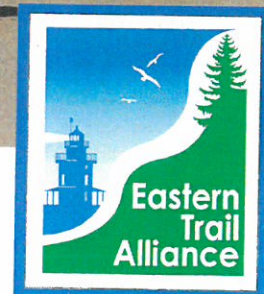


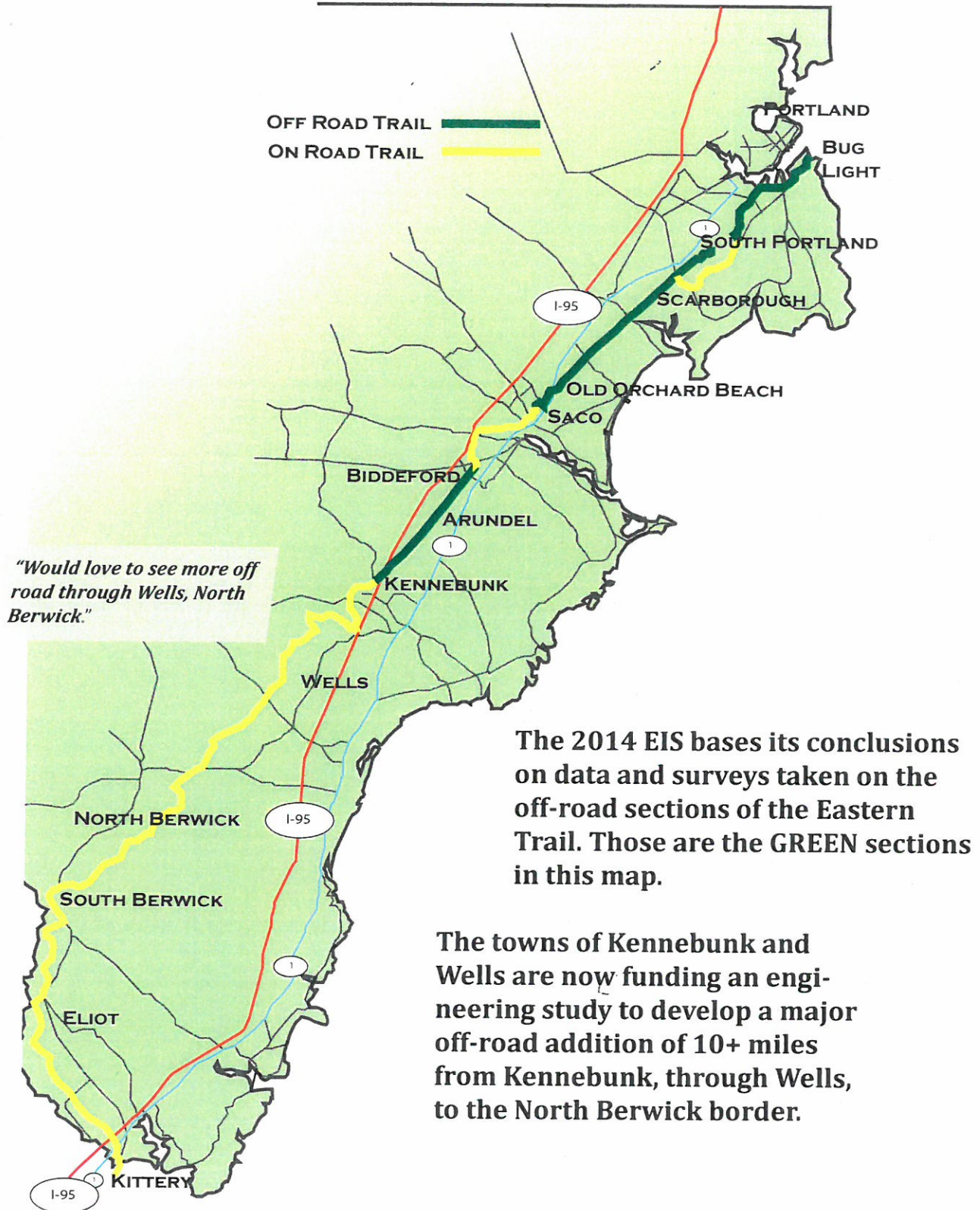
The
Economic Benefits
of the
Eastern Trail
in Southern Maine



**Based on a
2014 Survey**



The Eastern Trail in Southern Maine





The Bottom Line: a brief summary

Since the Eastern Trail's inception about fourteen years ago, an abundance of persuasive evidence has presented a strong case for its non-economic benefits to both individuals and communities in southern Maine. However, while plentiful observation and anecdotal evidence seemed to make a sound argument for substantial economic benefits to towns and businesses bordering the Eastern Trail (ET), no one had conducted a statistic-based, methodical examination of those benefits— until 2014.

During this past year, the Eastern Trail Alliance (ETA), following a survey methodology developed and tested by the Pennsylvania Rails-to-Trails Conservancy (RTC) specifically to monitor and measure the economic impact of rail-trails, began to monitor trail-user traffic and its economic benefits.

The details of the survey methodology and statistics— and their analyses— will unfold in the following pages. But here are the real-world conclusions:

**An estimated 88,828 annual visitors used the survey's off-road sections
User surveys show a total economic impact in 2014 of nearly \$900,000.**

