

# Trail Use/Impact Studies

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*Recent studies of particular relevance to Minnesota recreational trails*

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Note: The provided web addresses are correct as of the document's modified date. Please download any files for future reference, as online file locations may change.

## Minnesota Economic Impact of Recreational Trail Use (2009)

Published: November 2009

Prepared for: University of MN Tourism Center, MN DNR, MN Recreational Trail User Association

Researched/published in conjunction with the **"Profile of 2008 Minnesota Recreational Trail Users"** Report (2009)

### Summary

Estimates the total trail-user spending in each of Minnesota's regions and the economic impact on the local economy

Page 113 of the report has an excellent, single page financial summary that is ideal for distribution/discussion at meetings.

### Online Source:

Website of University of Minnesota Tourism Center, listed under Research Reports (easiest to find if sorted by Year)

<http://www.tourism.umn.edu/ResearchReports/ResearchReportsbyYear/index.htm>

### Complete Report

**"Economic Impact of Recreational Trail Use in Different Regions of Minnesota" (PDF)**

[http://www.tourism.umn.edu/prod/groups/cfans/@pub/@cfans/@tourism/documents/asset/cfans\\_asset\\_167538.pdf](http://www.tourism.umn.edu/prod/groups/cfans/@pub/@cfans/@tourism/documents/asset/cfans_asset_167538.pdf)

### Market Segment/Summary Reports

Summary 'At a Glance' economic impact fact sheets by user type are available (derived from the complete report).

<http://www.tourism.umn.edu/ResearchReports/MarketSegments/Outdoors/index.htm>

<http://www.tourism.umn.edu/ResearchReports/MarketSegments/Winter/index.htm>

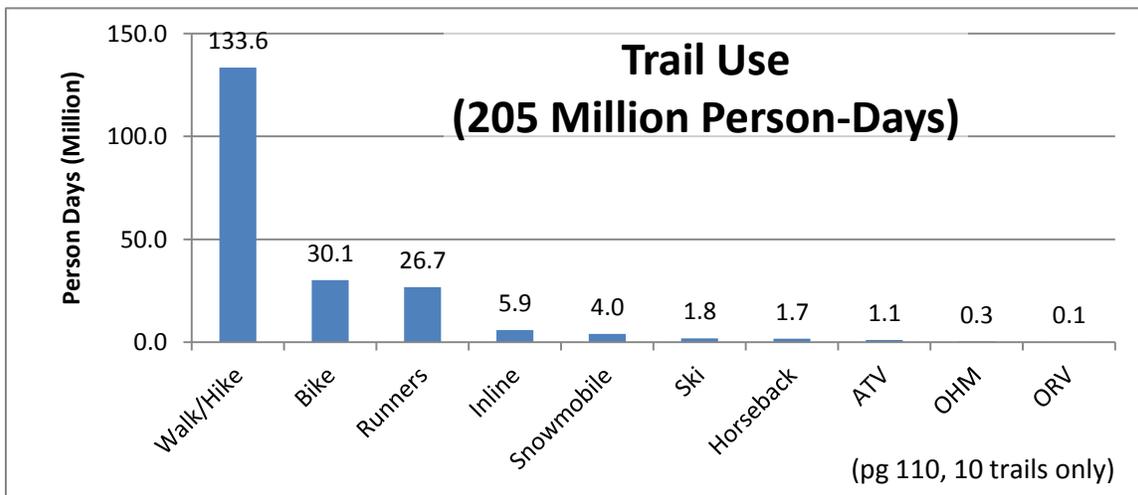
- **"At a Glance: Minnesota Cross Country Skiers" (PDF)**
- **"At a Glance: Minnesota Horseback Riders" (PDF)**
- **"At a Glance: Minnesota Inline Skaters (with Running as proxy)" (PDF)**
- **"At a Glance: Minnesota Mountain Bicyclists" (PDF)**
- **"At a Glance: Minnesota Off-Highway Motorcycle (OHM)" (PDF)**
- **"At a Glance: Minnesota Off-Road Vehicle" (PDF)**
- **"At a Glance: Minnesota Road Bicyclists" (PDF)**
- **"At a Glance: Minnesota Snowmobilers" (PDF)**
- **"At a Glance: Minnesota Walkers and Hikers" (PDF)**

