# BICYCLE TOURISM IN MAINE: ECONOMIC IMPACTS AND MARKETING

## Final Report

**April 2001**

*Prepared for:*

**Office of Passenger Transportation**

**Maine Department of Transportation**

*Prepared by:*

ENGINEERS
PLANNERS
ECONOMISTS

Wilbur Smith Associates

*In association with:*

**Buxton Communications**

**Bicycle Federation of America**

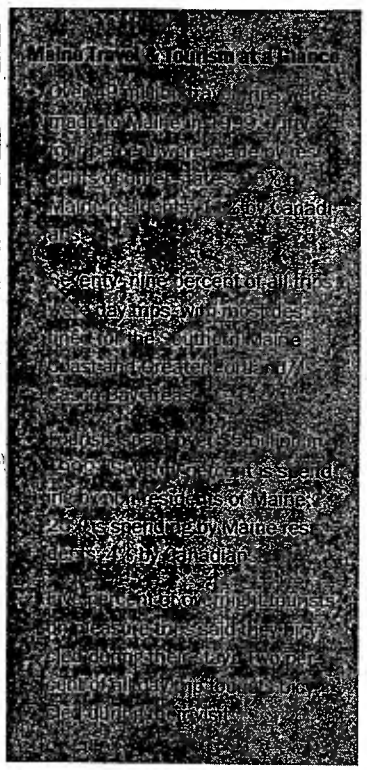
Executive Summary

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.

## Inside this Report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## 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 recommendations 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.

## Important Characteristics of 'Bicycle Tourists'

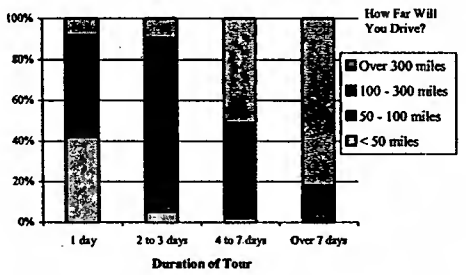
Bicycle tourism is a broad market. For the purposes of this study it has been divided into two broad trip-making categories:

- *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 Richelieu Survey, 1994.

*"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."*

## Bicycle Tourists and Their Spending Patterns

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% |

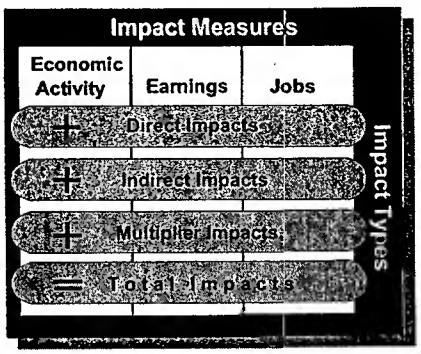
Daily Spending Distribution by Cyclist Type

## 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.

*Maine Department of Transportation*

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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.

| | Tour Group Make-up | | | |
|---|---|---|---|---|
| Miles per Day | Alone | Other Person | 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 Richelieu 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.

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# INTRODUCTION

The Maine Department of Transportation (MDOT) has contracted with Wilbur Smith Associates (WSA) to estimate the total economic impact of bicycle tourism (Part I) and to develop marketing recommendations to increase bicycle tourism in the State (Part II). WSA has been assisted in this project by Buxton Communications and the Bicycle Federation of America (BFA).

Wilbur Smith Associates is a national transportation engineering and planning firm that has Maine staff with experience in bicycle planning and company expertise in the economic analysis of transportation facilities and programs. Buxton Communications is a Portland, Maine, marketing communications firm that has extensive experience in marketing transportation programs and agencies. The BFA is the major national bicycling advocacy and research organization in the United States. In addition to his staff position with the BFA, Bruce Burgess (the principal contributor to this project from the BFA) has owned and operated a bicycle touring company for over 15 years. He has also authored several publications related to bicycle tourism in the northeastern United States.

## WHY STUDY BICYCLE TOURISM?

### Tourism and Travel in Maine

Bicycle tourism includes the activities such as lodging, restaurants and bicycle rentals that cater to the bicycle tourist. Tourism in Maine contributed over $ 5.4 billion in direct spending to the Maine economy in 1999 according to the Longwoods Survey of domestic and Canadian travel in Maine. This includes over 43 million domestic traveler trips and over 5 million trips by Canadians (Longwoods International, 2000). Tourism is the second largest industry in Maine behind the forest products industry (personal communication, Maine Office of Tourism). The tourism industry is of great value to the State of Maine because it is a clean industry providing jobs to local people and buying goods and services in support of local economies.

In 1997, the MDOT completed the Maine Strategic Passenger Transportation plan that seeks to increase the amount of tourism travel in Maine by means other than the private automobile, including passenger air, rail and ferry, intercity bus, local public transit, bicycling and walking. A major theme of the plan is that travel itself can and should be part of the overall vacation experience. Bicycling is an important component of the Plan as a means for low-impact travel within the State and also offers one of the best ways to experience what Maine has to offer. Many of Maine's most popular destinations are hampered by traffic congestion, particularly the Route 1/I-95 coastal corridor up to and including Acadia National Park. At Acadia, aggressive efforts are underway to reduce the impacts of the automobile on the park and its air quality.

The Longwoods Survey found that bicycling was an activity for 5 percent of those that took an overnight pleasure trip to Maine. Those taking a day trip to Maine reported

bicycling activity accounting for two percent of all day trips (Longwoods International, 2000). Bicycling is an important sector of the existing tourism market in Maine. It is a primary activity for a significant number of tourists and complements other activities and attractions by a very large number of tourists.

The bicycle tourism market has had little formal support from the Maine DOT or other state agencies. Since the federal Intermodal Surface Transportation Efficiency Act (ISTEA) passed in 1991, Maine has had an active program of supporting 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. Other places have had great success in this correlation like those in Quebec Province in Canada and Wisconsin.

Quebec is implementing an aggressive program of facility development, *La Route Verte*, to create a network of over 2,165 miles of interconnected shared use paths and bicycle friendly roads. The projected total economic impact of this system is over $30.7 million (US) per year ("Long Distance Bike Routes: La Route Verte Economic Spinoffs", Velo Quebec Newsletter, June 1998).

Wisconsin has had an active program of developing shared use pathways for over twenty years. They have moved from developing individual path projects of moderate length to developing and interconnected system paths as their transportation, recreation and economic benefits to communities are becoming better known. The Elroy-Sparta Trail, originally a 32 mile path in Monroe County, Wisconsin, documented over 50,000 annual users in 1988 that spent over $1.2 million in the local economy. The path attracted users from hundreds of miles away as well as local users (*A Look at Visitors on Wisconsin's Elroy-Sparta Bike Trail*, 1988). Other significant trails that have documented their impacts are the 14.5 mile Red Cedar Trail (40,000 annual users and $2.0 million in user expenditures in 1995) (*A Profile of Red Cedar State Trail Annual Pass Holders, 1996)* and the 23.5 mile Sugar River Trail (47,550 users and $430,000 in user expenditures in 1985) (as reported in *Rail to Trail Development in Chippewa County (WI): Economic and Recreational Aspects, 1996)*. The local communities are actively looking to extend their trails to link multiple communities in a network of paths.

The Federal Highway Administration has established the goal of doubling the amount of bicycling and walking transportation trips in the United States while reducing the number of nonmotorized users killed or injured in traffic crashes. The presence and accommodation of bicycle tourists is anticipated to increase awareness of the need for improved bicycling and walking facilities in many Maine communities and spur localities to do more for safer bicycling and walking.

The MDOT views its participation in promoting bicycle touring as chiefly providing information related to the suitability of various roads in the state for bicycling. This is intended to enhance bicycling as a transportation activity within a recreational context. This is similar to its promotion of the Scenic Byways Program. In the past several years the Maine DOT has begun additional efforts to raise the profile of bicycling in Maine. In

1999 the MDOT published 21 bicycle loop tours on its website. These tours are distributed throughout the state and are targeted to cyclists of intermdiate to advanced ability. In the Summer 2000, the agency published a state bicycle map with an initial printing of 60,000.

Within State government, the Maine Office of Tourism, within the Department of Economic and Community Development, has the responsibility for promoting Maine's tourism industry through numerous media, including print, television and the internet.

# PART I. ECONOMIC IMPACTS OF BICYCLE TOURISM

The Goals for Part I, from the Request for Proposals issued for the study, are twofold:

> Goal 1. Perform economic research to determine the economic importance of bicycle tourism in Maine including direct, indirect, induced and total economic effect on service sector businesses and the community.
>
> Goal 2. Forecast the market potential, facility potential and the economic impact of expanding bicycle tourism facilities in Maine including the direct, indirect, induced and total economic effects on service sector businesses and the community.

Goal 1 seeks to answer what are the present economic impacts while goal 2 seeks to forecast impacts assuming a set of tours and supporting systems are in place. This information is sought to assist facility planners (MDOT staff, trail organizations) and decision-makers (Legislators, e.g.) in applying for funds and evaluating those requests. It is also anticipated that the private sector will increase its attention to bicycle tourism.

## Methodology

Data for the economic impact analysis come from numerous sources.

- Data regarding demographics of and expenditures by bicycle tourists comes from a literature review of studies of shared use pathway usage and surveys of bicyclists from other similar regions.
- Data on the estimates of domestic bicycle tourists (including Maine residents and non-residents) come primarily from the annual Longwoods International Travel Survey completed for the Maine Office of Tourism for 1999. Data from Canadian tourists to Maine come from a similar survey of Canadian residents for 1999, also by Longwoods International.
- Estimates of the number of persons participating in guided bicycle tours is from a survey of bicycle tour operators in the northeast by Buxton Communications for this study.

## A. PROFILE OF MULTIPLE-DAY BICYCLE TOURISTS

Characteristics of multiple day bicycle tourists generally vary by the type of tour and length of tour. The two types of tour are self-guided and guided tours.

*Self-guided tours* are where the cyclist or cyclists do not enlist the help of a bicycle touring company during the tour itself. They may use a tour planning service or company to plan their itinerary including routes and/or accommodations.

A *guided tour* is provided by a bicycle touring company that typically provides transportation, pre-planned route, tour leaders, equipment, and a sag van to provide assistance to riders en route and ferry luggage and gear.

Two surveys have been used to construct a profile of potential bicycle tourists. These are:

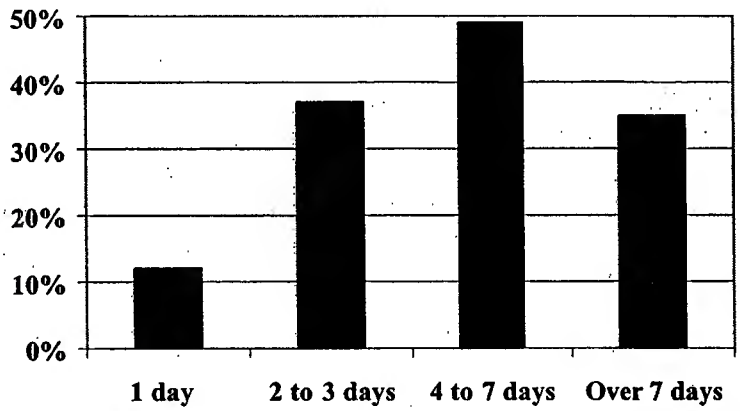
- Adirondack North Country Association's (ANCA) 1994 survey of 77 bicyclists that have a preference for guided bicycle tours
- Richelieu Valley Tourism Committee's 1994 (Haut Richelieu) survey of 440 households of "experienced cycling enthusiasts" (*Lake Champlain Bikeways: What It Can Do for Your Community and Business*, Burgess, 1995).

### Preferred Bicycle Tour Length and Trip Characteristics

The two surveys reveal that experienced touring cyclists prefer multiple day trips (Figure 1). Close to 50 percent preferred tours of 4 to 7 days in length; 37 percent preferred 2 to 3 days, and 35 percent preferred more than a 7 day tour (Haut Richelieu Survey, 1994). In the survey they also stated that for tours 3 days and under they preferred self-guided tours (59 percent) to guided tours (20 percent).

Respondents in the ANCA Survey revealed that their previous guided bicycle tours have lasted: 2-3 days, 17 percent; 4-5 days, 14 percent; and more than 5 days, 41 percent.

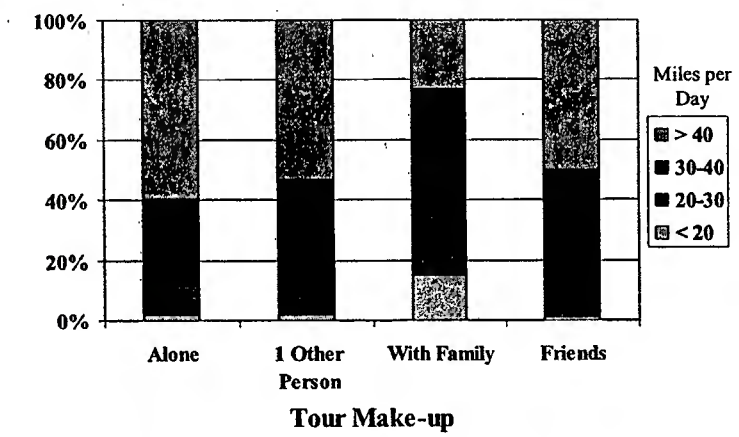
Figure 1
**Preferred Bike Length Tour: Experienced Cyclists**




Source: Haut Richelieu Survey, 1994.

