



ECONOMIC IMPACT ANALYSIS OF THE PROPOSED PIKE2BIKE TRAIL



PREPARED FOR:
Bedford County Commissioners
Fulton County Commissioners

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FOURTH
economy

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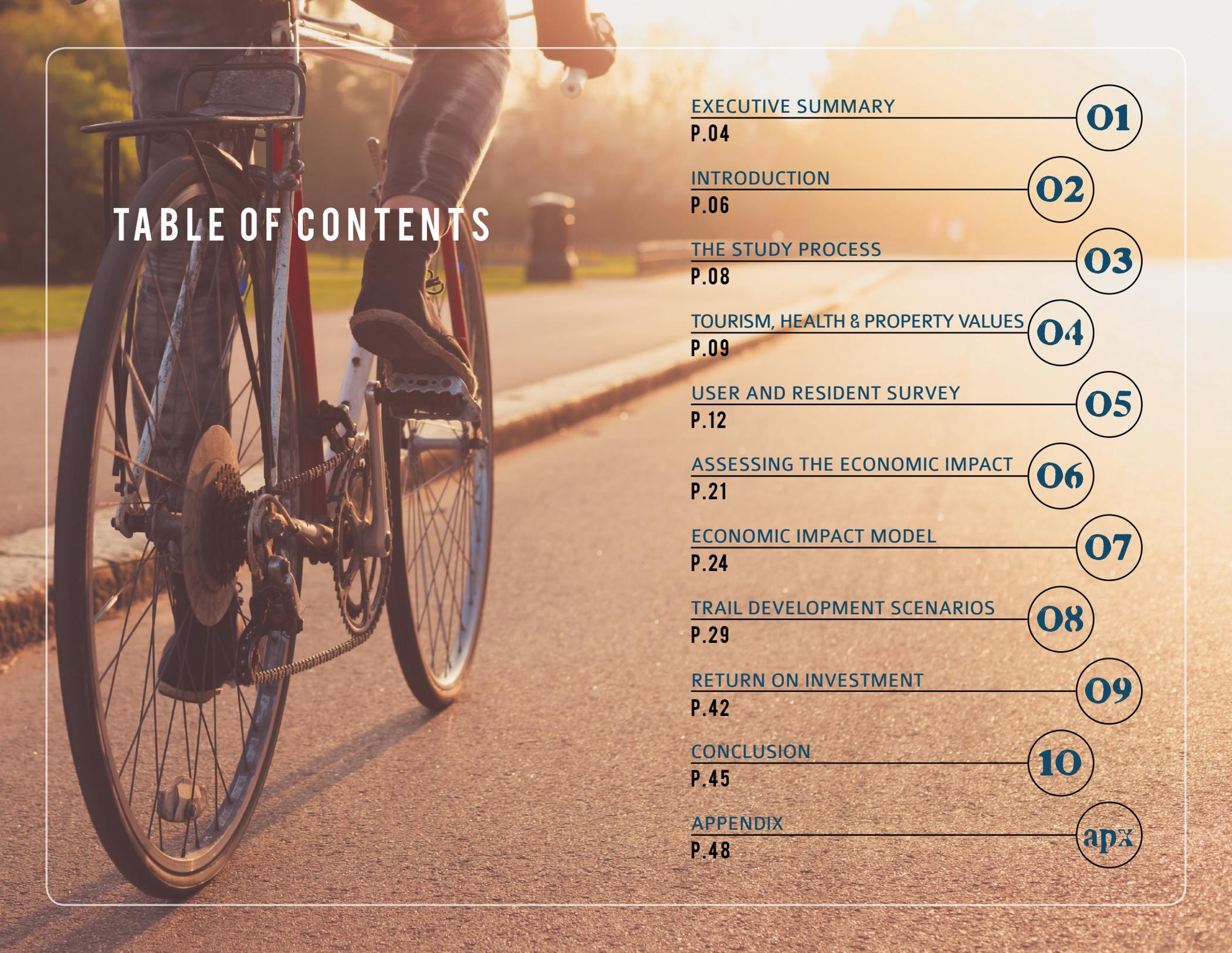


TABLE OF CONTENTS

EXECUTIVE SUMMARY

P.04

01

INTRODUCTION

P.06

02

THE STUDY PROCESS

P.08

03

TOURISM, HEALTH & PROPERTY VALUES

P.09

04

USER AND RESIDENT SURVEY

P.12

05

ASSESSING THE ECONOMIC IMPACT

P.21

06

ECONOMIC IMPACT MODEL

P.24

07

TRAIL DEVELOPMENT SCENARIOS

P.29

08

RETURN ON INVESTMENT

P.42

09

CONCLUSION

P.45

10

APPENDIX

P.48

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01. EXECUTIVE SUMMARY

In the summer of 2013, Bedford and Fulton County Commissioners launched a planning process to update the Pike2Bike Trail Network Master Plan and Adaptive Re-Use Study (2006). The vision for the Pike2Bike trail project is to develop an 8.5-mile section of the abandoned Pennsylvania Turnpike located in both Fulton and Bedford Counties into a destination, multi-purpose trail. This section of the former Pennsylvania Turnpike features two tunnels, the Rays Hill Tunnel (0.7 miles) and the Sideling Hill Tunnel (1.3 miles).

THE PROCESS

The first step in the master plan update process was to conduct an economic impact study. The economic impact study would endeavor to project the potential benefits to the community and regional economy if the trail was developed. The impact study began in August of 2013. The process included a series of site visits, public outreach meetings, a survey distribution and analysis, and an extensive literature review. Combined, these sources led to a comparative understanding of trail impact experiences, amenities and visitor levels. Using the information collected, a scenario-based economic model was created and analyzed using IMPLAN software. Inputs to the model included construction estimates and estimated visitors spending. Construction estimates were derived from a combination of sources to include the previous master planning report, a present-day onsite engineering inspection including a tunnel repair estimate, and additional independent web research. Estimates of visitors spending were derived from other trail studies that examined current and potential user spending.



POSITIVE OUTLOOK, POSITIVE IMPACT

The survey and public outreach revealed strong community support for the Pike2Bike project. Over 80 percent of current Fulton and Bedford County residents expressed support for the proposed Pike2Bike trail. Survey respondents from across the country (76 percent) believed that the completion of Pike2Bike project would help bring new jobs or economic opportunities to the area. Current and Potential business owners also indicated (32 percent) they may invest in a new business to support the trail if it were developed. Additionally, the economic impact results from IMPLAN reflected both construction and ongoing operational impacts in key areas such as visitor spending, wages, local taxes and overall economic output.

The findings revealed that if only access and safety concerns were addressed as part of the project, the economic impact to the local economy would be approximately \$5.1 million and result in a combination of 56.5 construction and ongoing support jobs. If additional infrastructure amenities and programming efforts were developed, allowing for a broader trail user constituency, the economic impact could increase to as much as \$8.8 million and a combination of 143.8 construction and ongoing support jobs. In each scenario, the Pike2Bike trail project would have a positive impact on the Bedford and Fulton County economies.





02. INTRODUCTION

A RICH HISTORY

The Pennsylvania Turnpike (America's first "superhighway") was opened to traffic in 1940. At that time, the tunnels on the Turnpike had only one travel lane in each direction. The result was significant bottlenecks as traffic increased over the years. In order to alleviate these bottlenecks, additional relief tunnels were added at most locations. However, for an 11-mile section of Turnpike that included Rays Hill Tunnel (0.7 miles) on the border of Bedford and Fulton Counties, and Sideling Hill Tunnel (1.3 miles; the longest tunnel on the Turnpike) in Fulton County, a new roadway was constructed and opened in 1968. The abandoned section and two tunnels continued to be used sporadically for various purposes, but slowly deteriorated. Over time, interested citizens have retained maps, letters, photographs and artifacts of the changes and uses this stretch of land has endured over the past one hundred years. This rich history has led advocates to push for the tunnels' preservation and public use.

In 2000 the Turnpike Commission chose to return the abandoned section to the public sector. In 2001 ownership of 8.5 miles of roadway including the two tunnels was transferred to the non-profit Southern Alleghenies Conservancy (SAC), with the intention of rehabilitating the roadway and tunnels into a multi-use trail corridor – the Pike2Bike. SAC commissioned the Master Plan several years later and it was finalized in 2006. The estimated cost for the project (2005 dollars) was \$3.05 million. Several ownership and management models were also investigated in the Master Plan. However, an analysis of the potential economic impact of the proposed trail, vital to advancing the funding and construction of the project, was not included in the Master Plan. The Pike2Bike corridor represents a unique blend of highway transportation history and interaction with the environment as



it traverses the Buchanan State Forest. The western trailhead in Breezewood offers easy access to and from a Turnpike exit and from Route 30 in McConnellsburg. Moreover, it is only an hour's drive from the Great Allegheny Passage trail in Cumberland, Maryland.

TUNNELS ATTRACT – BEDFORD AND FULTON COUNTIES' VALUE PROPOSITION

Communities across the country are often challenged to identify their unique value proposition - that one resource or feature that distinguishes it from all others and helps to attract new residents and investment. The Pike2Bike Trail, with its two major tunnel features, likely stands alone as one of the most unique trail features in the country.

In 2001, the Rails to Trails Conservancy (RTC) conducted a detailed summary of national trails containing tunnels. Entitled Tunnels on Trails, the study documented 78 tunnels on 36 trails in the United States. Additionally, RTC highlighted the trends in tunnel trail development and standard best practices in operations and maintenance. Of those trails, all except one are former railroad tunnels generally ranging in length between 300 and 1,500 feet.

The Nation's longest rail to trail tunnel is Snoqualmie Tunnel (11,288 feet or 2.3 miles) in the State of Washington. Snoqualmie is part of the Iron Horse State Park Trail and attracts approximately 200,000 annual visitors. The only former road-use tunnel is the Moiser Twin Tunnels in Moiser, Oregon. Each tunnel measures 493 feet in length. The Moiser Tunnel trail attracts just over 300,000 visitors each year and features special events to include a tunnel Marathon run/walk. In 2012 that marathon attracted 1,000 official registrants.

Based on the RTC study findings and independent web research, if developed and promoted, the Pike2Bike 8.5-mile, two-tunnel trail is likely positioned to be the largest and longest former road-use two-tunnel trail in the country—boasting over 10,500 feet of through-tunnel experience.