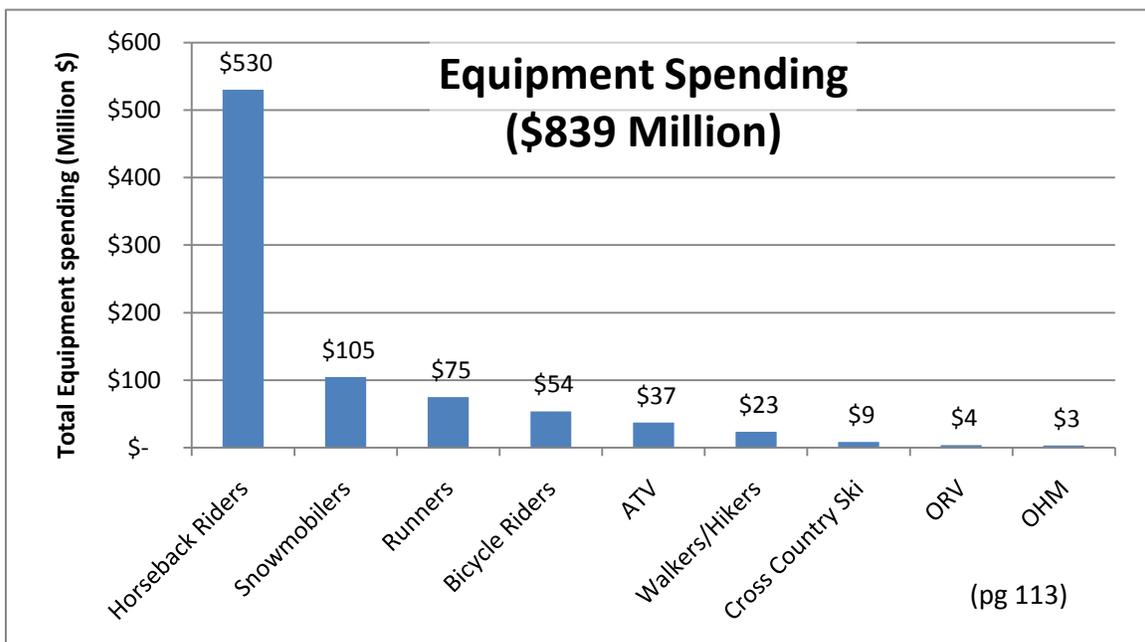
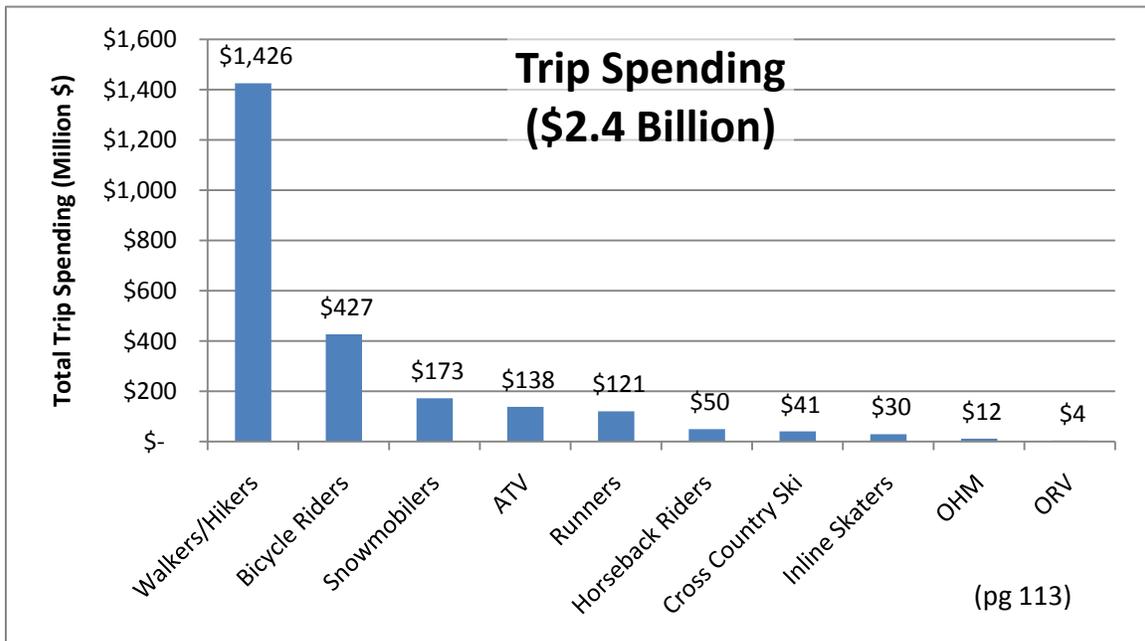
### Key Findings (MN trails, statewide for 2008)