The cyclists surveyed in the Haut Richelieu survey stated that their daily touring distance during a trip is related to the make-up of their touring group. This distribution is shown in Figure 2. Experienced cyclists traveling alone, with one other person and with 'friends' preferred covering longer distances per day – over 40 miles per day. When cycling 'with family' they preferred shorter distances; 77 percent preferred distances under 40 miles per day (Haut Richelieu Survey, 1999). These preferences, in concert with the preferences for the facility types, need to be considered when targeting marketing efforts to specific bicycle tourist segments. ANCA survey respondents listed

Figure 2
**Daily Biking Mileage Preferences vs. Tour Make-up**



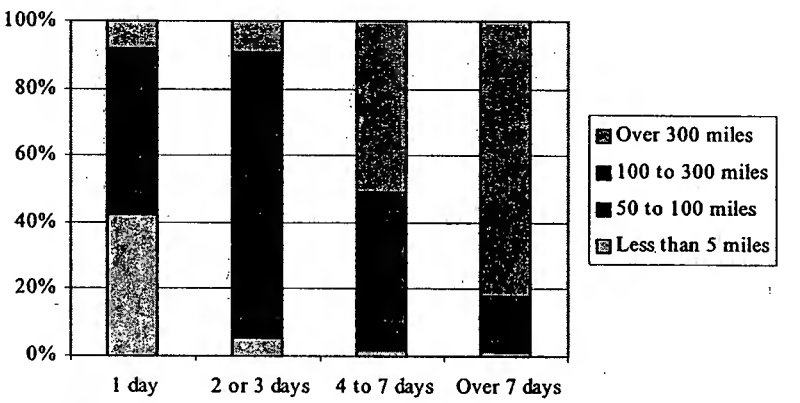

Source: Haut Richelieu Survey, 1994.

their daily preferred riding range of 3 to 100 miles with the average being 39 miles and median response being 35 miles.

Cyclists embarking on a multi-day tour were willing to travel farther the more days in the bike tour; those on shorter tours were willing to travel shorter distances. These results are shown in Figure 3. For a single day trip, 79 percent of respondents were willing to travel less than 100 miles to the start of the tour -- just over 40 percent were willing to travel under 50 miles. For tours 2 to 3 days in length, almost half of respondents were willing to drive between 100 to 300 miles (48 percent) with another 37 percent willing to drive 50 to 100 miles. For tours of 4 to 7 days in length, 51 percent of respondents were willing to drive over 300 miles. For tours over 7 days, over 80 percent were willing to travel over 300 miles (Haut Richelieu Survey, 1994).

These travel distances need to be matched to the types of tours offered by a region. For instance, a two day tour in Aroostook County would have much less attraction for those traveling from Massachusetts than the same length tour in York County. Boston to Presque Isle travel distance is approximately 375 miles while it is approximately 55 miles to Southern York County (WSA).

Figure 3
**Willingness to Travel to Start Bike Tour**




Source: Haut Richelieu Survey, 1994.

**Spending on Bike Tours**

Total spending per bicyclist on a bike tour as reported by Haut Richelieu survey respondents is shown in Figure 4. These figures include spending for transportation, lodging, food, fees, rentals and personal expenses. For one day tours, most respondents (68 percent) were willing to spend from $10 to $50. For a tour of 2 to 3 days, over half (52 percent) of respondents were willing to spend over $100. For longer tours of 4 to 7 days 64 percent of respondents would spend over $300, with 17 percent willing to spend over $600. For trips over 7 days, 62 percent of respondents would spend over $600 per person, including 26percent who would spend over $900 (Haut Richelieu Survey, 1994).

Table 1
**Per Person Trip Expenditures by Length of Bike Tour**

| | Length of Tour | | | |
|---|---|---|---|---|
| **Per Person Trip Expenditures** | 1 Day Tour | 2 or 3 Day Tour | 4 to 7 Day Tour | Over 7 Day Tour |
| Less than $10 | 11% | | | |
| $10 to $50 | 68% | | | |
| Over $50 | 21% | | | |
| Less than $50 | | 5% | | |
| $50 to $100 | | 40% | | |
| $100 to $300 | | 46% | | |
| Over $300 | | 9% | | |
| Less than $100 | | | 5% | |
| $100 to $300 | | | 32% | |
| $300 to $600 | | | 46% | |
| Over $600 | | | 18% | |
| Less than $300 | | | | 8% |
| $300 to $600 | | | | 29% |
| $600 to $900 | | | | 36% |
| Over $900 | | | | 26% |

Numbers may not total 100% due to rounding.
Source: Haut Richelieu Survey, 1994, as reported in Burgess, 1995.

Burgess reports that average spending of those on self-guided and guided bike tours in Vermont is $115 per person per day (Lake Champlain Bikeways, 1995).

**Distribution of Bike Tourists Spending by Industry**

Most studies report their findings using different groupings of industries or sectors so cross-comparisons are difficult. Broad patterns are as follows:

- The ANCA study reports a distribution of spending on bike tours as follows: 33 percent, lodging; 38 percent, restaurant, bar and groceries; and 29 percent, personal expenditures including bicycle repair.
- *La Route Verte* Economic Impact Study projects a distribution of 57 percent, lodging and food; 18 percent, transportation; 13 percent, entertainment and services; and 12 percent, for other products and services (for an evolving 3,400 km trail system in Quebec).
- Overmountain Victory National Historic Trail study documented trip expenditures of 25 percent, lodging; 28 percent, restaurants, food and beverages; 21 percent, transportation; 25 percent, retail and other expenses for a total average expenditure of $49 per person per day for a multi-state trail in the south.

**Household Income**

Surveys of bicycle tourists consistently report that bicycle tourists come from higher income households.

- The ANCA survey reported that the median annual household income was $60,000 $69,000 in 1993.
- The Haut Richelieu survey reported that 45 percent of respondents had a household income over $60,000 in 1994.

## B. PROFILE OF DAY CYCLISTS

Two types of day trip cyclists have been identified through the Longwoods International survey data: 1) those that cycle as part of a one day trip in Maine and 2) those that cycle for a part of their multiple day trip to Maine. It is estimated that in 1999, just over 580,000 persons bicycled in Maine for at least part of a day as part of a multiple day trip in Maine. In the same year, approximately 1.4 million persons are estimated to have bicycled during a day trip in Maine (see analysis of Longwoods International survey in Part C below) (Wilbur Smith Associates). From the Longwoods data, domestic travelers making day trips to Maine were more likely to travel to the southern coastal or greater Portland/Casco Bay Region (Longwoods International, 2000). This intuitively makes sense -- those traveling to Maine from other states for a day want a smaller part of their trip devoted to travel time. This is the part of Maine that is the most accessible to the larger population centers in the northeast.

A profile of day cyclists, gleaned from the literature survey, reveals the following:

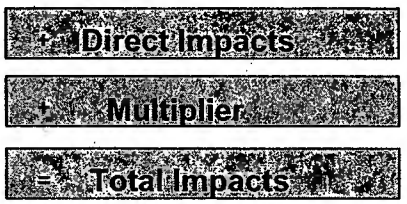
- For a one day bicycling trip, just over 40 percent would drive less than 50 miles to the start of the tour and another approximately 40 percent would drive between 50 and 100 miles to its start (Haut Richelieu, 1994).
- Per person spending for the day for most would total $50 or less (Haut Richelieu, 1994).
- Thirty-seven percent of ANCA survey respondents stated that they preferred half-day or less rides; 25 percent preferred all-day rides (while 38 percent preferred multiple day rides).
- Spending by 'day trippers'(non-local trail users) is projected in *La Route Verte* study to be distributed as Food, 47 percent, Transportation, 28 percent; Retail and services, 25 percent. Spending by local/resident users of the trail is projected to be distributed as Food, 66 percent; Retail and services, 34 percent.

## C. ECONOMIC IMPACTS ESTIMATES OF BICYCLE TOURISM

### OVERVIEW

The primary goal for this part of the study is to estimate the economic impacts of bicycle tourism in Maine. The following definitions are used in this analysis.

Direct Impacts: The actual direct expenditures by bicycle tourists attributable to the activity of bicycle tourism. This includes their direct spending on food, lodging, transportation and other services and fees.




Multiplier Impacts: The sum of indirect impacts (associated with supplying the industries that serve the visitors) and the induced impacts (associated with the re-spending of earnings by people who provide goods & services to visitors).

Total Impacts: The sum of direct and multiplier impacts attributable to bicycle tourism.

### Direct Impacts

The calculation of direct impacts relies on estimates of the number of bicycle tourists and estimates of their spending. Direct impacts were calculated for the following sectors: Retail and services, Restaurant and groceries, Lodging, and Transportation. Distributions for spending by the different categories of bicycle tourists were developed based on a review of the literature.

Direct impacts were calculated for several segments of the bicycle tourism market including:

- Overnight Bicycle Trips --
  Self-guided Bicycle Tours
  Guided Bicycle Tours
- Day Trip Bicycle Trips --
  Partial Day Trips of Overnight Visitors
  Resident Day Trippers
  Non-resident Day Trippers

Estimates of the number of bicycle tourists come primarily from the annual Longwoods International Travel Survey completed for the Maine Office of Tourism for 1999. Estimates of the number of persons participating in guided bicycle tours are from a survey of bicycle tour operators in the northeast by Buxton Communications for this study.

Estimates for the number of and economic impacts of bicycle tourists from Canada were also developed based on a Longwoods International Survey in 1999.

**Multiplier Impacts**

As defined above, the multiplier impacts are the combination of indirect and induced economic impacts associated with bicycle tourism.

A "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 do not use or directly serve the bicycle tourism related market.

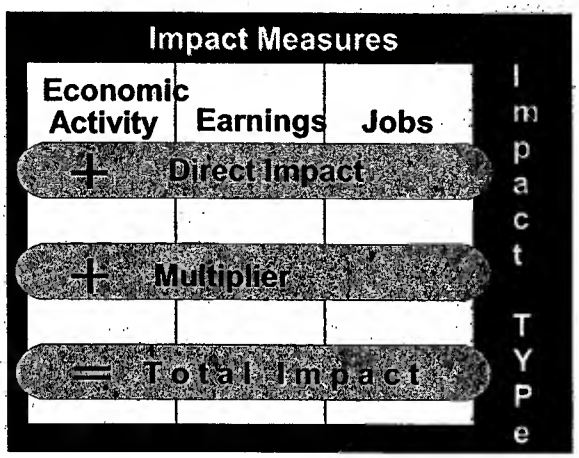
For example, if a Bed & Breakfast owner earns $100, and uses it to buy $100 worth of groceries, she is better off by $100 because she has $100 worth of groceries, and the local grocer is better off because he has the $100. The grocer then pays his employees, the delivery truck operator, etc. all of whom then are slightly better off due to the bicycle tourist's stay at the B&B. The multiplier traces this flow of funds until the money ultimately leaks to places outside the impact area, or reaches the source of its raw material. Therefore, the larger and more self-sufficient the impact area, the longer the money remains in the regional economy, resulting in a higher average multiplier.

Multiplier Model - To estimate the multipliers, the U.S. Department of Commerce, Bureau of Economic Analysis, Regional Input-Output Modeling System (RIMS-II) is used. To use the model, the final demand expenditures (i.e., direct impact and indirect impact values) are categorized into industrial codes. The multiplier calculation process uses the full 38-row by 490-column industries matrix of the U.S. Department of Commerce RIMS-II model, in computerized format. The total output multipliers include household earnings in each row industry group. Final demand expenditure or sales data was entered into the model under a variety of different classifications, depending on the nature of the final demand activities. These bicycle tourism related expenditure types and their respective RIMS-II classifications are presented in Appendix 2.

The size of the multipliers vary from place to place, depending on a location's size (population) and economic base. Typically, the larger the region, the greater the multipliers.

Three Measures of "Economic Impact" - The RIMS-II model provides three measures of the total economic impact attributable to bicycle tourism: Economic Activity (Output), Earnings (Payroll), and Jobs. The total impacts include the tourism sector spending itself (i.e. the "direct impacts") as well as the "multiplier effect". The impacts are estimated for 1999 (the year of the Longwoods tourism survey). These impact measures are described below:

- Economic Activity - The value of the bicycle tourism final demand (direct), plus the "multiplier" effect (the sum of all of the indirect goods and services needed to produce the tourism final demand, plus the induced impacts of increased household consumption). Total economic activity equals the sum of intermediate demands, consumption demand, government demand, investment demand, and net export demand.




- Earnings - The sum of the wages and salaries to all employed persons that the bicycle tourism industry pays, directly or indirectly, to deliver the output of final tourism demand. Earnings Impacts are always included in the Economic Activity totals, so they should not be summed with the Economic Activity impact. Earnings are a very conservative proxy for "value added." Earnings may be greater or less than the Direct values depending on the industry type.

- Jobs - The number of employees who are employed in the bicycle tourism-related industry, plus the bike tourism-oriented share of those that are employed in sectors that support the tourist (B&B's, restaurants, etc.) plus those employed in the industries included in the multiplier effect impacts. The number of jobs attributable to an industry is always greater than simply those in the industry itself, due to the "re-spending" of money.

Impact Measures and Types - These three impact "measures" and the two impact "types" explained earlier are inter-related. The economic activity, earnings and job impact measures comprise Direct and Multiplier impact types. The interaction of the three impact measures and the two impact types are diagrammed above.

## ESTIMATES OF ECONOMIC IMPACT: DOMESTIC TOURISTS

### Bicycle Tourist Estimates

The estimates of bicycle tourists are derived from the Longwoods International survey of domestic tourism in Maine in 1999. The survey estimates that over 43 million tourist trips were made in Maine that year. These include trips made by Maine residents and non-residents. Seventy-eight percent were classified as Day trips; twenty-two percent as Overnight Trips.

For our analysis, Overnight 'Marketable Pleasure Trips' were one focus of study (4.3 million trips). The Longwoods Study also has categories for 'Business Trips' and 'Visit Friends and Relatives' as trip types as well. While persons on these types of trips could engage in bicycle tourism activities, the survey data supported analysis using the marketable pleasure trip category – more likely bicycle tourists.

In the Longwoods survey, the key figures cited were that 5 percent of Overnight Marketable Pleasure Trips had a bicycling component and that 2 percent of all Day Trips had a bicycling component. Overnight trips averaged 2.7 persons per trip; day trips averaged 2.0 persons per trip. Using these figures, it is estimated that 583,740 overnight travelers bicycled (Table 2) and that almost 1.4 million day trip travelers (Table 3) bicycled in 1999 in Maine (Longwoods International, 2000).