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The flexibility of the proposed trail design allows users to either double back and return to their vehicles, or continue their ride to another destination. For users who choose to return to their vehicles, the Pike2Bike trail offers 17 miles of traveling distance and the opportunity to experience the tunnels four times. Unique features add major value and have the potential to attract more users from a larger geographical area.



03. THE STUDY PROCESS

The goal of this study is to project the economic impact of the Pike2Bike Trail- if developed. It is anticipated that later planning steps will focus on trail design, land use and technical engineering aspects.

The consultant team conducted several stakeholder meetings, workshops, and phone interviews in both Bedford and Fulton Counties with business, property owners, and concerned citizens. Throughout the study process, more than 700 individuals were contacted in person, by phone/email, or were able to comment through the online survey. A public comment period also followed the release of the draft report, allowing for additional input.

An extensive literature review (see Appendix A) was conducted that included trail master plans, national and regional trail economic impact studies and general web research into trail development. Research focused on gaining a deep understanding of trail programs, advocacy organizations, trail development best practices, and the types of user surveys conducted to understand trail impacts. Critical insights were also gained through original survey development, administration and analysis.

Based on the data gathered, literature reviews and survey responses, three development scenarios were created. Separate economic impact models were conducted for each scenario. Finally, a return on investment analysis was conducted in an effort to evaluate the net operating impact over time against the initial capital investment. The following sections of this report are divided into four phases of the study process: the literature review, the resident and user survey, the economic impact results (based on the development scenarios), and the return on investment.

04. TOURISM, HEALTH & PROPERTY VALUES: A REVIEW OF THE LITERATURE

Recreational trail use, and the experiences that come with it, is increasingly viewed as drivers for economic development. According to the 2010 Outdoor Foundation's Outdoor Recreation Participation Report, a total of 137.8 million Americans (48.9% of the total U.S. population) engaged in some type of outdoor activity. Beyond simply playing sports or riding bikes, Americans are traveling to experience different trails. While they travel, trail-users spend money in retail establishments, overnight accommodations, and on hard goods.

Tourism along trails and the associated spending has generated millions of dollars in economic impact for other trails around the country. For instance, the RTC reported that the Mineral Wells to Weatherford Rail-Trail near Dallas, Texas attracts approximately 300,000 people annually generating \$2 million in local revenues. According to the East Central Florida Regional Planning Council, the West Orange, Little Econ, and Cady Way trails in Orange County, Florida supported 516 jobs and realized an estimated economic impact of \$42.6 million in 2010. Throughout the literature review process, dozens of economic impact studies from across the country highlight the multi-faceted economic impact trails generate for the communities that surround them.





In Pennsylvania, the economic impact from trails is even greater than in other parts of the country. A 2012 report prepared in partnership with Penn State University and the Pennsylvania Department of Conservation and Natural Resources (DCNR) noted that the State's Parks, with their associated trail networks, hosted 37.9 million visitors (2010) who spent \$859 million on their trips. Of that spending, \$648 million resulted from resident visitors while \$201 million was from non-resident or out-of-state visitors. An additional \$9.5 million in extra spending was associated with marinas, whitewater, and ski areas. Restaurants/bars and gas/oil represented the largest percentage of visitor spending, followed by groceries and take-out food/drinks. Bedford and Fulton Counties are both surrounded by State Parks, ski areas, whitewater opportunities and lakes. Moreover, the Alleghenies region includes over 1.8 million acres of forested land, more than 20,000 acres of lakes and 9,500 miles of streams, making it an ideal place for nature related tourism.

Tourism can generate new business investment. From big mountain areas like Summit County Colorado and Hood River Oregon to smaller trail and river towns like Jim Thorpe, PA, thousands of annual visitors represent potential new, permanent business investors. According to research done by RTC, the Mispillion River Greenway Trail in Milford, Delaware, is credited with "inspiring downtown reinvestment and a net gain in new businesses with more than 250 people now working in a downtown that was nearly vacant 10 years ago." Furman University recently released an in-depth study of the health and economic impacts of the Greenville Hospital System Swamp Rabbit Tram Trail. The study revealed that businesses opened as a direct result of the trail development. One business moved closer to the trail and realized a 30 percent increase in profits while another reported that 75 percent of their weekend business and 40 percent of their business during the week is directly related to trail use. Multiple examples of businesses opening or expanding in towns nearby developed trails provides evidence that the financial impact from trail-related spending does spur business investment that would not otherwise occur.

While most studies focus on the benefits from visitor spending, some studies took more effort to highlight the less tangible benefits from trail related use such as improved health. The Northern Outer Banks study revealed that persons who began biking engaged in more healthful exercise and recreation habits and that could reduce healthcare costs. The Bicycling Means Business report noted that companies and individuals save money on health insurance costs as a result of a healthier lifestyle.



Socially, the push towards a healthier and more environmentally friendly lifestyle is being driven by a variety of additional factors. The Centers for Disease Control recognizes the continued crisis of obesity in the United States and need to reverse that trend. At Forks Area Trail System in Clarks Hill South Carolina, the Coldwater Mountain Bike Trail study reported that “about 80 percent of its users are local, most of who did not bike before the trail was built. However, now the 200-300 users per day that visit the 35 mile long course have helped support a double digit increase in bike store sales and service, an astonishing trend given that two out of three users of the trail did not bike before it was built”. Trails encourage an active lifestyle and trail regions attract residents (and businesses) seeking an active outdoor lifestyle.

Property values represent another often quoted but more difficult to quantify economic impact of trail development. The RTC has conducted extensive research into the positive effect of trails and greenways on surrounding property values. While the degree to which property values increase varies on the type, scale and location of the trail, in the end there is almost always a positive effect. The effect on property values was so dramatic in Indianapolis that, following a study by the Center for Urban Policy and the Environment at Indiana University–Purdue University Indianapolis, the Indianapolis Star proclaimed, “It may not have sand and crashing waves, but the Monon Trail is the equivalent of beachfront property in the Indianapolis area.”





05. USER & RESIDENT SURVEY

While existing literature provided insight into national and regional trends surrounding the economic impact of trail use, the proposed Pike2Bike is unique. The length, scale and history of the tunnels make the trail difficult to directly compare it to any existing trail in the country. Therefore a survey of potential users, current residents, and current and potential business owners was also important to understand the development potential of this asset.

The survey findings in part assisted with:

- The development of the impact scenarios
- Estimates for annual visitation
- The potential trail uses and how those uses interact
- The potential for business investment
- Measure the potential for volunteerism
- Expected visitation from outside Bedford and Fulton Counties

METHODOLOGY

The survey instrument was developed using an online survey platform. Questions were designed to follow a logic flow based on responses to the first two survey questions. To reduce bias, answer choices were randomly generated for each respondent. The Pike2Bike Steering Committee members were asked to email the survey letter/link to their employees, customers, friends, and other accessible databases. They were also asked to post the link on their websites and to encourage their personal contacts to participate in the survey.



The consultant team further contacted affinity groups on social media websites with an interest in biking, trails, horseback riding, dogsledding, camping and outdoor activities. Consistent and regular promotion of the survey continued through the period the survey was open, from October 14, 2013, to November 1, 2013.

Because the survey was designed to target a variety of stakeholders, the initial question led respondents to pages designed specifically to capture the opinions of this diverse group of stakeholders in one survey instrument.

The second survey question, also seen by all survey respondents, asked about specific trail uses. As a respondent selected a trail use, a survey page with questions about their desires was automatically appended to their individualized survey.

After responding to a series of survey questions based on individual responses to the questions listed above, survey participants were all directed to a page designed to collect responses related to their top 5 trail amenities (open comments were also permitted). Responses were later used to inform the impact scenario development.

In the comments section respondents noted that additional amenities are also desirable to include: emergency vehicle access with markers, handicap accessibility, trashcans, solar energy and cell-phone service. All comments can be found in the complete survey report.

**1. Please tell us about yourself.
(select all that apply)**

	Count	Percent
I own a bicycle	376	73.6%
I am a resident of Bedford or Fulton county	293	57.3%
I am a business owner / manager	115	22.5%
I am a farmer or run an agricultural-based business	37	7.2%
I own a horse	32	6.3%
None of these	31	6.1%

**2. Tell us about how you use trails.
(select all that apply)**

	Count	Percent
Walking / Hiking	417	81.6%
Cycling / Mountain Biking / Bike Riding	341	66.7%
Outdoor Tours of Historical Trails	153	29.9%
Camping / Backpacking	135	26.4%
Running / Jogging	129	25.2%
Skiing / Skijoring	77	15.1%
Geocaching	75	14.7%
Snomobiling / ATVing	48	9.4%
Dogsledding	39	7.6%
I do not advocate or access trails, but I think trails are important	30	5.9%
Horseback Riding	29	5.7%
None of these (trails do not interest me)	11	2.2%
I do not access trails, but I do environmental advocacy	2	0.4%
Other	26	5.1%



**3. What amenities do you expect to see if / when you visit a trail?
(select all that apply)**

	Count	Percent
Parking Lots at Trail Head	429	84.0%
Directional Signs / Maps	371	72.6%
Historical Markers (with historical information)	330	64.6%
Park Benches	301	58.9%
Portable Restrooms	284	55.6%
Picnic Tables (covered or uncovered)	273	53.4%
Rest Areas	256	50.1%
Security / Emergency Access	177	34.6%
Running Water	176	34.4%
Lighting at Night	149	29.2%
Flusing Toilets	146	28.6%
Camping Areas	146	28.6%
Access to Food	108	21.1%
Barbeque Pits	77	15.1%
Access to Electricity	46	9.0%
Exercise Stations	38	7.4%
Other	35	6.9%
I do not expect amenities on a trail	17	3.3%



The regional market of potential visitors for Pike2Bike is estimated to be as much as 51 million people across nine states.

