

Maine Department of Transportation

For the complete report on bicycle tourism in Maine or more information contact:
 John Balicki, Bicycle / Pedestrian Coordinator
 Maine Department of Transportation
 State House Station 16
 Augusta, Maine 04333

E-mail: john.balicki@state.me.us
 Phone: 207-287-6600
 Fax: 207-287-1030



Check the following website for bike map, bike tours and East Coast Greenway Route:
www.state.me.us/mdot/biketours.htm
 or
www.exploremaine.org/bike

Maine Regions 'Ripe' for Targeted Bicycle Tourism

The bicycle tourism market is very broad with very identifiable niches. It is composed of cyclists of all ages and abilities, each with well defined preferences.

Cyclist Preferences

Bicycle tourists have strong preferences for different types of experiences depending on their bicycling skill level and the make-up of their group.

Priorities for cyclists in selecting destinations include:

- Scenery
- Bicycle-friendly roads or shared use paths
- Services & accommodations with a 'bike-friendly' orientation (B&Bs/Inns with 'hearty breakfasts', for instance)
- Culture and uniqueness of an area.

Less experienced cyclists and cyclists with families prefer using shared use paths, such as the Androscoggin River Trail in Brunswick and those in Aroostook County. Facilities like the Carriage Roads of Acadia National Park are also very popular. They prefer cycling under 40 miles per day, stopping frequently for cultural or heritage sites. Experienced cyclists prefer riding on bicycle-friendly roads (with lower volumes or paved shoulders) and prefer longer daily distances.

Miles per day	Tour Group Make-up			
	Alone	1 Other Person	With Family	Group of Friends
Less than 20	2%	2%	15%	1%
20 to 30	10%	14%	24%	15%
30 to 40	29%	31%	38%	34%
Over 40	60%	53%	23%	50%

Daily Biking Distance Preferences Experienced Cyclists

Source: Haut Richelleu Survey, 1994.

Developing a Marketing Program

To capture a growing piece of this market it is important that a region take stock of its bicycle tourism-related resources. A marketing plan needs to be tailored to its strengths and the preferences of bicycle tourists. For instance, a region with few existing paths but with low volume roads may well want to focus its efforts on attracting more experienced cyclists for multi-day tours. Bike-friendly services and accommodations should be spaced accordingly.

Executive Summary

April 2001

Bicycle Tourism In Maine

Economic Impacts and Marketing Recommendations

Maine Department of Transportation



Bicycle Tourism is Good for Maine Business

Spending by Bicycle Tourists Estimated to be \$36.3 Million in 1999

In 1999, direct spending in Maine by over 2 million bicycle tourists is estimated to have totaled \$36.3 million. Of these 2 million tourists, the vast majority – 98% – were day trip cyclists spending \$ 30.0 million.

Those on multiple day bike tours were 2% of the total but accounted for 17% of spending, or \$6.3 million. This is attributable to higher per day spending in the areas of food and lodging. Surveys have shown that the lodging preferences by those on bike tours are Bed & Breakfasts / Inns and campgrounds. These capture more of the 'sense of a place', very important to attracting bike tourists.

From a survey of bicycle tour operators, it is estimated that 2,100 people participated in a guided bike tour in Maine, spending just under \$1 million in 1999.

Spending Distribution

	Direct Spending
Food & Groceries	\$ 16.2 million
Transportation	9.6 million
Retail and Services	8.5 million
Lodging	2.0 million
Total:	\$ 36.3 million

Source: Wilbur Smith Associates.

The estimated 32,100 self-guided bike tourists spent \$5.3 million that year.

Bicycle tourism is an important sector of the existing tourism market, a clean industry benefiting Maine's economy.

A Study of Bicycle Tourism in Maine

In 2000, the Maine Department of Transportation hired Wilbur Smith Associates of Portland, Maine, to estimate the total economic impact of bicycle tourism and to develop marketing recommendations to increase bicycle tourism in the State.

Part One of the study estimates the size of the current bicycle tourism market in economic terms and what the future market may be. It also estimates the order of magnitude economic impacts of three shared use paths of statewide significance and the MDOT's bicycle tour program.