Table 2
**Domestic Overnight Bicycle Tourists**

| | |
|---|---|
| Total Overnight Trips | 9,400,000 |
| Percent Marketable Pleasure Trips | 46% |
| Marketable Pleasure Trips | 4,324,000 |
| Percent Bicycling Trips | 5% |
| Estimated Bicycling Trips | 216,200 |
| | |
| **Travelers** | |
| Average Persons per Trip | 2.7 |
| Estimated Overnight Travelers That Biked | 583,740 |

Source: Longwoods International, 2000; WSA.

Table 3
**Domestic Day Bicycle Tourists**

| | |
|---|---|
| Total Trips | 34,300,000 |
| Percent Bicycling Trips | 2% |
| Bicycling Trips | 686,000 |
| | |
| **Travelers** | |
| Average Persons per Trip | 2.0 |
| Estimated Day Travelers That Biked | 1,372,000 |

Source: Longwoods International, 2000; WSA.

Overnight Trip Bicyclists. No additional specific information was available from the Longwoods survey regarding the percentage of overnight visitors that bicycled for only a portion of their trip versus those that took a multiple day bicycle trip. It was estimated by WSA that approximately 95 percent of the over 580,000 overnight visitors that bicycled did so only for one day or less during their trip and so were in fact 'partial day cyclists' for the purposes of this study. The remaining approximately 5 percent of multiple day trip cyclists are estimated to total 31,290. This number is comprised of those that took 'self-guided' bicycle tours (29,190) and those that took part in 'guided tours' (2,100 – estimated from our survey of bike tour operators). See Table 4.

Table 4
**Domestic Overnight Bike Travelers: Direct Impacts**

| | Self-Guided Tour | Guided-Tour | Totals |
|---|---|---|---|
| **Bike Travelers** | | | |
| Travelers That Bike | 29,190 | 2,100 | 31,290 |
| Estimated Days per Bike Traveler | 3 | 4 | |
| Total Biker Days | 87,570 | 8,400 | 95,970 |
| | | | |
| **Bike Traveler Expenditures** | | | |
| Total Biker Days | 87,570 | 8,400 | 95,970 |
| Average Daily Expenditure | $ 55.00 | $ 115.00 | |
| Total Biker Expenditures | $ 4,816,350 | $ 966,000 | $ 5,782,350 |

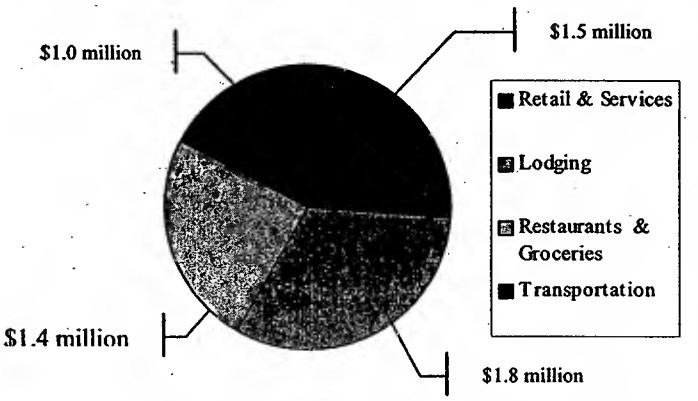
Source: Buxton Communications; WSA.

These figures are translated into expenditures by multiplying them by daily spending estimates. Based on the literature review, daily spending estimates of $55 per day for self-guided bicycle tourists and $115 per day for guided tour cyclists were used. The figures are lower for self-guided tourists due to their higher use of campgrounds than those on a guided tour and less support services. A guided tour generally also provides

additional services such as transportation and a van to ferry luggage and provide support for repairs. See Appendix 1 for comparisons with findings from other similar studies.

Total expenditures are estimated to be over $5.78 million in 1999. The distribution of spending by industry is shown in Figure 4 below.

Figure 4
**Spending Distribution by Domestic Overnight Bicycle Tourists**




Source: WSA.

Domestic Day Trip Cyclists. The cyclists that made day trips to Maine (1.4 million in 1999) far outnumbered the overnight trip cyclists.. From the survey, 45 percent of day trips were made by Maine residents; fifty-five percent were from out-of-state (Longwoods International, 2000).

Including the over 550,000 overnight visitors that made a day cycling trip, there were close to 2 million total day bicycle tourists in 1999 (Wilbur Smith Associates). This is shown in Table 4. Direct expenditures by day cyclists are estimated to total $27.5 million in 1999. The distribution of this spending is projected to be as shown in Figure 6 below.

by Canadians. Assuming the same 2 percent day cyclist rate as domestic travelers yields an estimate of just under 70,000 Canadian day cyclists. Their direct expenditures were estimated to be just over $1 million. (Table 7).

Using the similar bicycling rates as domestic tourists to Maine, (5 percent of overnight marketable trips and 2 percent of base day trips), it is estimated that approximately 127,500 Canadian travelers biked in Maine in 1999. This represents an additional estimated Direct Impact of $ 2.9 million. Using the same RIMS-II multiplier as for domestic travelers results in a Total Impact of $ 5.3 million (Table 8).

Table 6
**Canadian Overnight Travel Trips to Maine**

| | **Overnight Trips** |
|---|---|
| **Total Trips to Maine by Canadians** | 5,300,000 |
| Percent Overnight Trips | 15% |
| Total Overnight Trips | 800,000 |
| Percent Overnight Marketable Trips | 78% |
| Overnight Marketable Trips | 608,000 |
| | |
| **Travelers** | |
| Average People per Trip | 1.90 |
| Total Marketable Travelers | 1,155,200 |
| Percent That Bike | 5.0% |
| Travelers That Bike | 57,760 |
| Overnight Bike Travelers -- 5% | 2,888 |
| Partial Day Bike Travelers -- 95% | 54,872 |
| | |
| **Multiple Day Trip Expenditures** | |
| Multiple Day Bike Travelers | 2,888 |
| Average Days Per Trip | 3.0 |
| Traveler Nights | 8,664 |
| Expenditures Per Day | $55.00 |
| Subtotal - Overnight Bike Trips | $ 476,520 |
| | |
| **Partial Day Trip Expenditures** | |
| Day Bike Travelers | 54,872 |
| Expenditures Per Day | $25.00 |
| Subtotal - Partial Day Trip | $ 1,371,800 |
| | |
| **Total Direct Impact** | $ 1,848,320 |

Source: Longwoods International, 2000; WSA 2000.

Table 7
**Canadian Day Travel Trips to Maine**

| | Day Trips |
|---|---|
| **Total Trips to Maine by Canadians** | 5,300,000 |
| Percent Day Trips | 85% |
| Total Day Trips | 4,500,000 |
| Percent Marketable Day Trips | 69% |
| Total Marketable Day Trips | 3,060,000 |
| Percent In Biking Season | 60% |
| Estimated In-season Day Trips | 1,836,000 |
| | |
| **Travelers** | |
| Average People per Trip | 1.90 |
| Total Marketable Travelers – In-season | 3,488,400 |
| Percent That Bike | 2.0% |
| Estimated Travelers That Bike | 69,768 |
| | |
| **Expenditures** | |
| Expenditure Per Day | $ 15.00 |
| Total | $ 1,046,520 |

Source: Longwoods International, 2000; WSA 2000.

## COMBINED ESTIMATED DOMESTIC AND CANADIAN TOURISM IMPACTS

Table 8 shows the estimated combined economic impacts from the analysis of domestic and Canadian bicycle tourists to Maine in 1999. The analysis yields an estimated $36.3 million in direct spending impacts. Eighty-three percent of this total is derived from Day Trip cyclists and 17 percent from Overnight Trip cyclists. Total impacts, which include direct impacts and multiplier impacts, are estimated to total $ 66.8 million.

## E. RELATIVE ECONOMIC IMPACTS OF BICYCLE FACILITIES, TOURS AND PROGRAMS

Determining the *relative* economic impacts between proposed facilities and within regions in Maine, while difficult, is instructive in guiding implementation of bicycling programs. While an estimate is provided, the order of magnitude and the relative impacts between facilities are the focus of the analysis.

To develop the estimates, ratings were developed for each facility for factors that will influence use by major market segments (local users, day cyclists, multiple day touring cyclists), each with varying economic impact as described previously. The factors used are:

- *Resident population base* – how many potential 'local' users of a trail or tour are there based on the year round population of an area?
- *Visitor base* – how many existing visitors/travelers does a tourism region have to potentially attract to a facility or tour (used mainly as an indicator of 'day trip' potential)?
- *Overnight potential* – how strong a draw would a trail or tour be for multiple day/overnight bicycle trips based on its location and length?

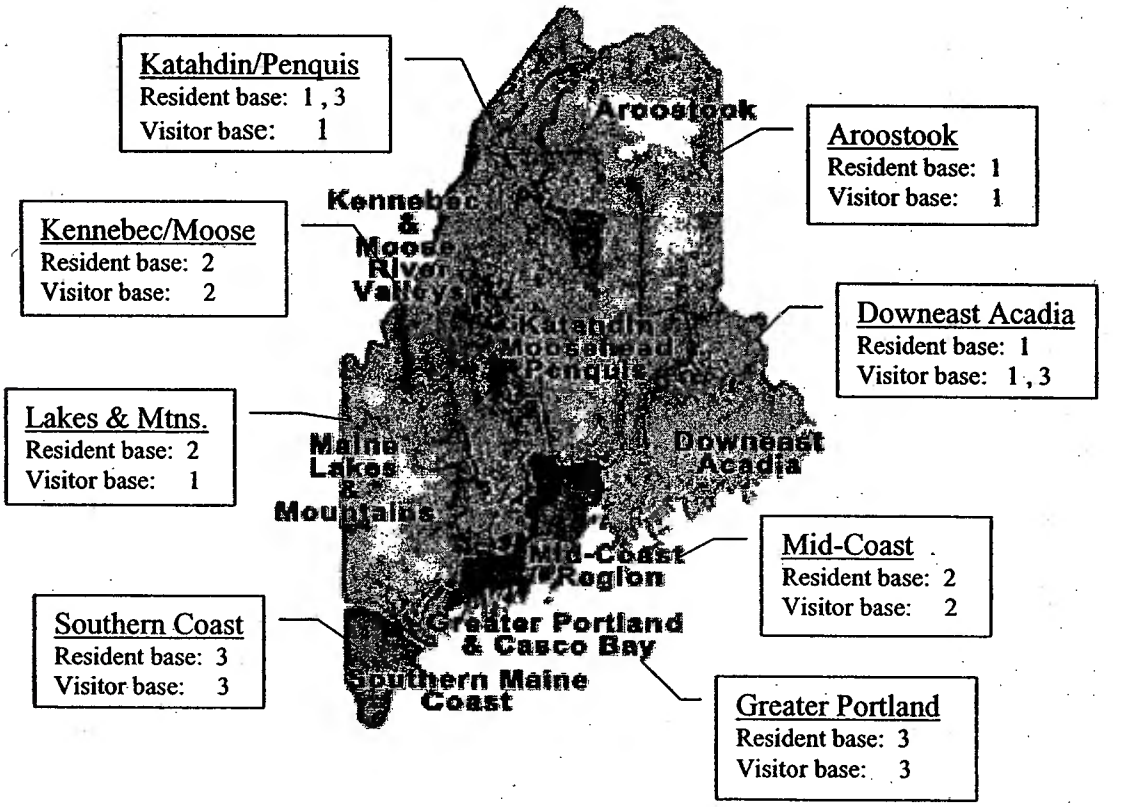
In this analysis, three proposed trails, the 21 MDOT Bike Tours and four individual segments of the East Coast Greenway route were assessed in these three categories. These were grouped by Tourism Region and usage estimates were then made for each facility.

The estimated total number of trail and tour users that are bicyclists was compared to trail usage numbers gathered for other multiple use trails in other regions of the country for a reasonableness check (Appendix 1). The breakdown between trail user types was used to compute estimated expenditures by users based on the spending profile used in the previous section. The usage estimates assume that the trails are 'in place' and operating for five years.

Figure 6 identifies each tourism region and its regional rating (1 – low to 3 – high) for resident base and visitor base. Overnight potential was rated individually by facility.

Two regions have ranges of values. This indicates that the resident population or the visitor base varies considerably within the region. For the Katahdin Moosehead Penquis region, its Resident Population base is rated '1 , 3'. This region includes the Bangor area (a '3' from a resident population standpoint relative to the rest of Maine) as well as less populated areas (a '1' from a population standpoint). Likewise for the Downeast Acadia region, the Mount Desert Island/Acadia National Park area rates a '3' related to Visitor Base while much of the remainder of the region is much less visited, rating a '1' for existing visitors. The 'visitor base' ratings are interpreted from visitor data from the Longwoods International Survey for travel destinations in 1999.

Figure 6
**Tourism Regions and Resident - Visitor Base Ratings**




Source: Maine Office of Tourism Longwoods International, 2000; WSA.

These figures look at bicycling-related impacts only. Impacts from other trail users including equestrian, walk/hike/joggers and cross-country skiers are not included. In many studies of trails, bicyclists account for roughly half of all users. Studies of other trails show that there is a high repeat usage by local users and is reflected in the differences between estimates of local users and day and overnight users.

Table 11
**Shared Use Paths of Statewide Significance**

| Path | Tour Name | Primary Tourism Region | Starting/ Ending Point | Length (mi.) |
|---|---|---|---|---|
| A | Downeast Trail | Downeast Acadia | Brewer - Calais | 135 |
| B | Mountain Division Trail | Maine Lakes & Mountains | Windham - Fryeburg | 40 |
| C | Eastern Trail | Southern Maine Coast | Kittery - So. Portland | 55 |

Additional information about these pathway projects can be found at www.state.me.us/mdot/opt/bike/projects.htm.

