County



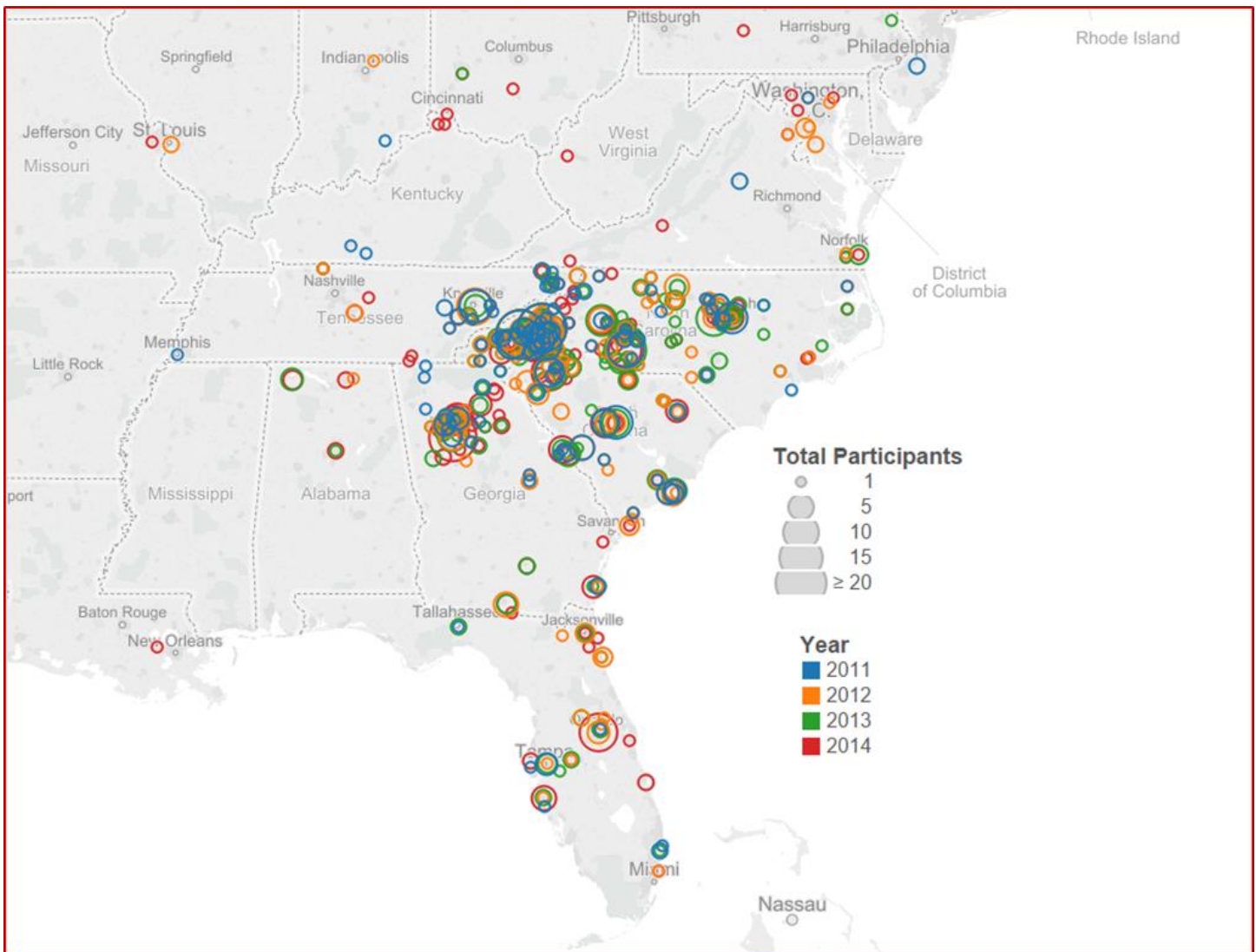
participants are overnight visitors and usually accompanied by one non-participant that brings the average party size to 3.3. The survey also found that visitors spend 4.3 nights on average. From this information we can estimate visitor volume at 2,122 person-days.

Although we do not have information on spending by participants, information from the literature review suggests that visitors on bike-related trips spend an average of \$84 per person per day on average (Exhibit 4-9).

Median spending is lower at \$76 per person per day. As a conservative estimate this study assumed that spending per person per day falls between \$70 and \$80. Under these assumptions, visitor spending generated by the Blue Ridge Breakaway would roughly fall between \$150,000 and \$170,000 each year.

The Blue Ridge Breakaway also serves as a venue to market the road cycling routes to participants who return to the region for recreational road rides or tours. Many cyclists also reported visiting Haywood County prior to the Blue Ridge Breakaway to train for the event. Exhibit 4-10 illustrates the markets from which Breakaway

Exhibit 4-10: Map of Blue Ridge Breakaway Participants by Residence, 2011-2014



participants travel.

Lake Logan Triathlon. In 2014 the Lake Logan Triathlon featured three events over two days in August that attracted more than 1,300 participants. All three events included a swim course on Lake Logan, a run course along the river, and a bike course of varying lengths on roads of Haywood County between Lake Logan and Canton.

While the economic impact of the Lake Logan Triathlon may be larger than that of the Blue Ridge Breakaway, a lack of survey information on participants makes it difficult to accurately estimate the total amount of visitor spending. If we use the same assumptions from the Blue Ridge Breakaway on trip characteristics for participants, the visitor expenditures at the Lake Logan Triathlon in 2014 would be estimated at more than \$500,000.

Opportunity for New or Expanded Events. The Lake Logan Triathlon was expanded in 2014 to include the Lake Logan Half event, which sold out, attracting over 500 additional participants. Expanding the Blue Ridge Breakaway to a multi-day event with more categories has been one strategy proposed to attract more visiting cyclists, increase the number of overnight trips, and raise the profile of road cycling in Haywood County. New and existing event survey data can help inform decisions about whether and how to expand an event such as the Blue Ridge Breakaway.

New events could also help to popularize off-road trails and gravel roads in Haywood County. A gravel grinder event, for example, could not only attract several hundred participants, but also raise awareness among off-road cyclists to the many miles of US Forest Service roads in the County. The Pisgah Monster Cross event, a 70 mile loop that climbs gravel roads to the Blue Ridge Parkway and back down, attracted roughly 200 participants to Brevard in 2014.

Mountain Biking

Off-road cyclists include mountain bikers, as well as cyclo-cross riders and a growing subset of other cyclists that are taking their bikes to gravel roads and other unpaved paths. Off-Road cycling can take place on single track mountain bike courses, multi-use trails, gravel roads or some combination of these facilities. Mountain bikers generally reach their destination by automobile and ride for several hours at a time on mountain bike loops. These activities may be part of day trips or overnight trips.

- **Rough Creek Watershed Mountain Bike Trails.** The area north of Canton known as the Rough Creek Watershed provides municipal water supply for the Town of Canton. The 830-acre preserve has more than 10 miles of designated trails that are open to mountain biking (Figure 9). The popularity of these trails has been limited due to the steep, strenuous climb required to reach the mountain bike trails. A new trailhead at a higher elevation has been proposed to address this issue. Given the limited appeal of the existing facilities and the nearby supply of high quality mountain biking it is assumed that the number of visitors

attracted to the Rough Creek Watershed for mountain biking is marginal at this time.

- **Regional Mountain Bike Trails.** The Rough Creek Watershed trails also have limited appeal for mountain bikers due to the large supply of high quality mountain biking trails in nearby areas, such as Tsali Recreation Area, Bent Creek, DuPont State Forest, and the growing number of trails in Pisgah National Forest around Brevard. Other recently constructed mountain bike trails in the Southwestern Commission Region that are growing in popularity include the Hanging Dog trails outside of Murphy and the Jackrabbit Mountain Trails in Clay County. Last year the Jackrabbit Mountain Trail system attracted 12,500 visitors, or 890 visitors per mile of trail.
- **US Forest Service Roads.** While the large network of unpaved roads on US Forest Service lands are not currently attracting visiting cyclists to Haywood County, they represent a large untapped resource that could attract visitors looking to explore Pisgah National Forest by bike and free from vehicle traffic.