- Total trail spending and equipment purchases \$3.2 Billion (pg 6)
- Total trail spending \$2.4 Billion (pg 5)
- Walking/Hiking spending is the most significant at \$1.4 Billion (total trip spending) (pg 113)
- Road/Trail Cycling spending is the second most significant activity at \$427 Million (total trip spending) (pg 113)
- Horseback riders spend the most on equipment at \$530 Million (pg 113)
- Snowmobilers spend the second most on equipment at \$105 Million (pg 113)
- Trail spending and equipment purchases are responsible for 43,000 jobs in Minnesota (pg 6)
- Trail spending generated \$206 Million in state/local taxes (pg 6)
- Trail equipment purchases generated \$74.7 Million in state/local taxes (pg 6)
- Total trail use exceeded 208 Million person-days for the 10-trails that were studied (pg 4)
- Economic impact is felt most strongly in communities adjacent to trails (pg 113)
- Out-of-state trail visitors spent \$439 Million\* (pg 115)

\* Out-of-state visitors were NOT included in this study. Average expenses of region residents at local trails were used to derive expenditure estimates for these users (pg 114).

Average Daily Spending				
Note: Does not include data on non-MN resident spending				
User Type	Residents*		MN Visitors**	Source
	< 30 min	> 30 min		
Walkers/Hikers	\$5	\$39	\$28	pg 22
Bicycle Riders	\$10	\$44	\$35	pg 31
Snowmobilers	\$42	\$49	\$37	pg 40
All Terrain Vehicles (ATV)	\$28	\$46	\$32	pg 49
Runners	\$3	\$26	\$18	pg 59
Horseback Riders	\$27	\$43	\$38	pg 68
Cross Country Ski	\$12	\$54	\$52	pg 77
Inline Skaters	\$3	\$26	\$18	pg 87
Off Highway Motorcycles (OHM)	\$32	\$63	\$32	pg 94
Off Road Vehicles (ORV)	\$23	\$69	\$40	pg 103





## Profile of 2008 Minnesota Recreational Trail Users (2009)

Published: September 2009

Prepared for: Minnesota Recreational Trail Users Association

Researched/published in conjunction with the “Minnesota Economic Impact of Recreational Trail Use” Report (2009)

### Summary

Presents a profile of trail users- the demographics, trail experiences, motivations, conflicts, and interactions

Page 113 has an excellent single page summary of trail user demographics.

### Online Source

Website of University of Minnesota Tourism Center, listed under Research Reports (easiest to find if sorted by Year)