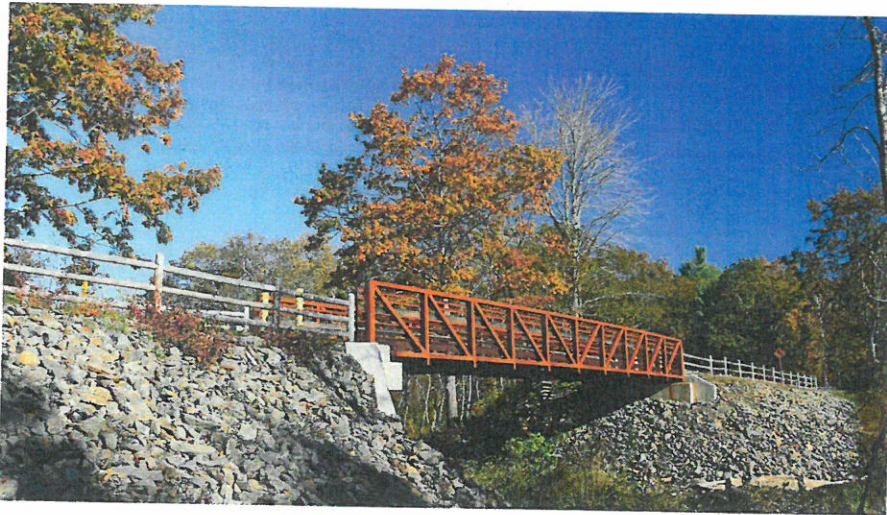
In short, the ET brings people to southern Maine, principally to communities served by its off-road sections; and those people spend money. Later sections of this report will clarify the demographic characteristics of those trail users.

It is important to note that those remarkable figures do not include all of the twelve municipalities in southern Maine connected by the ET, only six of the seven towns through which the off-road ET sections run. It is therefore reasonable to conclude that the numbers will climb when more towns develop off-road ET miles and are included in future surveys.

Communities connected by the ET

South Portland*
*Scarborough**
*Old Orchard Beach**
*Saco**
*Biddeford** [See Eastern Trail map, page 2]
*Arundel**
*Kennebunk**
 Wells
 North Berwick
 South Berwick
 Eliot
 Kittery

*Municipalities that include off-road sections of ET
 In italics= municipalities surveyed

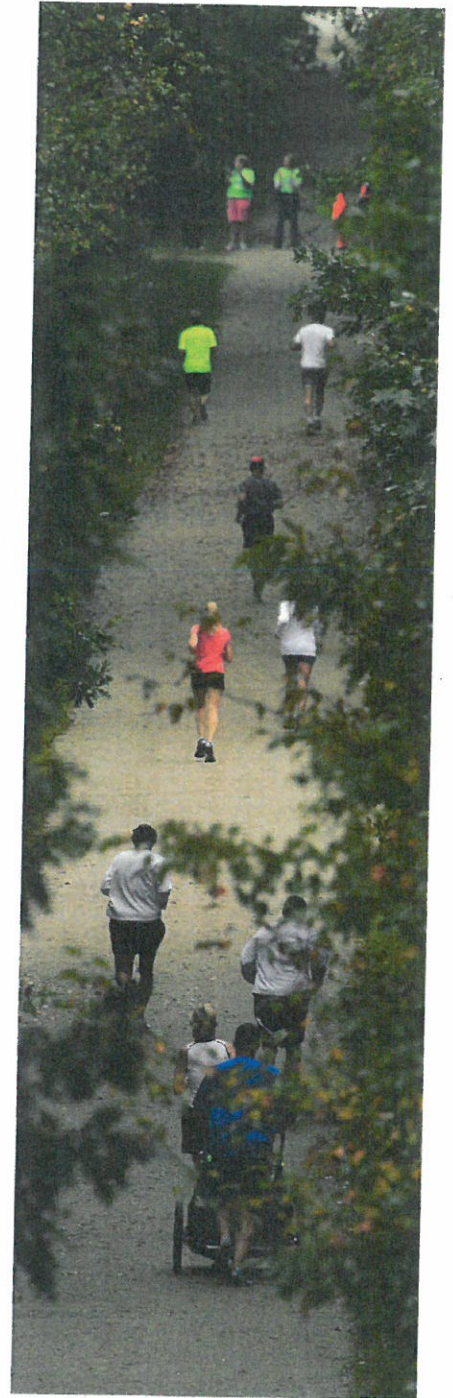


Very Brief History of the Eastern Trail in Southern Maine

Although the ET is relatively young, recent users— as noted in both written surveys and close encounters with ETA trustees and volunteers— have included many visitors from most of the United States and others from around the world. In other words, The Eastern Trail has been a potent tourist magnet since it began in the mid 1980's when South Portland, relying solely on municipal funding, paved a 2.0 mile trail. Emboldened with the success of that venture, the town won MDOT funding support to extend its corridor to 5.7 miles. However, not until 2004 were the needed energy and commitment and funds available to begin the exciting development southward of more off-road trail through Scarborough, then Old Orchard Beach and Saco, and a 6+ mile extension through Biddeford, Arundel, and Kennebunk. At present, in 2014, because of numerous towns' determination and commitment to converting abandoned railway beds into a traffic-free, public greenway, users can travel 22 safe, off-road miles, over three major bridges—including the dramatic turnpike bridge at Kennebunk— and through scenic, mostly wooded areas linking seven towns.

This year, although national and state funding has been limited, the towns of Kennebunk and Wells are underwriting engineering studies to prepare their joint application to MDOT for funds to extend the trail south for 10+ miles through their town limits, all the way to the Berwicks. That would add, in one stroke, 50% more off-road trail. Theirs is an exemplar of municipal cooperation, based on a realistic understanding of short term costs and long term benefits.

Even this, our first survey/study, confirms that the more miles of trail we build, the more users come to our area of Maine, and the more they benefit ET communities.



Purpose of the Economic Impact Study

The simple purpose of the study and its publication is to speak to a crucial audience:

The decision makers in towns and regions served by the Eastern Trail,
The business men and women who wish to increase their markets,
The elected officials who wish their constituents to prosper.

To inform them of the measureable and considerable economic benefits of the Eastern Trail. And by informing them, to persuade them to support the growth of the trail ... for *their own* benefit. We do not seek charitable gifts; we seek *investment*!

"The presence of the trail has increased our incentive to vacation in the Wells region - expanded the season past summer to include Spring and Fall."

"Would not object to tax increase to pay for better trails."