RESPONDENT PROFILES

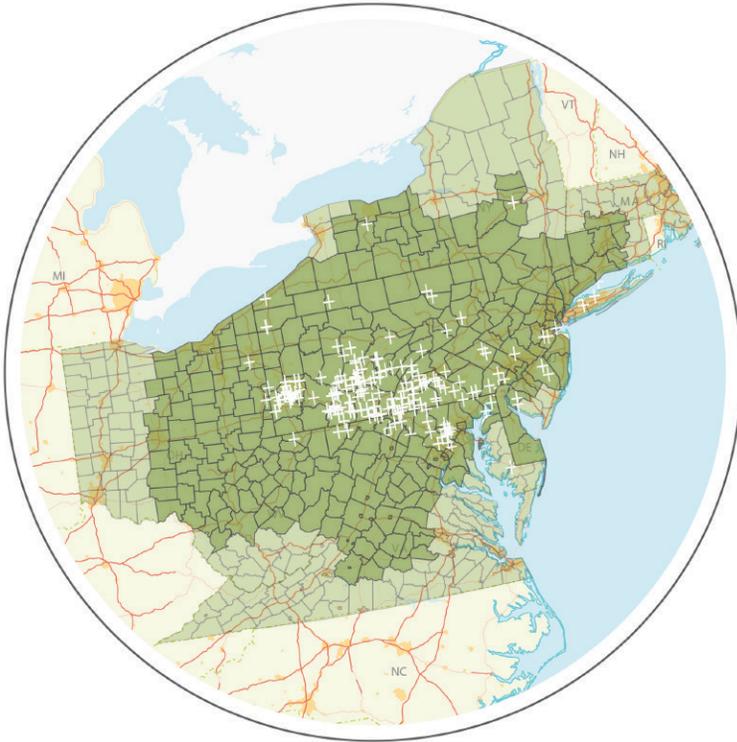
A total of 511 surveys were fully completed and 107 surveys were partially completed. Partially completed survey responses were usable and considered valid responses where applicable. Respondents included people from 16 states including California, Colorado, Connecticut, Delaware, Florida, Hawaii, Illinois, Maryland, New Jersey, New York, Ohio, Pennsylvania, Texas, Virginia, Wisconsin and West Virginia, as well as the District of Columbia. Additionally there were 5 international responses from India. Nevertheless, an overwhelming number of respondents (424 or 83%) were from Pennsylvania and 293 of those (or 57.3% of all respondents) were residents of Bedford and Fulton Counties.

The survey sample also included responses from 115 business owners. Of those, 99 are located in Pennsylvania. Respondents included 260 (51.2%) males and 240 (47.2%) females (1.6% did not disclose gender. Nondisclosure was an option for all demographic questions) Most of the respondents (93.4%) were between the ages of 18 and 75. A little more than half (53.3%) make less than \$75,000 per year in personal income and the remaining 46.7% make above \$75,000 per year. The respondents were largely well educated with 85% having some post-secondary education and 55.7% completed at least a four-year degree. 15% of survey respondents either had a disability or live with someone who has a disability.

Using spatial analysis techniques and statistical power calculations, there is a 95% level of confidence that responses from this sample are generalizable to the regional market. The regional market of potential visitors for Pike2Bike is estimated to be as much as 51 million people across 9 states.



Pike2Bike Survey Respondent Locations & Market Area



- Pike2Bike Market Area
- + Survey Respondent Location
(9 other respondents across U.S. not shown)

Within this overall market, there was special interest in responses from three specific demographics: 1) Residents of Bedford and Fulton Counties; 2) Potential non-resident visitors; and 3) Current and potential business owners.



The local residents of both Bedford County (85%) and Fulton County (82%) expressed great support for the development of the proposed Pike2Bike trail.

BEDFORD AND FULTON COUNTY RESIDENTS

This section captured opinions of local residents in the following areas:

- Knowledge and support of the Pike2Bike trail
- Assessment of the potential impact on jobs and wages in the area
- Potential concerns
- Additional comments as a resident

One hundred and fifty one (151) Bedford County residents and 68 Fulton County residents who did not own businesses responded to the survey. Of the local residents of both Bedford County (85%) and Fulton County (82%) expressed great support for the development of the proposed Pike2Bike trail. About one-third of resident respondents in both Fulton and Bedford Counties believed strongly that the development of this project would bring jobs, job security, or revenues to state and local governments through tax collection. Another 103 respondents (or about 51%) were hopeful but unsure of whether or not it would bring economic benefits. Both Bedford and Fulton County residents largely encouraged the trail development—some providing comments that they already access the trail regularly;



and others claiming that if the trail is developed, then they would use it regularly. The survey also documented that Bedford and Fulton County residents would be willing to volunteer over 3,700 hours annually to help maintain and improve the trail.

The largest concern expressed by both Bedford County and Fulton County residents related to vandalism. While residents were able to select as many concerns as they believed appropriate, if a respondent selected the option “nothing about this project concerns me right now”, the survey tool would allow respondents to select any concern or provide a comment. 38.6% of respondents selected that this project did not present any concerns. Vandalism mitigation and protection from trespassing on private property are two of the public concerns that could be addressed through the next planning phases.

The survey also collected information on local residents occupational travel patterns. A combined total of 63.7% (128) of the survey respondents were currently employed. Of those, 42, or 20.9%, were employed outside their current county of residence. This is important as it highlights the interconnectedness of the local economies in the area. The survey results correspond with Census Data. In 2011, the Longitudinal Employer-Household Dynamics reported that there were 10,993 Bedford County residents employed outside of Bedford County. During the same period, there were 6,440 residents from other counties working inside of Bedford County. Of those 6,440 residents from other counties working inside Bedford County, 2,766 (46%) of them were employed in the services industries. For Fulton County, in 2011, there were 3,531 people living in Fulton County but working outside of the County. During the same period, 2,802 people from other counties held jobs inside Fulton County. Of those 3,531 people leaving the Fulton County to work, 1,838 (52%) were employed in the service industries.

4. What concerns, if any, do you have about the development of the Pike2Bike trail? (select all that apply)

	Count	Percent
Vandalism	90	44.6%
Nothing about this project concerns me right now	78	38.6%
Alcohol / Drug Use	47	23.3%
Trespassing on Private Property	41	20.3%
Environmental Damage	24	11.9%
Increased pressure on plice, EMTs, hospitals, or other services	20	9.9%
Increased Accidents	18	8.9%
Traffic / Congestion	15	7.4%
Other	12	5.9%
Construction	6	3.0%
Noise	2	1.0%

The census data and survey results imply that there is a regional economic interdependence between counties in the area. Workers from one county may live in another, distributing the economic impact across multiple counties. For example, if a person living in Fulton County works in Bedford County in a service related industry (as the above data indicates is possible), then the wages they earn will largely impact Fulton County where they pay bills, taxes, and entertain. However, the value-added their work brings to the employer in terms of profits may largely impact the Bedford County employer.



NON-RESIDENTS

A total of 218 non-residents responded to the survey. In this section, the survey questions for respondents were designed to understand the awareness of the proposed Pike2Bike trail project by non-residents of Bedford and Fulton Counties as well as their potential for future visitation. 110 (50.4%) were aware of the Pike2Bike trail prior to participating in this survey. 148 (68.2%) expressed interest in visiting the Pike2Bike trail should it be completed. It is clear from the survey results that awareness of the Pike2Bike trail has generated interest from potential visitors. If this percentage is applied to the entire Pike2Bike market area of 51 million people, that would be the equivalent of 35 million Americans expressing interest in visiting the trail. While an expression of interest does not imply action, it does indicate that the pool of interested potential visitors may be significant.

When asked about their propensity to visit other attractions in the area based on previous action or interest, non-residents chose attractions in both Bedford County and Fulton County further highlighting the interconnectedness of the two regions. It would be possible for non-resident visitors to patronize multiple attractions on one trip to the area. Visits to other attractions should be considered a part of the overall potential economic impact of trail development—to attract and retain non-resident visitation for a multiple-day, multiple-attraction experience.



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5. Which of the following attractions have you visited or would you consider visiting in the area? (select all that apply)

	Count	Percent
Pike2Bike Trail	148	68.2%
Breezewood, PA	138	63.6%
Shawnee State Park	137	63.1%
Old Bedford Village	134	61.8%
Fall Foliage Festival (Bedford County)	128	59.0%
Cowan’s Gap State Park	97	44.7%
Buchanan State Park	95	43.8%
Lincoln Caverns / Wisper Rocks	93	42.9%
Blue Knob Four Seasons Resort	90	41.5%
Omni Bedford Springs Golf Course or Resort / Spa	85	39.2%
Historic Burnt Cabins Grist Mill	65	30.0%
Annual Fulton Fall Folk Festival	44	20.3%
Whitetail Resort	37	17.1%
Cedararrow’s Bison Farm’s Bison Corral	34	15.7%
Christmas in McConnellsburg	32	14.8%
The National Museum of the American Coverlet	21	9.7%
Saundersosa Campground	17	7.8%
Other	14	6.5%
Great Cove Golf Course	11	5.1%
I have not visited and I would not consider visiting any of these	1	0.5%



CURRENT AND POTENTIAL BUSINESS OWNERS

Current Business Owners

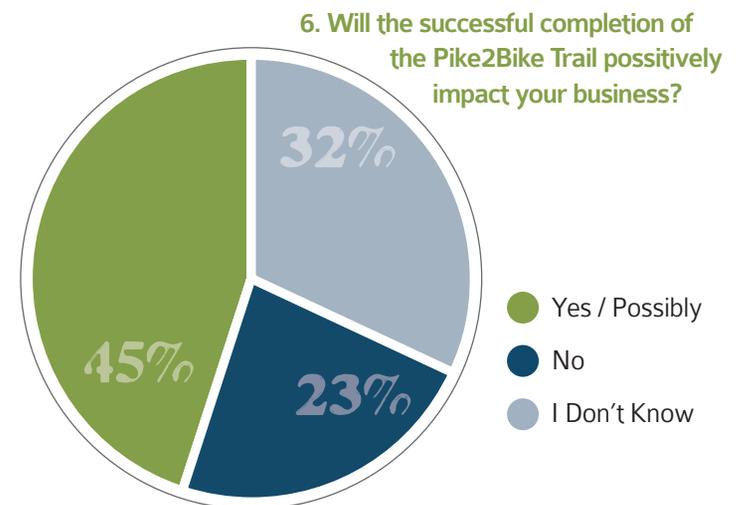
A total of 115 respondents identified themselves as business owners or managers. Thirty seven (37) selected that they were farmers or operated an agricultural based business. These two categories cannot be added together because some respondents selected both. Three separate pages of the survey were designed to capture the opinions of current business owners in the following broad categories:

- Bedford/Fulton County Resident Business Owners
- All Business Owners
- Farmers/ Agricultural Businesses Owners/Managers

Business Owners/Managers that were residents of Bedford and Fulton Counties (89) were generally aware of the project (86.5%) and would support it becoming a world-class trail with many uses and frequent visitors (85.4%). Sixty-five (65) owned or managed businesses in Bedford County while 25 owned or managed businesses in Fulton County. Of these businesses owners, 51 reported that all their employees live and work in the same county (12 businesses had 0 employees other than the owner). The remaining business had between 1 and 150 employees living outside of the county where they work.