<http://www.tourism.umn.edu/ResearchReports/ResearchReportsbyYear/index.htm>

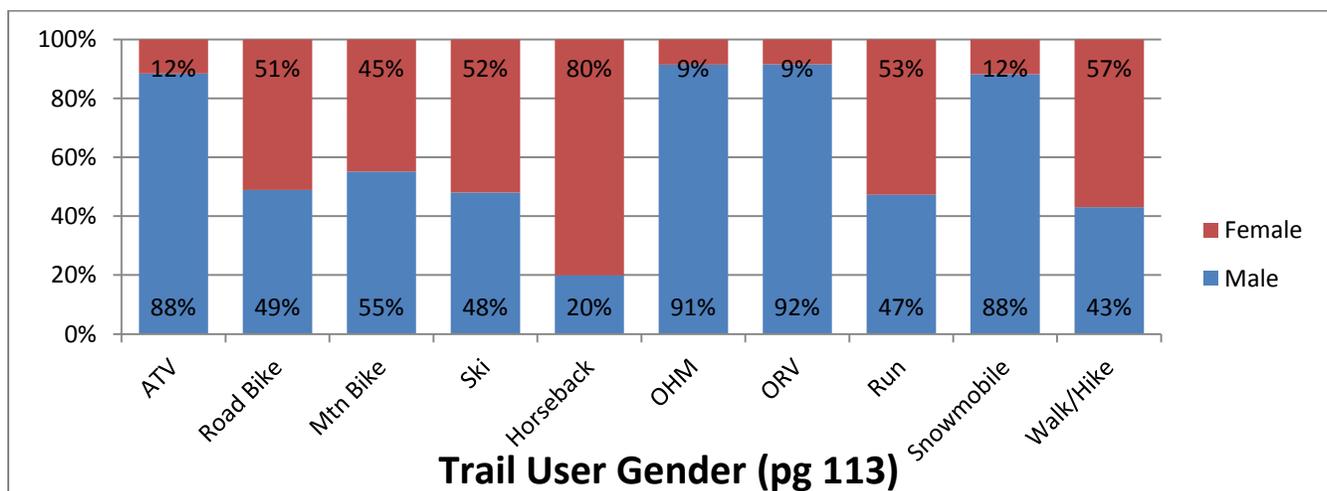
### Complete Report

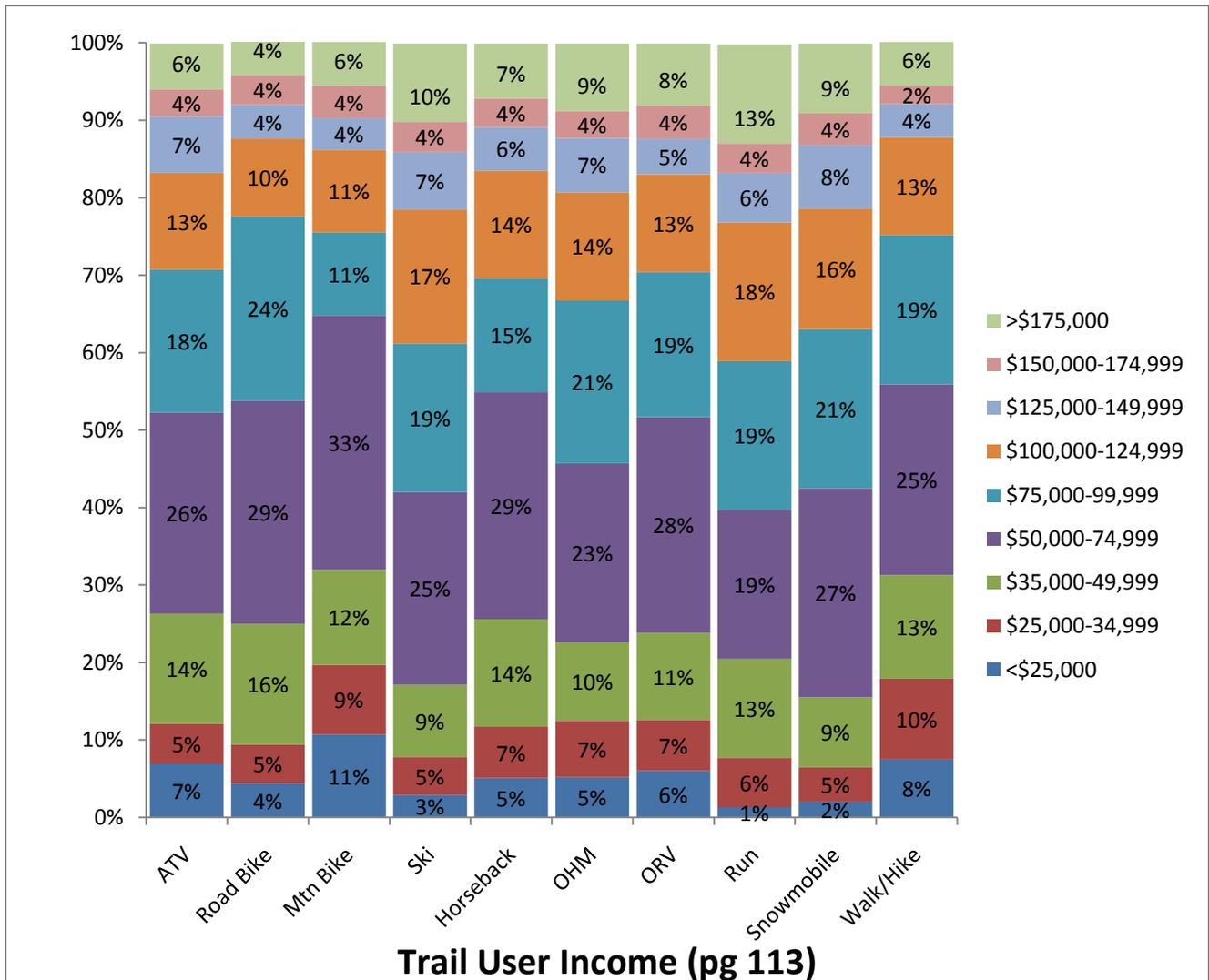
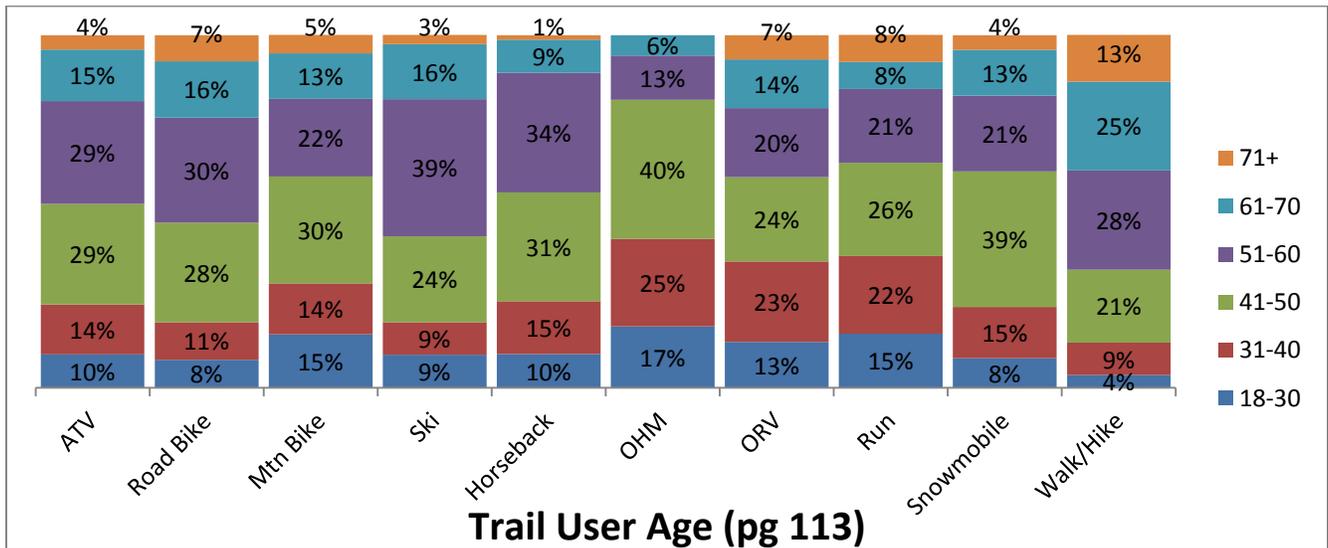
- **Profile of 2008 Minnesota Recreational Trail Users (PDF)**

