

Cycle Tourism Development Case Study 2012: Maine, United States

Background

Located on the east coast of the United States, and close to numerous heavily populated urban areas, Maine has long been viewed as a vacation spot for those from near and far. Beginning in 1991, the Maine Department of Transportation (MaineDOT) began to invest in cycling infrastructure with an aim to improve facilities for both residents and visitors.



MaineDOT works on a number of transportation programs targeting different types of travel modes and travellers. Travel by air, bike, foot, bus, ferry and train are all covered with an extraordinary amount of information and attention to detail available under the banner of 'Explore Maine.' The website www.exploremaine.org is the primary portal for this information which is further broken into options by region, biking and walking, scenic bikeways, ferries and islands, commuters, and train travel.

Explore Maine is one of MaineDOT's methods of promoting Maine as a tourist destination for cyclists. For the cycle tourism market, the objective is to make Maine a better place to cycle by creating and maintaining cycling infrastructure and providing useful resources such as bike books for bicyclists to better explore the state. There are 33 bicycle tours throughout the state.



The latest figures available show that in 2001, the total estimated economic impact of cycle tourism related activities added USD\$66 million annually to the economy.

Governance

MaineDOT convenes the Explore Maine which includes cycling programming. MaineDOT is a cabinet-level state agency with responsibilities for statewide transportation by all modes of travel. MaineDOT employs approximately 1,900 people and expends or disburses over \$600 million per year, including federal, state, and local funds (MaineDOT, 2010). Decision making and allocation of funds are mainly under the MaineDOT's control, with reporting to central state government.



Organizations such as Visit Maine, Maine Tourism Association, the Bicycle Coalition of Maine, the East Coast Greenway, Healthy Maine Walks, and GO MAINE collaborate with MaineDOT to assist with the development of Explore Maine and their cycling programs.

Operations

MaineDOT oversees all state level transportation related services and infrastructure. MaineDOT's mission is to responsibly provide customers with the safest and most reliable transportation system possible, given available resources.

MaineDOT Goals:

1. **MANAGE THE EXISTING SYSTEM.** Effectively manage Maine's existing transportation system for safety and effectiveness within reliable funding levels.
2. **SUPPORT ECONOMIC OPPORTUNITY.** Wisely invest available resources to support economic opportunity for our customers.
3. **BUILD TRUST.** Demonstrate our core values of integrity, competence, and service, both individually and organizationally.

With regards to cycling, developing, and managing transportation modes, MaineDOT undertakes the following activities:

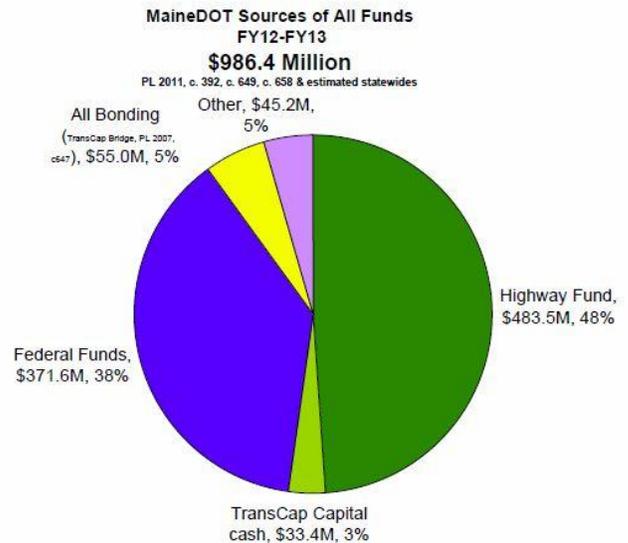
- Provides bicyclists with information about sites, maps, trails, and attractions.
- Promotes Maine through tourist attractions and organizations.
- Promotes and facilitates initiatives to improve safety for cyclists.
- Hosts bike tours to familiarize tourists with the area.
- Partners with organizations in Maine to support bicycling in the state.

For Maine residents, the MaineDOT Bicycle and Pedestrian Program work with Maine communities on public policy and infrastructure. These programs help to improve conditions and access for pedestrians and bicyclists and improve the quality of community environments. This department works with a variety of state agencies, local municipalities, health professionals, planners, pedestrian, trail, and bicycle enthusiasts, to create more livable communities, and raise awareness of the need to provide safe access for walkers, bicyclists and people with disabilities.



Revenue and Funding

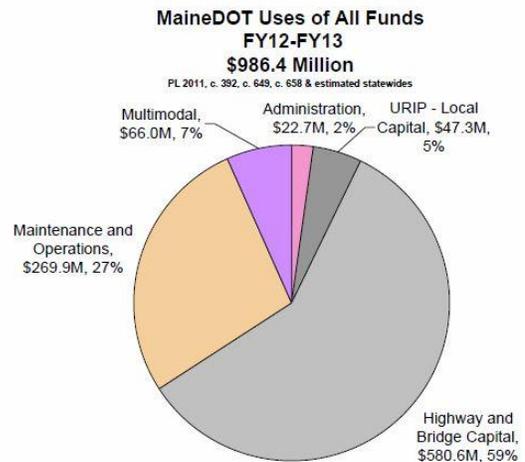
As a state government department, the sources of funding are primarily through the state wide allocated Highway Fund and from federal funds for transportation.