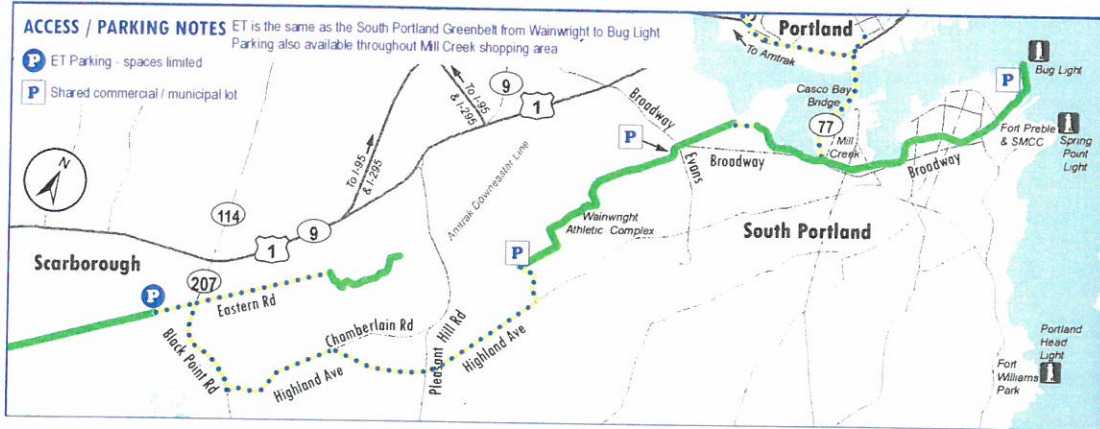
The Methodology of the EIC

As noted earlier, the Eastern Trail Alliance followed a tested and proven method developed and used by the Rails-to-Trails Conservancy (RTC) in Pennsylvania.

The study's central mover, ETA President Emeritus, John Andrews, placed infrared traffic counters in four strategic locations along off-road sections of the ET in March 2014. [See maps on facing page.] However, initial results, skewed by false signal triggers and placement too far off the trail, led to further experimentation in locating the counters and rejection of the earlier figures. Much more reliable and trustworthy data began to be accumulated in August and continued through October; the months of data this report relies on. Of course, that data misses the heaviest trail traffic during Maine's peak summer months, but RTC's extensive experience affirmed the statistical viability of even one month's counter data. Thus, ETA feels confident that the estimate of 88,828 annual trail visits reflects real trail traffic accurately and conservatively, and probably even under-estimates it.

ET Off-Road Sections and Infrared Counter Locations

South Portland Scarborough: On-Road Eastern Trail

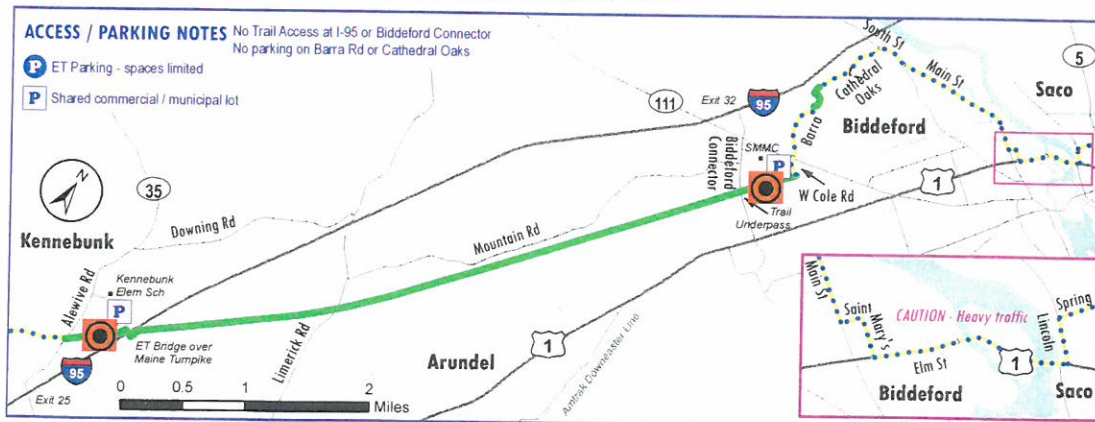


- Counter Locations**
- Scarborough Marsh Bridge
 - John Andrews Bridge- Saco
 - SMHC- Biddeford
 - Turnpike Bridge- Kennebunk