After answering these questions, resident business owners were then asked the same questions as non-resident business owners/managers. Approximately 133 business owners and managers answered questions with a focus toward businesses. Information was collected on the size and type of the business. Questions were designed to elicit their attitudes about the Pike2Bike trail's effect on the jobs, wages and business opportunities—both current and future.

While farmers represent only a small portion of the survey respondents (32), they do offer an interesting impact opportunity. All of the Farmers were also Bedford and Fulton County residents. Many of the respondents believed they could increase farm tours and visits to the farm along with increased sales in food and meat. The development of the Pike2Bike trail has the potential to impact local farms and local farmers. Either programming can be developed to purposely support relationships with local farmers and incoming tourists or it can be done through individual initiatives of farmers to capitalize on increased traffic flows. Local farmers could set up farmers markets or farm stands, initiate farm tours, hayrides, pumpkin patch visits and more to advertise to Pike2Bike visitors. Additionally local farmers could create partnerships with local food suppliers to buy and sell local farm products. While these potential economic opportunities cannot be directly factored into the formal economic impact modeling, the capacity for farmers to realize economic gains from these activities increases as a result of increased traffic flow from visitation.





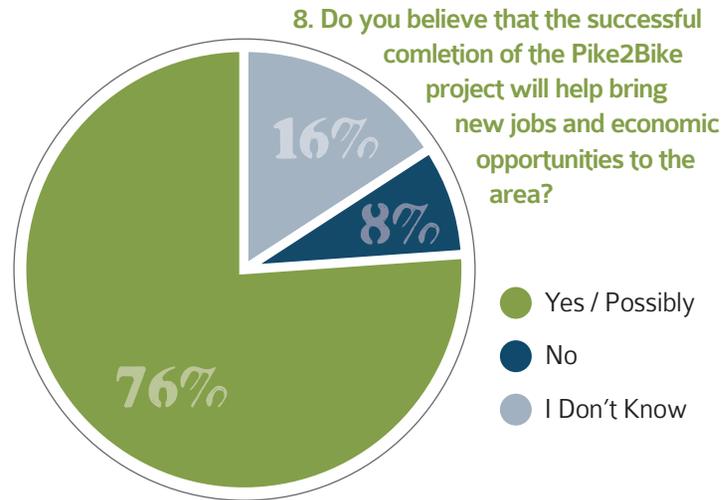
To gauge the potential for investment directly related to the development of the Pike2Bike trail, all respondents were asked about their willingness to invest in a new business. The chart below summarizes those results. If a respondent selected they were not interested in investing in a new business, all other answer choices were disabled.

7. Would you be willing to invest in any of the following business opportunities associated with the Pike2Bike project? (Current Business Owners)

	Count	Percent
I am not interested in investing in a new business	87	65.4%
Bike Rental	17	12.8%
Bike Supplies	15	11.3%
Bike Shops	14	10.5%
Maintenance and Repair	13	9.8%
Event Planning	13	9.8%
Bars / Restaurants	13	9.8%
Hotels	11	8.3%
Outdoor and Supply Stores	10	7.5%
Other	9	6.8%
Construction	8	6.0%
Landscaping	7	5.3%
Clothing	7	5.3%
Auto Accessories	6	4.5%
Convenience Stores	5	3.8%
Footwear	4	3.0%

Potential Business Owners

All non-business owners (396) were asked if they believed the Pike2Bike trail would help bring jobs and new economic opportunity to the area. They were also asked that if the trail were developed, would they consider opening a business related to the trail. A solid majority, 282 (76%), believed that this project has the potential to bring jobs and economic opportunity to Bedford and Fulton Counties. People also expressed a genuine interest in the potential for small business investment. One hundred and twenty-six (126) respondents reported previously considering starting a new business and indicated their specific interests as it relates to the Pike2Bike trail below. Some respondents also provided contact information and asked to be notified of entrepreneurial opportunities.





9. Would you be willing to invest in any of the following business opportunities associated with the Pike2Bike project? (Potential Business Owners)

	Count	Percent
I am not interested in investing in a new business	299	80.8%
Bike Rental	30	8.1%
Bike Supplies	23	6.2%
Bike Shops	18	4.9%
Other	17	4.6%
Bars / Restaurants	16	4.3%
Maintenance and Repair	14	3.8%
Outdoor and Supply Stores	14	3.8%
Clothing	9	2.4%
Footwear	8	2.2%
Convenience Stores	8	2.2%
Construction	7	1.9%
Event Planning	7	1.9%
Landscaping	5	1.4%
Hotels	5	1.4%
Auto Accessories	0	0.0%



SURVEY SUMMARY

The results from this survey have proven to be very informative throughout the study process. Many questions allowed respondents to comment in their own words. These comments have been provided to the Bedford and Fulton County planning staff and represent a good source of information that can inform the future planning phases and ongoing development of the trail.

After collecting and analyzing the survey responses, the next step was to quantify the economic impact. With the potential update of the previous Pike2Bike master plan, it was suggested that three development scenarios be created using a low, mid, and high-level investment approach. The results of the economic impact analysis for each of the three scenarios are addressed in the following sections.

06. ASSESSING THE ECONOMIC IMPACT

TRAIL DEVELOPMENT SCENARIOS

Each of the trail development scenarios summarizes the potential economic outcome for the Pike2Bike trail. Scenario 1 or “Safety First” represents the minimal-level of investment and development needed to make access and use through the tunnels safe and comfortable for the general public. Scenario 2 or “Multi-User Recreational Trail” represents a mid-level investment and development scenario that would accommodate more and diverse user constituencies with added comfort and trail access. Scenario 3 or “World Class Trail” assumes the highest level of investment and development within this study scope resulting in a high profile destination trail experience. The costs and amenities associated with each scenario was developed based on the 2006 Gannett Fleming Master plan, the user and resident survey conducted as part of this study, and selected comparative trail experiences nationally.

Assumptions relating to trail features and amenities were made in order to estimate the necessary investment and the level of impact that investment would generate. More detailed and technical cost estimating is expected to take place in future planning phases. It is important to note that the development scenarios and analysis in this study are not intended to be technical site planning or design/engineering recommendations. Rather the investment and impact described in each of the following scenarios should be considered to broadly represent three distinct “visions” for potential Pike2Bike trail development. These visions begin to define what may be possible for development. The results help inform what could be done to capture, and capitalize on, the opportunities for economic impact.





VISITATION ESTIMATES

Annual visitation levels can vary significantly depending on a number of factors. Already it is a known fact that people use the proposed Pike2Bike trail as a bike trail (and for a myriad of other uses) despite the site being officially “closed to the public.” Visitors have commemorated their recent experiences through web sites and social media indicating dates and times. While this information is anecdotal and not reliable as actual trail visitor counts, it has contributed to the estimation of current visitation levels. It also suggests that current visitors are coming from a broad regional area and even outside of Pennsylvania.

Each development scenario contains a low, medium, and high level of visitation estimates, correlating loosely to a low, medium and high level of investment in each scenario. Estimates of annual visitation numbers in each scenario were generated by considering the overall market area, survey responses, and visitation estimates for comparative trails. Statistical software and forecasting tools using STATA were compared to population data generated from GIS spatial analysis. The results were then compared to the findings from other trail impact studies.

Given the unique features associated with Pike2Bike, five trail studies were used to help inform potential visitation numbers (see chart below). They were selected based on factors such as some of the factors that make Pike2Bike unique: historical association with the turnpike, a special feature (such as the tunnels), a similar length, a destination trail and a trail near a state forest.

Annual Visitation Estimates for Other Benchmark Trails

Element of Comparison	Trail Name	Location	# of Visitors
Association with Turnpike	Laurel Highlands Hiking Trail	PA	281,145
Historical Significance	Virginia Heritage Trail (aka The Ghost Town Trail)	VA	130,172
Destination Trail (unconnected)	Lower Trail	PA	130,000
Near a state forest	Jackson Hole Trail Project	WY	222,533
Similar length	St. Mark’s Trail	FL	220,000

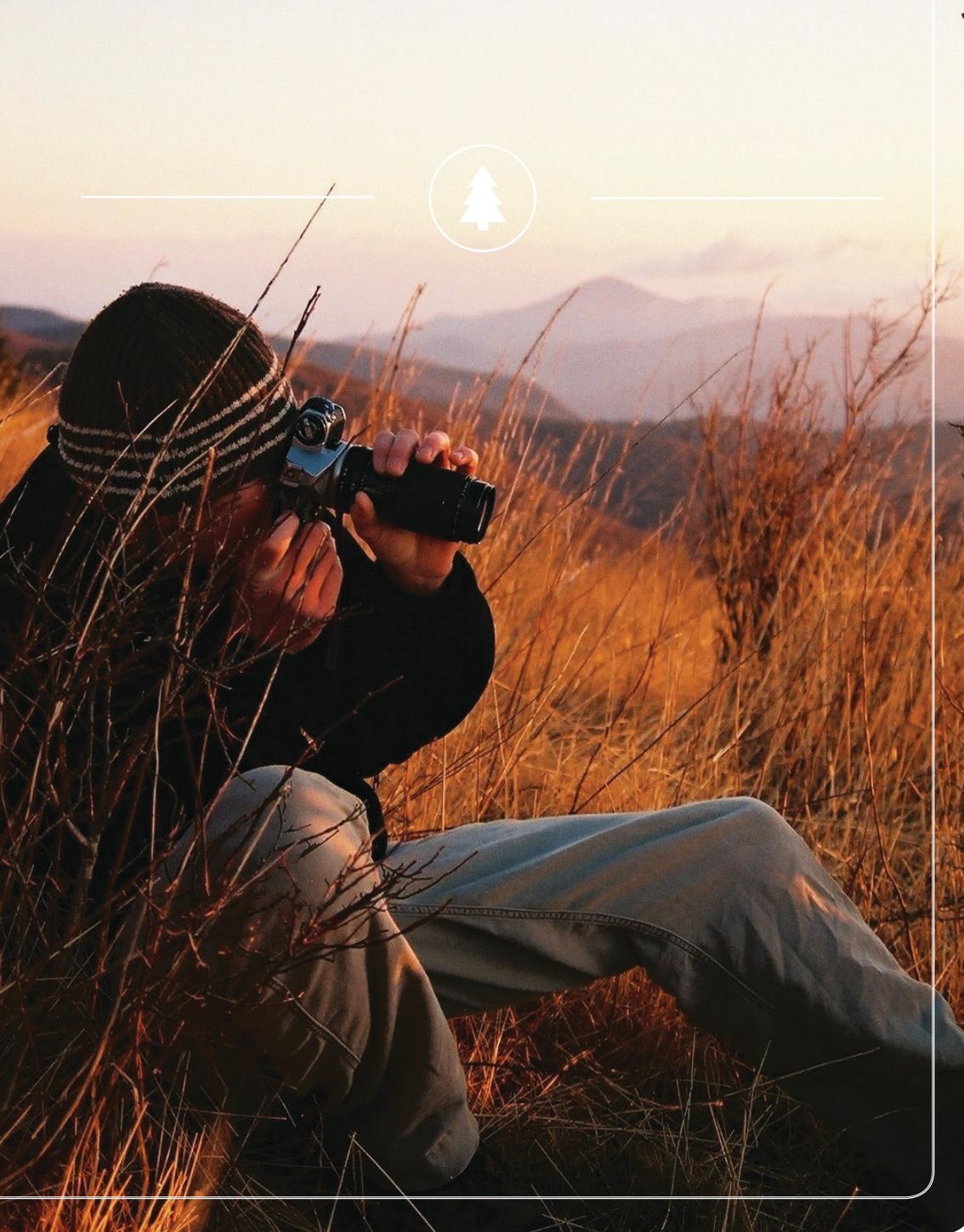
- The Laurel Highlands Hiking Trail in Pennsylvania was chosen as a potential comparison trail because it is also associated with the turnpike. It has a bridge that required significant repair before the trail could be opened. Laurel Highlands was estimated to have 281,145 visitors in 2011.
- The Virginia Heritage Trail (aka The Ghost Town Trail) was chosen because it has an interesting history with unique features that would attract visitors for historical purpose only. This trail welcomed 130,172 visitors in 2006.
- The Lower Trail located in neighboring Blair County is also a destination trail not connected to other trails in the area. The Lower Trail was visited by at least 130,000 people in 2012.
- The Jackson Hole Trail Project is a proposed extension to an existing trail located in a State forest.
- The St. Marks trail in Florida is 16 miles long, and is paved, is located with a town (like Breezewood) at one end and an extensive trailhead at the other end that includes restrooms, a pavilion, picnic tables and a playground. The St. Mark’s trail realizes 220,000 visitors annually.