[http://www.tourism.umn.edu/prod/groups/cfans/@pub/@cfans/@tourism/documents/article/cfans\\_article\\_132056.pdf](http://www.tourism.umn.edu/prod/groups/cfans/@pub/@cfans/@tourism/documents/article/cfans_article_132056.pdf)

### Key Findings (MN trails, statewide for 2008)

- Aesthetics (scenery), fitness, and escape are primary motivators for trail users (pg 3)
- ‘Nature related experiences’ were important to all trail user groups (pg 3)
- Average age was in the 40s and 50s (pg 3)
- Trail use was greatest in Central MN followed by Metro, Northwest, Northeast, Southern respectively (pg 4)
- 60% traveled more than 30-minutes for their recreational trail activity (pg 5)
- Biking, skiing, running, walking were about evenly divided between men/women participants (pg 113)
- Horseback is dominated by female participants, while motorized uses are predominantly male (pg 113)
- ATV, OHM, ORV most often reported a vocational/associate degree (pg 3)
- Horseback, cycling, snowmobile, walker/hiker most often reported a college degree (pg 3)
- Skiing, running most often reported postgraduate degree (pg 3)





## Valuing Bicycling's Economic and Health Impacts in Wisconsin (2010)

Published: January 2010

Prepared for: WI Legislature

### Online Source

#### Complete Report

- **Valuing Bicycling's Economic and Health Impacts in Wisconsin (PDF)**
  - o [http://www.sage.wisc.edu/IGERT/download/bicycling\\_Final\\_Report.pdf](http://www.sage.wisc.edu/IGERT/download/bicycling_Final_Report.pdf)
- Press Release
  - o <http://nelson.wisc.edu/news/item.html?id=757>

### Summary:

Comprehensive, statewide economic impact study for all cycling related activities in WI

### Key Findings: (WI overall cycling activity for 2008)

- Total value of bicycling in Wisconsin \$1.9 Billion (pg 31)
- Total economic impact of bicycle recreation and tourism in WI \$924 Million (pg 1)
- Total health benefits of cycling \$410 Million (pg 1)
- County construction of bicycle paths began in 1901 (pg 1)
- From 1993 to 2008, WI invested \$40 Million in bicycle projects, with \$156 Million in federal funds (pg 1)
- More than 6 million overnight person-visits for recreational cycling in 2007 (pg 3)
- 1.2 Million bicycle person-days on WI DNR Trails (pg 4)
- 13 Million person-days were spent cycling in WI (pg 7)
- Cycling has a \$533 Million direct economic impact (pg 7)
- Bicycle recreation supports more than \$924 Million in economic activity annually in WI (pg 8)
- Increasing non-resident bicycle tourism by 20% would result in \$107 Million and 1,500 jobs (pg 8)
- Increasing all bicycle recreation by 20% would result in \$185 Million and 2,638 jobs (pg 8)
- 60% of WI residents are overweight/obese and do not meet physical activity recommendations.  
Walking/cycling can be an important component to reducing obesity and dramatic health care cost savings. (pg 12)
- 78,000 trail passes are sold annually (WI trails require pass) (pg 21)
- Cycling supports 13,200 jobs (pg 38)

### Average Cyclist Expenditure per Recreational Trip (pg 6)

Bicycling Activity	Resident Daily Exp.	Non-Resident Daily Exp.
Roadways	\$39	\$54
Trails	\$18	\$34
Single-Day Bike Event/Tour	\$76	\$76
Multi-Day Tour	\$81	\$81