Scarborough-Old Orchard Beach-Saco: On-Road Eastern Trail



Biddeford-Arundel-Kennebunk: On-Road Eastern Trail

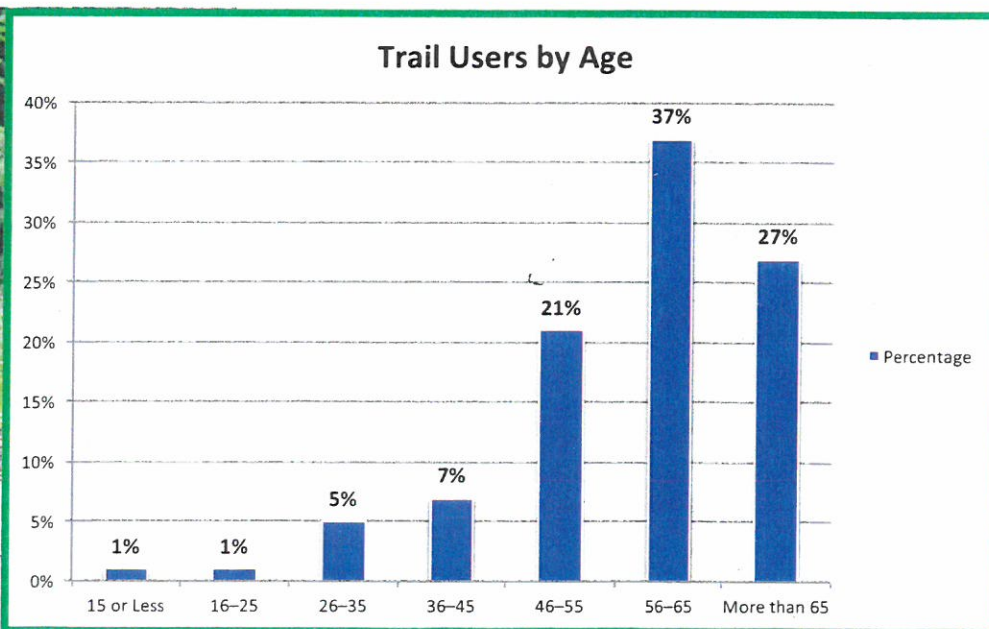


Demographic Profiles of Users Derived from Surveys

The literal number of trail users, while impressive, does not in itself predict much about what kind of economic impact they will exert while they enjoy the ET. For that information, the ETA, like the RTC, distributed paper surveys at trail kiosks and then analyzed the returns. Although a copy of the survey is included in an appendix, the body of this report includes only those survey responses most relevant to economic impact: the age, education, income profiles of trail users, and their spending patterns. In those four areas, Eastern Trail user profiles describe a group inclined and affluent enough to make purchases well above state and national norms, all of which confirms long standing national data regarding bicyclists, bird watchers, fitness enthusiasts, and family-oriented tourists.

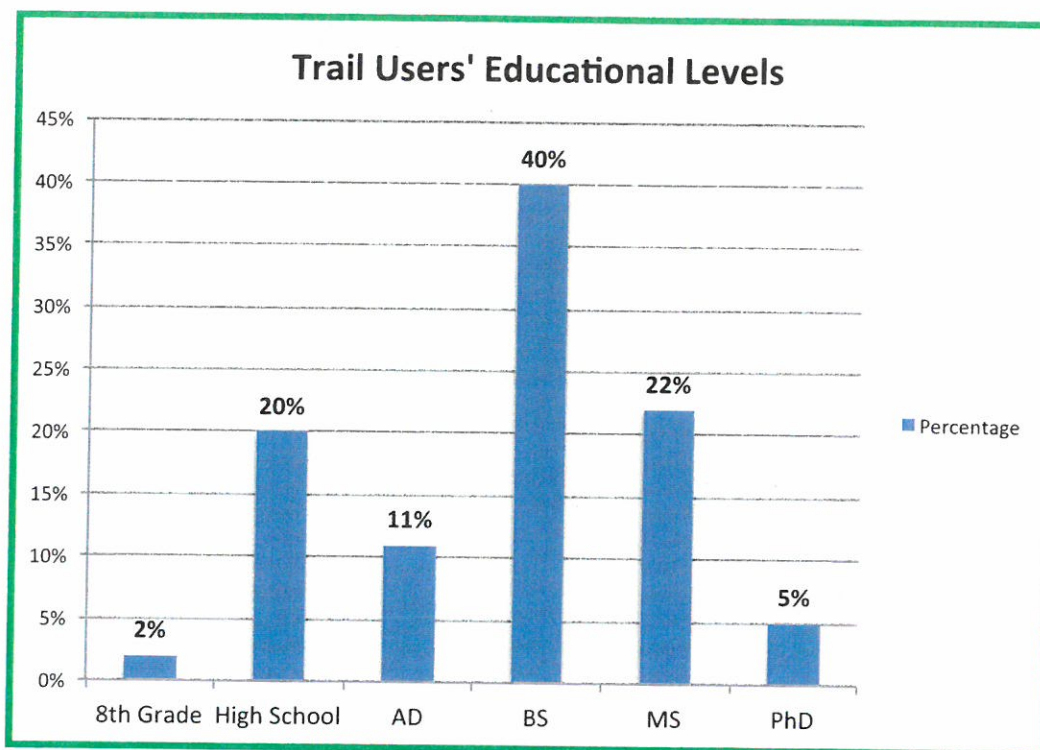
Trail Users by Age

Survey responders lean heavily (86%) toward the above-45 population group, known for the most earning power:



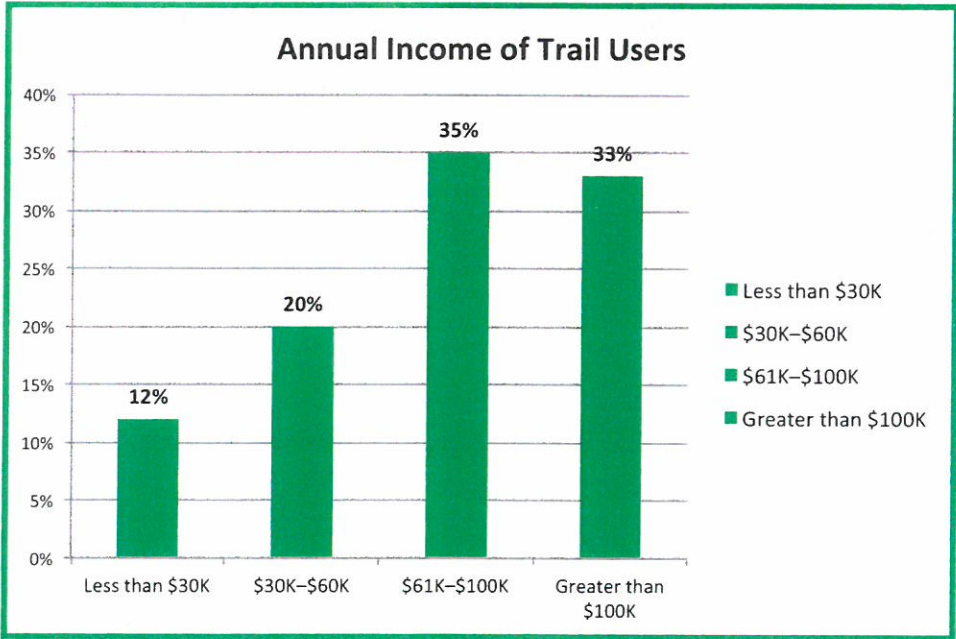
Trail Users by Educational Level

The correlation between the profiles for age and education levels is remarkably tight: 78% of respondents reported degrees above the high school level. And 40% held four-year college degrees. Even more remarkable, over one in five had Masters Degrees:



Trail Users by Annual Income

According to U.S. Census survey for 2013, the median income for Maine households was just under \$47,000; for the entire U.S. population, the figure was just over \$52,000. Consider, then, the chart below; it puts the annual income of 68% of trail users at over \$61,000—well above state and national averages— with an income of over \$100,000 for a full third of users:



Spending by Trail Users

Last, the returned surveys indicated that the Eastern Trail's affluent users bring with them a willingness to enhance their experience on the trail with a broad range of expenditures. The survey's first-hand evidence appears in the table below:

Category of Purchase	Percentage Who Made Purchases	Total Expenditure in Category
Hard Goods	46%	\$251,123
Soft Goods	45%	\$590,925
Lodging	10%	\$15,492
TOTAL 2014		\$857,541

Hard Goods: are non-perishable: biking and hiking hardware and accessories, clothing.

Soft Goods: include food and beverages, restaurant meals, rentals of equipment.

Lodging: the 10% number deserves more detail. Eighteen percent of survey respondents said their visit to the ET involved an overnight stay. Of that group, 55% reported paying for lodging; hence, the 10% figure. That percentage also agrees with the 17% of respondents who said they were visiting from out of state.

*"We can't wait to go again . . . This small trip made the expense of **purchasing bikes** for 4 people . . . [at a York County bike shop] well worth it."*



Annual BCM Bike Swap- heavily attended

More Supporting Evidence

Eastern Trail Impact on Housing Values and Municipal Revenues

Housing values nationwide are reported to increase from 5 to 10% for proximity to a trail. (Boulder, Colorado and the Hartford Area anecdotally report 25%.) One of Saco's more successful realtors in a private conversation told the author that he had not noticed values increasing, but he had noticed that those near-trail properties sold much more quickly. That must be why real estate advertisements and MLR listings now commonly mention when a property is "close to the Eastern Trail."

Scarborough's Project and Data Coordinator, a GIS mapping expert, Stephen Buckley, computed the total real estate property value for all real estate within one-half mile of the ET in Scarborough as \$260,423,000. If follows, then, that a conservative 5% increase in those property values by the Eastern Trail increases their value by \$13,021,150, which potentially yields increased tax income of \$192,322 annually to Scarborough.



Apparently, local real estate companies agree that the Eastern Trail enhances property values:



Case Study: Economic Impact of the 2014 Maine Lighthouse Ride

After 11 years of increasing MLR ridership, the Eastern Trail Alliance was forced to cut off registration five weeks before its 2014 ride because the limit of 1200 riders had been reached. Following the ride, ETA asked the riders to rate the ride and to tell ETA something about themselves.

What are the demographics of the people who participated in the Eastern Trail Alliance's 2014 Maine Lighthouse Ride?

55% of the riders have a masters degree or higher.

56% earn more than \$100,000 annually.

What did they spend while in Maine for the one-day ride?

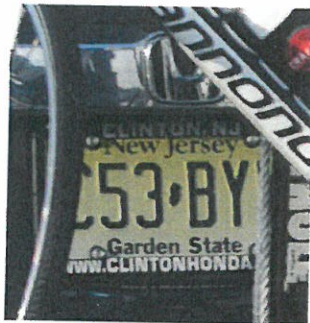
Riders and their families spent \$354,000 locally to participate in the Maine Lighthouse Ride.

Why is the MLR's performance relevant? It demonstrates just how wide and compelling is the net the Eastern trail casts, and how potent its economic benefits can be.

Where did the 2014 riders register from?

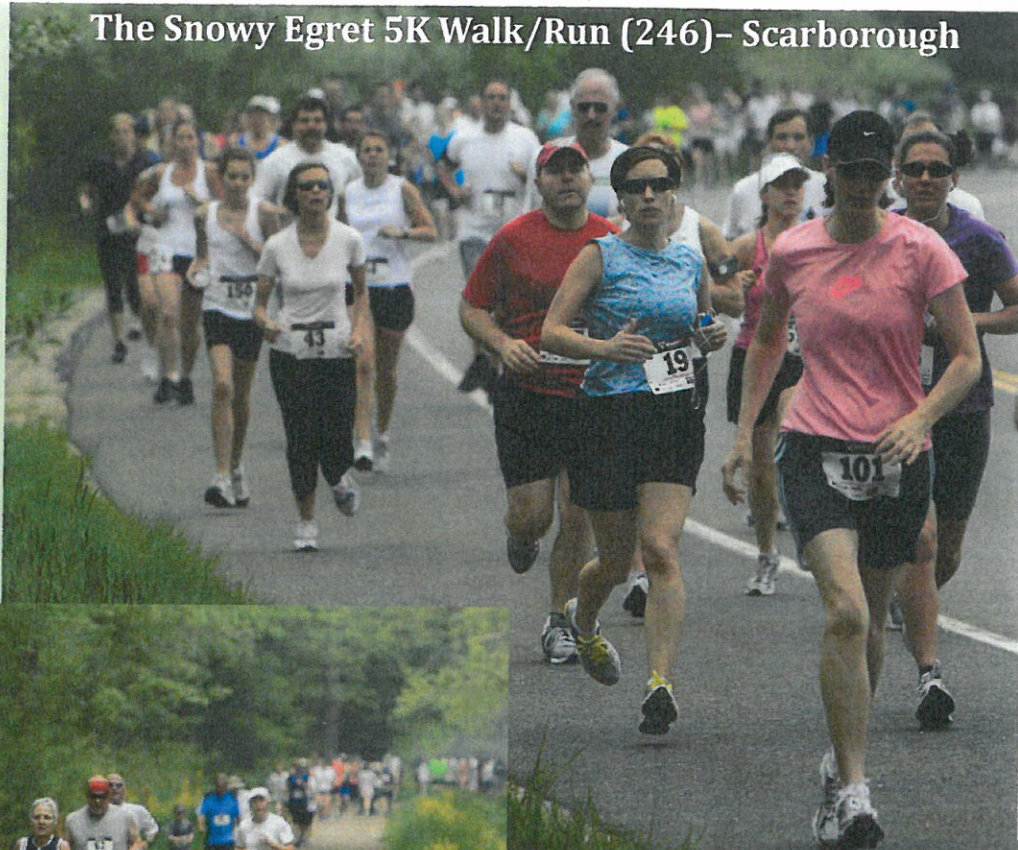
44% from Maine; 56% from out-of-state.