Part Two makes recommendations for new marketing initiatives and recommenda-

tions to make existing programs more effective.

Since 1991, Maine has invested in bicycling infrastructure improvements such as adding paved shoulders to roadways and developing shared use paths to increase the use of bicycling for transportation and spur increased bicycle tourism. Bicycling will play a key role in the implementation of "Explore Maine" which seeks to bring more tourists to Maine and move them once here using other than the automobile.

A goal of the project is to learn from other regions' successes in reaping the benefits of bicycle tourism.

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Important Characteristics of 'Bicycle Tourists'

Bicycle tourism is a broad market. For the purposes of this study it has been divided into two broad trip-making categories:

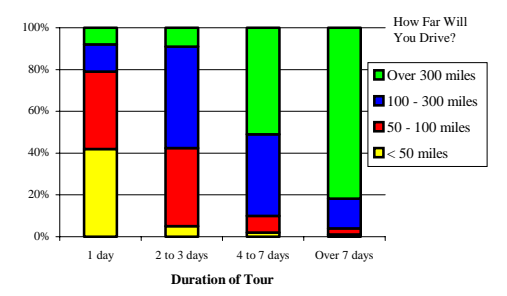
- *Cyclists on a multi-day bicycling trip* that may be a self-guided tour or a guided tour by a bicycle tour company
- *Day trip cyclists* that may cycle for a day during a multiple day trip or come to cycle on a one day trip.

These distinctions are important both for marketing purposes but also for their very different economic impacts.

Important findings from the review of surveys reveal that bicycle tourists:

- Come from higher income households and are middle-aged (with their average age increasing)
- Are more likely to take a guided bike tour than self guided tour if a less skilled cyclist
- Prefer self-guided bike tours for tours less than 3 days

- Will travel long distances to use shared use pathways and to take bike tours over 4 days (see chart below)
- Average 35 miles per day for less experienced cyclists; up to 100 miles for the experienced
- Prefer B&B / Inns and campgrounds for lodging for multi-day bike tours.



Bike Tourists Will Drive Longer Distances to Start Longer Tours
Source: Haut Richelleu Survey, 1994.

Bicycle Tourists and Their Spending Patterns

“The bicycle tourism market is very broad with very identifiable niches. It is composed of cyclists of all ages and abilities, each with well defined preferences.”

Spending by bicycle tourists depends on the type of activity. Estimates for daily amounts spent by tourists are:

- Self-guided Tour, \$55 per day
- Guided Tour, \$115 per day
- Day Trip, \$25 per day
- Local/Maine resident, \$4 per day.

The table to the right shows how the daily spending estimates are distributed between different tourism sectors.

	Self-Guided Tour	Guided Tour	Day Trips	Local
Retail & Services	25%	34%	25%	0%
Lodging	32%	30%	0%	0%
Food & Groceries	25%	21%	47%	66%
Transportation	18%	15%	28%	34%

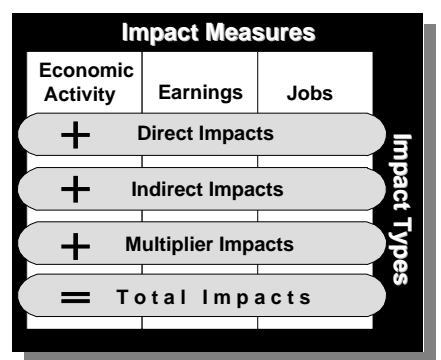
Daily Spending Distribution by Cyclist Type

Total Economic Impacts Estimated at Over \$66.8 Million Per Year

Direct spending by bicycle tourists is not the only indicator of magnitude of impact on the state's economy. Spending by tourists have 'spin-off' or 'multiplier' effects as well.

In effect, the 'multiplier' is used to trace money as it flows through the regional economy. The longer that the money stays in the region, the better off the region is and the higher the multiplier. The multiplier indicates that, as the money is used over and over again, many people and businesses benefit, even if they're not directly involved in bicycle tourism.