**Estimated Potential Value of Bicycling in WI (pg 31)**

Economic Impact of Manufacturing, Sales, & Services	\$593,787,990
Economic Impact of Tourism & Recreation	\$924,211,000
Value of Additional Physical Activity	\$319,572,108
Value of Air Quality Improvement	\$89,214,200
Value of Greenhouse Gas Reductions	\$1,157,859
<b>TOTAL POTENTIAL VALUE OF BICYCLING IN WISCONSIN</b>	<b>\$1,927,943,157</b>

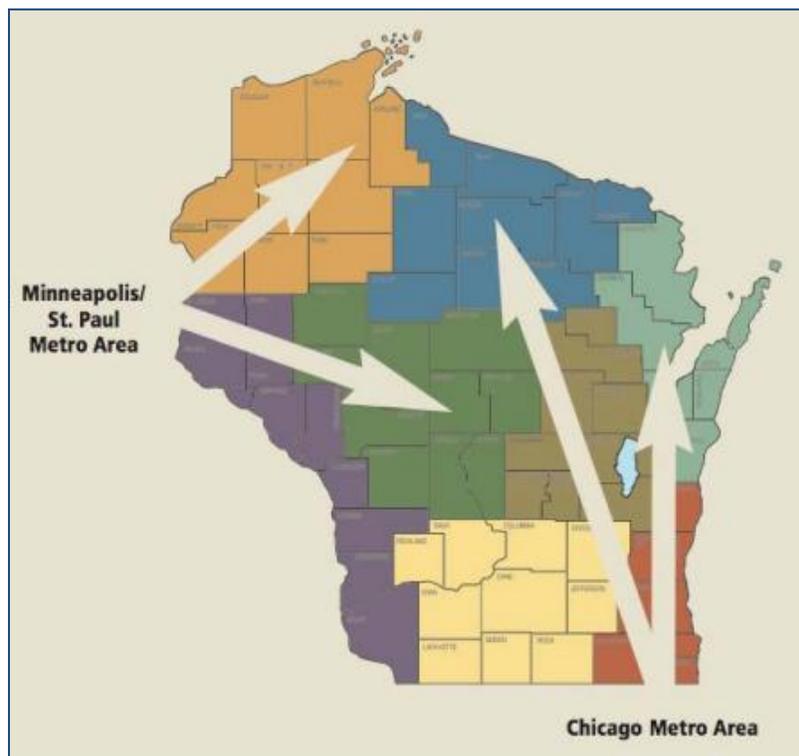


Figure 1: Recreational Travel Movement from Outside WI (2006, pg 28)

## Great Allegheny Passage\Cumberland & Pittsburgh Trail Economic Impact Study (2008)

*Published:* 2009

*Conducted:* 3 phases: 2005, 2008, 2009

*Prepared for:* Trail Town Program, Laurel Highlands Visitors Bureau, Allegheny Trail Alliance

### Summary

Comprehensive study conducted over 4 years to evaluate economic impact of the trail on local businesses and perform trail user market research.

Phase I: Economic impact research among businesses located on or around the trail (2005)

Phase II: Marketing research among trail users (2008)

Phase III: Update of economic impact research among businesses located on or around the trail (2009)

### Online Source

#### *Complete Report*

- [www.greatalleghenypassage.org/about/reports.cfm](http://www.greatalleghenypassage.org/about/reports.cfm)