Maine	44%	Others: 13% AZ, BC, CO, DC, GA, IL, MD, MI, NV, OH, ONT, OR, QUE, RI, SD, TN, TX, UT, VA, VI, VT, WI (29 states and Canadian provinces represented)
MA	21%	
CT	7%	
NY	7%	
NH	6%	
NJ	2%	
PA	2%	



Special Events on the Eastern Trail . . .

The Snowy Egret 5K Walk/Run (246)- Scarborough



**SMHC Be Healthy 5K Run/
Walk (143)-Biddeford**



... bring crowds of participants to southern Maine



Appendix

Eastern Trail User Comments

I like the Eastern Trail. It is flat no cars not crowded I work nearby so I stop after work.

The Eastern Trail is Great!

Would like to learn about volunteer opportunities.

I would like to have outhouses and water fountains every two or three miles

Terrific first experience with the trail. *It won't be my last.*

Wish there were a porta potty on the Kennebunk-Biddeford portion. Also I am afraid to walk there during hunting season.

Tremendous Asset to Community.

We have walked and biked from Eastern Rd. to Saco while geocaching. ***We have brought other friends with us*** so they may as well.

The trails are a wonderful resource for me, my husband and our friends. Thanks so much for taking care of them so well and making them available.

Thank you!

A great resource! Keep up the good work.



I use the trail to commute to work - safer than Rte's 1 or 111.

Thanks for the availability of this trail so close to Prouts Neck, ***where so much access to the shore and woods and trails is private and unavailable to the visiting public.***

Looking forward to Eastern Road to Pleasant Hill Road opening.

People not picking up what's left behind by their dog.

Thank you, and keep up the great work. Happy Summer

Love this trail! Look forward to off-road connection from Eastern Rd. to So. Portland.

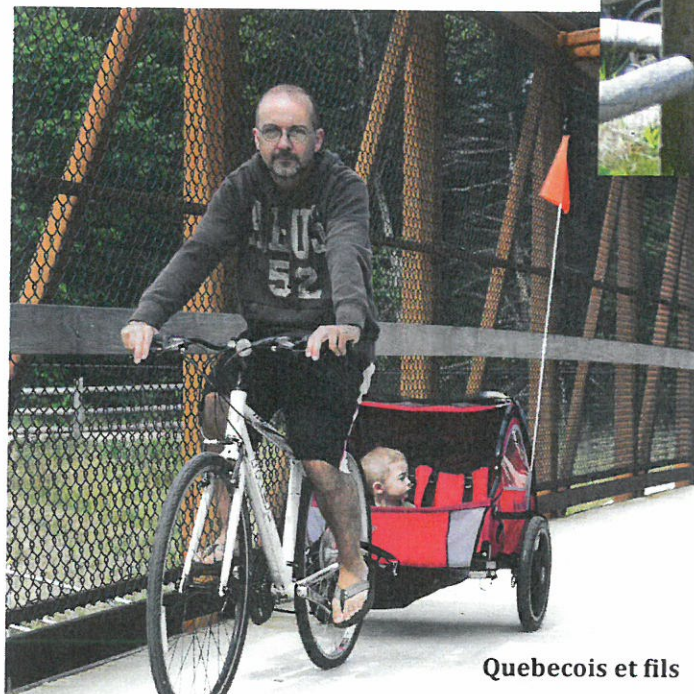
This trail is well maintained and very well signed. ***Some of the best marked trails on the East coast.*** Fantastic Ride!

Great Trail.



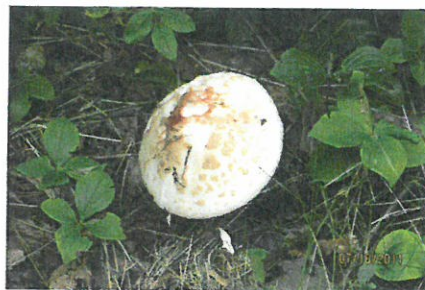
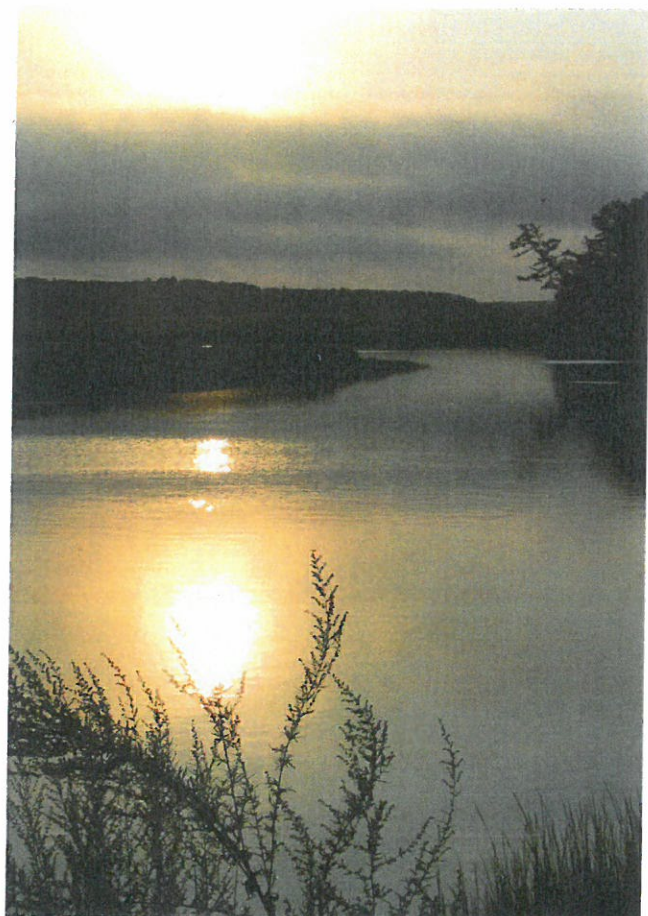
*"I am retired and thankful for the trail - **finally a safe walking area.**"*

