Economic Impacts: How & Why of Counting the Dollars

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You are all Bicycle enthusiasts. Your point of view must be...
How much do bicyclists spend? What do they spend it on?
MT Bicycle Tourism Study

- What is the relationship between cycling and tourism in Montana? Who are these cyclists?
- What makes a successful multi-day bicycle trip in Montana?
- What can Montana and business owners do for infrastructure development to encourage more cycle touring in the state?
Methods

- Adventure Cycling Association
- Web Survey
- 718 Respondents
Average age = 52.4
Age range = 18 - 79
58% make > $75K
76% male

Who are the touring cyclists?

Cartographer: Dan Kozel

<table>
<thead>
<tr>
<th>INTERNATIONAL PARTICIPANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
</tr>
<tr>
<td>Netherlands</td>
</tr>
<tr>
<td>UK</td>
</tr>
<tr>
<td>Australia</td>
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<tr>
<td>Switzerland</td>
</tr>
<tr>
<td>New Zealand</td>
</tr>
<tr>
<td>Spain</td>
</tr>
<tr>
<td>Germany</td>
</tr>
<tr>
<td>Scotland</td>
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</tbody>
</table>

Legend:
- NO DATA
- 1 - 9
- 10 - 22
- 23 - 49
- 50 - 89
• 92% planning to take a multi-day bike trip in the next 3 years.

• 73% have taken 1-5 trips in the past 3 years.

• 52% prefer trips lasting 5-14 days, and 28% prefer trips lasting longer than 30 days.
<table>
<thead>
<tr>
<th># of Nights in MT</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>0-2 nights</td>
<td>4%</td>
</tr>
<tr>
<td>3-4 nights</td>
<td>12%</td>
</tr>
<tr>
<td>5-6 nights</td>
<td>19%</td>
</tr>
<tr>
<td>7-8 nights</td>
<td>23%</td>
</tr>
<tr>
<td>9 nights</td>
<td>8%</td>
</tr>
<tr>
<td>10+ nights</td>
<td>33%</td>
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</table>

<table>
<thead>
<tr>
<th>Overnight Stay</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motel</td>
<td>39%</td>
</tr>
<tr>
<td>Private campground</td>
<td>22%</td>
</tr>
<tr>
<td>Public land campgrounds</td>
<td>19%</td>
</tr>
<tr>
<td>Dispersed camping along route</td>
<td>6%</td>
</tr>
<tr>
<td>Home of friend/relative</td>
<td>5%</td>
</tr>
<tr>
<td>Warm Showers.com</td>
<td>3%</td>
</tr>
<tr>
<td>B&amp;B</td>
<td>2%</td>
</tr>
</tbody>
</table>
While in MT these cyclists:

- Visit historical sites (40%)
- Visit Lewis and Clark sites (38%)
- Watch Wildlife (37%)
- Day hike (33%)
- Photograph Nature (30%)
- Visit Local Breweries (29%)
- Visit Museums (28%)
Daily Expenditures

- On average, cyclists spend $75.75/day
- ITRR nonresident survey 2012 3rd Q Vacationer spent $58.24/day
- ITRR estimates - nonresident visitors road/tour biking while in Montana in 2012 = 565,372
Possible Impact of Montana’s multi-day cyclists:

8.8 nights in MT x $75.75/day = $666.66/trip x 565,372 = $377 million
Montana Expenditure Data

2014 Expenditure Allocation by Category

Restaurant, Bar 32%
Retail Sales 15%
Gasoline, Diesel 18%
Hotel, B&B, etc. 9%
Groceries, Snacks 6%
Outfitter, Guide 5%
Auto Rental 3%
Auto Repair 1%
Rental Cabin, Condo 1%
Licenses, Entrance Fees 1%
Other 1%
Misc. Services 1%

Touring Cyclists Expenditure Allocation by Category

Restaurant, Bars 29%
Guided Trip 17%
Hotel, motel 13%
Camping 5%
Retail 9%
Transport Fares 3%
Services 2%
License, Gasoline 1%
Other 1%
Groceries, Snacks 10%
Satisfaction

Cyclists are most satisfied with:
– The hospitality of local people
– Historical Sites
– Local Breweries

Cyclists are least satisfied with:
– Cell phone coverage
– Width of shoulders, debris on road/shoulders, quality of pavement, and rumble strips
– Availability of cycling stores and bike repair services
Needs and Challenges

• Road shoulders
• Route Safety
• Availability of campgrounds
• Driver Courtesy
What does this mean?
Another study emerged...
Methods and Response

– On-site data collection in Glacier with a mail-back component
– 211 spring group respondents
– 30 bus driver respondents
– 441 mail-back respondents
– 597 Experimental respondents
– 628 Control group respondents
Preliminary data showing...

Comparing people visiting Glacier National Park

<table>
<thead>
<tr>
<th></th>
<th>Daily spending/person</th>
<th>Length of stay</th>
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</thead>
<tbody>
<tr>
<td>Bicycled during their MT trip</td>
<td>$71.51</td>
<td>3.18</td>
</tr>
<tr>
<td>Non-cyclists on this trip</td>
<td>$46.21</td>
<td>6.68</td>
</tr>
</tbody>
</table>
More to come on the Glacier study... stay tuned!
Questions?

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www.itrr.umt.edu