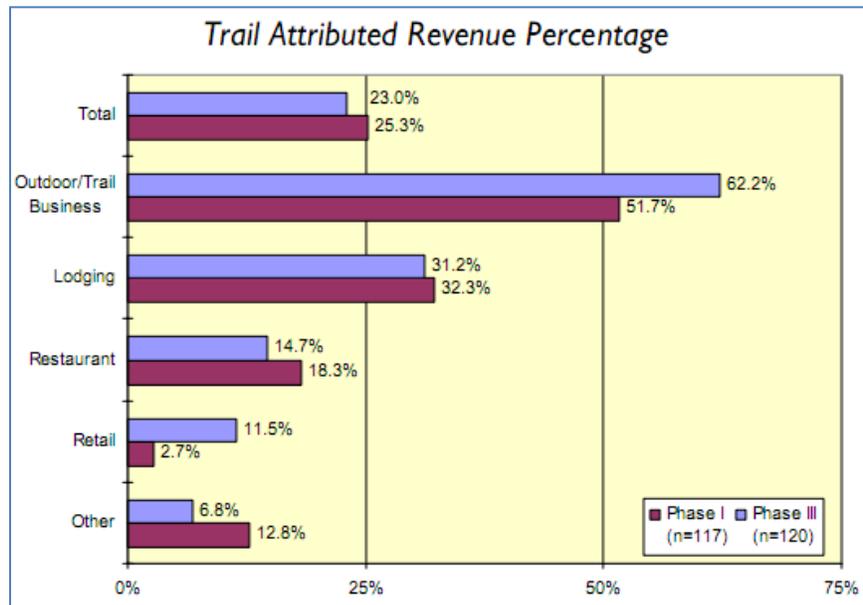
### Key Findings

- In 2008, trail users spent \$40.7 Million with local businesses near the trail, resulting in \$7.5 Million in local wages
- Overnight users spend an average of \$98/day (phase 2: pg 7)
- Local users spend an average of \$13/day (phase 2: pg 7)
- 41% of trail users planned an overnight stay as part of their trail visit (phase 2: pg 7)
- Average distance travelled to arrive at the trail terminuses were 131 and 289 miles for overnigheters (phase 2: pg 7)
- Users travelling >50 miles to get to the trail spent twice as much as those travelling <50 miles (phase 2: pg 7)
- The most frequent suggestion for improving the trail was better signage on/off the trail (phase 2: pg 7)
- 75% of locals reported using the trail at least several times a month, 17% several times per year (phase 2: pg 20)
- Average distance travelled by locals to get to the trail is 7 miles (phase 2: pg 20)

*Perceived Economic Impact of Trail*

	Phase III - Business Type						
	Phase I	Phase III	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
<b>Bases:</b>	<b>101</b>	<b>110</b>	<b>39*</b>	<b>34*</b>	<b>26*</b>	<b>7*</b>	<b>4*</b>
<b>Increased revenue</b> significantly or somewhat	64.4%	66.4%	74.4%	67.6%	42.3%	100.0%	75.0%
<b>Decreased revenue</b> significantly or somewhat	0.0%	1.8%	0.0%	0.0%	7.7%	0.0%	0.0%
Has had no impact	35.6%	31.8%	25.6%	32.4%	50.0%	0.0%	25.0%

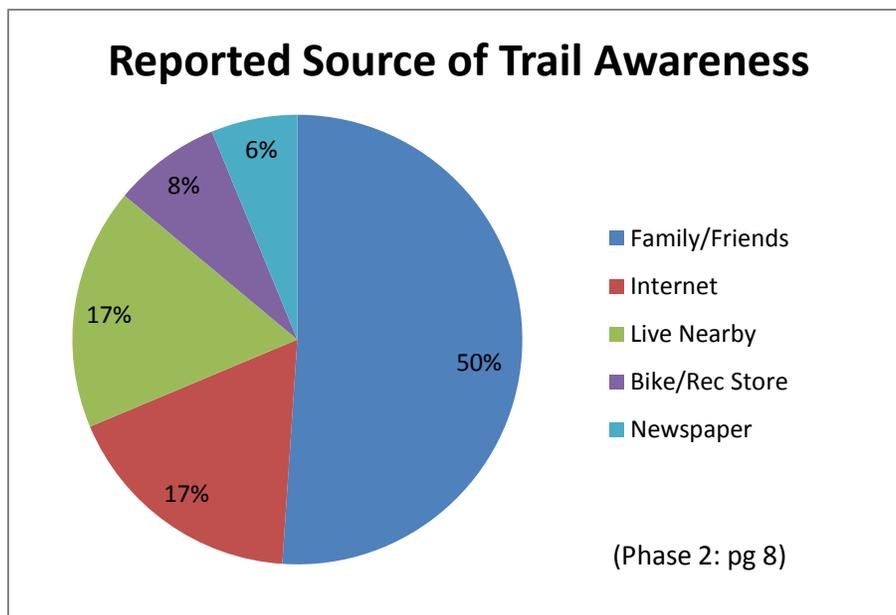
*\*Caution: small base sizes*



Reported Spending by Trail Users

	Trail Users Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
<b>Bases:</b>	<b>858</b>		<b>635</b>	
Total (excluding package & lodging costs)	67%	\$23	33%	\$74
<b>Bases: Specific Items/Services</b>	<b>858</b>	<b>14*-521</b>	<b>635</b>	<b>13*-415</b>
-Beverages	56%	\$6	52%	\$18
-Clothing	7%	\$22	5%	\$57
-Candy/Snacks	21%	\$6	21%	\$17
-Daily Equipment Rental (bikes, etc.)	5%	\$22	8%	\$57
-Ice Cream	24%	\$5	27%	\$16
-Restaurants	56%	\$20	65%	\$65
-Souvenirs	10%	\$13	13%	\$25
-Transportation (shuttling, taxi, etc.)	2%	\$51	2%	\$117
-Other (sunscreen, film, etc.)	8%	\$15	9%	\$21
Individual/Group Package Costs	8%	\$350	11%	\$2,970