"We were visiting from MA and enjoyed being able to ride our bikes on off-road trails that were safe"



Quebecois et fils

*"Using the trails has persuaded us to **extend our stay in the U.S., in Maine, when we are retired!**" [from Canadian citizen]*



"We love having this great trail! It is peaceful and gives us the opportunity to connect with the natural beauty of Maine!"



"The trail from Kennebunk to Biddeford is perfect for children new to biking. We enjoy making it a part of our Maine vacation."



"We can't wait to go again - Great location for our 4 and 6 year old to practice riding bikes without worrying about cars."

We were visiting from MA and enjoyed being able to ride our bikes on off-road trails that were safe. I'm supporting the local bike trail org.

Enjoy walking the trail to **see the birds of Scarborough Marsh**. I am glad we have repurposed the railroad lines for public use around Maine.



More benches at kiosks and along the way in Kennebunk and Biddeford. Notice at Kiosks and maps where to go off road to find restrooms.

Thank you for getting Arundel to add parking spaces on the Limerick road!!

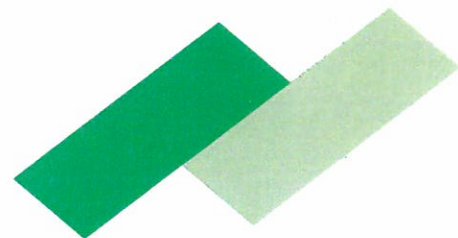


Bicycle riders on the trail often do not signal their approach to walkers. Bikers need more instruction on trail etiquette.

Thanks for all you do, we enjoy the trail.

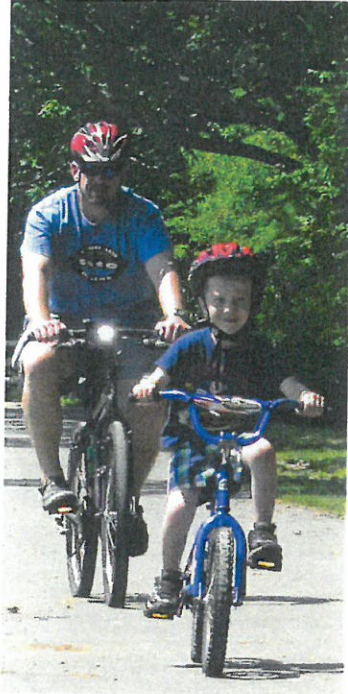
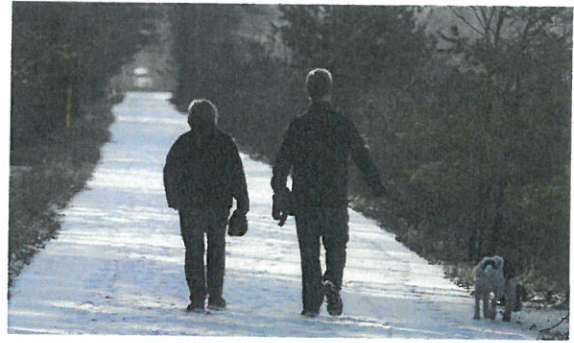
I'm very glad it was improved from what it was before!

Great trail - **thoroughly enjoy the 12 mile bike ride from KES to SMHC** and back. Kennebunk should mow and clean up the downed trees!



Great to find and use this. Terrific condition and **length is a big plus**
Thanks! **We'll be back for more.**
Like the Maine DOT spiral bike book.





Love the trail! **Hope it will be expanded south and that off-road section from Biddeford (SMHC) to Thornton will be done soon.** Thanks!

More signage in Biddeford near medical center (hard to find). Also trail was narrow and steep, need caution other than that, fabulous!! [Ed. note-- off-road section]

Wonderful asset to this area - we ride off-road only - enjoying the trail a lot!

The trail is very important for the health and vigor for the people of the country. **To have these trails nationwide should be the next public works project, to bring back prosperity.**

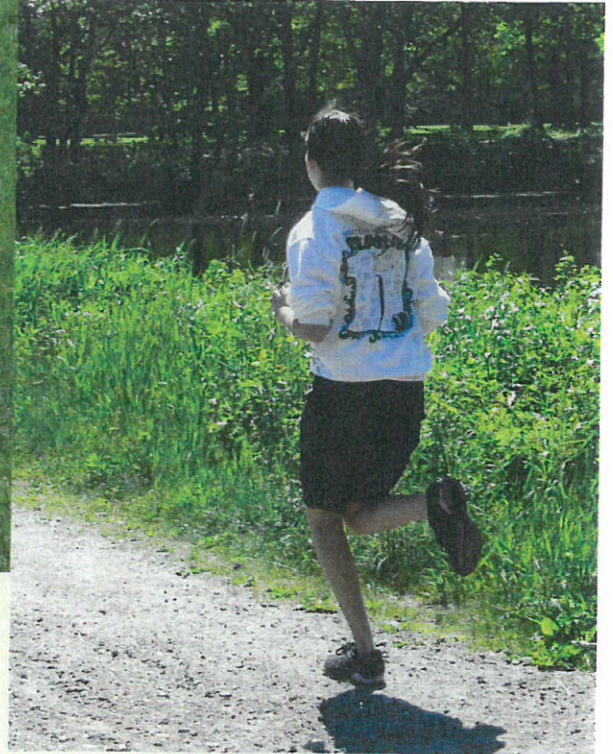
Great to find and use this. Terrific condition and length is a big plus Thanks! **We'll be back for more.** Like the Maine DOT spiral bike book.