Daily expenditures are assumed to be the same as for the economic analysis presented previously: $4.00 per resident day cyclist; $25.00 per day non-resident cyclist; and $55.00 per day for an overnight cyclist (self-guided tour).

Key findings from this analysis (Table 10) are as follows:

Downeast Trail. The Downeast Trail is the longest of the three planned trails at 135 miles. It is planned as a combination of off-road rail-with-trail and on-road trail, extending from Brewer to Calais, Maine. Much of its length will be in rural Hancock and Washington Counties. Based on its resident base rating of '1', day trip rating of '2' and overnight user rating of '3', 43,000 total annual bicycle users of the trail are estimated. It is estimated to have the fewest total users but a proportionately higher total impact due to its length and potential to draw higher numbers of overnight users. Bicyclist direct economic impact is estimated to be on the order of $910,000 annually.

Mountain Division Trail. The Mountain Division Trail traverses 8 communities over its 40 miles from Windham to Fryeburg, Maine. It is planned to be a rail-with-trail, with the trail located alongside the rail line. Phase II of the project hopes to extend the trail from Windham into Portland. Based on its resident base rating of '2', day trip rating of '2' and overnight user rating of '1', 61,000 total annual bicycle users of the trail are estimated. Bicyclists using the Mountain Division Trail are estimated to have a direct impact on the order of $ 715,000 annually.

Eastern Trail. The Eastern Trail spans 12 communities from Kittery to South Portland, connecting several town centers and urban centers over its 55 miles. It is planned to be a combination of off-road trail and on-road trail. The Eastern Trail is estimated to have the largest 'local' and 'day trip' usage based on its resident population and visitor base

ratings. Based on its resident base rating of '3', day trip rating of '3' and overnight user rating of '1.5', 91,500 total annual bicycle users of the trail are estimated. It is estimated to have a lower overnight usage and fewer visitor nights due to its shorter total length. Estimated direct impacts are anticipated to total on the order of approximately $1,000,000 per year.

Again, the intent of this analysis is to assess the *relative potential impacts* of the trails and the mix of potential users. The important aspects of the analysis are:

- the potential higher number of local and day users for the Eastern Trail based on its high resident population and visitor bases;
- higher potential number of overnight users of the Downeast Trail due to its length and location; and
- mid-range number of all user types for the Mountain Division Trail due to its shorter length and resident and visitor bases.

Combined, the estimated direct expenditures of users of the three trails, following implementation and marketing, is approximately $2.7 million per year (constant dollars). The Eastern Trail is estimated to generate 40 percent of these total expenditures. The Downeast Trail is estimated to generate just under 34 percent and the Mountain Division, 27 percent (Wilbur Smith Associates).

Bicycle Tours

In 1999, twenty-one bicycle tours were developed by the Maine Department of Transportation. These tours cover the entire state and range in length from 29 miles to 110 miles. The tours total approximately 1,100 miles. The tours are described in Table 12. Descriptions of the bicycle tours can be found on the MDOT website at www.state.me.us/mdot/biketours.htm. The tours were developed to introduce cyclists to a variety of bicycling experiences throughout Maine and spur increased bicycle tourism.

Similar to the analysis for the multi-use trails, the assessment of the bicycle tours is geared toward identifying *relative impacts by tourism region*. The relative impacts by tourism region are estimated in Table 13. These are developed using estimates of bicycle tour users similar to the trail user estimates. For local users, 750 users per rating point were estimated; 500 users per day cyclist (non-resident) rating point; and, 250 overnight users per rating point (Wilbur Smith Associates). These generated estimates of total users with the intent of estimating relative economic impacts by region.

The analysis estimates that the tours would have an approximate direct impact of $782,000 per year. The impacts vary considerably by region based on the number of tours within each region and the length of the individual tours. The 'Mid-Coast', 'South Coast ' (a combination of two tourism regions) and 'Maine Lakes and Mountains' have the highest number of tours and a high proportion of the estimated impacts(29 percent, 27 percent and 18 percent, respectively) (Wilbur Smith Associates). These estimates use the same per day by user type expenditures: 'local', 'day trip' and 'overnight' -- spending averages, $4 per day, $25 per day and $55 per day, respectively.

Interim East Coast Greenway Route

A third set of relative impacts were estimated: the interim on-road East Coast Greenway Route (Table 14). The East Coast Greenway is proposed as an interurban trail system that eventually is planned to extend from Key West, Florida to Calais, Maine for over 2,600 miles. The plan is for the Greenway to be composed of shared use paths for at least 80 percent of its length. In Maine, an on-road route has been designated for interim use until a more extensive network of paths can be integrated into the route. Due to the distances involved, it is likely to remain a largely on-road route for much of its extent for the foreseeable future.

Table 14
**Interim East Coast Greenway Routes**

| Tour Name | Primary Tourism Region | Starting/ Ending Point | Approx Length (mi.) |
|---|---|---|---|
| Maine East Coast Greenway: Eastern Trail & Casco Bay Route | Southern Maine Coast & Greater Portland/Casco Bay | Kittery-Brunswick | 115 |
| East Coast Greenway: Coastal Route | Mid-Coast - Coastal | Brunswick -Ellsworth via Belfast | 190 |
| East Coast Greenway: River Route | Mid-Maine - Inland | Brunswick - Ellsworth via Bangor | 175 |
| East Coast Greenway: Downeast Trail | Downeast Acadia | Ellsworth - Calais | 140 |

The number of users per rating point for the East Coast Greenway were estimated to be double those used in assessing the relative impacts of the bicycle tours for local and day trip users. The Greenway will enjoy national as well as local publicity and is expected to draw a larger user base. For local users, 1,500 users per rating point were estimated, 1,000 users per day trip rating point and 250 users per overnight rating point.

The estimated relative impacts are shown in Table 15. This shows an estimated direct economic impact of over $530,000 per year. The table shows the estimated distribution of these direct impacts by major segment: 32 percent, Kittery-Brunswick; 30 percent, Brunswick-Ellsworth via Belfast; 13 percent, Brunswick-Ellsworth via Bangor; and, 25 percent, Ellsworth-Calais.

Appendix 1 contains a listing of other economic impact studies for similar facilities.

Table 15

**Estimated Direct Impacts of Interim East Coast Greenway**

| Interim On-road Tour | Tourism Region | Length miles | Resident Population Base (1-3) | Visitor Base (1-3) | Overnight Potential (1-3) | Local Users | Day Trip Users | Overnight Users | Total Users | Avg Nights | Visitor Nights | Estimated Bicyclist Impacts | Percent of Subtotal |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| East Coast Greenway: Eastern Trail-Portland-Brunswick | Southern Maine Coast & Greater Portland/Casco Bay | 115 | 3 | 3 | 3 | 4,500 | 3,000 | 750 | 8,250 | 2 | 1,500 | $168,000 | 32% |
| East Coast Greenway: Coastal Route | Mid-Coast - Coastal | 190 | 2 | 3 | 3 | 3,000 | 3,000 | 750 | 6,750 | 2 | 1,500 | $162,000 | 30% |
| East Coast Greenway: River Route | Mid-Maine - Inland | 175 | 3 | 1 | 2 | 4,500 | 1,000 | 250 | 5,750 | 2 | 500 | $68,000 | 13% |
| East Coast Greenway: Downeast Route | Downeast Acadia | 140 | 1 | 2 | 3 | 1,500 | 2,000 | 500 | 4,000 | 3 | 1,500 | $133,500 | 25% |
| | | | | | **Total:** | 13,500 | 9,000 | 2,250 | 24,750 | | 5,000 | $531,500 | 100% |

Estimates are intended to provide relative impacts between East Coast Greenway sections and order of magnitude for direct impacts.

| Assumptions | |
|---|---|
| | Users/Rating Point |
| Local Users: ECG Tours | 1,500 |
| Day Trip Users: ECG Tours | 1,000 |
| Overnight Users: ECG Tours | 250 |

Source: Wilbur Smith Associates.

# PART II. BICYCLE TOURISM MARKETING

## INTRODUCTION

The purpose of this portion of the study is to assist the Maine Department of Transportation (MDOT), the Maine Office of Tourism and the Maine Tourism Association to channel resources and identify marketing program and facility development priorities. Resources may include staff time and a bicycle tourism-related marketing budget. Priorities may include which bicycle tours and Maine regions to emphasize to increase bicycle tourism.

The goals for these marketing recommendations, from the Request for Proposals issued for the study, relate to marketing to bicycle tourists and the bicycle tourism industry:

> Goal 1. Perform market research to characterize and describe the bicycle tourism segment of the existing tourism industry in Maine, including information that describes the different categories of bicycle tourists, their preferences and needs.
>
> Goal 2. Using the new information generated by the previous research, make recommendations on facility improvements, program strategy, promotional campaigns and advertising materials for the MDOT and its partners' bicycle programs.

The key to promoting Maine as a bicycle touring destination is recognizing that:

- there are different types of bicycle touring activities
- there are unique demographics associated with the participants of each activity type
- regional differences will support the various types of bicycle touring activities and market segments to a greater or lesser degree.

The challenge, therefore, is:

- to recommend the types of bicycle touring activities best suited for the individual regions of Maine
- to recommend a marketing plan and materials aimed at the market associated with each type of bicycle touring activity.

As a fundamental part of this study, this report aims to present the critical factors that the state as a whole, its regions and individual businesses can apply in a coordinated fashion to become a successful bicycle touring destination.

## A. OVERVIEW OF BICYCLE MARKETING

In developing a marketing plan to promote bicycle tourism, the Maine Department of Transportation (MDOT) has some excellent examples to follow. During the past decade, several states have successfully marketed themselves as destinations for bicycle tourists. Notably, Vermont and Wisconsin have had success promoting their states as bicycle-friendly vacation destinations, and Maine could learn a great deal from them.

Like Maine, Vermont and Wisconsin have earned reputations 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 share. Unfortunately for Maine, many of the locations to which cyclists might otherwise gravitate are currently perceived in negative terms. Our survey of bicycle tour companies and interviews with experienced cyclists and tourism professionals indicates that these areas are viewed as either plagued by heavy traffic (Bar Harbor / Acadia and the south and mid-coasts) or by poorly maintained roads (downeast, western and mountain regions).

Maine can overcome the reason for these negative perceptions by continuing its efforts to improve road conditionsand directing bicycle tourists to facilities for off-road and trail cycling, as well as to regions where there is lower traffic. The goal of this marketing effort should be not to merely generate more business for the state by increasing bicycle tourism. The effort should also effectively "create" bicycle tourists and guide themto routes that will ensure a positive experience, promote good word-of-mouth referrals and spur return visits.

To its advantage, Maine has a resource that neither Vermont nor Wisconsin has – a 2,500-mile coastline – in addition to an interior landscape that is both varied and rich in the types of cultural, historical and natural attractions that casual and seasoned cyclists seek. Promoting the quintessential "Maine" experience should form the cornerstone of any bicycle tourism marketing effort undertaken by the state.

Another advantage for Maine is that much of it is within a day's drive from the major metropolitan areas of New York and Boston. The state is also in the process of improving its passenger transportation network with air, bus and train connections throughout the U.S. and to Europe. This will increase Maine's accessibility.

Finally, it should be recognized that any efforts the state of Maine makes to increase its share of the bicycle tourism market will be limited if it does not include partnerships with the private sector. In regions where bicycle tourism has flourished, the states' efforts have been greatly enhanced by commercial bicycle touring companies that are well established and that make use of sophisticated marketing techniques. For this report, we have looked at ways to enhance MDOT's investment by forming partnerships with other public agencies, non-profit organizations and corporate and commercial establishments – parties that all stand to benefit from the promotion of Maine as a cyclists' destination.

How These Recommendations Were Developed

The recommendations listed below have been developed based on research and interviews from a variety of sources.

- A literature and internet review was conducted to determine the "best practices" in use by states, regions and bike/hiking trail initiatives throughout the country.
- A survey of professional bike tour operators was conducted to identify, among other things, perceptions of Maine as a cyclists' destination. Also investigated were barriers to, and opportunities for the successful promotion of cycling in Maine.
- Interviews with tourism and cycling professionals were conducted to identify opportunities for the promotion of cycling tourism on a statewide and region-by-region basis.

Audience

While it may seem simple, building awareness of Maine as a bicycle destination is a potentially complex task. It will require a carefully targeted marketing plan that reaches out to cyclists of varying skill levels (beginning, intermediate and experienced) and cycling preferences (on-road vs. off-road and trail, "serious-minded" long-distance touring cyclists vs. casual "day trippers" and families). MDOT's marketing plan also should dovetail with efforts by businesses, chambers of commerce and other regional economic development organizations, bicycle advocacy groups and state agencies to promote mountain biking and other forms of off-road cycling.

Brief descriptions of the target audiences for the recommendations in this report are as follows:

**Tour Operators and Others in the Bicycle/Tourism Industry**
While there is a limited number of touring companies offering tours in Maine, this is an influential group and an important core audience for any bicycle tourism promotional plan. There are also bicycle shops, outdoor outfitters and other recreation professionals that have a large influence in building Maine's cycling reputation.

**Experienced multi-day touring cyclists**
Like tour operators, experienced touring cyclists will play an essential role in creating a positive "buzz" about cycling in Maine. These multi-day touring cyclists are also, for the most part, an affluent group that spends a significant amount on equipment and on their travel experience.

**Day trippers or "casual" cyclists**
This sizable group represents, by far, the greatest potential for developing bicycle tourism in Maine, although it is in many ways a more difficult group to define and reach. Also, their decision to cycle is usually much more spontaneous than experienced cyclists.

There are several advantages to promoting Maine as a destination to all three of these target groups. First, there are inter-relationships between the three distinct groups. Tour operators and long-distance touring cyclists are typical "opinion leaders" and have the ability to influence a broad spectrum of the bicycle tourism market. Younger cyclists who tend to make up the off-road and mountain bike market will eventually grow older, start families and migrate, at least temporarily, to the casual cyclist group and often on to the touring group. Casual cyclists make up the largest portion of the market, and hold the greatest potential for increasing Maine's share of the bicycle tourism market. Finally, there are economies to be gained by reaching out to all three markets in the state's marketing materials – although care should be taken to create images and provide information tailored specifically to each group.