The Jackrabbit Mountain Bike & Hiking Trails in Clay County attracted more than 12,500 visitors in 2014.

Opportunities for New Off-Road Trails. The mountainous terrain and large amount of publicly held land in Haywood County and the greater WNC region provide great potential for the development of new mountain bike trails and gravel road rides. Haywood County will need to find a way to differentiate its existing and future off road facilities from others in the region if they are to attract new visitors.

Low-Stress / Family Cycling

There are several existing municipal trails in Haywood County, but all are too small to provide opportunities for low-stress / family cycling that may attract visitors from outside the county (Exhibit 4-11).

The International Mountain Bicycling Association published these tips for attracting mountain bikers.

Tips for attracting mountain bikers....



1. Provide and promote trails for all abilities
2. Develop sustainable singletrack
3. Showcase the natural beauty
4. Good signs and maps
5. Help the community understand MTB
6. Get your community involved
7. Seek support from local shops
8. Provide lodging with cyclists in mind
9. Photograph your trails professionally
10. Promote other amenities in the area
11. Create package deals
12. Woo the media
13. Quantify your success

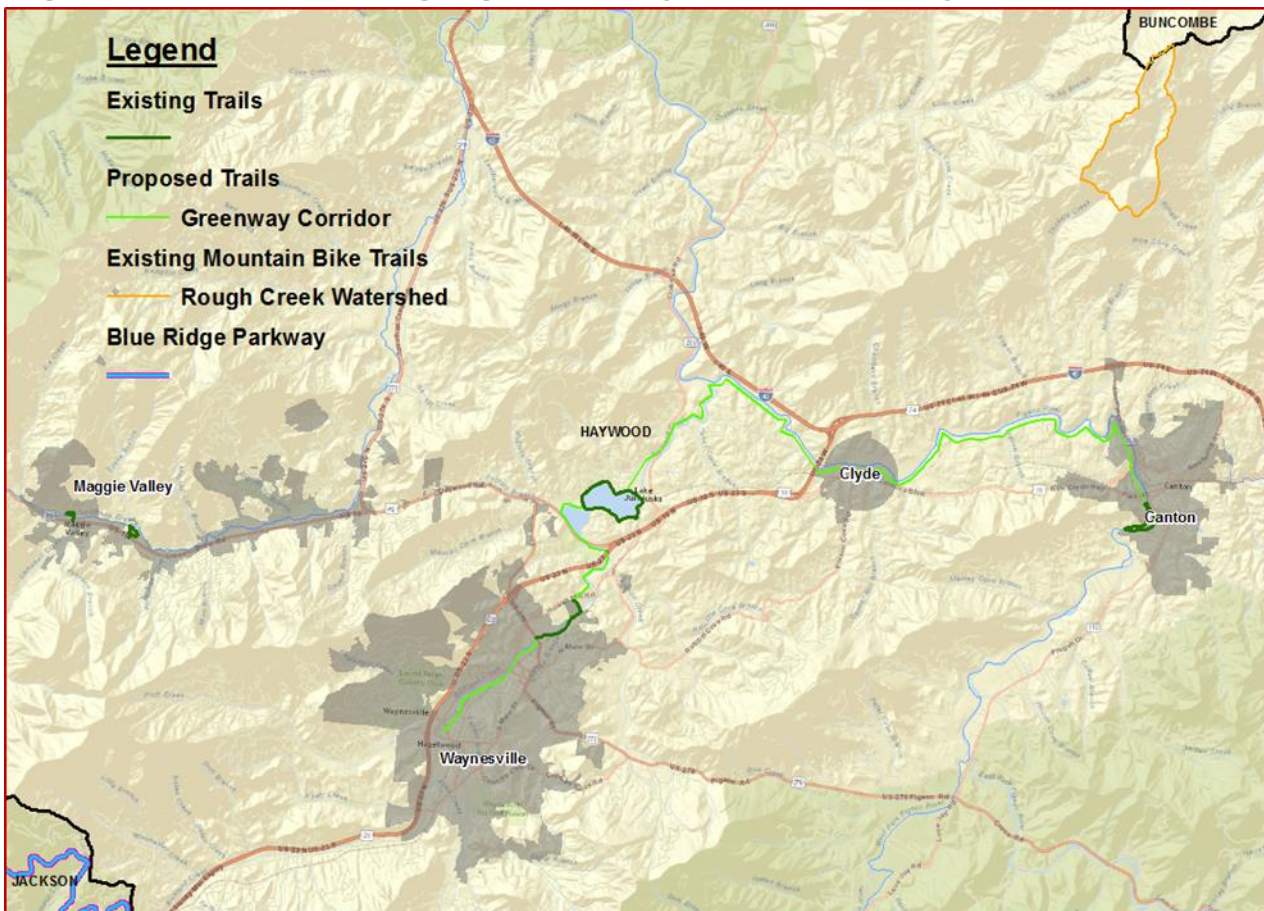
Several existing greenways in the Southwestern Commission Region that offer opportunities for low-stress or family cycling include The Little Tennessee River Greenway in Franklin, the Oconaluftee River Trail in Cherokee, and the Lower Deep Creek Trail outside of Bryson City.

A trail connecting the communities of Haywood County from Waynesville to Canton would create a corridor of nearly 20 miles along the Pigeon River, Richland Creek and Lake Junaluska. This greenway corridor would be an invaluable recreational resource for residents, but also a regional attraction for visitors from outside the region, especially families and other groups looking for low-stress cycling excursions without strenuous climbs or vehicle traffic.

Such a greenway would be comparable in size to the proposed Ecusta Rail Trail that would be nearly 20 miles between Brevard and Hendersonville. Based on data from similar trails, The Ecusta Rail Trail Economic Impact Analysis projected that the Ecusta Rail Trail could attract 1,000 out-of-town visitors per mile of trail, representing roughly 20,000 new visitors each year.

Given the high profile of the Ecusta Rail Trail in comparison to the proposed Haywood County greenway, this study estimates out-of-town visitors using a more conservative range of 500 to 1,000 out-of-town visitors per mile of trail. Based on these assumptions, anywhere from 8,000 to 16,000 visitors could be attracted to Haywood

Figure 9: Proposed & Existing Segments of Haywood Co. Greenway



County to recreate on a 16.5 mile greenway running from Canton to Waynesville.

If we estimate that the average out-of-town visitors to the Haywood County greenway corridor would spend \$70 to \$80 per person per day, total annual visitor expenditures would reach somewhere between \$500,000 and \$1.3 million. Additional bicycle tourism dollars may also be attracted with the help of events that use this proposed greenway for races and other non-competitive events.

Greenway Construction Spending. The Haywood County Parks & Recreation Master Plan estimates that a four-mile stretch of greenway between Canton and Clyde would cost \$2.3 million or approximately \$575,000 per mile. Construction cost estimates for the Ecusta Rail Trail proposed between Brevard and Hendersonville ranges between \$495,000 and \$670,000 per mile.

More recent estimates of trail construction costs in the Southwestern Commission Regional Trails Plan offer benchmarks of \$150,000 per mile for unpaved trail to \$600,000 for paved trail. If we assume that paved trails are constructed at a rate of \$600,000 per mile, \$9 million dollars would be spent to construct the 15 miles of paved trail needed to connect the existing greenways in Canton, Lake Junaluska and Waynesville.

Projected Real Property Value Impact from

Greenway. Another probable economic impact from greenway construction is an increase in real property values in areas adjacent to the greenway corridor, which would most likely be perceived as an amenity. This property value increase would provide gains to homeowners in the form of increased household wealth and to local jurisdictions in the form of higher property tax revenues.

A greenway corridor connecting the towns in Haywood County would represent a major recreational amenity that would increase the demand for land and housing around it. A review of studies in this field suggests that properties within a quarter mile of greenways can see increases in value that range from less than 1% to over 10%.