Surrounding market attractions were also considered such as the Old Economy Village and the Penn Trolley Museum which attract as many as 25,000 visitors annually. Stakeholder interviews and independent research further suggest that events programming such as geocaching, cycling tours/races, dog-mushing, and running events can attract anywhere between 200 and 1,500 visitors per event (or more depending on the type, purpose and level of promotion).

In each scenario, visitor numbers were projected to best match the level of trail development and the additional visitors that may be attracted by programming and amenities. During the master planning phases, efforts should be made to consider additional amenities and programming that enhance the user experience, attract more visitors and increase the potential economic impact.





07. ECONOMIC IMPACT MODEL

IMPLAN provides a basic input/output model of economic activity that can be used to identify the effects of a specific stimulus, such as employment in a specific industry or investment in the construction of new facilities or even the impact of the expenditures from a firm or industry. An input/output model estimates the interactions between industries and households in an economy to identify how transactions impact the production and consumption of goods and services in an economy.



IMPLAN refers to these as Indirect and Induced impacts. Indirect effects take account of everything that an industry needs to produce a unit of commodity. For example, the production of \$100 worth of paper would require inputs from a variety of supplier industries such as chemicals, toolmakers, trucking companies and more. Furthermore, that \$100 worth of paper may then be inputs for other goods and services in schools, hospitals, architects, manufacturing plants and so on. Induced effects are the Impacts that result from household expenditures for goods and services as a result of earnings from the direct and indirect expenditures. For the purposes of this study, all economic impact numbers reported include direct, indirect and induced impact.



These IMPLAN models estimate the resources required to produce given quantities of different kinds of output. In other words, what amount of concrete and other supplies does it take to produce \$1million worth of new roads? For these new roads to have a net impact on the economy, we have to assume that the businesses providing those goods and services are at capacity and cannot produce them without additional workers and resources. If there is slack capacity, then the \$1 million helps to retain existing jobs. The input-output model is therefore more like an accounting tool that describes the allocation of resource requirements, but it does not tell us if they are new resources or substitutions.

For the purpose of this economic impact study, specific models for Bedford and Fulton County were used. This model reports impacts to Bedford and Fulton Counties only and does not consider impacts to Pennsylvania, the United States or the greater global economy. For a local model, like the county models here, there is a multiplier effect which increases the impact on the economy and a local capture effect which limits that impact. As money and purchases circulate through the economy, moving from one business to another and one individual to another, the economic benefits are shared – this is the multiplier effect. No local economy produces every good or service, so the local capture effect counters the multiplier effect because only that portion of the goods or services that are produced locally can be recirculated to benefit the local economy. When there are gaps in local production, you will have a small local capture effect, which will reduce the benefits to the local economy.

TYPES OF IMPACT

There are two types of economic Impacts when considering the development of the Pike2Bike trail: 1) Construction Impacts and 2) Operations Impacts. Construction impacts occur during the construction phase, while operational impacts result annually from visitors and as part of the ongoing operation of the trail.

CONSTRUCTION IMPACTS

A two-year timeframe was allotted in this model for the construction phase and it assumes that there would be no ongoing operations during the construction phases. Under each scenario, it is assumed that all construction at a given level of investment is completed within the 24-month (2-year) time frame. This model deviates from the original master plan as it does not consider a phased approach to construction. As long as the project is close to the cost projected for construction, the following are the estimated impacts (resource allocation) for the entire life of the construction despite the actual length of time the construction phase lasts. A longer construction phase would potentially increase costs and reduce the available funding for higher-quality trail amenities— amenities that would ultimately enhance the visitor’s experience. Construction impacts should not be viewed as an annual impact but rather an overall impact for the construction period in each development scenario.

OPERATIONS IMPACTS

Operations impacts are associated with activities that support the visitor experience and spending. The model accounts for three types of visitor spending: 1) Retail sales on soft goods, 2) Retail spending on hard goods, and 3) Spending for overnight accommodations. It is important to note that visitors may also spend on other items not



accounted for in this model such as spending at other attractions in the area or spending on businesses that do not currently exist. Therefore these estimates are considered “conservative,” as the actual impacts are likely to be well above these numbers.

What visitors buy when they are in the area will depend on a variety of factors. Most visitors will require food, drinks, gasoline, and other basic human travel needs. Beyond basic needs, purchases related directly to trail use will depend on the trail uses allowed along the Pike2Bike trail, whether or not they are visiting other attractions in the area, whether or not they are traveling as a family (especially with small children), and whether or not they are traveling with animals such as dogs or horses. A planned tour bus or church group may have different spending patterns than a group of cyclists taking a detour from a nearby route. Depending on how the Pike2Bike trail is designed and marketed, some groups will find it more desirable than others, and some groups will spend more than others. These influences to the economic impact should be considered during the Pike2Bike trail planning phases.

The types of users are also important when considering the business cycle and planning for year-round economic activity. If the Pike2Bike trail is designed to be mostly attractive to summer users, businesses may see a decline in sales during colder months. If the Pike2Bike trail could be designed to attract users year-round, then the visitation cycle could be expanded throughout the year. Winter users could include horseback riding, dog sports, and other snow sports. It is possible to separate uses of the trail by either time (e.g. allow horses only December 1st through March 31st) or by space (e.g. allow horses only on parts of the trail or create a “lane” for horse riding). Separation of uses could allow for more types of users year-round and that could increase the economic impact.

Use of the trail by motorized vehicles, however, requires special consideration. At this time, the current land deed does not allow for motorized vehicles. However, if that were to change in the future, it should be noted that survey respondents expressed concern with allowing for Pike2Bike trail use by motorized vehicles. These users may be incompatible with other users and the presence of motorized vehicles may decrease visitation from other user demographics—potentially having a deleterious effect on the overall economic impact. Information on the preferences of each user type projected to be interested in the Pike2Bike trail can be found in the full summary of the User and Resident Survey. The survey provided an opportunity for each user-type to express their specific preferences and this information could be invaluable during the next master planning phase.

RETAIL SPENDING

In each of the development scenarios, all visitors are estimated to spend about \$13 per day on food, drinks, snacks, gas and other soft goods. The Rails to Trails Conservancy (RTC) reported that visitors of Ohio’s Little Miami Scenic Trail spend an average of \$13.54 per visit just on food/beverage and transportation to the trail. This number was consistent with several other studies on spending related to trail use. In the interest of under-estimating rather than over-estimating the potential, the number was rounded down to \$13. Another study, the Heritage Rail Trail County Park 2012 User and Economic Impact Study, reported a similar number for user spending on soft goods at \$13.26 per visitor. This survey has been repeated every 5 years. These numbers are consistent with several other studies on spending related to trail use. In the interest of under-estimating rather than over-estimating the economic potential of visitor spending, the number was rounded down to \$13.



The Heritage Rail Trail study also indicated that spending on hard goods is estimated to be about \$356.59 per visitor with approximately 89% of their visitors engaged in hard goods spending associated with trail use. In the Heritage Rail Trail study, hard goods were defined as bike accessories, auto-accessories, running, walking or hiking shoes, or clothing. However, for the purposes of understanding the economic impact of the proposed Pike2Bike trail, the definition of hard goods must be expanded. The IMPLAN software would consider hard goods to be anything sold in a retail environment that was not soft goods, food or gas. Examples include but are not limited to:

- Sunglasses
- Souvenirs
- Automobile repair parts (tires, windshield wipers)
- Toiletries (including diapers or soap)
- Books (including magazines, maps and tour guides)
- Entertainment (such as toys, swimming supplies, sports balls)
- Cameras, video recorders (including cell phones chargers)
- Outdoor cooking equipment or supplies
- Emergency care supplies

Because the retail environment in Bedford and Fulton Counties is limited and because the Pike2Bike trail has not yet been developed, it is reasonable to assume that a lower percentage of users would require hard goods purchases associated with trail use than at the Heritage Rail Trail's report of 89%. A very conservative adjustment for this study is that only about 10% of visitors would require hard goods when visiting the Pike2Bike trail. This means that if 100,000 people visit annually, only about 10,000 people will purchase hard goods. Calculations of hard goods using this methodology provide an estimate, but actual spending could vary greatly. The reality for Pike2Bike could be that 89% of people spend an average of \$40 per visitor. A ratio of 10% of people spending \$359 per person is generally equivalent to 89% of people spending \$40 per person. Therefore, the potential hard goods spending estimates are considered to be modest and could possibly exceed the estimates presented in this study.

