

Section Contents

VI. Conclusions and Recommendations	41
Conclusions	41
Recommendations	44
Table 9. Comparison of the quality of bicycling, facilities, and feeling of safety across three respondent categories	42
Table 10. Comparison of bicycle facility investment priorities among the three respondent categories	43

VI. CONCLUSIONS AND RECOMMENDATIONS

Conclusions

The literature review revealed that tourism is an important resource for North Carolina, as it is for many other states. The primary reason, of course, is that tourists spend money that benefits both the state and local economies. The economic impact of such expenditures is large and varied, and it benefits businesses, workers, and state and local governments.

Because of this favorable economic impact, competition for tourist dollars is strong. The competition occurs between states and between areas within a state. Tourists can be drawn to an area by specific attractions, such as the beaches, but also by the complex mix of things that provide a variety of things to see and do. The richer the mix, the stronger the draw. Bicycling can obviously be one ingredient of the mix. For it to be significant, attention must be paid to making an area “bicycle-friendly.” This means, among other things, providing bicycle facilities, such as bicycle paths, bicycle lanes or wide paved shoulders on roads, to make the overall cycling experience convenient, pleasurable and safe.

Although it is difficult to determine the proportion of tourists who come to an area like the Outer Banks primarily because of bicycling, it is fair to say that bicycling is one of the important factors in the decision by many people to visit. In regard to distinguishing those who are attracted by the quality of bicycling in general from those who are attracted by the quality of the bicycle facilities in particular, it is also fair to say that both factors are probably at play in varying degrees for different individuals or groups.

The findings of the South Carolina study regarding its coastal area applies equally well to North Carolina, i.e., South Carolina coastal areas are well-suited for attracting bicycling tourism because of their level terrain, year-round temperate climate, availability of rural roads with low traffic densities, and variety of natural and manmade attractions easily accessible by bicycle (See References listed within the Literature Review on page 10 for more information.)

The South Carolina study cited in the literature review makes it clear that South Carolina intends to compete more vigorously for coastal bicycle tourists. It can be assumed that Virginia is another nearby state that competes with North Carolina for tourist business including tourists who bicycle. Although improving bicycle facilities may not be the main reason that tourists will be drawn to the Outer Banks or other coastal areas, they may well be an important ingredient in the complex mix of factors that induce tourists to choose North Carolina coastal areas over other nearby states.

Bicycling is clearly an important activity in the northern Outer Banks. Observation alone would suggest this—many bicyclists can be seen on the streets, roads and multi-use paths throughout the area. There are also many parked bicycles in evidence at beach locations, and in shopping and dining areas. In addition, a significant proportion of motor vehicles in the area can be seen to have bicycle racks. However, it can also be intuitively assumed that bicycling is not the dominant reason for visiting the area. Clearly, beach and ocean-related activities would be more important reasons for most tourists to visit.

The visitor center surveys revealed that about 17 percent of tourists, or about 680,000 annually, engage in some bicycling activity while in the area. Approximately one-third of these bicyclists indicated that it was an important factor in their decision to visit. The quality of bicycling in the area was rated fairly high by survey respondents, as was the quality of bicycle facilities. Scoring even higher was the perception that the bicycle facilities added to the cyclists’ feeling of safety while riding. Finally, many survey respondents indicated that the quality of bicycling would be important in their decision to return to the area.

It should also be recognized that bicycling is important not just for the tourists. Many residents also benefit by the presence of the bicycle facilities and use them for purposes of exercise (46%), recreation (32%),

and personal errands (11%). Four percent of residents indicated that their bicycle trip was for the purpose of commuting to work or school.

The following table provides the average rating given to key survey questions by the three types of respondents. (In the survey, a respondent could rate an item from 1 – 5, with 1 being Not Important/Poor/Not a Factor, and 5 being Very Important/Excellent/A Great Deal, depending on the question.)

Table 9. Comparison of the quality of bicycling, facilities, and feeling of safety across three respondent categories. Note: Visitor Center Cyclists are likely to have been at the beginning of their visit and therefore may not have yet had a chance to actually experience the quality of bicycling or bicycle facilities in the area.