Figure 2: (Phase 2, pg 15)



## Additional Studies

### Minnesota

- Ten-Year Forecast of Minnesota Adult Outdoor Recreation Participation, 2004-2014 (2005, MN DNR)
  - [http://files.dnr.state.mn.us/aboutdnr/reports/ten\\_year\\_rec\\_forecast.pdf](http://files.dnr.state.mn.us/aboutdnr/reports/ten_year_rec_forecast.pdf)
- Paul Bunyan and Heartland State Trail Studies, 2007-2008 (2009, MN DNR)
  - [http://files.dnr.state.mn.us/aboutdnr/reports/trails/paulbunyan\\_heartland\\_report.pdf](http://files.dnr.state.mn.us/aboutdnr/reports/trails/paulbunyan_heartland_report.pdf)
- Economic and Social Benefits of Trails (MN article, 2003)
  - [www.americantrails.org/resources/economics/MNecon.html](http://www.americantrails.org/resources/economics/MNecon.html)
- Minnesota Tourism Center – Other Publications, Studies and Reports
  - [www.tourism.umn.edu/ResearchReports/ResearchReportsbyYear/index.htm](http://www.tourism.umn.edu/ResearchReports/ResearchReportsbyYear/index.htm)

### Other

- Trail User Surveys and Economic Impact: A Comparison of Trail User Expenditures (2009)
  - [www.railstotrails.org/resources/documents/resource\\_docs/Comparison\\_of\\_Trail\\_Users\\_Surveys\\_FINAL.pdf](http://www.railstotrails.org/resources/documents/resource_docs/Comparison_of_Trail_Users_Surveys_FINAL.pdf)
- Heritage Rail Trail County Park 2007 User Survey and Economic Impact Analysis (2007)
  - [www.yorkcountyparks.org/PDF/2007%20Rail%20Trail%20User%20Survey%20Report%20VERSION%204.1.pdf](http://www.yorkcountyparks.org/PDF/2007%20Rail%20Trail%20User%20Survey%20Report%20VERSION%204.1.pdf)
- Trail Town Economic Impact Study of the Great Allegheny Passage (PA)
  - 2008, Laurel Highlands PA Visitors Bureau
  - 220-page, comprehensive, 3-Phase study
  - Extensive business surveys and data
  - [www.atatrail.org/about/reports.cfm](http://www.atatrail.org/about/reports.cfm)
- Bicycle Tourism in Maine: Economic Impacts and Marketing (2001, ME DOT)
  - Last page has nice summary financials
  - [www.adventurecycling.org/routes/nbrn/resourcespage/Economics%20of%20bike%20routes.pdf](http://www.adventurecycling.org/routes/nbrn/resourcespage/Economics%20of%20bike%20routes.pdf)
- Indiana Trails Study: A Study of Trails in 6 Indiana Cities (2001, IN DOT)
  - [www.in.gov/indot/files/z-CompleteDocument.pdf](http://www.in.gov/indot/files/z-CompleteDocument.pdf)
- Bicycling and Walking in Colorado: The Economic Impact and Household Survey Results (2000, CO DOT)
  - [www.dot.state.co.us/BikePed/BikeWalk.htm](http://www.dot.state.co.us/BikePed/BikeWalk.htm)
  - [bicyclecolo.org/page.cfm?PageID=64](http://bicyclecolo.org/page.cfm?PageID=64)
- Economic Impacts of Bike Tourism in Colorado (1999, CO DOT)
  - [www.americantrails.org/resources/economics/biketourismcolo.html](http://www.americantrails.org/resources/economics/biketourismcolo.html)
- Economic Benefits of Bicycle Infrastructure (2009, League of American Bicyclists)
  - [www.bikeleague.org/resources/reports/pdfs/economic\\_benefits\\_bicycle\\_infrastructure\\_report.pdf](http://www.bikeleague.org/resources/reports/pdfs/economic_benefits_bicycle_infrastructure_report.pdf)
- Pathways to Prosperity – Economic Impact of Investing in Bicycle Facilities: A Case Study (2003, NC DOT)
  - [www.ncdot.org/transit/bicycle/safety/safety\\_economicimpact.html](http://www.ncdot.org/transit/bicycle/safety/safety_economicimpact.html)
- Active Transportation for America: The Case for Increased Federal Investment in Bicycling and Walking
  - 2008, Rails-to-Trails Conservancy
  - [www.railstotrails.org/resources/documents/whatwedo/atfa/ATFA\\_20081020.pdf](http://www.railstotrails.org/resources/documents/whatwedo/atfa/ATFA_20081020.pdf)
- Rails-to-Trails Document Library
  - Dozens of economic, user and related trail studies
  - <http://community.railstotrails.org/media/p/2307.aspx>