**Marketing Goals & Objectives**

These recommendations are intended to guide the Maine Department of Transportation (MDOT) and its public and private partners in the development of a targeted, two-year campaign to promote bicycle tourism. These partners include the Office of Tourism, the Maine Tourism Association, the Chambers of Commerce, business associations that will benefit from bicycle tourism (lodging, campgrounds, restaurants, e.g.) and the Bicycle Coalition of Maine. The goals of the recommended marketing campaign are to increase awareness of Maine as an ideal destination for casual and experienced bicyclists, encourage travelers to consider Maine a destination for car-free vacations and increase Maine's share of the bicycle tourism market.

The key marketing objectives of this campaign are as follows:

- Generate interest in the many cycling opportunities available in Maine (on-road, off-road/shared use paths, mountain and trail)
- Provide information about cycling resources that will help travelers plan their Maine vacations
- Promote cycling throughout the state, with an effort to direct cyclists to regions where hiking/biking trails, traffic and road conditions will create a positive cycling experience
- Stimulate private commitment to and investment in making Maine a bicycle tourism destination.

## Marketing Messages

In marketing the state as a bicycle destination, MDOT and its marketing partners should consistently emphasize Maine's chief natural and cultural assets as it promotes Maine as a destination for bicyclists.

1) Scenery. Maine has an abundance of outstanding natural scenery – from seven major river systems and the northern reaches of the Appalachian Mountain range to the state's diverse and extensive coastline. All have a great deal of appeal for cyclists. Bicycle facilities (paths, paved shoulders and bicycle racks on buses) and information (maps, bicycle tours and bicycling resource directories) promoting Maine's natural resources should be developed.

2) Road, Off-Road and Trail Opportunities -- Variety of Cycling Experiences and Terrains. Because of the diversity of the cycling market, Maine needs to incorporate messages about locations and facilities for all types of cyclists: road routes or tours for touring cyclists; mountain bike and backwoods trails for mountain bikers; and multi-use trails for casual cyclists and day trippers. Materials should also include a variety of trip lengths and terrains from easy half-day rides to rigorous, multi-day tours.

3) Natural / Rural Maine. Bicyclists, both casual day trippers and experienced, multi-day touring cyclists, seek experiences that are different from their typical daily lives. Because a majority of Maine's potential market comes from more densely populated and developed regions, Maine should emphasize its natural / rural heritage.

For example, when reaching out to experienced multi-day touring cyclists who are willing to travel a greater distance for a positive cycling experience, Maine should actively promote multi-day bicycle tours in areas such as Aroostook and Washington counties. Alternatively, with casual day-trippers, Maine should direct cyclists to what this group perceives to be safer rides, and consequently more positive experiences, by promoting bike trails and resources within a short travel distance of major tourist attractions, e.g., the Mountain Division trail to travelers visiting the beaches of south coast and the mountains of southwestern Maine or the Schoodic peninsula to Acadia National Park / Bar Harbor area visitors. Both of these examples promote areas where the natural and cultural experience is distinct from more congested and metropolitan regions where Maine traditionally has drawn the greatest numbers of new visitors.

## B. BICYCLE TOURIST MARKET CHARACTERISTICS

Bicycle tourists vary in cycling skill, age and bike group composition. These differences strongly influence the preferences of cyclists and will be discussed below.

### 1. Bicycle Tourist Preferences

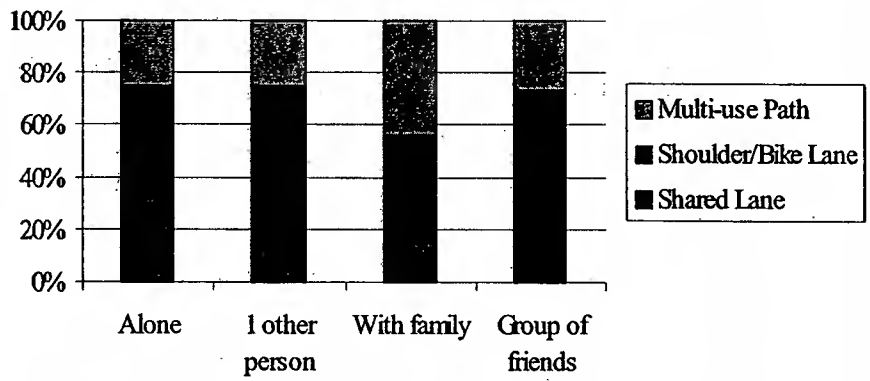
#### Facility Type and Location Preferences

Bicycle facility preferences, like daily bicycling distances relate to the experience and make-up of the bicycle touring group. Preferences for facility types were surveyed as part of the Haut Richelieu survey. Facilities specifically surveyed include shared use paths, paved shoulders/bike lanes, and shared lanes. Shared lanes are roadways where cyclists and motorists share the travel lane.

Experienced bicyclists traveling alone or with other adults generally prefer riding on roadways bike-friendly roadways than shared use paths. Cyclists traveling with family members, particularly those likely to include children, prefer greater separation from automobile traffic, using shared use paths or roadways with bicycle facilities (paved shoulder or bike lanes). A low percentage of cyclists traveling with family preferred shared lane bicycle facilities (Figure 8).

Figure 8

**Bicycle Facility Preferences and Group Make-up: Experienced Cylists**



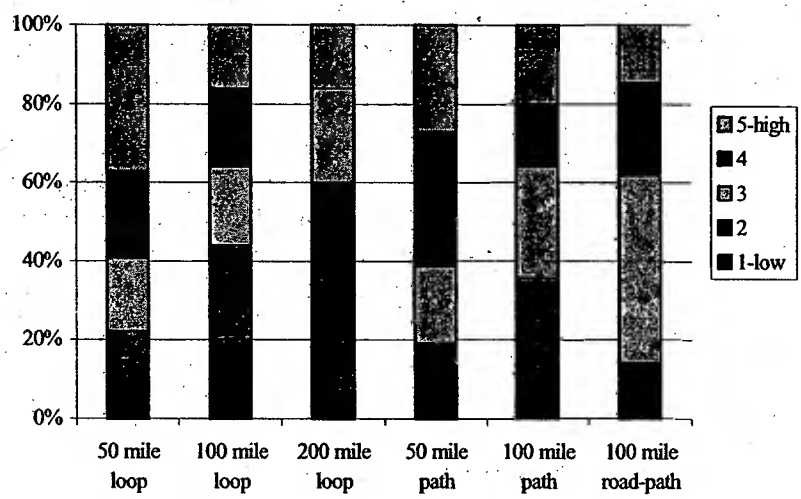

Source: Haut Richelieu, 1994.

A survey of 27 groups of bicyclists (composed of 82 cyclists) was conducted in September 2000 of users of the carriage roads at an entrance to Acadia National Park to gain additional insight into bicycle facility preferences for touring. Respondents were asked to rate their interest "in a multiple day bicycling trip with maps and packaged

information including cultural/historic points of interest and lodging/camping" using a variety of bicycle facility types and tour distances. Tour lengths and facilities included tours loops using "bicycle friendly roads" (road 'loop'), "shared use paths" (linear "path") and combinations of the two facility types (linear "road-path" combination). Responses are shown in Figure 9.

The highest interest (answers with '4' and '5') were for the 50 mile loop and the 50 mile path, each totaling approximately 60 percent. The least preference (answers with '1' and '2') was for the 200 mile loop and the 100 mile loop.

Figure 9
**Facility Preferences by Tour Length**




Source: WSA, 2000.

Respondents were also asked about the length a shared use path would need to be "to be a major factor in selecting the location of a future Maine vacation"?

- Trail not important to vacation location, 29 percent
- 10 miles, 26 percent
- 20 miles, 15 percent
- 40 miles, 26 percent
- 60+ miles, 4 percent (Wilbur Smith Associates).

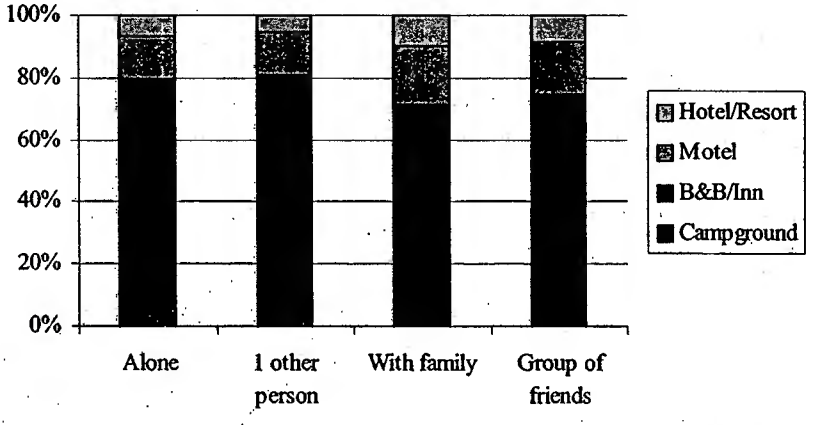
Almost all respondents were from out of state -- vacationing in Maine and had traveled over 250 miles to reach Acadia. These results conform with the literature review regarding the ability of shared use paths to attract people, notably families with children, from long distances. In the late 1980's, a survey of users of the Elroy-Sparta Trail in western Wisconsin showed that the then14 mile trail attracted a high proportion of its users from the Chicago metropolitan area for overnight visits. The trail was a primary reason for their choice of vacation location. Similar findings were discovered for users of

the Red Cedar Trail, also located in Wisconsin (Wisconsin Extension Service, 1988 and 1995).

### Lodging Preferences

Experienced bicycle tourists, according to the Haut Richelieu survey, prefer a wide variety of lodging choices. Preferences again varied depending on group make-up but Beds and Breakfasts and Inns were strongly preferred to other types of lodging. When traveling with families (and presumably children), motels rated higher than for other group compositions.

Figure 10
**Lodging Preferences by Group Make-up**




Source: Haut Richelieu, 1994.

## 2. Bicycle Tour Operators and Participants: Preferences

Background

A survey of bicycle tour operators was conducted to help determine the current economic impact of organized bicycle tours in Maine, as well as better to understand the strengths and weaknesses of Maine as a bicycle tourism destination.

Surveys were mailed and e-mailed to 42 tour operators. Eleven companies responded for a 26 percent response rate. The respondents represented a wide range of businesses, though all were located in the east of North America, ranging form New York to Quebec. The responding companies all have significant experience in the business. Fifty percent (50 percent)of the respondents have been in business for 6 to 10 years, 33 percent for more than 11 years. Those that have been in business for 11+ years offer the highest number of tours per year, with one company offering 100 tours per year and another offering 240 tours. Younger companies tend to offer two to 25 tours per year. Sixty-seven percent (67 percent) of the tours offered by the respondents have fewer than 20

participants, 33 percent have over 100 participants. The largest number of participants per tour was for those tour companies that offer tours less often (2-3 times per year).

Participant Profile

The majority of the participants ranged in age from 31 to 60 years, coming mainly from the New York metro area, with New England and the Mid-Atlantic making up the majority of the remaining tour participants. There were more participants from Europe, the West Coast and the Mid West than there were from Canada, despite that country's proximity. One Canadian tour company mentioned the exchange rate as a factor that made tours prohibitively expensive in the United States. Most participants were not expert cyclists (33 percent Beginner, 45 percent Intermediate), and only one company indicated that the majority of their clients were expert cyclists (80 percent for this one tour company).

Tour Profile

Analysis of the survey results offer the following findings, representing survey respondents only.

- 83 percent of the tours offered lasted a week or less, 17 percent lasted two to three weeks.
- The average tour cost per day was $115.00, though the prices ranged from $45.00 to $215.00 per day.
- On average, each participant spent about $29.00 additional per day.
- 66 percent of the respondents have offered tours in Maine.
    - From the survey responses, the majority of these tours were conducted in the Acadia National Park/Bar Harbor/Downeast region of the state. The mid-coast region, Rangeley and the mountains were also popular, and a limited number of tours had been offered in Southern Maine and in the Bethel/Sunday River area. The survey respondents did not offer tours in the Moosehead, Aroostook County and mid-Maine areas. This could be due to the high interest in ocean views, which these inland regions do not provide.

Choosing a Tour Location

When deciding where to conduct a tour the tour operators indicated that **suitability of roads** and the **scenery** were the most important factors. **Accommodations** (including proximity to the route), **terrain** and **accessibility** were also important factors for them. Distance to location, driving time from city, level of participant ability, historical and cultural attractions, opportunities for entertainment and other forms of recreation were of moderate importance for the tour operators.

Off-Road Cycling / Shared Use Paths

When asked if they would consider integrating a long- distance trail such as a rail/trail segment into future tours, 81 percent of the respondents answered yes. Sixty four percent also said that a long distance path would enable them to market their services to new audiences.

Interest was expressed in the safety and ease of such a trail and facility. One respondent, a youth bicycle camp, said that a long-range rail/trail and facility would be helpful, as they are "safer than most roads. Parents are more comfortable sending their kids on a bike tour knowing they are on paths rather than busy roads." Another said, "Family tours are popular and a long-range facility [such as a shared use path] would help."

Authentic New England

When asked to rate Maine on a scale of 1 to 10 (10 being excellent) as a location for bicycle touring, nine of 11 respondents answered. Maine received a rating of **8.6**. Positive factors leading to this rank included the **scenery, food** and **people** of Maine. One respondent appreciated that Maine is "still 'authentic' and very 'New England.'"

Negative factors included the level of **traffic** (felt to be too high) and the **condition of roads/shoulders**. The "unavoidable" traffic on Route One was cited as the only drawback for one respondent. Another respondent later mentioned the high cost of flying into Maine and suggested expanding air travel choices.