With the exact path and characteristics of the trail still uncertain, one can only make a rough estimate of the property value impact at this juncture. Using precedents from similar studies, it is assumed that the construction of a Haywood County greenway from Canton to Maggie Valley will result in a one-time four percent increase in the value of properties located within a quarter mile of the trail. This resulting property value impact would be expected to increase household wealth for property owners near the greenway and generating additional property tax revenues for local governments.



The existing sections of the Haywood Greenway could be part of a trail system that links Waynesville to Canton. The completed greenway would cost approximately \$9 million to create a trail with bicycle tourism potential.

5. Branding Pillars & Promotion

Successful bicycle tourism relies on two main components: building a strong bicycling destination; and utilizing effective promotion. Further, there are two main components to building a strong bicycling destination: offering quality cycling opportunities and Bolstering/ tailoring the hospitality offered to bicycling visitors.

This section of the report looks at creating these quality cycling opportunities, within the context of a scenic bikeway type program, including utilizing effective promotion to entice potential visitors to use and enjoy. It also summarizes emerging trend in bicycle marketing.

There are numerous examples of local or regional efforts to build a community into a bicycling destination. For the purposes of Western North Carolina and Haywood County, the best examples are those that operate on a larger state or national level, such as the Oregon Scenic Bikeways and New Zealand Cycle Trail.

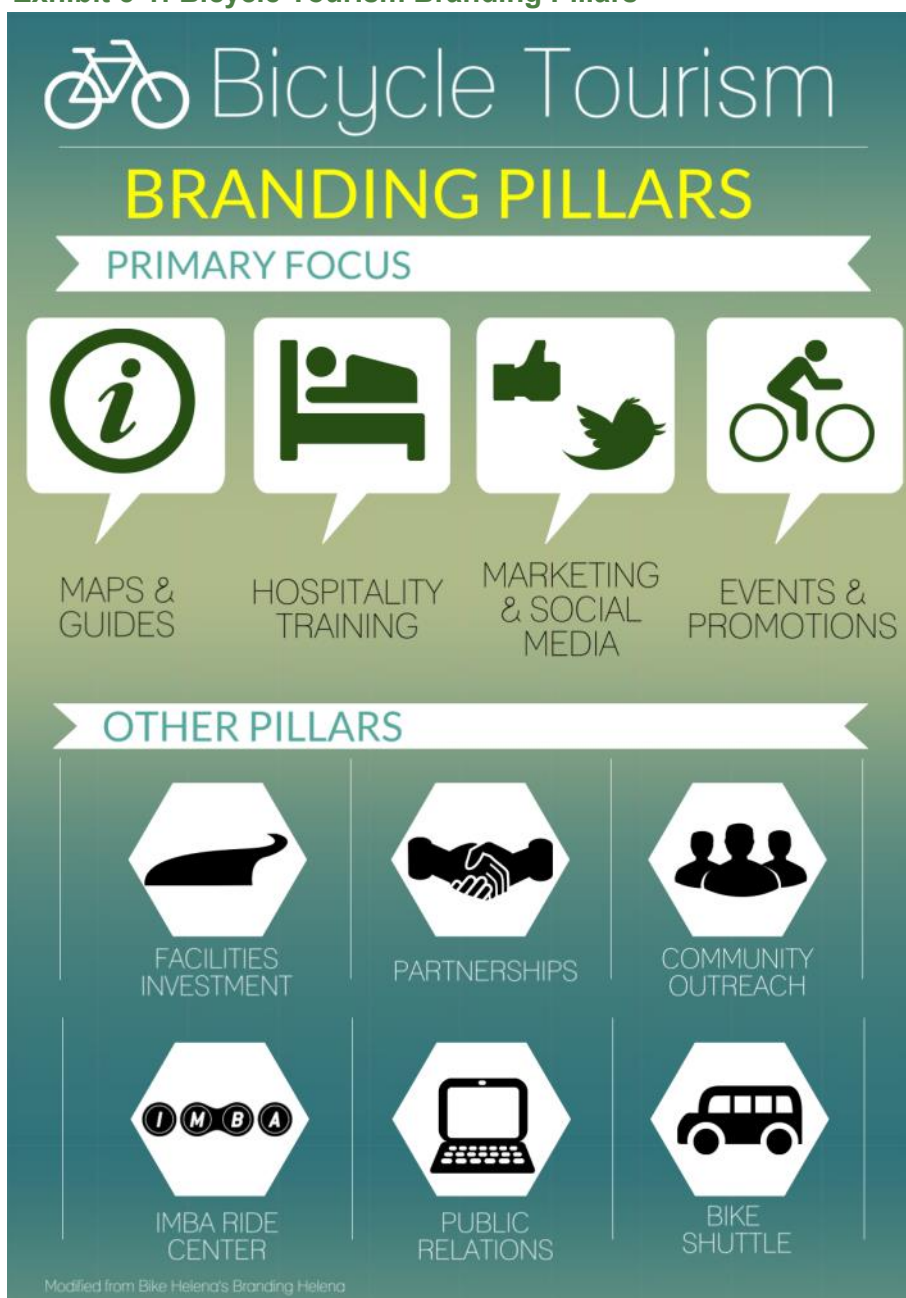
Branding Pillars

Based on the evaluation of opportunities for Haywood County and Western North Carolina, the following short- and long-term recommendations are made for various stakeholders to consider. These are titled branding pillars as they are what successful bicycle tourism is built upon.

Primary Focus

- Maps & Guides:** Catalog bicycling assets. Log all roads, gravel roads, mountain biking trails that currently exist. Gather all electronically-mapped bike routes (i.e existing on RideWithGPS.com, Map-MyRide.com, etc.). Create separate bicycling website for Haywood County that targets bicycle visitors. Map, sign, and promote three signature rides in the area.
- Hospitality Training:** Conduct specialized outreach or training to businesses and accommodations about how to be bicycle-friendly. This could be printing of materials, hosting a half-day workshop or taking participants to popular trails or bike routes to ride them.