Using a regional economic model specific to the Maine economy, the total economic impact of the bicycle tourism market is estimated to be \$66.8 million dollars. This includes the direct expenditures of \$36.3 million and 'spin-off' of \$30.5 million. This total impact is calculated to include earnings of over \$18.0 million. Earnings are the sum of the wages and salaries attributable to bicycle tourism, equal to 1,200 full-time equivalent jobs.



Source: WSA and RIMS-II Economic Model, US Department of Commerce.

Enhancing Maine as a Cycling Tourism Destination

During the past decade, several states have successfully marketed themselves as destinations for bicycle tourists. Notably, Vermont and Wisconsin created names for themselves as bicycle-friendly vacation destinations, and Maine could learn a great deal from them.

Like Maine, Vermont and Wisconsin are perceived by those living beyond their borders as beautiful places largely unspoiled by development and sprawl. Vermont and Wisconsin also have a reputation for having good, bicycle-friendly roads with a minimum of traffic, a reputation that Maine does not yet share.

Our survey of bicycle tour companies and interviews with experienced cyclists and tourism professionals indicated several steps that Maine can take to improve its image as a cycling destination.

- Continue its efforts to improve road conditions, adding paved shoulders and improving pavement condition.

- Create more shared use pathways and trail cycling opportunities. The study estimates that investment in the three MDOT trails of statewide significance – the Eastern Trail, Mountain Division and Downeast Trail – would generate bicycle tourist expenditures of approximately \$ 2.7 million per year.

- Direct bicycle tourists to areas where conditions are appropriate for their bicycling experience and have supportive services. Promotion of the 21 loop bicycle tours is estimated to generate bicycle tourist expenditures of approximately \$780,000 per year. The East Coast Greenway Route is estimated to generate approximately \$530,000 per year.

The goal of any planned marketing effort should be not to merely generate more business for the state by increasing bicycle tourism, but to generate "quality business" – to work with public and private partners to effectively "create" and guide bicycle tourists to routes that will ensure a positive experience and return visits.

Bicycle Tourism Marketing Recommendations

Promoting bicycling in Maine will require a coordinated marketing effort on the behalf of MDOT and its public and private partners, the Maine Office of Tourism, Maine Tourism Association and the regional chambers of commerce.

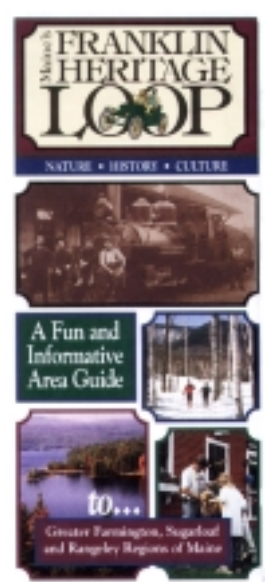
The recommendations below focus on the development of resources that will serve as the core of Maine's marketing efforts in the future.

- Updated bicycle map for the next printing featuring consistent graphic styles, active/scenic photography and web links
- Expanded and refined MDOT bicycle web site – or creation of a new, tourism-related bicycle web site – to generate interest in and disseminate information about cycling in Maine
- Print copies of the 24 loop bicycle tours. Promote and print the East Coast Greenway Route through Maine from Kittery to Calais
- Fulfillment package for those requesting bicycling and bicycling touring information for Maine

- Program for creating links with state tourism web sites and regional tourism/economic development organizations
- Advertisements in the state vacation planner to generate bicycle tourist inquiries
- A statewide community relations effort to create awareness of the economic and social benefits of bicycling and bicycling tourism and urge Maine drivers to "share the road"
- Information and guidelines to encourage businesses to become "bike-friendly" in order to help build the state's network of bicycle tourism resources and stimulate bicycle tourism.

Tracking and measuring response is important to gauge the effectiveness of the marketing program. This effort should be re-evaluated at the end of two years and updated and expanded as new programs, trails and other bicycle facilities are developed.

“Promoting bicycling in Maine will require a coordinated marketing effort on the behalf of MDOT and its public and private partners.”



Existing brochures can be adapted to better market bicycling in Maine.