OVERNIGHT ACCOMMODATIONS

Overnight spending includes lodging at hotels, motels, bed and breakfasts, hostels, or any other licensed establishment. Using the same source for the soft goods and hard goods spending, the Heritage Rail Trail Studies (2007 and 2012), approximately 5.7% of visitors to the trail are estimated to require overnight accommodations. Overnight visitors are estimated to spend approximately \$93 per visitor on overnight accommodations. Because tourism in Pennsylvania (and in the Alleghenies) has been increasing and because of Pike2Bike's proximity to surrounding attractions, the 5.7% estimate for overnight visitors appears very conservative and was adopted for this study.



SEPARATION OF IMPACTS BETWEEN COUNTIES

An IMPLAN model isolating the potential impacts to Bedford and Fulton Counties independently was selected for this economic impact study. One model was designed for Bedford County and a separate model was designed for Fulton County. Those models were run separately and the outputs were then combined to calculate an overall economic impact for each scenario. Additional improvements in either county could increase the overall economic impact of the Pike2Bike trail. The inputs to the model, construction costs and visitor spending, were separated and tailored to best represent the situation in each county.

With limited spending opportunities on both hard and soft goods in Fulton County, an estimate of only 20% of the potential visitor spending was assigned as an input to the Fulton County model and 80% was assigned to Bedford County. For example, if the total projected retail visitor spending was \$100, then \$20 was entered into the Fulton County IMPLAN model. IMPLAN then calculates the economic impact of that \$20 and provides an output based only on how that \$20 would move through the Fulton County economy. Then the remaining \$80 of potential visitors spending (from the fictional \$100 projected retail visitor spending) would be allotted to the Bedford County model. IMPLAN would then produce an output for Fulton County and an output for Bedford County. These two outputs were then combined to create the overall economic impact.

For hotel accommodations, the model assumes that overnight spending would happen largely in Bedford County. This assumption is based on the employment in the hotel industry in each county. Of the total hotel employees in both counties, 98% of all hotel employees work in Bedford County and 2% work in Fulton County. Using this split and because it seemed intuitive to stakeholders, 98% overnight spending was allocated to Bedford County and 2% to Fulton County. However, it should be noted that bed and breakfast or other overnight accommodations could attract additional overnight visitors to Fulton County.

Construction impacts were also separated by county. The trail is physically located in both Bedford and Fulton Counties. The allocation of construction investment inputs was based on the proportion of the proposed trail located in each county- 85% was allocated to Fulton County and 15% was allocated to Bedford County. The economic impact from that construction investment will be realized by Fulton County and Bedford County residents to a greater or lesser degree based on the contractor selected and where the employees live, work and play. In Appendix C, a table splits the impacts numbers reported below by county in a single summary table. Caution should be used in drawing a hard line between impacts in Bedford County and impacts in Fulton County because the local economies are interdependent and some of the splits (like the Ray's Hill Tunnel repair which lies in both counties) are somewhat artificial. Moreover, visitors will likely not make a clear distinction between Bedford and Fulton County regarding this investment. Visitors are likely to see the Pike2Bike trail as a single attraction and make spending and visitation decisions accordingly.

08. TRAIL DEVELOPMENT SCENARIOS

SCENARIO 1: SAFETY FIRST

In the “Safety First” scenario, the level of investment required to open the trail and make the tunnels safe for broad public use is estimated to be approximately \$3.85 million. At this level of investment, it is anticipated that tunnel improvements can be made safe for users and the trailheads developed to a level that establishes Pike2Bike as an official and publicly- accessible trail. Beyond access, trail surface improvements and tunnel repairs, no additional amenities are assumed under this scenario. Most of the additional landscaping and trail maintenance would be carried out through volunteer support.

TUNNEL REPAIR

The tunnel repairs represent the single most capital-intensive part of the total investment to develop the Pike2Bike trail. The tunnels, their history, and the unique experience of travelling through them are the focal point of this entire project. If the tunnels were not repaired and repurposed as a trail and/or national historical treasure, they may be left to ruin. As they continue to deteriorate, the costs to repair the tunnel structures in the future will continue to increase thus creating a sense of urgency. Part of the goal of this project is to preserve the two tunnel structures and prevent their continued decay. Several estimates of repair and repurposing costs were submitted for review by the Consulting Team during this economic impact analysis. Based on average hard and soft costs identified in an original master plan developed by Gannett Fleming Engineers adjusted to 2012 dollars and based on unit prices from the 2012 Allegheny Tunnel Rehabilitation, the tunnel repairs alone are projected to be \$2.8 million. This estimate includes all the safety repairs and lighting. The tunnel repair would support through direct, indirect and induced impacts 36.3 full-time equivalent jobs for the construction period.





Map Rendering: Scenario 1



NOTE: Icon placement for visual purposes only. Icons do not reflect final or recommended amenity location.



TRAILHEADS

For the purposes of this economic impact study, trailheads are assumed to provide safe access to the Pike2Bike trail bed and tunnels. Like all trails, access is essential. The amenities available at the trailhead could attract visitation and be used for a variety of purposes. An example is the St. Mark's trail in Florida that has a playground at the trailhead. A citizen suggested building a stage to host concerts or other events at the trailhead. Another suggestion was made to develop retail or lodging. While it is acknowledged that trailheads can take many forms, in the "Safety First" Scenario, trailhead construction is only about establishing safe access (potentially with handicap accessibility). Because the form the trailheads take could improve visitation, it is assumed that in Scenario 2, trailheads could be upgraded to improve the visitor experience. The cost estimate for trailhead improvements was \$613,750. This budget level assumes improved access points in both Fulton County and Bedford County. Special attention should be given to providing directional signage, lighted parking, restroom facilities, landscaping, handicapped access and/or any other amenities would help to draw visitors and allow for a diversity of uses.

TRAIL RESURFACING

The trail's surface was expressed as a safety concern and affirmed by the public comments and survey results. The type of materials used (pavement/mulch/gravel etc.), will determine the degree to which the trail can accommodate diverse user types (strollers, wheelchairs, skates, scooters and other types of wheeled vehicles). Construction estimates developed by Gannett Fleming Engineers adjusted to 2012 dollars estimates the resurfacing costs to be \$433,325 including drainage inlet improvements. No other formal construction or engineering cost estimates have been developed. Therefore \$433,325 was used as the estimated budget for a trail-resurfacing project.

In Scenario 2 and Scenario 3, construction dollars are allotted for amenity improvements to the Pike2Bike trail. The amenities suggested in those scenarios could be exchanged for, or amended to include, an improved trail surface. It is reasonable to assume that as improvements are made to the trail surface, a wider variety of users will be attracted to visit the Pike2Bike trail.

VISITORS

All of the economic impact studies reviewed for this study reported visitor counts greater than 50,000 annually. All of those trails also provided a higher degree of amenities and services not currently reflected in Scenario 1. However, it is also assumed that the tunnel features alone are a significant draw for visitors. Because the tunnels will draw visitors on their own merit and given the anecdotal information on current visitor levels, it is assumed that simply providing safe access to them could attract an estimated 25,000 visitors annually.

At an estimated rate of \$13 per day, these visitors would spend \$325,000 annually. Of the 25,000 visitors, approximately 2,500 visitors may likely have hard good needs each year, spending about \$897,500 annually. Overnight visitors would be approximately 1,250 at a rate of \$93 per visitor they would spend \$116,250 annually on overnight accommodations. Total spending for 25,000 visitors is expected to be approximately \$1,338,750 annually. Annual visitor spending would support 5.5 full time equivalent positions where workers would earn approximately \$143,000 in wages. State and Local governments can expect to earn \$ 39,000 in tax revenue annually.



SUMMARY

Focusing on safety and access, the first development scenario is a minimalist approach. Repair to the tunnels, the construction of two trailheads and the resurfacing of the trail can be completed for approximately \$3.85 million dollars. At this level of investment, the Pike2Bike trail can expect approximately 25,000 visitors a year who would have a spending potential of approximately \$1.34 million dollars annually. Overall economic impact of the Pike2Bike trail for Bedford and Fulton Counties is a total \$4.8 million during construction only and an additional \$370,000 annually for each year the trail is fully operational.

Safety is a fundamental trail requirement of successful trails. The survey responses revealed and the literature review supported the idea that good maintenance, signage, and access to and from the trailheads are critical requirements for the modern trail user—helping to attract new and repeat visitors. Added amenities such as water, picnic areas and solar energy (lighting, charging stations for mobile phones and more) are of special interest for day users, youth and families.

SCENARIO 2: A MULTI-USER, RECREATIONAL TRAIL

Development scenario 2, “A Multi-User, Recreational Trail,” includes all of the improvements in the first scenario and adds several higher value trail amenities. In total, this scenario would require an additional \$1,020,685 bringing the total investment level to \$ 4.87 million dollars. Scenario 2 adds trail amenities, access to water and an interpretative museum with staff.

TRAIL AMENITIES

Trail Amenities such as directional signage, restroom facilities, fencing and landscaping, park benches, access to water, a midway rest area (pavilion), and/or a playground would increase the attraction for a wider variety of users including families. To estimate the cost of additional amenities, consultants referred to the master plan, conducted web research and had consultations with trail experts. The total cost for these amenities is estimated to be \$508,740. Scenario 2 considers the construction of two wells and two pump stations for drinking purposes only at an estimated cost of \$15,960. This does not include soft costs such as permitting and inspection.

MUSEUM

Throughout the study there was considerable interest in and discussion of the economic benefits to Fulton County’s tax base and residents. Currently there are limited facilities and services in Fulton County to immediately support trail use and therefore realize immediate significant economic benefits. There does appear to be site capacity though to plan for and develop new attractions in Fulton County commonly associated with trails.



Map Rendering: Scenario 2



NOTE: Icon placement for visual purposes only. Icons do not reflect final or recommended amenity location.



One potential opportunity is the development of a museum and/or interpretative center featuring the history of the Pike2Bike trail. Museums, similar to Canal Basin Park and Visitors Center associated with the Lower Trail in Hollidaysburg, Pennsylvania (Blair County) help to attract trail users as well as history enthusiasts, families and others interested in the history of the trail. The Pennsylvania Trolley Museum in Washington, PA attracts approximately 30,000 visitors annually and is supported by 150 volunteers annually. It is currently planning a \$9 million dollar expansion.