Exhibit 5-1: Bicycle Tourism Branding Pillars

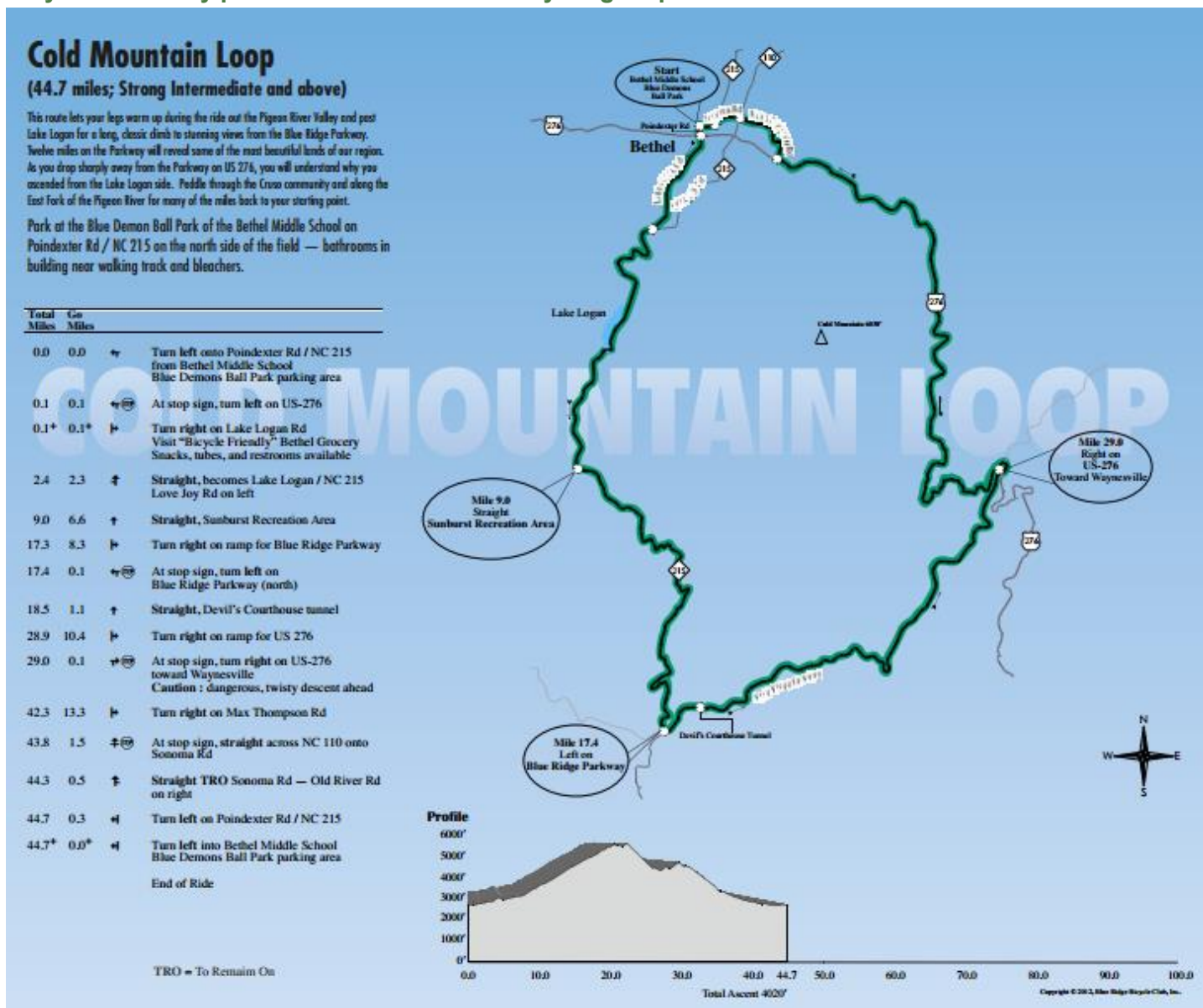


- **Marketing & Social Media:** Capitalize on the existing assets in Haywood County. Identify complementary activities that can be easily partnered with bicycling in marketing and media outreach. Survey local bicycling event participants to learn where they came from, why they chose that ride, etc. Invest in high-quality bicycling photography.
- **Event Promotion:** Continue to promote existing events in feeder markets and in targeted publications. Determine if events such as the Blue Ridge Breakaway should be expanded to two days to entice participants to spend another day in the area.

Secondary Focus

- Identify bicycling partners (bicycle advocacy groups, bike shops, bike groups/teams, event organizers) in Haywood County and all feeder markets.
- Install bike racks and fix-it stations in strategic locations around Haywood County.
- Map, sign, and promote three signature rides in the area.

Haywood County promotes local on-road bicycling loop with a brochure that includes several routes.



Promotion Recommendations

The second important component of a successful scenic bikeway initiative is utilizing effective promotion. This is the front-end or consumer-facing piece of the puzzle, and is extremely important in terms of reaching out to potential visitors.

This chapter examines a variety of promotional options that are recommended for Western North Carolina and Haywood County, organized along a sliding scale of relatively inexpensive projects that can be completed quickly to larger, more long-term projects.

1. Identify and Outreach to Feeder Markets. It is highly likely that Haywood County and other WNC counties are already aware of the best or most successful tourism-related feeder markets, in order to draw visitors into the region for other tourism-related activities. There is likely to be a large cross-over, in terms of which feeder markets will produce the largest ROI for bicycle-related tourism. In terms of which markets to reach out to first, it is the recommendation of this report to reach out first to these current feeder markets for bicycling tourism purposes.

Local bike shops and bike groups within these feeder markets will have a broad reach to a diverse cross-section of potential bicycling visitors. Relationships should be established with these shops and groups in order to promote their consideration of the region or a particular county as a bicycling destination. As routes are developed and mapped, these shops and groups can be an effective partner in distributing information, raising awareness, and creating excitement. Similarly, bicycling event promoters who operate in or out of any of these feeder markets can be effective partners in promoting the region. As Western North Carolina identifies its “top” rides, another effective tool will be to encourage and empower event promoters (both from within and outside of the region) to highlight these rides and the local businesses and communities.

2. Create Web-Based Maps. Increasingly, bicycling visitors are turning almost exclusively to web-based information, in order to scout and plan their bicycling vacations. Non-web-based information can still be useful for bicycling visitors who find themselves in an area without any specific plans, but web-based information will provide the highest ROI in terms of advance planning. Cycling visitors are looking for maps and GPS tracks of quality, curated routes. Once the region or a county has created a scenic bikeway type program and identified these high-quality routes, the routes should be carefully mapped and uploaded into an online format. Websites such as RideWithGPS.com can help facilitate online creation of high-quality web-based maps, complete with their own searchability. This report recommends starting with a small number of very high-



Promoting Haywood County and WNC in feeder markets such as Charlotte and through the Charlotte Area Bicycle Alliance (CABA) social media sites are easy outreach methods to increase bicycle tourism.

Photo: CABA Facebook Page

quality routes, which can be marketed as the “Best of Western North Carolina.” Further routes and online mapping can be developed over time, to provide a wide-variety of options for bicycling visitors.

3. Create Various Itineraries for Bicycling Visitors. To further assist bicycling visitors in planning their trip to the area, craft several potential and inspirational itineraries for a variety of bicycling-related vacations. These can be weekend trips to full-week-long trips, focused on any type of bicycling, including a variety of other activities. They should be geared toward a specific niche and as detailed and specific as possible, while also remaining editorial in content to allow visitors to start dreaming. Do not be afraid to call out specific businesses that bicyclists should visit, particularly if these businesses are known to be bicycle-friendly, as these specifics will give bicycling visitors a definite place to start their planning process. Provide all contact information for identified businesses and always point visitors back to Haywood County and WNC for further information.

4. Collect High-Quality Visual Assets. One of the best ways to inspire and excite potential visitors is to show off the bicycling opportunities in high-quality photography and videography. Visitors will look to this imagery to visualize an area ahead-of-time and gain a


The website for New Zealand’s Otago Central Rail Trail includes itineraries for various trips.

Planning

SHARE


POPULAR ITINERARIES

Which way to go? Where to start/stop/stay? How long will it take you? You choose. You can decide if you want to cycle the whole trail – or select a part of the Trail. Decide what you would like to see and do, and the distances you want to travel. You can arrange your own trip – or there are helpful independent Trail operators who can organise a trip that will suit you.




FIVE DAYS OR MORE

A 5-Day (or more) trip (2.5 - 3 hours cycling per day) allows you even...[READ MORE](#)



FOUR DAY TRIPS

A 4-day trip allows you to travel at a more relaxed pace, and to spend...[READ MORE](#)



THREE DAY TRIPS

Most people who bike the whole length of the 152 km Trail allow themse...[READ MORE](#)