Respondents were then asked to rate on a scale of 1 (poor) to 4 (excellent) how well Maine met a list of factors that would make a destination attractive to bicycle tourists. Highest ranked were the **scenery** and **water views** that Maine has to offer. Lowest ranked were urban experience and bike friendly roads. **Friendliness** of residents, **small town life** and **vegetation** were also ranked as strong factors in Maine.

How Maine Ranks As a Cycling Destination

When compared to other New England states, **Vermont** and **New Hampshire** ranked highest (24 pts each of 66 possible). Maine ranked third (21), and Massachusetts was fourth (19). Connecticut (15) and Rhode Island (13) scored lowest among tour operators.

'Inform the public!'

When asked what Maine could do to encourage more bicycle tourism in Maine, respondents most often mentioned the need to **improve roads**. Lack of information was also cited as a problem, with suggestions that Maine create "one main source of information on cycling in Maine" as well as "well-documented trails/maps," better marketing of trails in the state and more information on B&Bs and other support industries. One respondent suggested, "Run a press trip covering a bicycle vacation,

distribute magazines.... simply put out bike racks in towns." Such actions would communicate an image of Maine as a knowledgeable and friendly state ready to support visiting bicycle tour companies.

When asked if they would find a monthly or quarterly email cyclists' update from Maine useful 100 percent of the respondents who answered the question said yes. One respondent was already receiving updates from the Bicycle Coalition of Maine and found it to be very useful.

*"We did not know that this existed. Is it advertised in the Maine Vacation Guide?"* When asked if they had visited the MDOT website for cyclists, none of the respondents knew that it existed.

Where They Turn for Information

**Magazines** read and advertised in by respondents include: Adventure Cycling (or Cycling Adventure), Bicycle Magazine, Outside, Metro Sports (N.Y.), National Geographic Adventure, New Yorker, NY Cycle Club Newsletter, The Ride, Rochester Cycling Club Newsletter, Travel America, Vélo Québec.

**Websites** mentioned: www.bicycletourpassion.com and www.okfreewheelers.com

'Let the Roads deteriorate even further'

When asked what Maine could do to discourage bicycle tourism, the above was a common answer, further demonstrating the bad reputation Maine's roads have. Also mentioned was mass tourism. "We appeal to clients looking for natural beauty, historical inns, etc. Any mass tourism, outlet malls, bus tours and LARGE hotels can have a negative impact." Maine does a good job of balancing the shopping tourists with eco tourists, emphasizing the natural treasures of Maine. This message needs to be communicated to tour companies, reassuring them that while Maine is a natural jewel, it also has available high quality, convenient amenities for their clients.

## C. BICYCLE TOURISM MARKETING PLAN

### 1. Bicycle Map Distribution

The Maine Department of Transportation published the Maine Bike Map in 2000 which provides bicyclists valuable information about on-road cycling in Maine. The information contained on the map is comprehensive and well-planned and will be particularly useful as the state cultivates the bicycle touring market. The launch of the map, featuring the Governor, was a success with broad news coverage within the state. Nearly 50,000 of the maps have been distributed in the first year.

The map currently includes:

- Traffic volumes and availability of paved shoulders
- Location of State and National Parks, public lands and historic sites
- 21 bike tours
- State ferry routes
- Insets for urban areas.

The reverse of the map includes:

- Welcome from the Governor
- 'Rules of the Road' for the safe operation of a bicycle
- Connections to other modes of transportation including ferry, air, intercity bus, fixed route bus service and park and ride lots
- Bicycling related laws in Maine
- Lodging opportunities
- Summaries of the 21 bike tours
- List of cycling resources
- Trip planning tips.

As distribution of the map expands and subsequent printings are undertaken, it will be essential to integrate the map into a coordinated effort to promote bicycle tourism -- in essence making the map one part of the larger, targeted promotional campaign. This means using graphics and images that are consistent with other materials. For the next printing, the map should reinforce and emphasize Maine's natural beauty and the unique opportunities for outdoor recreation and other activities using graphics and images similar to those found in other state tourism materials.

From our survey of other states' maps and tourism materials, we make the following recommendations to be considered for this and future map revisions.

- Print 100,000 maps for distribution over the next two years.

- Print using a paper that folds well, doesn't crack at the folds and withstands rain (evaluate the current map against these criteria). If possible print using recycled paper and soy-based inks to reflect the environmentally-conscious sensibility of the typical bicycle tourist.

- Enhance the overall graphics and layout of the map. This includes:

  - ✓ Use professional photography and display photos more prominently – particularly on cover
  - ✓ Include images of Maine's small town life and natural beauty
  - ✓ Develop more consistent and higher quality illustration style to make overall map layout more attractive, simpler and easier to read.

- Encourage interested cyclists to request more information.

- Include web site address and toll-free information number prominently on the map. Both should be incorporated into the "logo" and appear in several locations, i.e., front cover, back cover, main map panel, as well as in the section titled "Web Resources," in the case of the web site.

- Expand in-state distribution through the following channels:

  - ✓ Continue to use the Maine Tourism Association's and state chambers' distribution networks to place maps (and other bicycle tourism promotional materials) in tourist information centers and chamber information centers.
  - ✓ Continue to distribute map to all bicycle shops and recreational outfitters in Maine (with assistance from the Bicycle Coalition of Maine).

- Create awareness of map outside of Maine by the following actions:

  - ✓ Issue press releases about map to outdoor press
  - ✓ Target bicycle and outdoor publications, newspaper travel sections and television and radio shows with travel and outdoor themes
  - ✓ Target states where Maine traditionally draws a greater proportion of overnight visitors (Connecticut, Massachusetts, New Hampshire, New Jersey, New York and Pennsylvania)
  - ✓ Post map on MDOT web site as a downloadable file
  - ✓ Work with Maine Office of Tourism and Maine Tourism Association to promote map on visitmaine.com site and create links with chamber web pages
  - ✓ Advertise in "Maine Invites You" and refer readers to web site and toll-free number

- ✓ Develop a direct response poster and / or mailing to bike shops and outfitters outside of Maine. Be sure to keep poster size to 8.5" x 11" or smaller, because of limited display space within these stores

- Produce an on-line version of the bike map that can be viewed and downloaded and promote it through the appropriate marketing channels (PR, state tourism information materials, web links). To the extent possible the on-line version should be packaged based on the Maine tourism regions as used by the Maine Office of Tourism. Each region would be scanned and posted in an individual file for easy printing and reference. Maps should overlap with adjoining regions to ensure continuity of coverage between regions.

In addition, the MDOT should re-evaluate its role as the sole producer of these maps. While it would be wise for the agency to continue providing technical assistance for mapping and route development, there may be advantages to working with another state agency (e.g., Maine Office of Tourism, Maine Department of Conservation) or organization (e.g., Maine Tourism Association or Bicycle Coalition of Maine) to produce regular updates of the map.

Consideration should also be given to providing, free of charge, all relevant map data to cartographic companies in the private sector so they can produce their own version of the map for sale. This will likely result in many more editions of a bicycle map at different price points being made available to the general public at little or no cost to the State of Maine. Eventually, MDOT may want to follow the example of the Lake Champlain Bikeways steering committee which offered technical support and route information to private sector companies free of charge. Two companies ended up publishing the information, and the outcome of this process resulted in multiple map products at different price points. Copyright issues should be explored in relation to data ownership.

The MDOT should also consider partnering with a state agency to produce an "outdoor adventure" map that combines bike information with information about other recreational activities (mountain biking, multi-use ATV/off-road trails, state parks, etc.) and avoid duplication of effort and realize cost savings for the state. By working with a non-profit organization, MDOT and its partner may be able to offset a portion of the production costs with the sale of advertising or solicitation of corporate sponsorships.

### 2. Bicycle Loop Tour Marketing

In 1999, MDOT developed 21 bike tours in Maine. Currently these tours are available from the department's Bicycle and Pedestrian web site in Adobe Portable Document Format (PDF) and in printed form requested through the MDOT. Once published and publicized, these routes will be a particularly valuable marketing tool for reaching two of the targeted audiences – experienced, multi-day touring cyclists for the longer tours and day trippers or "casual" cyclists, who need the reassurance and guidance that loop tours will provide. The tours range in mileage from 29 miles to 110 miles, providing a range

of experiences for cyclists of moderate to experienced abilities and in most areas of the state.

The loop tours, it also should be recognized, have considerable potential as economic development tools that, if distributed and well publicized, could benefit businesses such as bicycle dealers, bicycle rental agencies, restaurants, food/grocery stores and lodging providers. The tours can be packaged and publicized by targeted regions within Maine, e.g., western and central Maine and Aroostook and Washington counties.

Initially MDOT should select between six and 12 tours to print and publicize during the first two years. The initial tours selected should meet, to the extent possible, the criteria listed below:

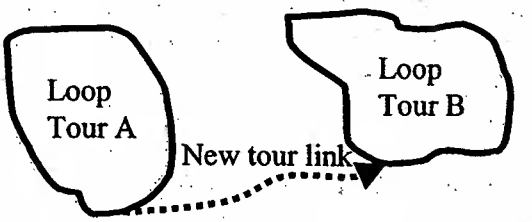
- Provide the most favorable experience for cyclists (e.g., wide shoulders and moderate or low traffic volumes)
- Begin in locations that can easily be reached via commercial and public transportation as well as private vehicle
- Direct touring cyclists to loops where the scenery is pleasant and services are available to ensure success and where the economy would benefit the most from increased bicycle tourism.

Quantities will vary for the printing of each of these informational pamphlets, depending on the region, anticipated demand and distribution (between approximately 20,000 and 50,000 total for two years). Regarding specific recommendations about design, content, printing and distribution, MDOT should follow the recommendations provided for the Maine Bicycle Map provided above. Additional recommendations include:

- ✓ Produce and emphasize an attractive, and on-line/downloadable version of bike tours and promote them through the appropriate marketing channels (public relations, state tourism information materials, web links)
- ✓ Distribute to tourists through the Bicycle Coalition of Maine, visitor information centers and chambers of commerce
- ✓ Create awareness of tours in key regions in the Northeast with press releases and direct response poster
- ✓ Promote tours in 'Maine Invites You' ad
- ✓ Consider partnering with other state agency(s) or non-profit organization to produce maps and consider providing information to private sector as a potential longer term strategy to produce and distribute tour maps and information.

Implement 'Loop and Link' Strategy

To increase the effectiveness of the individual bicycle loop tours, the MDOT should identify routes that provide links between the starting point of tours, where possible. This would provide guidance to cyclists who want to extend or diversify their cycle tour experience. The East Coast Greenway route, discussed below, would be one natural way to functionally link the bike tours along its route. This connectivity should be promoted within each loop tour's description.




Thematic Tour Brochures

In addition, we recommend that MDOT encourage production of thematic tour brochures by local and regional entities and/or the private sector. These would be targeted to the more casual cycling tourists for day or more extended tours. Similar in concept to the Maine Art Museum Trail or the Franklin Heritage Loop promotions recently developed in Maine, these brochures may thematically connect a selection of the shorter loop tours and encourage cyclists to experience more of Maine by riding two or more of the routes.

In addition to providing cycling routes, this brochure should also provide a comprehensive listing of cultural, historical and natural attractions, including state parks and hiking / walking trails, all resources that would also appeal to this market. Next year, the Bicycle Coalition of Maine will be working with the Department of Conservation to develop a "Hiker / Biker" policy for state campgrounds. A joint effort to produce a hiker / biker link and loop brochure may be both timely and cost-effective.

Just as the Franklin Heritage Loop and Maine Art Museum Trail brochures were produced with sponsorship funds, we believe there is excellent sponsorship potential for these brochures for production by the private sector for sale. Other options include inviting lodging providers to package a tour linking their facilities. For instance, Farm B&B's currently produce a brochure that describe their location and area attractions. Lodging providers along a tour could repackage the tour to attract/target specific interests.

### 3. Bicycle Tourism - 'Explore Maine' Joint Marketing

The 'Explore Maine' project by the Office of Passenger Transportation seeks to implement a coordinated program of passenger transportation services throughout Maine. These services encompass passenger rail, excursion rail, passenger ferry, passenger air,

local bus transit, intercity bus, motorcoach tours, bicycling and shared use paths. The goal is to allow visitors to Maine and its residents to travel on a seamless network without the automobile. Bicycling is an important aspect of this program as both a mode of transportation and as one of the mix of activities that is critical to attract visitors to Maine.

One part of the Strategic Passenger Plan program was the concept of tour packaging. Depending on the target market for a tour package, bicycling can be either a central or complementary part of a tour.

Recommendations include:

- Ensure bicycle accommodations and bicycle friendly policies on trains (fares and carry-on or convenient storage not requiring disassembly or crating), buses (bike racks) and ferries (bike friendly fares and policies)
- Identify bicycle access routes to and from Amtrak and other passenger rail stations
- Assess and coordinate transit connections with bicycling touring opportunities
- Bike racks and/or lockers at intermodal stations
- Make bicycling prominent in Explore Maine promotions/public relations programs & literature
- Identify and promote bike and bus combination tour possibilities.

The Office of Passenger Transportation is currently developing a statewide bus transit strategic plan. This plan will include a statewide transit system assessment. The material developed for the plan should be used to assess the adequacy of transit services to support bicycle tourism. For instance, persons on a self-guided, multiple day bike tour on the Downeast Trail would be potential users of a bus service to return them to their starting point. Locations where local bus service intersects with tours and trails should be identified. A daily service of this type is currently offered by West Transportation ('West's Coast Connection') along the proposed Downeast Trail corridor.

### 4. East Coast Greenway Joint Marketing

The East Coast Greenway Alliance is developing a system of interconnected trails from Key West, Florida to Calais, Maine. Their goal is "to connect existing and planned trails that are locally owned and managed to form a continuous, safe, green route -- easily identified by the public through signage, maps, users guides, and common services". Facilities are planned to be 80 percent shared use paths.