There is strong evidence that visitors will travel for historical tourism, visiting museums and other historically significant sites. Efforts to highlight the history of Pike2Bike could attract additional visitors interested in exploring the history of the area separate from the Pike2Bike trail experience.

A museum can also serve as the hub from which the trail is managed and operated. With the level of investment outlined in Scenario 2, a museum is envisioned to serve as a center for the coordination of volunteer activities, social media marketing and the general management of trail operations. The investment would involve (1) securing a building (or site) and artifacts, (2) renovating and/or constructing the exhibits within the museum, (3) staffing and handling of ongoing operations of the museum. The initial staff is estimated at 1.5 persons with limited marketing and promotion duties. In Scenario 3 the role of this museum is further expanded with the intent of attracting increased visitation.

Given the existing lack of water, sewer and utility infrastructure on the trail, this analysis assumes a museum would be sited in the central portion of McConnellsburg. This location would take advantage of the existing infrastructure and may further promote synergistic

economic outcomes in and around the museum. Based on stakeholder input and interviews with local realtors it was estimated the cost of a building purchase option in McConnellsburg would be approximately \$200,000. Because a structure has not been assessed for a museum, renovation costs could vary greatly depending on the plans. The museum could take many forms and have many different uses that include, but are not limited to, public use space and year-round programming. Renovation and staffing support was estimated at \$281,000 for the first two years. Total cost to establish the museum is estimated to be \$481,000.

VISITORS

Repairing the surface of the proposed Pike2Bike trail, adding amenities, and constructing a museum to manage and operate the trail would likely increase the visitor totals. Based on the expected level of investment, amenities and similar trail experiences visitation levels are estimated at 100,000 users annually. Many of the trails reviewed for this economic impact study reported annual visitation levels between 80,000 and 130,000. For the purposes of this study, 100,000 is a quality mid-level estimate of annual visitation for a fully developed, multi-use trail.

It is estimated that 100,000 visitors annually would likely spend \$13 on soft goods daily or \$1.3 million annually. Spending on hard goods is estimated to be \$3.59 million annually. About 5,000 visitors will require overnight accommodations resulting in potential spending of approximately \$465,000 annually. Economic impact from visitor spending would support 22 full time equivalent positions with workers earning approximately \$575,630. State and Local governments can expect to earn \$157,450 in tax revenue annually.



SUMMARY

Seeking to create a multiple-use, family-friendly trail experience, Scenario 2 builds upon the safety-first development scenario. At this level development includes trail amenities, access to water, and a museum. Total investment levels would be approximately \$4.87million yielding 100,000 visitors annually. During the 2-year construction phase, the overall economic impact would be \$6.1 million. Additionally, 100,000 annual visitors would have a spending potential of \$5.36 million dollars creating an economic impact of \$1.5 million dollars each year the trail is fully operational.



SCENARIO 3: A WORLD-CLASS TRAIL

Scenario 3 – “A World-Class Trail Development Scenario” – projects an additional increase in total investment levels by \$2 million dollars. Additional features assumed in this scenario include a nature reserve, greater connections to existing trail networks, a third trailhead or other layout modification, and robust programming and promotional activities. Formal construction estimates for trail expansion and greater connectivity were not available and was beyond the scope of this study. However, in consultation with Fulton and Bedford County planning officials and using the costs estimated in the previous two scenarios, an additional investment of \$2 million was considered reasonable. During the update of the master plan, the \$2 million dollar budget may be expanded based on actual construction plans or dollars could be diverted to make previously suggested improvements better. Combining this level of investment with the previous 2 scenarios, the total investment for trail development under scenario 3 is \$6.87 million.

NATURE RESERVE

There is the potential to acquire property currently owned by the Pennsylvania Turnpike Commission near the proposed trailhead in Fulton County. Stakeholders expressed interest in developing that property as a nature reserve and linking it to the Fulton County trailhead. This type of development would further expand the potential user/visitor base and attraction to the eastern trailhead in Fulton County. Stakeholders recommended the addition of a footbridge that would connect Pike2Bike to the proposed nature reserve property. The trail, the two tunnels, a museum and the nature reserve combine to create a higher level trail experience providing the potential for a multi-day, multiple-attraction outdoor and historical experience.



Map Rendering: Scenario 3



NOTE: Icon placement for visual purposes only. Icons do not reflect final or recommended amenity location.



CONNECTIVITY TO TRAIL SYSTEMS

Analysis into several trail studies suggests that trails that are part of a larger trail network attract more visitors. The potential for increasing visitors through such connectivity is significant. In 2012, the Great Allegheny Passage reported over 800,000 annual users. Additional existing and new trail linkages can be made to Pike2Bike. The proposed Pike2Bike trail is surrounded by a robust trail network to include the Great Allegheny Passage and the “Route S” trail. There was consensus among stakeholders that it is feasible that Route S, the closest trail to the Pike2Bike trailhead, could be connected to the Pike2Bike trail allowing for great trail network access. Moreover, re-routing Route-S may actually make the ride less taxing on cyclists that currently use that route. The popular C&O Canal Towpath and the Western Maryland Rail Trail are located within the region. Additionally, a new, 10-mile trail is currently under construction in northern Bedford County (Huntingdon & Broad Top Rail-Trail), and its southern trailhead would be only minutes away from the Pike2Bike. The 2-mile Bedford Heritage Trail, linking the Omni Bedford Springs Resort to downtown Bedford, is tentatively scheduled for construction in 2014. These assets could combine to help the region become recognized as a trail mecca for millions of residents in the Pike2Bike trail market area—including Pittsburgh and Northeast (DC-Philadelphia-Baltimore) Metropolis.

The RTC further notes that Pennsylvania has converted approximately 176 rails to trails totaling more than 1,600 miles, making the Commonwealth #1 nationally. Sixty-two additional projects are currently planned, adding another 600 miles. The region’s highway system, Interstates 70, 99, 80, and the Pennsylvania Turnpike, establishes Bedford and Fulton Counties as a drivable, year-round destination for over 65% of the east coast population.

ROBUST MARKETING EFFORT – “A MUSEUM AS ANCHOR”

Considering the level of investment outlined in Scenario 2, this study envisions museum staff managing the trail and museum (and potential nature reserve) to include all of the operational functions. Beyond the basic museum operations and volunteer staff, it is anticipated that at least 2 additional FTEs would be necessary to support and manage a robust national marketing program. They would also serve as coordinators (points of contact) for the actual events. Employees would manage a webpage to include a calendar of events and the ability to make donations and plan/schedule events. Staff would be responsible for external communication to potential visitors (answering general inquiries, and responding to concerns or complaints). Staff would also manage the trail finances including any additional fundraising and would coordinate with both Counties for any necessary support.



Pennsylvania has converted approximately 176 rails to trails totaling more than 1,600 miles, making the Commonwealth number one nationally.



PROMOTION AND EVENTS

Trail races, craft shows and other special promotions can attract additional visitors and ultimately generate economic impact. A report issued by the league of American Cyclists in partnership with the Alliance for Biking and Walking noted that “organized rides and races are often major events, drawing thousands of people to the host communities. Once there, riders need food and lodging, and often need ride- related supplies. All of these purchases, by people who wouldn’t otherwise be there, boost the local economy.” In 2011 the National Bicycle Tour Directors Association (now the Bicycle Tour Network) conducted a pilot study of 11 large bicycling rides and events. Spending related to the 11 events reached over \$32.5 million. The survey shows why communities are so eager to attract these visitors: 57% of riders had household incomes over \$100,000.

Special events may include trail running events, bike tours, geocaching, dog sledding events and harvest festivals. Events along the Pike2Bike trail can be scheduled in association with other more established programming, such as the Bedford Fall Foliage Festival, held in each county each year. Based on similar regional events it is anticipated that a full special events program calendar can attract an additional 25,000 to 50,000 visitors annually. For instance, based on stakeholder feedback and independent research, a well-planned trail 10K race or marathon event can attract as many as 1,000 people or more including runners and their families. Bicycling events may attract 300 to 500 cyclists.

ADDITIONAL TRAILHEAD AND OTHER LAYOUT MODIFICATIONS

Some stakeholders encouraged trail planners to consider the development of a third or mid-point trailhead access. This third access point is may not be essential to the operation of the trail or for its primary purposes, however, it could be provide additional access for horse owners (horses), dogsleds, RV’s, large tour vans and other specialty vehicles. It also would offer an additional emergency access point). Allowing for access for a wider variety of users has the potential to increase both the number of users and the variety of users that access Pike2Bike. Adding a middle trailhead for example may allow other uses such as horse riding, dog sledding, and recreational vehicles all having different (and likely more expensive) needs for hard goods.

Another use for funds in this category is the construction of a footbridge to the proposed nature reserve or the acquisition of additional land to expand the trail and create a loop. All these possibilities have a similar economic impact because they would be designed to change the layout of the trail and involve similar types of construction allocation requirements.

Additions such as these will require engineering and construction cost estimates which were not available at this stage in the planning process. It is anticipated though that these types of additions will attract additional users. Depending on funding levels, many variations of trail development are possible.



CONSTRUCTION IMPACTS

Unlike previous scenarios, construction impacts were not estimated for each improvement in this scenario. Estimating the cost for the construction of the elements included in this scenario was beyond the scope of this study. However, using the costs estimated in the previous two scenarios and based on planning official's feedback, an additional investment of \$2 million was considered reasonable for this scenario. This additional funding would include the hiring of the museum employees for 2 years of operation.

During the technical update of the master plan, the \$2 million dollar budget may be expanded based on actual construction plans or dollars could be used to enhance previously suggested improvements. (e.g. improve the trail surface or trailheads). During the construction phase, an additional \$2 million investment (totaling \$6.87 million) would have an economic impact of approximately 8.8 million dollars and promote the employment of a total of 93.7 FTE jobs. Workers would earn an estimated \$3.7 million in wages and their spending would contribute to \$304,424 in state and local tax revenues.

VISITORS

In Scenario 3, it is estimated that visitor counts would likely peak at around 225,000. Estimating peak visitation is very difficult. Several sources were considered in arriving at the maximum usage numbers. A previous estimate of maximum annual visitation was reported to be 250,000 for the proposed Pike2Bike trail. Statistical forecasting based on the entire market region suggests visitor levels could be much higher. The consulting team elected to first take an average of peak user counts from the trail studies referenced for this report. The average peak user count was approximately 180,000 users. By combining these three pieces of information and considering the capacity of Bedford and Fulton Counties, a peak user count of

225,000 is not unrealistic. Because Scenario 3 represents a high-profile development scenario, it is appropriate to use an optimistic estimate for annual visitation.