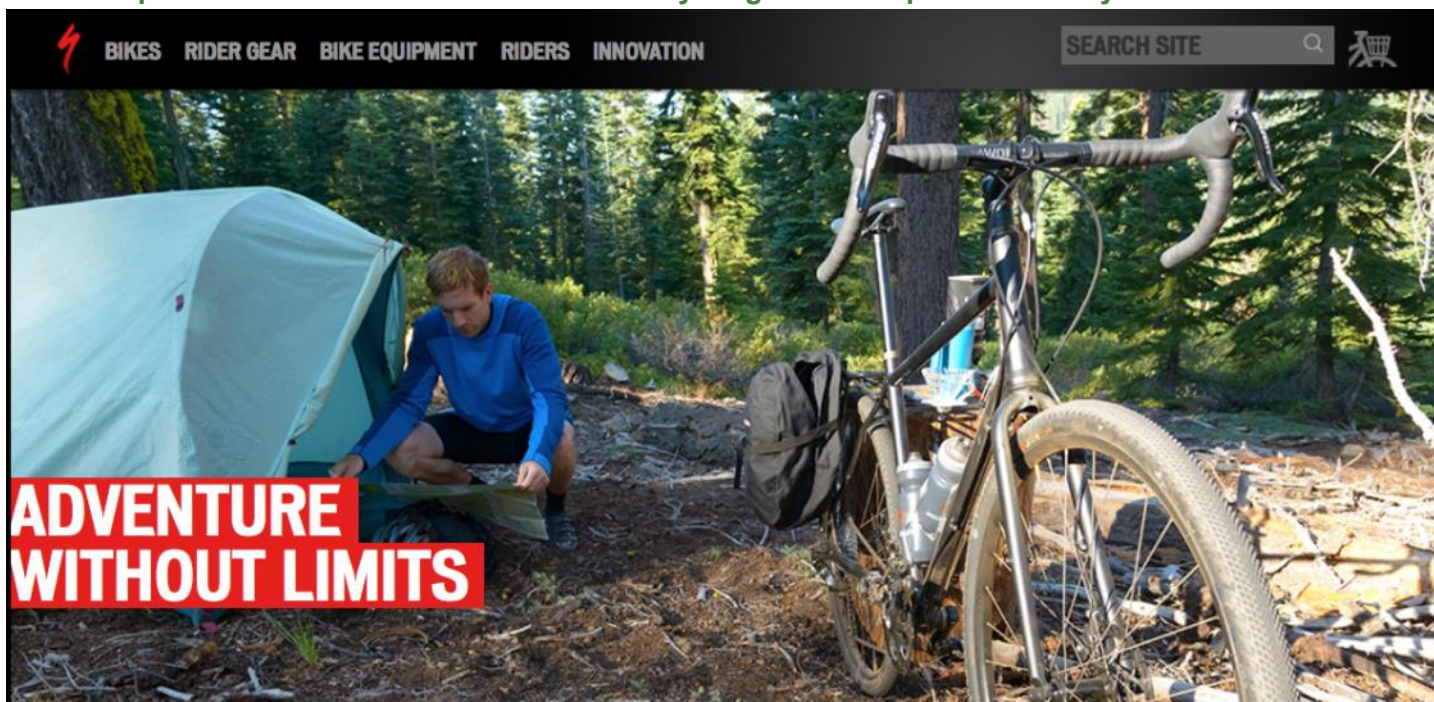
sense of what their experience might be like. Thus, it's important to showcase all of these potential experiences - both on and off the bicycle. Bicycling visitors will be looking for a great ride, and then they will be looking for a great place to eat or drink or participate in other activities. Depending on the particular bicycling niches which Haywood County decides to reach out to, this imagery could include: bicyclists in full-kit in the middle of a difficult ride, bicyclists in street clothes on a more mild ride, bicyclists drinking coffee or eating lunch or participating in other tourist activities after or during a ride, etc. This report highly recommends budgeting for a professional photographer to take high-quality images of a variety of bicycling visitors participating in a variety of riding and other related activities during all seasons.

5. Create a Bike-Specific Guide or Website. A long-term promotional project which can yield great results is to create and then distribute a bicycling-specific guide or website. This could be a brochure or other publication full of riding information and other tourism activities, which could be sent to feeder markets or interested parties, or which could be made available to existing visitors at hotels or visitor centers. This could also be a separate website, distinct from any Haywood County-branded tourism website, which would provide this same information in an online, digital format, such as RideOregonRide.com.

Emerging Trends with Potential Impact on Western NC

For the last 30 years, bicycle marketing and production has been centered around speed and performance. This is due in part to the athletic and physical sport aspect of bicycling. Designs were created for professional cyclists and trickled their way down to the consumer market.

An example of a modern adventure-focused bicycling ad from Specialized Bicycles.



Things are changing. Within the last 5 to 7 years many cycling brands have also entered into a new class of bicycle called the “adventure bike” or “all-roads bike.” The primary purpose of these bikes isn’t speed, but exploration. Bicycling marketing has also shifted from focusing on pure performance to the experience of travel. Bicycling marketing is urging its customers to “get out there” (Blackburn), to go AWOL (Specialized) and find their # AdventurebyBike (Salsa Cycles). Bicycling is using the metaphors, language and imagery of the tourism and travel industry to inspire a new breed of bicyclists to explore beyond the town line and be travelers and tourists.

Other Trends in Bicycling

Here are three current trends from the bicycle industry that are relevant to tourism destinations.

Gravel Grinder / All-Roads / Adventure Bike. One of the most popular trends in the bicycle industry is the “gravel” bike. It has the appearance of a drop bar road bike with the major differences being in its ability to use wider all-terrain tires and slacker geometry for more stability on gravel and dirt roads. In addition, many bikes in this class utilize disc brakes for improved all weather braking. Prior to the development of this type of bike, most dropped bar road bikes had limited tire clearance and could only be ridden on paved roads.

The trend began around 2010 with early adopters from such brands as Salsa and Surly. Since then, every major bicycle brand has followed suit with their own style of bike. Even brands such as Specialized and Trek, who have heavily targeted the road bike market has branched into this new niche. It is important to note that this trend at the moment seems to be more popular with Millennial riders than Baby Boomers.

- **What it Means:** From a bicycle tourism standpoint, it opens up the range of possible roads to market to the visiting bicyclists. As a destination, you are no longer limited to just viewing paved roads as an asset. Forest service roads, soft surface trails, dirt farm to market roads and logging roads become marketable assets. Rides and itineraries can be designed that feature these undeveloped roads. “Gravel grinders” or mass participation rides that occur on these dirt roads are among the fastest growing types of events in bicycling today. Undeveloped roads can either be the main attraction of a ride or be used as connectors between paved routes.

Fat Bikes / Bikepacking. Just as road bikes have seen an increase in tire width, so have mountain bikes. Typical mountain bikes have widths from 2 to 2.5 inches. A new class of all-terrain bike has emerged with even wider tires known as “fat bikes.” Fat bike tires range anywhere from 3 to 4 inches and are run as low pressures as 3 to 5psi. The visual effect is that of a monster truck of bicycles. Fat



One of the most popular trends in the bicycle industry is the “gravel” bike. Several Forest Service roads in Western NC are ripe for promoting this type of riding.

Photo: Path Less Pedaled

bikes excel in snow, sand and general rocky terrain. The ultra wide high volume tires give the rider increased traction on surfaces that would be difficult for even traditional mountain bikes.

When they were first introduced, they were regarded as an unusual curiosity. Since then, every major bicycle brand has brought their own fat bike to the market. Initially seen as primarily for snow and sand riding, they are slowly being adopted on mountain bike trails. Fat bikes have also brought about a new iteration of self-supported bicycle touring known as “bikepacking.” Bikepacking combines these new bikes with ultra-light backpacking principles and ride bikes and camp into areas where traditional bikes can not go.

- **What it Means:** Pre-existing mountain bike trails and dirt/gravel roads can be marketed to fat bikers. Multi-day trips into the wilderness on rough roads is another product that can be developed. For destinations that receive snow, fat bikes allow bicycling to extend into a four season activity. Because fat bikes are a relatively new phenomena best practices for fat bikes on cross country ski trails and snowmobile routes are still being established. However, some destinations which see four season outdoor recreation like Bend, Oregon and Winthrop, Washington are already working on purpose-built trails for fat biking in the snow. Since fat bikes generate a lot of curiosity, they are a great rental offering for accommodations and resorts that have close access to outdoor recreation opportunities. Although there are some organizational barriers, this might be an attractive activity to promote along the Blue Ridge Parkway when it is closed via gates to motorized use but is still open for hiking and bicycling.

E-Bikes. Another trend to watch is the emergence of electric-assist bicycle or E-bikes. Currently E-bikes are a growing segment of the urban commuting and urban exploration markets. There is a business in Asheville that offers tours of the city via e-bike. Speculation in the industry is that e-bikes may soon emerge as a viable option for trail riders and long-distance recreational riders that may have some trepidation about riding in places like Western North Carolina where mountain climbs can be intimidating.

E-bikes could grow into a more viable option for bicycling for older adults living in small towns who may have limited physical strength to ride throughout the community.