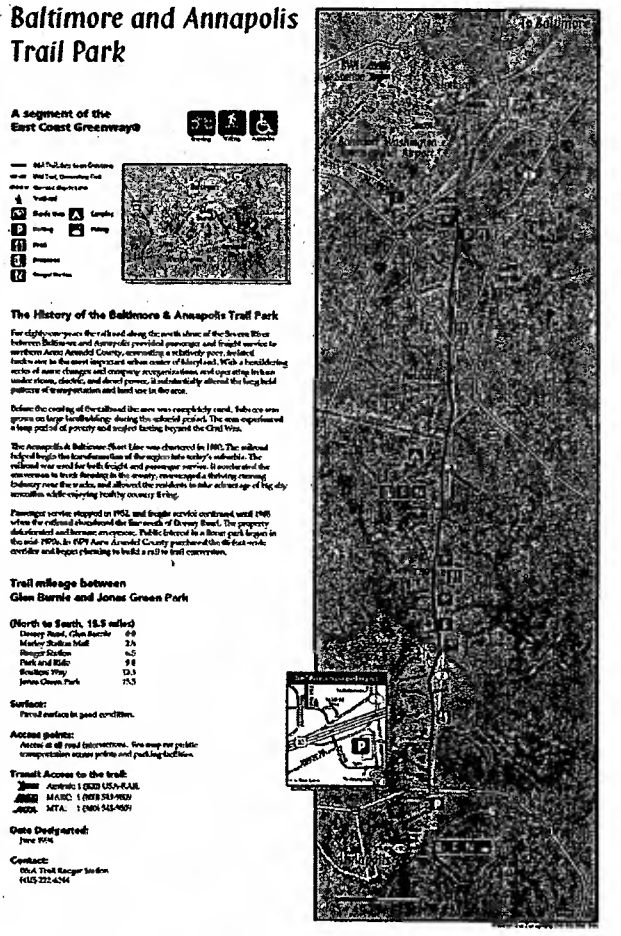
In Maine, the Greenway extends from Kittery, Maine to Calais, Maine. Until more pathways can be developed, an interim, primarily on-road bicycle route has been developed for the entire corridor. In the section from Brunswick to Ellsworth, two distinct routes – the inland or River Route, and the Coastal Route – have been developed.

Bicycle tour descriptions for the ECG route similar to the MDOT's other 21 bicycle tours are being developed. These tours will be segmented into four distinct two to four day tours.

The Alliance has developed map and information standards for producing maps of the Greenway. Maps produced for these tours should meet these standards. Route signage design standards should be coordinated with the Alliance and implemented in conjunction with the interim routes and the Mountain Division Trail, Eastern Trail and Downeast Trail. The latter two trails will be part of the East Coast Greenway when developed.

Other recommendations related to the ECG include:

- Continue to provide technical support for development of maps and brochures for the ECG
- Coordinate promotions / announcements for events such as the placement of signs, release of maps and the opening of trail segments
- Include appropriate material in fulfillment packages regarding the ECG in requests for information in areas where the




Sample map for a portion of the ECG in Maryland. Source: ECG website, 2000.

ECG is located
- Incorporate ECG information & maps into bike promotions by Chambers of Commerce, the Maine Office of Tourism and other parties
- Promote the use of the ECG to link and extend coastal and inland bike tours that intersect with the ECG route
- Develop signage standards for the ECG, other bicycle tours and for shared use paths in Maine..

**5. Bicycle Tourism Information Dissemination**

Getting the word out about bicycling in Maine will require a coordinated marketing effort on the behalf of MDOT and its partners. The two-year plan described below focuses development of key partnerships and resources that will serve as the core of Maine's marketing efforts in the future. This effort should be re-evaluated at the end of two years and updated and expanded as new tours, trails and other programs and facilities are developed.

**Develop and publicize a more accessible and complete bike-tourism related website.**

As more American homes go on line, the internet is quickly becoming one of the most effective and cost-efficient tools for promoting tourism. The current MDOT site has valuable information and compares moderately well with other states' bike pages.

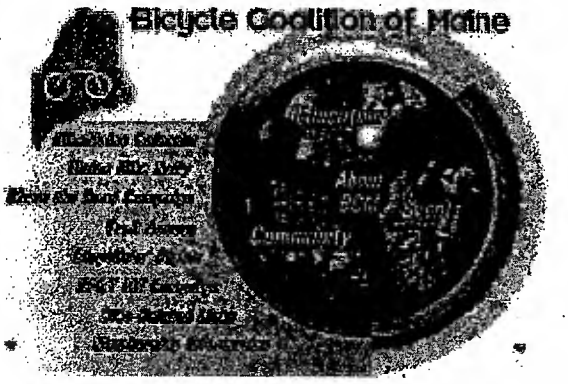
The site's primary shortcomings are accessibility and lack of information on other resources or links to other resources. Our survey of tour operators and interviews with tourism professionals indicates that few people within these communities are aware of this resource. One barrier is the site's address (www.state.me.us/mdot/biketours.htm) which is long and difficult to remember.

Although the MDOT site does contain many useful elements, it needs to be expanded. It should also be noted that other related bike sites in Maine, including www.visitmaine.com (Office of Tourism) or www.bikemaine.org (Bicycle Coalition of Maine), provide a more comprehensive guide to the resources and information available to bicycle tourists in Maine.

Maine's bike tourism site should demonstrate that Maine possesses the common commercial support services generally sought by cyclists -- bike-friendly accommodations and campsites, bike racks on buses, restaurants, country stores, gift shops, transportation and travel agencies, publishers of bicycle tour maps and guidebooks, bicycle dealers, bicycle rental agencies and bicycle tour companies -- will be essential as Maine invests in increasing its share of the bicycle tourism market.

Integrated information about public resources such as state parks and historic sites must also be available.

To create a better, more accessible, comprehensive and effective website we recommend the following:



Source: BCM Website.

- ✓ Partner with the Bicycle Coalition of Maine (BCM) to develop a more effective and accessible web site. BCM has four chief assets that will be invaluable to MDOT for this task – their membership, knowledge of and commitment to bicycling in Maine, existing information database and their web address -- www.bikemaine.org.
- ✓ Continue to provide technical assistance in developing routes, mapping and other content
- ✓ Enhance current information with more information on cycling and trip resources (see "On-Line Guide," below)
- ✓ Develop more extensive links to other bike-related sites
- ✓ Develop a program for managing and tracking responses to the website – e-mail and mail follow-up / fulfillment

**Continue to develop partnerships with Maine Office of Tourism and Maine Tourism Association**

The main tourism website for Maine (www.visitmaine.com) and the state's tourism publications are two additional resources that have yet to be tapped. In Wisconsin and Vermont, as well as in Connecticut and New Hampshire to a lesser degree, state publications and websites promote cycling extensively. This only makes sense. Tourists today look for a combination of available active pursuits such as bicycling, mountain biking, hiking and boating to make their travel decisions. In other words, they like to go "where the action is". By depicting Maine as a good place to cycle, all organizations stand to benefit.

MDOT needs to further cultivate this relationship to:

- ✓ Increase site's emphasis on bicycling as a tourist activity (photos and web links)
- ✓ Increase emphasis on cycling in tourism advertising and publications (photos in ads and photos and a listing of bike resources – web sites, phone numbers, trails and routes – in publications, including "Maine Invites You")
- ✓ Develop write-ups of specific routes, perhaps in conjunction with the East Coast Greenway or the Mountain Division Rail-Trail and provide them to the state and the relevant chamber organizations. Massachusetts has done

this effectively in their 2000 tourism brochures, touting the Minuteman Bikeway and the Norwottuck Rail Trail.

- Establish a method for tracking and utilizing leads from bike-related inquiries to a state toll-free line. In the past, Vermont has sold leads that come in to its toll-free information line to commercial bike touring organizations for a fee.

**Develop stronger relationships with regional chambers of commerce.**

All of the chamber directors we spoke with were enthusiastic about working with MDOT to promote bicycle tourism in their areas. The major barriers for even the largest and well-funded organizations are time, money, resources and adequate knowledge of cycling routes and safety issues. All were interested in having materials (e.g., photographs – see below – brief write ups, lists of cycling resources, and perhaps safety information) provided by MDOT.

There was concern by chambers of commerce about providing safe routes for cyclists to use – particularly routes for less experienced and casual riders. Some were interested in MDOT perhaps developing a series of short one- and half-day rides similar in format to the 21 Bike Tours in Maine appropriate for casual and family riders in their areas.

Below are some specific recommendations for cultivating good relationships with Maine's chambers:

- ✓ Develop a presentation about the economic and environmental benefits of bicycle tourism for chambers and regional economic development agencies

- ✓ The Maine Association of Chamber Executives and several regional groups (e.g., the Southern Maine Coast Tourism Association) meet two or three times a year to discuss tourism issues and host special programs. It may be possible to get the MDOT to present a special program to these groups – and to get feedback and enlist their support for marketing cycling in Maine.

- ✓ Establish web links with regional chambers of commerce who promote tourism on their own websites and work with them to promote cycling on their own websites and in their printed materials by providing text and photos.

It is very important that inclusion in bicycle-oriented literature and marketing should be equal for all players (including bicycle dealers, bicycle rental agencies and bicycles outfitters statewide) whether such organizations are chamber members or not.

**Develop a targeted public relations campaign**

The use of strategic public and media relations will play a key role in any bicycle tourism marketing plan. Public relations can be a particularly cost-effective way to reach a niche market and create a positive "buzz". Funding and implementing a public relations campaign related to bicycle tourism is outside the scope of the MDOT but the MDOT can support the efforts of the Office of Tourism or a private entity such as the Maine Tourism Association.

In the case of marketing Maine as a cycling destination, there are two primary means to achieve this:

1. Creating awareness of cycling opportunities for day-trippers and casual cyclists (e.g., shorter half-day and one-day trips and shared use paths) through the general tourism press and among travel book writers.

2. Working with the bicycle and outdoor press to promote multi-day touring, mountain biking and backwoods trail riding.

A successful public relations campaign will likely include the following elements:

- ✓ Regular "feature" releases about cycling in Maine sent to major US and European dailies, selected regional weeklies, cycling and outdoor publications – with an emphasis on sending releases six months prior to the prime cycling months from May through October

- ✓ A series of outdoor press tours – invite top outdoor and cycling journalists (TV and print) to Maine for guided tour sampling the best of Maine cycling (could be a 4- to 7-day that gives writers a taste of cycling on the coast and inland). Several chambers of commerce we interviewed expressed interest in partnering for a promotion like this.

**Develop a stock library of professionally photographed bicycle images**

This will be a particularly sound investment, in that the photos will be used several times over. They can be used in the future printings of the map and tours, in press packets, and they can be made available, free of charge and upon request, to journalists and travel book writers. These photos also can be distributed to the state tourism office and regional chambers of commerce to be used on web sites and in brochures.

Providing good, ready made photography will increase the likelihood that these organizations will give cycling in Maine good play. It will also allow the MDOT to emphasize safety by making sure all riders are wearing helmets properly, using good equipment and are operating their bicycles safely – underscoring important safety issues.

Regarding the development of stock photography, several options exist to do this economically. One is to establish a bargain with professional photographers to avoid professional fees. In exchange for unlimited, non-commercial use of photos taken by professional photographers, the state will provide a listing of participating photographers with all feature releases. Any photographer interested in such a relationship would be required to provide the State with a sheet of 20 slides free of charge. In return, the State would make the photographer's name and contact information in all releases so that editors interested in additional photos could purchase them from the photographer directly.

Guidelines for developing a stock photo library are included as an appendix to this report.

**Court bicycle tour operators and outdoor adventure outfitters**

Professional bike tour operators are an influential group and Maine stands to benefit significantly from their choice of Maine as a touring destination. While the numbers of tourists they bring to the state are limited – an average of 10 and 35 cyclists per tour (although a few host tours with up to 200 participants) – this group has a high per tour expenditure on food, lodging and related travel items. Additionally, tour operators spend significant sums on advertising and promotion, so working to attract more multi—day guided tours to the state will in turn help market Maine to cyclists around the world.

This program would also be outside the scope of the MDOT for implementation but the MDOT can play a significant role in providing information and support.

Marketing efforts to court tour operators should have three central messages:

1) The availability of diverse touring opportunities in Maine (coastal, mountains and small town New England experiences);

2) The state's commitment to the bicycle touring industry, including Maine-based touring companies;

3) The availability of supporting services and facilities throughout the state when these become available.

This audience is small – there are fewer than 500 companies offering guided bicycle tours in the country and approximately 20 companies that would be most likely to consider expanding their roster of tours in Maine. Therefore marketing to them will require more targeted public relations efforts rather than an expensive advertising campaign.

Following are some suggestions:

- ✓ Host a tour for tour operators. Invite them to Maine for a free four to seven-day sampler of the best of Maine. Give them great scenery, great biking and great

food and offer them technical assistance in planning effective routes for their customers. Timing of a junket like this will have to be carefully chosen – probably either late season or early spring – as the majority of their tours take place between June and October.

- ✓ Publish a monthly e-mail bulletin about biking in Maine. Be sure to include information about road improvements, services, tourism and bike-related news and seasonal events in targeted areas (e.g., Salmon Festival in Eastport, Potato Blossom Festival in Fort Fairfield), and other information that will offer ideas for planning trips and reinforce Maine's commitment to bicycle touring.

**Encourage more Maine businesses to become "bike friendly"**

"Build it and they will come." The bicycle touring market is still very young in Maine, and as a result there is not a well-developed network of commercial businesses that cater to bike tourists. MDOT's marketing should include an effort to build that network of services by educating businesses – primarily inns, B&Bs and restaurants – to the economic potential of bike tourism and how they can encourage more bike-related business. As part of this effort, MDOT should:

- ✓ Develop a simple three-fold brochure with tips for making their businesses bike friendly, as well as information on how to promote their businesses to the bike tourism market.