May 2012

With spending on capital projects and maintenance on projects that include cycling infrastructure, it is difficult to estimate the exact year to year funds allocated for bike transportation.

Multimodal investment as a standalone item is approximately \$66M, over 6% of total funding allocations.



May 2012

A more detailed breakdown of sources and spending can be found at: www.maine.gov/mdot/mainedotfunds

The allocation of funds for trails and cycling infrastructure is driven by economic modelling that shows how much the investment would generate in annual bicycle tourist expenditures.

For example, there are funds available from MaineDOT to help in the further development of three MDOT trails of statewide significance including the Eastern Trail, Mountain Division and Downeast Trail, are estimated to generate bicycle tourist expenditures of approximately \$ 2.7 million per year.

The funding for marketing and the **Explore Maine by Bike Book** are cofunded by MaineDOT and Maine Tourism.

Strategic Plans

Stemming from some of the research completed to estimate the economic impacts of bicycle tourism, marketing recommendations to increase bicycle tourism in the State have been developed and implemented. See below research section for more information.

Transportation Master Plan - Transportation departments of all levels of government are guided by Transportation Master Plans. These which are generally reviewed and updated every 3 to 5 years include a full range of priority and smaller scaled projects with detailed workplans, all leading to a goal that is usually measured in kilometers/miles completed.

Roadworks Paved Shoulder Policy - Further assisting the development of bicycle tourism in Maine is the state wide policy and design standards on paved shoulders having to be installed with any new road construction.

MaineDOT's Yearly Bicycle & Pedestrian Success Report - These annual reports are completed by the Biking and Pedestrian division of MaineDOT. They provide a comprehensive overview of projects undertaken, underway or complete for the year. More information can be found at: www.maine.gov/mdot/bikeped

Bicycle Coalition of Maine Strategic Plan, 2009-2014

The Bicycle Coalition of Maine has been working to make the state a better place for biking since 1992. Providing an information source for cyclists and promoting cycling, their current strategic plan and continued partnership with MaineDOT are relevant. The strategic plan recommends the Coalition work on the following activities:



- Lead advocacy efforts to improve the quantity, quality and accessibility of bikeways in Maine.
- Foster a love of bicycling in Maine children and teach them to bicycle safely.
- Educate Maine motorists and bicyclists to Share the Road.
- Be the leading advocate and voice for Maine bicycling and engage more Mainers in bicycling.
- Expand membership, increase financial resources and sustain a highly effective organization.

Research

As a result of numerous studies and research undertaken to evaluate the economic impacts of cycle tourism in the state, there is considerable data on the size of the cycle / bicycle tourism market.

A variety of additional research has been completed to examine: what attracts tourists to a particular destination; the different market segments including those on cycle trips as individuals, with groups, with one person, and with families; and what are the most popular tour groups and routes.

Bicycle Tourism in Maine: Economic Impacts and Marketing Recommendations, 2001

In 2000, MaineDOT hired consultants to estimate the economic impacts 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 looks at what the future market may be worth. It also estimates the order of magnitude of the economic impacts of three shared use paths of statewide significance and the MaineDOT's bicycle tour program. Part two made recommendations for new marketing initiatives and recommendations to make existing programs more effective.

Market Research

General Market Data on Tourism in Maine

- Over 49 million travel trips were made to Maine in 1999. 54% were made by residents of other states, 35% by Maine residents, and 11% by Canadians.
- 79% of all trips were day trips, with most destined for the Southern Maine Coast and Greater Portland/ Casco Bay areas.
- Tourists spent over \$5 billion in 1999. 75% is spending by non-residents of Maine; 26% is spending by Maine residents; 4% by Canadians.
- 5% of overnight tourists on pleasure trips said they bicycled during their stay. 2% of all day trip tourists bicycled during their visit.

Specific Market Research on Bicycle Tourism in Maine

- In 1999, the total economic impact of the bicycle tourism market was estimated to be \$66.8 million dollars. This includes the direct spending of \$36.3 million by over 2 million bicycle tourists 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.
- 98% of these visitors were day trip cyclists spending \$30 million. There should be an emphasis on day trip visitors, as they currently generate the most profit for the industry.
- 2% of bicycle tourists were on multi day tours, but their spending accounts for 17% or \$6.3 M of total spending.
- Distribution of spending is as follows: 45% on food & groceries; 26% on transportation; 23% on retail and services; and 6% on lodging.
- There are an estimated 32,100 self guided bike tourists a year, spending \$5.3M yearly.