- **What it Means:** For bicycle tourism it’s hard to tell where e-bikes may fit. Given the context of Western NC it is something to watch as more long-distance e-bikes could emerge and allow people to enjoy the scenery on the area’s roads without as much effort dedicated to steep climbs. A business could emerge in places such as Waynesville that offer tours of the area or rides based on destinations such as restaurants and breweries.

Convergence with other Niches. Bicycling, as an outdoor activity has long been isolated in its own silo, with the assumption that the only thing a bicyclists would do is ride. More modern and accurate



“Fat” bikes are also a growing trend. They can be ridden on snow, mountain bike trails and in more rugged terrain.

Photo: Path Less Pedaled

thinking about bicycle tourism realizes that while riding a bike may be the primary motivator for a trip, it is not the only activity a bicyclist will partake in. A bicycle tourist may ride in the morning, but once off the bike they will participate in other tourist activities.

- **What it Means:** The classic niche pairing with bicycling has been wine. However, bicyclists are also drawn to craft beer, coffee, locally grown food and other culinary experiences. Agritourism and heritage tourism also provide a lot of crossover with bicyclists. This is important to note in destination marketing to bicyclists. Riding itineraries and routes should pass through and mention possible culinary or heritage experiences.

Other current thinking realizes the bicycle tourist as part of the greater outdoor recreation market such as hiking, fishing and hunting. Bicycle tourists are active travelers in good health and are also apt to enjoy other outdoor activities while on their vacation. The bicycle industry is currently responding to this emerging trend towards convergence by creating multi-use bicycles with special racks for carrying fishing and hunting gear.

QBP (Quality Bicycle Products), one of the largest distributors of bicycles and bicycle parts has begun to carry outdoor equipment such as tents, knives and sleeping bags under their sister company Q-Outdoors. It is not uncommon to go to bicycle shops and also see brands such as Stanley, Gerber Knives and GSI.

For marketing purposes and productization of experiences, it is important to keep this idea of cross niche convergence in mind. It would not be out of place to suggest hiking and fishing opportunities in bicycling specific materials. Good riding opportunities will always be the prime motivator for a cyclist to choose a destination, however it is also important to include culinary, heritage and outdoor experiences in the marketing.

Given the small town context in Western North Carolina, this is also an important element in helping existing bicycle shops diversify their product offerings as well as their customer base. One of the primary comments during workshops for this study was the lack of a full-time bicycle shop in Haywood County. There are no bicycle shops in Clay, Graham or Cherokee Counties.

Bike-Friendly Businesses, Hospitality & Training

The importance of extending hospitality to bicycling visitors, also known as being bike-friendly, cannot be overstated in terms of a region's success with bicycle tourism. As with any other form of tourism, it's crucial for visitors to feel welcome. Being bike-friendly means extending basic hospitality or customer service to bicycling visitors (as one would any other guest), with a few important distinctions due to the inclusion of a bicycle.



It would not be out of place for Haywood County and Western North Carolina tourism interests to suggest hiking and fishing opportunities in bicycling-specific outreach.

Photo: Path Less Pedaled

The closest example of this is along the Virginia Creeper Trail in Abingdon, Damascus and White Top, Virginia, where several bike-friendly businesses have emerged along the trail. While not an official organized program, the businesses along the trail have oriented their messages to accommodating bicycling tourists.

Important elements of being bike-friendly are:

- Understanding the unique needs of a bicycling tourist;
- Having staff that have some level of understanding of a bicycling tourist in order to respond to their needs in a positive way;
- Serving meals that reflect the nutritional needs and interests of bicyclists; and
- Providing small but important amenities, such as a dry, secure area to park a bike overnight and an outdoor water supply to wash bikes.

These are the building blocks that many businesses can begin to incorporate into their approach to being accommodating. It is not expected that they exclusively cater to bicyclists like those along the Creeper Trail have until there is more of a critical mass. But the power in starting small is that bicyclists spread the word about bicycle-friendly businesses and are quick to recommend restaurants, hotels and campgrounds to their friends.

Bentonville, Arkansas, has increased its investments in bicycling facilities dramatically over the past decade. Each year they gather leaders from their tourism bureau, the chamber of commerce and hospitality industry for a day-long training on bicycle tourism. They teach the attendees about the different needs of bicyclists and emerging trends in bicycling so they can better serve this growing sector of the tourism industry.

Helena, Montana, actively promotes itself as a mountain biking destination for the United States. Each year they organize a “Trails Day” for the hospitality industry where they take business owners and employees to the trails to experience what it’s like to ride. It helps them understand the needs of visitors they are looking to attract and retain.

It is recommended that WNC develop a similar program to prepare local businesses for accommodating bicycling tourists. Some notable examples outside the Southeast are the Oregon Bike-Friendly Business Recognition Program and Ontario By Bike. Both programs require certain amenities for bicycling visitors, depending on the type of business, including allowing cyclists to bring their bicycles into their hotel rooms (or provide safe, locked, covered storage) and providing safe bicycle parking (or rental locks) at food, beverage, or retail establishments.

Below are some case studies of bicycle friendly businesses that serve as examples for Western North Carolina.



Businesses are sprouting up along the entire length of the Virginia Creeper Trail as the routes popularity has risen with growing interest in the trail by visitors.

Photo: Don Kostelec

Hotel Pattee

Located in Perry, Iowa (population 7,702), Hotel Pattee is a historic railroad-era hotel, which was extensively renovated to its stunning former glory, and which has taken steps to become a bicycle-friendly lodging establishment. Owner Jay Hartz recognized the business potential of being located across the street from a new rail-trail (recreational bicycling path), and took the steps to integrate bicycle-specific hospitality into the hotel's everyday operations. Guests are welcome to roll their bicycles directly into their rooms (the elevator is large enough to accommodate bicycles), or they can leave them downstairs in an indoor (and, thus, guarded) bicycle lock-up area.

A bicycle fix-it station is permanently located on the sidewalk in front of the hotel, featuring a variety of basic bike tools, a stand to enable easy repairs, and an air pump. Staff is trained to welcome all cycling visitors, so that guests feel comfortable entering the grand-looking hotel in their bike clothes. Information is provided about the nearby trail, as well as other nearby cycling routes and cycling events. The in-hotel restaurant even goes above and beyond basic hospitality by offering “cyclist special” breakfasts, consisting of food items that cyclists commonly request to fuel up for their ride.

Burning Kiln Winery. Located in St. Williams, Ontario, Canada (population 400), Burning Kiln Winery is one of several young wineries in Southwest Ontario. In July 2014, Velo Quebec staged their annual Grand Tour multi-day organized event ride in a neighboring town. Burning Kiln recognized that 2000 cyclists would be passing by their facility on one day, and reached out to invite them to stop in the tasting room.

The owner and staff stacked wine crates beside the road and painted a letter on each crate, spelling out “Bienvenue Cyclistes” (French for “Welcome Cyclists”). They also set an old bicycle beside the large sign, to drive home their message. They estimated that 1700 cyclists stopped into the tasting room that day because of the wel-



A bicycle fix-it station is installed outside the Hotel Pattee. It provides tools and a pump and costs approximately \$900.

Photo: Hotel Pattee

Hotel Pattee has a special page on its website devoted to its amenities for bicyclists.

come message. Burning Kiln extended further hospitality by arranging shipping of any wine purchases that cyclists made that day. Following that pivotal experience, Burning Kiln has stepped up to join the Ontario by Bike program and continue to welcome cycling visitors.

TREO Ranch. Located outside of Heppner, Oregon (population 1,291), TREO Ranch is a bird-hunting lodge which recently expanded operations to include cycling. Phil and Kathy Carlson had been looking for another activity to supplement their business during the bird-hunting off-season, which they discovered is the same time of year as cycling in Eastern Oregon is most popular. They reached out to Travel Oregon and private consultants to help them develop their cycling program, structuring it in a similar fashion to their guided and supported hunting trips.