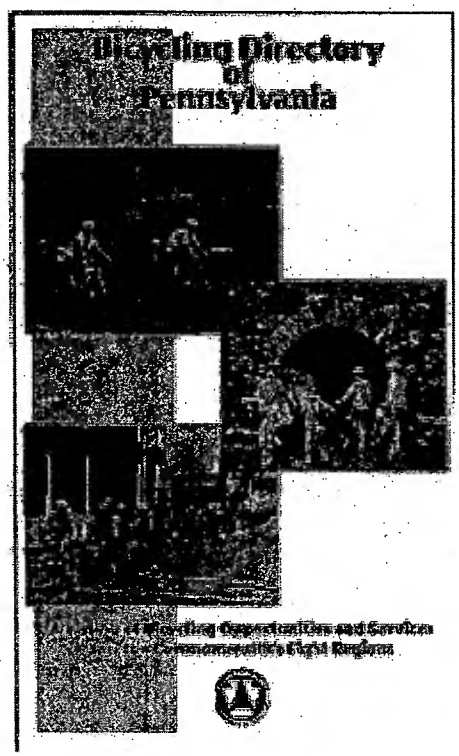
- ✓ Develop a web version of this information for the bicycle website.

**Develop an on-line biking guide to Maine**

Currently there is no single comprehensive source of information available for tourists regarding the resources they need to plan a bicycle-centered visit to Maine. Wisconsin and Pennsylvania both publish excellent biking guides that bring information from a variety of sources together in one location. We recommend that MDOT take the lead in producing such a guide as an on-line publication that will help promote consumer awareness of cycling and services available to cyclists visiting Maine.

This guide should be comprehensive and focus on resources available to all the target markets (professional tours, experienced multi-day touring cyclists, casual cyclists and off road and mountain cyclists). It should be updated annually to ensure accuracy and include comprehensive listings, brief descriptions and contact information for:

- shared use paths
- mountain bike trails
- bike clubs and rail-trail organizations
- state bike organizations
- bike rental / repair shops
- outdoor / recreational suppliers and tour operators / outfitters
- bicycle-friendly lodging options (inns, B&Bs, hostels, campgrounds and state and local parks)
- state and national parks, historic sites and other points of interest
- listing of festivals, fairs and other events that may be of cultural, historic or scenic interest to cyclists similar to the calendar produced by the Bike Coalition of Maine in 2000 (potato blossom season in Aroostook County, peak foliage dates by region, Salmon Festival, etc)
- transportation carriers (including those with bike carrying policies)
- regional chamber and tourism promotion organizations
- regional tourist information centers.




Pennsylvania's extensive printed guide to bicycling resources.

Once again, it would make sense for MDOT to partner with an outside organization (BCM or whichever organization assumes primary responsibility for the web site) to produce this cycling resource.

**Develop partnerships with chambers and regional economic development organizations**

An enormous amount of tourism information is disseminated by regional business development organizations, both on the web and in printed materials. MDOT should forge strong relationships with Maine's chambers of commerce and regional economic development organizations to educate them to the potential of bicycle tourism and encourage them to include their regional bicycle resources (bike tour routes, trails, etc.) in their promotional materials. These efforts should include:

- ✓ Create a "bicycle tourism roadshow." The MDOT Bicycle/Pedestrian Coordinator should create a half hour presentation to update them on MDOT's efforts and the plan to present to regional chamber and business organizations

- ✓ Develop protocols for links with regional web sites. Once again, the web promises to be one of the most useful marketing tools for this market. There should be a

system for creating an updating links between the regional organizations' and the bicycle tourism web sites.

- ✓ Disseminate bicycle information through chamber information centers. Follow the lead established with the bicycle map and work with organizations to place bike information in the regional information centers.

- ✓ Encourage organizations to include bicycle information and photos in their regional publications. Offer them access to MDOT's stock photo library and provide information about cycling facilities and resources in their areas.

**Coordinate with promotions of mountain biking and trail riding**

The Maine Department of Conservation recently published an ATV trail map. Coordinate with the MDOC to incorporate bicycling in future editions of this map. Also work with commercial mountain bike centers to include them as resources in the on-line biking guide, the bike map and other materials developed for the bicycle tourism market.

### 6. Bicycling Inquiry 'Fulfillment' Packaging

Currently there is no coordinated response for requests for bicycling information in the state. Each organization (MDOT, BCM, the Maine Tourism Association, as well as groups such as the East Coast Greenway Alliance) each receive requests for information and deal with responses in a variety of ways. The Maine Office of Tourism does not have the resources to give special handling to these requests. MDOT sends out a letter and map for all requests for cycling information that come to its web site or into the Office of Passenger Transportation. Separately the Bicycle Coalition of Maine handles a significant number of requests generated from its web site and other sources.

Once a more accessible web site is established and promoted, we can assume that the majority of bicycle-related inquiries will come in through this channel.

Several states and Canadian provinces were surveyed; responses varied. Some merely responded with a generic package of tourist information – with no bike-specific information. Still others included a minimum of bike information that had been incorporated into state tourism guides. A few provided a combination of general tourism information and bicycle-specific information. In one case, we received several follow-up mailings, all with subsequent information about seasonal activities, some of them bike-related.

The key to creating a successful fulfillment package will be to create a sense of excitement about the possibilities available to cyclists in Maine by providing attractive materials, at least some of them developed specifically for cyclists, and depicting cyclists actively enjoying themselves in Maine.

The fulfillment package should contain the following:

- Welcome letter
- Bicycle map
- Bike tour information specific to stated bicycling experience level and region(s) of interests (or incorporate listing of specific bike tours and web address into Welcome Letter or other insert to save printing costs associated with the tours)
- Bicycling safety information (may be incorporated into map or other brochures)
- Materials from bicycle and trail organizations (e.g., ECG, BCM)
- Postcard referencing bike website, state tourism website (for general information) and on-line biking guide

How MDOT administers these fulfillment packages is another question. Ideally, the state office of tourism would incorporate a bicycle fulfillment package into their marketing efforts, but at the time they do not have the resources to do this. Two alternatives would be for the MDOT's Office of Passenger Transportation to continue to send out information or for MDOT to partner with another organization (BCM or the Maine Tourism Association). Currently the level of inquiries may not be high enough to warrant contracting this function to another entity. As inquiries increase, it is recommended to contract with the BCM. The BCM is ideally suited to answer specific requests for bicycling related information in Maine.

### 7. Recommended Two-Year Budget (FY 2001/2002 and 2002/2003)

The budget for the recommended marketing program totals $130,600 for fiscal year 2001/2002 and $115,200 for fiscal year 2002/2003.

For the first year, primary costs are related to:

- Bicycle map upgrade and printing
- Map graphics and text for ten bike tours
- Link and loop brochures
- Website enhancement
- Lodging brochure
- Public relations campaign
- Theme tour brochures
- On-line bike guide
- Maine Today ad
- Stock photography
- Fulfillment package.

Second year cost elements are the same except for:

- No costs for printing of statewide bike map
- Printing of bike tour maps.

Costs are shown in Table 16. It is not anticipated that all funding would come from the MDOT or other public entities. Several items have a high potential for funding by private organizations, such as the individual bike tour maps. The MDOT could invest in

the content (text and graphics) and leave the final packaging of information to private organizations such as local or regional Chambers of Commerce or local entrepreneurs to fund privately.

## Proposed Two-year Budget for Bicycle Tourism Marketing

| Marketing Program | First year | Second Year | Potential Funding Source |
|---|---|---|---|
| Bike Map | | | MDOT and its partner organization may be able to subsidize this with advertising or corporate sponsorships. |
| Graphics | $ 2,500 | | |
| Editing | $ 450 | | |
| Production | $ 750 | | |
| Illustration | $ 500 | | |
| Printing (100K /2 yrs | $ 25,000 | $ - | |
| | $ 29,200 | $ - | |
| 10 Bike loop tours (graphics) | | | There are several potential sources of funding for these tours. There may be economic development grants available for individual tours. There is a great deal of potential for corporate sponsorships (as with the bike map). For some, it may also be possible to partially fund through advertising, although it should be noted that sponsorships and advertising typically do not mix. |
| Graphics | $ 12,000 | | |
| Editing | $ 2,250 | | |
| Production | $ 4,000 | | |
| Illustration | $ 2,500 | | |
| Printing (20K each) | - | $ 25,000 | |
| | $ 20,750 | $ 25,000 | |
| Link and Loop Brochures | | | Once again, MDOT should explore funding opportunities such as grants from other government agencies, economic development organizations and corporate sources. |
| Graphics | $ 2,500 | | |
| Editing | $ 1,000 | | |
| Production | $ 750 | | |
| Illustration | $ 750 | | |
| Printing (60K) | $ - | $ 15,000 | |
| | $ 5,000 | $ 15,000 | |
| Web-site enhancement | | | We anticipate that MDOT will be the primary funder for this project. |
| Web designer | $ 3,200 | | |
| Content editor | $ 2,600 | | |
| Hosting | $ - | | |
| | $ 5,800 | $ 6,500 | |
| On-line bike guide | | | MDOT will likely be the sole funder for component of the project. |
| Content editor | $ 4,500 | | |
| Production | $ 500 | | |
| | $ 5,000 | $ 2,000 | |

Source: Buxton Communications; WSA.

## Proposed Two-year Budget for Bicycle Tourism Marketing

| Marketing Program | First year | Second Year | Potential Funding Source |
|---|---|---|---|
| Fulfillment package (30K) | | | The Office of Tourism says it will be prohibitively |
| Leads from state (4¢) each | $ 1,200 | | expensive to incorporate a bike-specific response |
| Letters (30K) | $ 1,700 | | into their current fufillment plan. We believe MDOT |
| Postcard (30K) | $ 3,500 | | may be able to partner with an outside organization to |
| Envelopes (30K0 | $ 3,600 | | manage this, but the department will likely be the primary |
| | $ 10,000 | $ 10,000 | funder for this part of the project. |
| Stock photography | | | Maine DOT and the Maine Office of Tourism could partner on this. |
| 4 days of photograph | $ 5,200 | | We have estimated this cost below market because of availability |
| Expenses | $ 1,550 | | of stock photography. |
| | $ 6,750 | $ 6,200 | |
| Bike Friendly Business' Brochure | | | Funding possibilities include the DECD or Maine Tourism Assoc. |
| Inhouse design | $ - | | Opportunities exist for B&B/Innkeeper and Campground |
| Printing (5K) | $ 1,500 | | Associations to participate in funding this project. |
| | $ 1,500 | $ 1,500 | |
| PR Campaign | | | Maine Office of Tourism can include biking |
| 9-month retainer | $ 22,500 | | in their ongoing PR / media relations campaign, but will |
| Expenses | $ 10,000 | | likely need half or more of the cost of the |
| | $ 32,500 | $ 35,000 | campaign contributed from other sources. |
| Thematic Tour Brochures | | | We have budgeted an MDOT contribution of "seed money" |
| | $ 4,000 | | as technical assistance to help stimulate private and local |
| Materials | $ 500 | | commitment to the project. |
| | $ 4,500 | $ 4,500 | |
| Maine Today ad | | | All advertising will need to be funded through the Maine |
| Concept & graphics | $ 2,000 | | Office of Tourism. |
| Ad space (1/2 p. 4c) | $ 7,600 | | |
| | $ 9,600 | $ 9,500 | |
| | $ 130,600 | $ 115,200 | |

Source: Buxton Communications; WSA.

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Appendix 1

## Usage and Economic Impact Figures for Other Facilities/Programs/States

| | | | Users | | | | Economic Impact | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Trail | Location | Miles | Annual Users | Users/ Mile | Resident | Non-Resident | Annual Total | Per Mile | Per User | Per Day Expenditure | Year | |
| Red Cedar Trail | Dunn Cnty, WI | 14.5 | 40,000 | 2,759 | | | $2,000,000 | $137,931 | $50.00 | $49.28 | 1995 | |
| Elroy-Sparta Trail | Monroe Cnty, WI | 32 | 50,000 | 1,563 | | | $1,200,000 | $37,500 | $24.00 | $25.14 | 1988 | |
| Heritage Trail | Dubuque,IA | 26 | 135,000 | 5,192 | | | $1,200,000 | $46,154 | $8.89 | $9.21 | 1991 | |
| Sugar River Trail | New Glarus, WI | 23.5 | 47,566 | 2,024 | | | $430,000 | $18,298 | $9.04 | $9.04 | 1985 | |
| St. Marks Trail | Tallahassee, FL | 16 | 170,000 | 10,625 | | | $1,875,000 | $117,188 | $11.03 | $11.02 | 1991 | |

| | | | Users | | | | Economic Impact | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Trail Systems | Location | Miles | Annual Users | Users/ Mile | Resident | Non-Resident | Annual Total | Per Mile | Per User | Per Day Expenditure | Year | |
| La Route Verte | Quebec, Canada | 2,165 | 2,734,375 | 1,263 | 178,715 | 2,555,660 | $11,148,800 | $5,150 | $4.08 | Local: $7 Day Trip: $25 Overnight: $60 | 1996 | Projected for new facility/trail |

| | | | Users | | | | Economic Impact | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Statewide Bike Touring Studies | Location | Miles | Annual Users | Users/ Mile | Resident | Non-Resident | Annual Total: Direct | Per Mile | Per User | Per Day Expenditure | Year | |
| Vermont | | | 32,000 | | | | $13,100,000 | | $409.38 | $115.00 | 1991 | 10,500 guided tours; 16,250 self-guided |
| Vermont | | | 1% of all tourists | | | | $22,000,000 | | | | 1997 | |
| Colorado | | | 3,400 | | | | $640,000 | | $188.24 | | 1999 | Bike tours only |
| South Carolina | | | 30,000 | | | | $37,760,000 | | | | | 30,000 users |

| | | | Users | | | | Economic Impact | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bike Touring Studies | Location | Miles | Annual Users | Users/ Mile | Resident | Non-Resident | Annual Total | Per Mile | Per User | Per Day Expenditure | Year | |
| NY North Country | Upstate NY | | | | | | | | | $52.00 | 1993 | |
| Haut Richelieu | Quebec Province | | | | | | | | | $33-$85 | 1994 | |

Source: Various Studies, see bibilography for references.