The Economic Benefits of the Eastern Trail in Southern Maine

Based on a 2014 Survey
The Eastern Trail in Southern Maine

The 2014 EIS bases its conclusions on data and surveys taken on the off-road sections of the Eastern Trail. Those are the GREEN sections in this map.

The towns of Kennebunk and Wells are now funding an engineering study to develop a major off-road addition of 10+ miles from Kennebunk, through Wells, to the North Berwick border.

“Would love to see more off road through Wells, North Berwick.”
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The publication was financed by a generous donation from Kennebunk Savings Bank.

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Appreciation for Support
Without the technical guidance provided by Rails-to-Trails Conservancy (RTC), especially its Northeast Regional Trail Development Manager Carl Knoch, this study could not have been undertaken.

Jim Bucar, Photographer, Graphic Designer, and Editor, is an Eastern Trail Alliance Trustee.

Kennebunk Savings

The publication of this report was financed by a generous donation from Kennebunk Savings Bank.
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*
Arundel*
Kennebunk*
Wells
North Berwick
South Berwick
Eliot
Kittery

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

[See Eastern Trail map, page 2]
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 measurable 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 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.
### South Portland Scarborough: On-Road Eastern Trail

**ACCESS / PARKING NOTES**
- ET Parking - spaces limited
- Shared commercial / municipal lot

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

**ACCESS / PARKING NOTES**
- No Trail Access at I-95
- Parking only during non-school hours at Thornton Academy
- Shared commercial / municipal lot

### Biddeford-Arundel-Kennebunk: On-Road Eastern Trail

**ACCESS / PARKING NOTES**
- No Trail Access at I-95 or Biddeford Connector
- No parking on Barra Rd or Cathedral Oaks
- Shared commercial / municipal lot
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:
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' Educational Levels**

- 8th Grade: 2%
- High School: 20%
- AD: 11%
- BS: 40%
- MS: 22%
- PhD: 5%

**Percentage**
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:

<table>
<thead>
<tr>
<th>Category of Purchase</th>
<th>Percentage Who Made Purchases</th>
<th>Total Expenditure in Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Goods</td>
<td>46%</td>
<td>$251,123</td>
</tr>
<tr>
<td>Soft Goods</td>
<td>45%</td>
<td>$590,925</td>
</tr>
<tr>
<td>Lodging</td>
<td>10%</td>
<td>$15,492</td>
</tr>
<tr>
<td><strong>TOTAL 2014</strong></td>
<td><strong>$857,541</strong></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maine</td>
<td>44%</td>
</tr>
<tr>
<td>MA</td>
<td>21%</td>
</tr>
<tr>
<td>CT</td>
<td>7%</td>
</tr>
<tr>
<td>NY</td>
<td>7%</td>
</tr>
<tr>
<td>NH</td>
<td>6%</td>
</tr>
<tr>
<td>NJ</td>
<td>2%</td>
</tr>
<tr>
<td>PA</td>
<td>2%</td>
</tr>
<tr>
<td>Others</td>
<td>13%</td>
</tr>
<tr>
<td>AZ, BC, CO, DC, GA, IL, MD, MI, NV, OH, ONT, OR, QUE, RI, SD, TN, TX, UT, VA, VI, VT, WI</td>
<td>(29 states and Canadian provinces represented)</td>
</tr>
</tbody>
</table>
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 Trial. 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.* Fantas-tic Ride!

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

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

"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.
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.Traillink.com  other web site  _____________

13. Has your use of the trail influenced your purchase of: (circle all that apply)
    Bike  Bike supplies  Auto accessories  Footwear  Clothing  Nothing
    Other  _____________

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  _____________

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 overnight 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  _____________

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________________________________________________________________________________________________________
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