Phil enrolled in a bicycle mechanic course, so that he would be prepared to help fix mechanical issues. Because TREO is located in an incredibly rural area, four miles from the nearest community, safe bicycle parking is not really an issue at the lodge, but it would be incredibly easy for guests to get lost or overwhelmed in the miles of empty rolling hills, so Phil provides full service support to his bicycling guests.

He purchased a shuttle and a large enclosed trailer to provide sag services, which also enabled him to expand the route offerings and area in which his guests could ride. His full service itineraries include home-cooked steak dinners and craft beer on tap, keeping his offerings in line with the uniqueness and character of the area.

The TREO ranch in rural eastern Oregon diversified its customer base by offering bicycle tours.



6. Building a Scenic Bikeway Program

Scenic Bikeways are gaining momentum in the United States as bicycling is increasing and bicycle-based tourism has become an economic development strategy for states, regions, local communities and chambers of commerce.

The idea of Scenic Bikeways in Western North Carolina emanated from work in Haywood County stemming from the county's bicycle plan and a visit from Russ Roca and Laura Crawford of The Path Less Pedaled to Haywood County during the 2011 Blue Ridge Breakaway. The effort was bolstered by the Blue Ridge Bike Plan as it included a section on scenic bikeways.

To build a successful scenic bikeway program, Western North Carolina needs to think about the nuts and bolts of developing of a strong bicycling destination, as well as the effective promotion of this destination once built. Those strategies are outlined previously in this report.

One way to envision these two components is as the “back end” and the “front end.” The back end is the foundational work that creates a sustainable, long-lasting program, with which visitors will likely have little-to-no contact. The front end is the promotional component, all of which will be consumer-facing.

There are two main building blocks that will enable Western North Carolina to be successful in the back end, with the foundational work of building a scenic bikeway program:



Photo: Path Less Pedaled

1. **There must be buy-in at an agency level.** In Western North Carolina this requires support from the tourism development authorities, city and counties, Southwestern Commission NCDOT and the US Forest Service. The two programs profiles in this report from Oregon and New Zealand are similar. The success of both the Oregon Scenic Bikeways and the New Zealand Cycle Trail rests, in part, on the strong support from all key agencies. In Oregon, this means that the Scenic Bikeway Committee includes representatives from Oregon Parks and Recreation Department, Travel Oregon, Oregon DOT, Forest Service, Bureau of Land Management, local and regional road and transportation jurisdictions, and local and regional chambers of commerce or destination marketing organizations. Having the support and buy-in of all these agencies from the beginning has enabled broader support and a much smoother designation process. Similarly, in New Zealand, the support of both the national government and one of the main political parties led other agencies to support the project as well.
2. **There must be buy-in from engaged and empowered local proponents.** With both the Oregon Scenic Bikeways and the New Zealand Cycle Trail, there has been a requirement that applications for designated routes come from an organized local committee. In both cases, these local proponent groups include cyclists who are able to suggest routes based on their personal experiences riding within their community. Enabling proponent buy-in also leads to longer-term sustainability, as community members (by-and-large) recognize that these routes came from within their ranks and take pride in being able to show off their region.

Stakeholders in Western North Carolina should begin organizing a local committee. There is already discussion among Blue Ridge Bicycle Club members on the heels of the first Bikes in Beds workshop in fall 2014 to establish and promote a cross-county bicycle touring route. This would be a great first step in establishing a Scenic Bikeway program.

There is precedent in North Carolina for efforts like Scenic Bikeways. The Lake Normal Bike Route in the Piedmont region is a signed and designated bicycle route around the lake that links the many small towns along or near its shores.

Oregon Scenic Bikeway Program

Oregon's innovative Scenic Bikeways program is the first program in the United States to fuse recreation, transportation, and the economic benefits of bicycle tourism. These mapped, marketed, and maintained routes connect communities, and highlight the scenery, history, and culture of the state to residents and visitors alike.

The program is managed by Oregon Parks and Recreation Department (OPRD), and was developed as a partnership between OPRD, Travel Oregon, Oregon DOT, and Cycle Oregon. The first Oregon



Signage for the Lake Norman Bike Route in Davidson, NC.

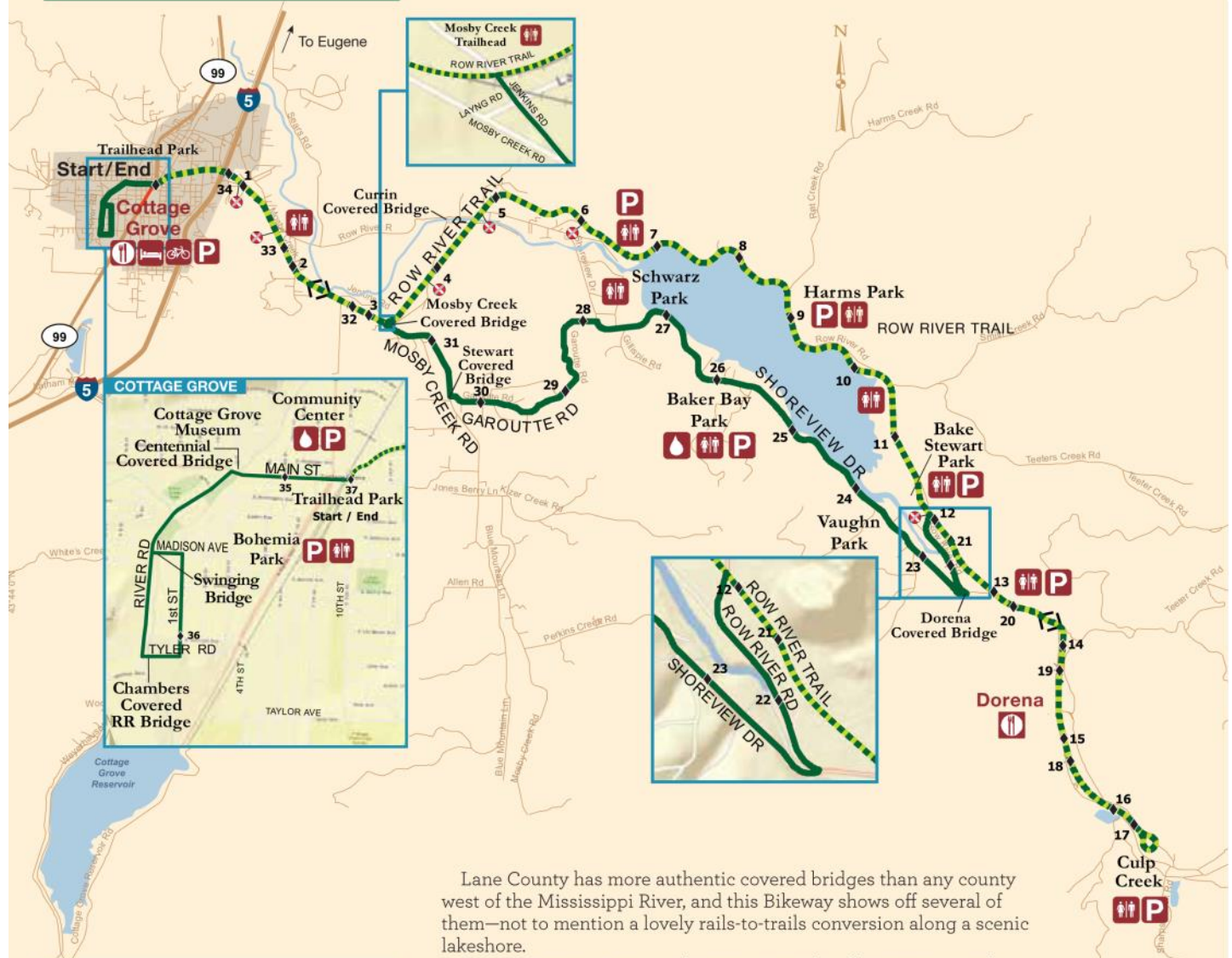
Photo: Don Kostelec

Resources:

- OPRD Route Criteria Checklist: <http://www.oregon.gov/oprd/BIKE/docs/RouteCriteriaEvaluation.pdf>
- OPRD Bikeway Handbook: <http://www.oregon.gov/oprd/BIKE/docs/BikewayHandbook.pdf>
- Lake Normal Bike Route Signage Plan: <http://www.catawbacountync.gov/Planning/Projects/LNBR/LNBRSignagePlan.pdf>

Oregon Scenic Bikeway Route Profile

2 Covered Bridges Scenic Bikeway



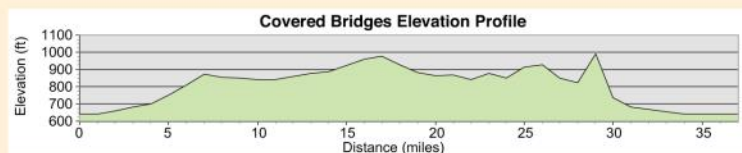
Lane County has more authentic covered bridges than any county west of the Mississippi River, and this Bikeway shows off several of them—not to mention a lovely rails-to-trails conversion along a scenic lakeshore.