On Sunday morning quite a lot of biking, running, and walking activity. This is a **jewel of a trail, close yet distant from the commercial surroundings of Saco**, or for that matter all around the beaches. From a health and fresh air perspective everyone should be using regularly. Word needs to get out, consider connecting actively with 'tourism/hotel personnel to promote!

We come from Boston. Trail is big draw. Unfortunately Amtrak stopped taking bikes at Wells stop. Amtrak needs to be more accommodating to bikes, then more bikers will come. They used to allow bikes on/off at Wells but stopped. So we come less often. **(International visitor from Germany.)**





The trail is very important for the health and vigor of the people of the country. To have these trails nationwide should be the next public works project, to bring back prosperity.



Monthly Full-Moon Walk on the ET



USER SURVEY

EasternTrail.Org



SCARBOROUGH ME 04070-9984

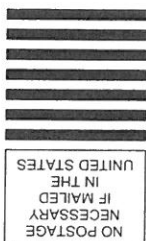
PO BOX 10

C/O DMM

EASTERN TRAIL ALLIANCE

POSTAGE WILL BE PAID BY ADDRESSEE

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 82 SCARBOROUGH, ME



Your first-class stamp on this envelope saves us postage and puts your money to work for the Eastern Trail.



The Eastern Trail Alliance, an all-volunteer nonprofit, helped create the Eastern Trail Management District, consisting of representatives from the towns the ET traverses and three members of the ETA. The ETMD oversees construction, maintenance, and uses of the ET, tasks that have grown dramatically as the off-road segments have been completed.



Eastern Trail – User Survey

In order to provide you with a high quality experience, we are conducting a survey of trail users.
Your cooperation in completing this survey will be greatly appreciated. One user per survey form please!

1. What is your zip code? _____
2. How often, on average, do you use the trail? (circle one response)
Daily Once a week Twice a week More than twice a week Once a month A couple of times a month A few times a year
First time
3. Please identify your age group. (circle one response)
15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older
4. Were any children under the age of 15 with you on your most recent trail experience? Yes No
5. What is your gender? (circle your response) Male Female
6. What are your primary activities on the trail? (circle all that apply)
Walking/ Hiking Biking Jogging/Running Horseback Riding XC skiing Geocaching
Other activity (specify) _____
7. Has the trail had an influence on the type or frequency of activity you participate in? Yes No
8. Generally, when do you use the trail? (circle one response) Weekdays Weekends Both
9. How much time do you generally spend on the trail each visit? (circle one response)
Less than 30 minutes 30 minutes to 1 hour 1 to 2 hours More than 2 hours
10. Would you consider your use of the trail to be for (circle one response)
Recreation Health and Exercise Training (marathon, triathlon) Commuting Walk to School Other (specify) _____
11. During your trail visit did you (Circle all that apply) Bike Hike Run Fish Birdwatch Watch wildlife
Study wildflowers Geocache Other _____
12. How did you find out about the trail? (circle all that apply)
Word of mouth Roadside signage Driving past Newspaper Bike shop Tourist Bureau Eastern Trail Brochure
EasternTrail.Org www.Trailink.com other web site _____ Other _____
13. Has your use of the trail influenced your purchase of: (circle all that apply)
Bike Bike supplies Auto accessories Footwear Clothing Nothing
14. Approximately how much did you spend on the items above in the past year? \$ _____
15. In conjunction with your most recent trip to the trail, did you purchase any of the following? (circle all that apply)
Beverages Candy/Snack foods Sandwiches Ice cream Meals at a restaurant near the trail Bike rental
Other _____ None of these
16. Approximately how much did you spend, per person, on the items above on your most recent visit? \$ _____
17. Did your visit to the trail involve an overnight stay in one of the following types of accommodations? (circle one response)
Motel/Hotel Bed and Breakfast Friend or Relatives Home Campground Other (please specify) _____
18. How many nights did you stay in conjunction with your visit to the Eastern trail? _____
19. Approximately how much did you spend on over night accommodations per night? \$ _____
20. In your opinion, the maintenance of the trail is (circle one) Excellent Good Fair Poor
21. In your opinion, the safety and security along the trail is (circle one) Excellent Good Fair Poor
22. In your opinion, the cleanliness of the trail is (circle one) Excellent Good Fair Poor
23. Would you be willing to be a paying member of an organization that supports the trail? Yes No
If yes, you can join at EasternTrail.Org or provide an email address: _____
24. Are you aware of the East Coast Greenway project? Yes No
25. What portion of the off-road trail do you use most often? Circle all that apply: South Portland Nonesuch-Desfosses
Black Point to Pine Point Pine Point to Saco Biddeford to Kennebunk both on-road & off-road
Kennebunk Elementary School out & back Southern Maine Health Center (formally Southern Maine Medical Center) out & back
26. Which trail access point do you generally use when you visit the trail? (circle all that apply) Eastern Road Pine Point Road
Mill Brook Office Park Thornton Academy SMMC Limerick Road Kennebunk Elementary School
Other (please specify the street) _____
27. Highest completed education (circle one) 8th Grade High School Associates Bachelors Masters PhD
28. Household Income (circle one) Less than \$30K Less than \$60K Less than \$100K Greater than \$100K



Additional comments _____



The Economic Benefits of the Eastern Trail



WWW.EASTERNTAIL.ORG