Survey Question	Intercepted Visitor Cyclists	Visitor Center Cyclists	Intercepted Resident Cyclists
Importance in decision to visit area	3.1	2.8	N/A
Overall quality of bicycling	3.7	3.1	3.3
Quality of bicycle facilities	3.6	2.9	3.5
Feeling of riding safety due to bicycle facilities	3.8	3.4	4.0
Importance in decision to return	3.5	3.0	N/A

Another factor that indicates that bicycling is important in terms of visiting the area is that 70 percent of the Intercepted Visitor Cyclists, and 62 percent of the Visitor Center Cyclists, stated that they had brought their own bicycles. In addition, the average Intercepted Visitor Respondent bicycled on 69 percent of the days of his or her trip, with 75 percent reporting that they bicycled on more than 50 percent of the days of their visit. Finally, 11 percent of the Intercepted Visitor Respondents and 16 percent of the Visitor Center Cyclists stated that their visit duration was longer due to bicycling, by an average of three and four days respectively.

Interestingly, a higher percentage of both Intercepted Visitor Cyclists and Visitor Center Cyclists said that bicycling would be more important to their decision to return to the area than it was in their decision to come. This suggests that once exposed to the quality of bicycling in the area, visitors are more likely to return.

The economic impact of this number of visitors is obviously significant. In addition, the impact of the investment in the bicycle facilities also creates a significant economic impact in terms of money spent, and jobs created or supported. A reasonable mid-range estimate is an economic impact of at least \$60 million per year.

A large percentage of bicyclists indicated that additional facilities should be built in the area—76 percent of Intercepted Visitor Cyclists, 70 percent of Visitor Center Cyclists, and 91 percent of Intercepted Resident Cyclists. Even larger proportions favored the use of state and/or federal funds to build such facilities—95, 88 and 100 percent, respectively. In terms of the kinds of facilities most desired, the following table summarizes the survey responses, in order of priority.

Table 10. Comparison of bicycle facility investment priorities among the three respondent categories.

Top Five Bicycle Facility Investment Priorities			
Priority	Intercepted Visitor Cyclists	Visitor Center Cyclists	Intercepted Resident Cyclists
1	Wider bike lanes	More bike paths	More bike paths
2	More bike paths	More bike lanes	Wider shoulders/curb lanes
3	Wider bike paths	Off-road trails	Wider paths
4	Bike path only—no walkers, etc.	Public restrooms	More paved shoulders
5	More crossing areas	Wider bike lanes	Route signs/maps

More details on the types of bicycle facilities desired are given in Appendix F (page 63).

Residents were asked about where such facilities should be located. Along NC 12 seems to be the preferred improvement location with the Duck, Kitty Hawk, Corolla, and Southern Shores areas all mentioned. Other suggestions included U.S. 158, Collington Road, Nags Head to Oregon Inlet, and every two to three miles for signs, benches, and water fountains.

The intercept and visitor center surveys did not specifically ask about desired facility locations but some suggestions did come out of the priorities listed:

- Trails inland to shore
- Pavement from Jeannette’s Pier to Oregon Inlet
- Bike paths on NC 12 South of Kitty Hawk
- Connect bike paths Nags Head to Duck
- Link to Coquina Beach
- Wider shoulder on NC 12
- Widen connector between Southern Shores and Duck
- Wider sides from Duck to U.S. 158
- Bike lane on National Seashore
- Better bike path to Corolla
- Complete wide shoulders/trails along NC 12/Beach Rd
- Separate parallel lane along NC 12

Recommendations

The investment in bicycle facilities in the northern Outer Banks (and in otherwise supporting and encouraging bicycling as a tourist activity) has resulted in a very favorable economic return for the area. Continued investment could only be expected to increase this favorable impact and is therefore recommended. In addition, if North Carolina is to stay competitive with other nearby coastal states for bicyclists, a failure to continue investing in such facilities could prove to be harmful in the long run.

The types of bicycle facility investments found to be most desired in this study are:

- More and/or wider bicycle paths and lanes (it is realized that the geographic and development pattern constraints inherent to the Outer Banks makes the advancement of special, multi-use paths very difficult).
- More and/or wider paved shoulders on roads.

In addition, it is recommended to:

- Pursue opportunities to create connections between existing bicycle facilities wherever possible.
- Develop more bicycle lanes or paved shoulders on side streets away from the beach.
- Upgrade existing bicycle facilities where necessary and feasible to meet national guidelines and standards (4- to 5-ft width for bicycle lanes and paved shoulders, and 10- to 12-ft width for off-road paths), and build new facilities to meet these standards.
- Increase efforts to promote the use of the bicycle facilities in the area.

It is expected that investments in bicycle facilities in other areas would return similar benefits. This would be true whether the area is already a tourist attraction for other reasons, or whether the bicycle facility was itself the primary attraction, for example a dedicated bicycle path in an abandoned railroad right-of-way.