Start in Cottage Grove, an historic city right off Interstate 5 with a handsome old downtown and a multitude of activities and attractions. Pedal through town and into the flat countryside past two covered bridges, all on the Row River Trail, a protected bike path that was once a thriving railroad. Then, skirt the shores of Dorena Lake (stop for a swim!) at the foot of the Cascades out to more bridges. This Scenic Bikeway is appropriate for almost any rider—you can do an out-and-back on the path and be traffic-free, or for variety, you can go out on the path and back via roads—including one healthy climb.

Distance: 37.8 miles
 Best seasons to ride: year round.
RideOregonRide.com/CoveredBridges

LEGEND

	Bikeway		Parking
	Paved Bikeway on Old Railroad		Trail
	Mile Marker		Bike Shops
	Restroom		Oregon State Park
	Drinking Water		Airport
	Lodging		Caution Area
	Food		Caution Area
	Camping		
	Path Crosses Road		



Scenic Bikeway, the Willamette Valley Scenic Bikeway, was established in 2005 as a way to pilot the designation process. The Willamette Valley Scenic Bikeway is a 134-mile point-to-point route through the agricultural areas south of the Portland Metro area. Subsequent Scenic Bikeway development and designation requires that applications be submitted from local proponent groups, rather than top-down creation by the committee. Currently, 12 Scenic Bikeways are officially designated by the State of Oregon

OPRD defines a Scenic Bikeway as “a signed bike route on existing roads and paths that provide access to national, state, or regional resources of superlative quality and scenic splendor. The route is on public lands, rights-of-way, or on existing easements on private property. The route is open to the public.”

The stated benefits of designation include: providing a unique cycling experience that creates lasting memories of Oregon, identifying the best bike rides in Oregon, attracting tourism dollars, and providing additional value to the neighboring communities. The impetus for building the Scenic Bikeways program in tandem with state tourism and transportation officials was to enable OPRD to leverage strategic partnerships to meet their stated goals. Travel Oregon committed to be the marketing arm of the program, while ODOT helps local proponents and road jurisdictions work through the official processes and procedures.

For the proponents who are working through the application and designation process (who are, oftentimes, from small and rural communities), this means that there is outside assistance built into the program to enable them to build the best possible route, reach a broad audience of potential visitors, and capture increased tourism revenue.

Oregon’s Scenic Bikeway Designation Process

The current process for approving and designating an Oregon Scenic Bikeway rests on the submission of an application from a strong local proponent group. This step ensures support and buy-in from the local communities, leading to a higher probability of last-lasting success of a route and positive visitor experiences.

1. **Application.** The Proponent group submits an official application, including the proposed route and letters of support from governing bodies and road management agencies.
2. **Review of Application.** Following receipt of the application, OPRD reviews for completeness and forwards completed applications to members of the Oregon Scenic Bikeways Committee (which is comprised of 11 members, representing bicycle advocacy organizations, local governments, and state agencies involved in bicycling recreation or transportation).



The Snow Farm Winery in Vermont is a designated rest area for bicyclists along the Champlain Bikeway.

Photo: Don Kostelec

3. **Evaluate the Route.** The Committee reviews completed applications, evaluates each route, and reports back to the Proponent group.
4. **Develop Scenic Bikeway Plan.** If a route has a positive evaluation, the Proponent group continues building a coalition and local support, holds public meetings, and develops a Scenic Bikeway Plan.
5. **Review Scenic Bikeway Plan.** The Committee reviews and approves the Scenic Bikeway Plan.
6. **Submit Recommendations.** The Committee submits their recommendations to the Oregon Recreation Trails Advisory Council (ORTAC) and OPRD Director.
7. **Public Comment Period and Vote.** OPRD receives public comment, holds public hearings, and forwards recommendations to the State Parks Commission for vote on designation.
8. **Implementation.** Following designation, Proponents work in conjunction with OPRD, Scenic Bikeway Committee, and road jurisdictions to implement the bikeway plan, install road signs, and post maps and information online and in official marketing materials. Proponents complete an annual review with OPRD to adjust goals and renew contact with governing bodies.

As of 2014, due to the growth of the program and broad state-wide interest, the application process for new Oregon Scenic Bikeways occurs on a biennial basis.

New Zealand “Nga Haerenga” Cycle Trail

In 2009, the national government of New Zealand created the Nga Haerenga, or New Zealand Cycle Trail. The goal was to create a bicycle trail program which would entice local and international visitors alike to spend their bicycling vacations within New Zealand. The New Zealand Cycle Trail is modeled after the highly-successful Great Walks program, which highlights premier hiking tracks through spectacular scenery, each beginning and ending in communities with guides, accommodations, and transportation. The stated objectives of the New Zealand Cycle Trail were to:

- Create jobs through the design, construction, and maintenance of the cycle network;
- Create a high quality tourism asset to enhance New Zealand’s competitiveness as a tourism destination;
- Provide on-going employment and economic development opportunities for regional economies; and
- Provide complementary benefits to a wide range of people.

The New Zealand Cycle Trail is similar in many ways to the Oregon Scenic Bikeways. Under the umbrella of the Nga Haerenga, there are 18 Great Rides, selected from 54 applications submitted by communities across the country. The Network Expansion Project envisions a connecting network of on-road routes to enable visitors to bicycle from one Great Ride to another.

Resources:

- Nga Haerenga Evaluation Report: <http://www.nzcycletrail.com/sites/default/files/uploads/Nga%20Haerenga%20NZCT%20Evaluation%20Report.pdf>

Unlike the Oregon Scenic Bikeway program, however, the New Zealand Cycle Trail was built almost entirely on newly-created off-road paths. Roadways in New Zealand tend to be narrow, limited, and overly-crowded, which led to the push for separate bike paths. Additionally, mountain biking is more popular than road cycling in New Zealand, and many of the Great Rides are unpaved mountain bike trails. This is significant because it shows that a scenic bikeway type program can be successful with both road biking and trail riding. \$50 million in funding from the national government enabled the new trail development, which occurred between 2009-2013 (most of the 18 Great Rides are just now open to the public, meaning that reports on their economic success are not yet fully available).

Another key difference between the New Zealand Cycle Trail and the Oregon Scenic Bikeways is in the long-range planning. The New Zealand Cycle Trail created a National Cycleway Fund under the Ministry of Economic Development to disburse funding from the national government to the individual trail bodies, specifically and solely for trail construction. As of this date, the National Cycleway Fund has been disbanded, and on-going responsibility (including operational costs) is squarely in the hands of each trail body. This is significant because it raises questions of long-term sustainability. The Oregon Scenic Bikeways were created to provide a long-term partnership between proponent communities, the Scenic Bikeway Committee, and OPRD, enabling proponent communities to rely on continued support in the forms of operational costs and promotion.

MOUNTAINS TO SEA CONNECTION

Taumarunui to the 'Mountains to Sea'



SWITCH TO MAP VIEW 🔍

GRADE: 3 | Intermediate ?

DURATION	TOTAL LENGTH
3-4 Hours	45km