- Further breakdown shows spending by type of bicycle tourist to be: self guided tour \$55 per day; guided tour \$115 per day; day trip \$25 per day; local/Maine resident \$4 per day.
- Promotion of the 21 loop bicycle tours (2001) 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.

Demographics and Qualitative Research on Maine 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 the cyclist is less skilled.
- 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.
- 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 (Maine Department of Transportation, 2001).
- Travelling with groups of friends and alone is the most common cycle touring party size.
- 50% of cyclists prefer to cycle with friends over 40 miles per day and 60% of cyclists like to cycle alone over 40 miles per day.
- Cyclists select destinations depending on scenery, bicycle friendly roads or shared use paths, services and accommodations with a bike friendly orientation, and culture and uniqueness of an area (Maine Department of Transportation, 2001).

Marketing

Promoting bicycling in Maine is a coordinated marketing effort undertaken by MaineDOT and its public and private partners including the Bicycle Coalition of Maine, Maine Office of Tourism, Maine Tourism Association and regional chambers of commerce. With the assistance of this, many organizations promotions increase and so too does the amount of publicity Maine bicycle services and events receives.

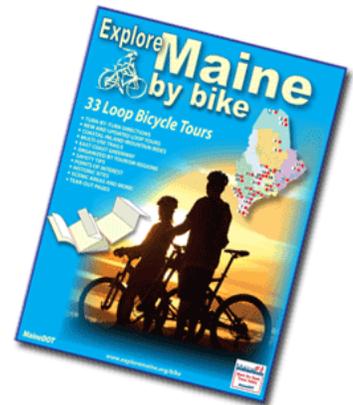
Explore Maine seeks to attract more tourists to Maine and move them here by using alternative transportation modes other than the automobile. The Explore Maine brand published materials and their website offer the main supporting marketing materials that are focused on promotion of cycling and bicycle tourism in the state.

Explore Maine by Bike Book

To promote cycling and bicycle tourism in Maine, Explore Maine publishes maps and bike books to provide cyclists with valuable information including regional cycling maps.

MaineDOT has recently published all of the Maine bike tours on this site in a handy book. The book includes:

- 33 Loop Bicycle Tours
- Turn-by-Turn Directions with Tear-Out Pages
- Multiuse Trails
- East Coast Greenway & Downeast Sunrise Trail
- Mountain Biking Rides
- Bicycle/Pedestrian Trails
- Safety Tips
- Point of Interest
- Historic Sites
- and more!



The *Explore Maine by Bike Book* is available by request, at Maine Visitor Centers across the state and also at travel and trade shows that Maine Tourism attends.

www.visitmaine.com

Current Status

MaineDOT continues to work on bicycling infrastructure improvements for residents and tourists. They also continue to work with partners including Maine Tourism Association and the Bicycle Coalition of Maine to promote bicycle tourism and safe cycling practices.

More specific on-going projects include:

- Update versions of 33 bicycle route maps for the next printing of Bike Book featuring consistent graphic styles, active/ scenic photography and web links, which will be republished in summer 2012.
- Expand and refine 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.
- Promote and print the East Coast Greenway Route through Maine from Kittery to Calais.
- Work with partners to create information packages and tour package options for those requesting bicycling and touring information for Maine.

Summary

The State Government has enabled bicycle tourism and the cycling culture in Maine to develop over the past 20 years through sustained funding for infrastructure and partnerships to promote both safe cycling and cycle touring. The result is a vast network and numerous trails and cycling routes that span the state.

Working with a variety of partners, MaineDOT has a great information source for a variety of travel modes with the Explore Maine program and website. The bicycle and pedestrian division is focused on trail development and safety messaging. They also work closely with Maine Tourism and together co-fund the Maine Bike Book which helps

promote safety, bicycle routes and touring options, helping fulfill all partners' mandates. The Bicycle Coalition of Maine also plays an integral role in promoting cycling.

In examining a number of locations developing cycle tourism, Maine may want to consider the following as they move forward:

- Focusing on bed and breakfasts and how to better promote these lodging accommodations. This could be accomplished through bicycle friendly business certification and promotion program similar to Ontario's Welcome Cyclists Network, and Quebec's Bienvenue Cyclistes and others found elsewhere around the world.
- Tracking and measuring the success of bicycle tourism is important to gauge the effectiveness of the work completed to date and any growth in the market segment. In 2001, the economic impacts and marketing recommendations report provided a great deal of statistical information valuing the current bicycle tourism market. Since then, many of the marketing recommendations have been acted upon so it would be useful to evaluate the impact of this before moving forward again. There has been no published new data since that date, leaving outdated numbers now a decade old.
- Competition from neighbouring states to attract the bicycle tourism market segment is increasing. Vermont and Wisconsin have created names for themselves as bicycle-friendly vacation destinations with good, bicycle-friendly roads with minimum of traffic, a reputation that Maine does not always share.

As there are a lot of partners involved and no designated lead on bicycle tourism, further coordinated growth may be enhanced should a lead be designated.

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