Based on 225,000 visitors annually, there would be an estimated spending potential of \$2,925,000 annually on soft goods. An estimated 22,500 visitors are likely to have hard good needs each year spending about \$8,077,500 annually. Overnight visitors would potentially spend \$1,046,250 annually (12,825 visitors per year and \$93 per visitor). Total potential spending for 225,000 visitors is \$12,048,750 annually. Economic impact from operations (on an annual basis) would support 50.1 FTE jobs with workers earning approximately \$1.3 million. State and Local governments can expect to earn \$354,284 in tax revenue annually.

SUMMARY

Building upon the development previously proposed, a World-Class Trail development scenario would provide numerous trail amenities along the Pike2Bike Trail along with a central support/administrative system. Features of this trail experience include a nature reserve, additional trailhead, connectivity with a broader trail system, full-time professional staff to market Pike2Bike and host events. The estimated investment of \$6.87 million could attract up to 225,000 visitors per year. Construction of the Pike2Bike at this level would have an overall economic impact of \$8.8 million dollars over an estimated 2-year construction phase. Visitors would have a total spending potential of over \$12 million dollars annually, a portion of which is captured by the local economy and results in an economic impact of \$3.3 million dollars for each year the trail is fully operational.



CAPTURE POTENTIAL: LOCAL PURCHASING PERCENTAGES

In an IMPLAN model, the Capture Potential is measured by the Local Purchasing Percentage (LPP) is a tool that can be used to uncover the difference in outcomes based on type of spending activity. Further analysis revealed that during the construction phase, the LPP is 100%—implying that 100% of the impacts from construction can be captured by Bedford and Fulton Counties. For operational impacts from visitor spending, the LPP was below 100% for all IMPLAN sectors for both Bedford County and Fulton County (Leakage).

Bedford County Visitor Spending

IMPLAN Sector	Local Purchase Percentage (Capture)	Leakage
Hotels / B&B	59%	41%
Retail Sales - Soft Goods	75%	25%
Retail Sales - Hard Goods	39%	61%

Fulton County Visitor Spending

IMPLAN Sector	Local Purchase Percentage (Capture)	Leakage
Hotels / B&B	29%	71%
Retail Sales - Soft Goods	69%	31%
Retail Sales - Hard Goods	11%	89%

UNDERSTANDING LOCAL PURCHASING PERCENTAGE

To better understand LPP, it is important to consider that because the purchase of a soda from a corner store or the purchase of a bike helmet from a sporting goods store are retail purchases, the only direct impact those sectors would experience would be the retail margin of those sales (i.e., the retail mark-up added by the corner store or sporting goods store to compensate it for bringing the soda or bike helmet to a convenient location for consumers to purchase). The corner store and sporting goods store are providing a service to Bedford and Fulton counties; they are not producing the soda or bike helmet. For example, the sale of a soda (soft good) in Fulton County, the local economy captures 69% of the total impact. The sale of a bike helmet (hard good) in Fulton County, the local economy only captures 11% of the total impact. Thus, if local production is increased or more supply chain businesses are developed, it will increase the benefits captured by the local economy.

While most of the total output from retail locations is the resale of inputs, the stores add value by serving the customer, marketing the product, etc. The store uses labor, management time and the revenue of the business to create the value added. The value added is the real contribution the stores make to the overall wealth of the economy.



SUMMARY

Realizing maximum economic impact from the development of the Pike2Bike trail requires a multi-layered approach. This economic impact study was able to estimate the impacts to the economy based on current and historical economic activity using the IMPLAN software as well as other historical research and surveys. However, this study cannot predict the economic impact that would occur from the opening of new businesses that are not currently in place. The LPP provides evidence that neither county is currently able to capture all of the benefits associated with annual visitor spending. Through supply chain development, increased retail, and increased overnight accommodations, both counties could, in theory, capture a greater portion of the potential visitor spending.

This analysis suggests that it is likely investment in additional establishments will take place as a result of the development of the Pike2Bike trail. There are already establishments profiting from tours on the trail despite the fact that it is still closed. Individual business owners and potential business owners have expressed serious interest in investing through the User and Resident survey and during the public meetings held in Bedford and Fulton Counties. Current business owners have expressed direct plans to add more overnight accommodations and potential business owners left their contact information and asked to be notified when they can begin investing in new establishments related to the Pike2Bike trail. Depending on the nature of these establishments and their individual business structures, there is opportunity in both Fulton County and Bedford County to increase the share of economic impact captured from visitor spending.





09. RETURN ON INVESTMENT

As part of this study, the consulting team was asked to develop a methodology to project the return on the public investment needed to construct this new civic asset. The Return On Investment (ROI) calculations are based on the three development scenarios. Each of these levels assumes a two-year construction phase. The dollar amounts of the initial investments in each of the three levels are based on a per capita calculation using labor income. It was also assumed that the level of investment and the level of visitation are correlated—the greater the level of initial investment the greater the level of visitation. Year 1 of each of the Levels returns 50 percent of the construction labor and tax income. Year 2 of each of the Levels returns 100 percent of the construction labor and tax income. Each of the subsequent Years equals the cumulative return from the previous year with the addition of annual operations labor and tax income.

The smaller the initial investment amount and subsequent low visitation, the longer it takes to recoup the initial investment amount. The larger the initial investment amount and subsequent increase in visitation, the less time it takes to recoup the initial investment amount. However, ROI calculation assumes the Pike2Bike is fully operational. The amount of time required to become fully operational could vary.

Additional considerations in determining ROI are operational costs. All of the Pike2Bike trail development scenarios include operational costs during the life of the construction phase (assumed to be two years). However, after the two years, regular operations and maintenance will be required to keep the trail open and attract visitors. Actual costs for operations and maintenance could vary significantly between scenarios. However, especially in Scenario 2 and Scenario 3, staff could perform tasks to generate funding for the ongoing maintenance



and support of the Pike2Bike trail. For example, museum entrance fees, event registration fees, the rental of space inside the museum, other partnerships, dedicated fundraising events, and grant writing are all sources of income that are not projected as part of this study. Nevertheless, the 2006 Gannett Fleming master plan included costs for the operations of 1.5 staff members at approximately \$82,000 per year. For the purposes of this study, the operational costs from the master plan will be considered reasonable and will be applied only to Scenario 2 and Scenario 3.

Scenario 1: Safety First

The amount of investment equals \$3.9 million. With annual visitation of 25,000 persons in Scenario 1 the ROI could be expected in Year 11.

Scenario 2: A Multi-User, Recreational Trail

The amount of investment equals \$4.9 million. With annual visitation of 100,000 persons in Scenario 2 the ROI could be expected in Year 8.

Scenario 3: A World-Class Trail

The amount of investment equals \$6.9 million. With annual visitation of 225,000 persons in Scenario 3 the ROI could be expected in Year 6.

COMPARISON TRAILS

The time to reach maximum levels of visitation can vary considerably from trail to trail. To better understand the length of time required to reach maximum visitation for Pike2Bike, two comparison trails were used: Northern Central Rail Trail (NCRT) in Maryland and the St. Marks trail in Florida. These trails were chosen given their detailed documentation of visitation over time and the additions that were made to the trail systems. NCRT reached higher levels of visitation in its ninth year of operation, while the St. Marks Trail required 17 years of operation to reach its highest visitor levels.

This may in part be due to some unique aspects of the NCRT. Opened in 1984, in its first year of operation the NCRT trail had 10,000 visitors. By its ninth year of operation the trail reported 450,000 visitors. NCRT extends 20 miles through Maryland, stretching from Ashland Road in the Hunt Valley area to the state line. The trail is 10 feet wide with a stone dust surface. The trail activities include: hiking, jogging, bicycle riding and horseback riding. The trail also provides access for fishing and tubing along the Gunpowder Creek. The NCRT continues another 20 miles into Pennsylvania as the York County Heritage Trail, ending in the city of York, PA. The trail surface changes somewhat in Pennsylvania. The rails are still in place and the trail occasionally crosses the tracks. The trail in Pennsylvania features a rail tunnel and historic Hanover Junction. There are eight major parking lots along the Maryland portion of the trail and many small lots as well. In addition, the NCRT has a dedicated running group called the NCR Trail Snails. The Trail Snails are a Baltimore-based Running Club dedicated to promoting fitness and friendship through group runs, group racing, and social events.



St. Marks Trail opened in 1985. After 7 years in operation, the trail reached 170,000 visitors. The trail reached 220,000 visitors after 17 years in operation. St. Marks Trail is 20.5 miles connecting Tallahassee, Florida to the coastal City of St. Marks. This trail is officially part of Florida's Greenways and Trails System and is designated as a National Recreation Trail. It was the first rail-trail in Florida's system of greenways and the first to be paved for running, walking, bicycling and skating. Horseback riding is available on an adjacent unpaved trail. Hikers can use a portion of the Florida National Scenic Trail, which joins the Trail at U.S. 98 and continues south. At the main trailhead, there is access to the Munson Hills/Twilight Mountain Bike Trails in the Apalachicola National Forest. At the southern terminus of the trail, the City of St. Marks greets trail users with seafood restaurants, fishing and entertainment, and the chance to learn about the history of San Marcos de Apalachee Historical State Park. The Tallahassee-St. Marks State Trail is a completed section of the developing, 120-mile "Capital City to the Sea Loop" corridor and is a destination along the "Big Bend Scenic Byway."

The length of time these two trails took to reach their maximum visitation varied widely. They highlight the unpredictability of user responses to the amenities and trail features. In each of the development scenarios, the Pike2Bike trail could experience unprecedented spikes in users in a very short period of time, especially considering the level of support it currently has even before it has been officially developed. Given the right type and mix of support and promotion, visitation could exceed the numbers estimated in this economic impact study in less than 10 years. Likewise, with lower levels of investment and support, the proposed Pike2Bike trail could take much longer to realize its full potential. Nevertheless, the economic impact from construction would be immediately realized in the shorter term.

10. CONCLUSION

In an effort to inform the decision-making process, three scenarios were constructed to serve as “visions” for the potential development and use of the proposed Pike2Bike trail. In Scenario 1, trail development takes on a minimalist approach targeting a limited range of users. In Scenario 2, trail development leads to a well maintained, amenity filled trail, designed to enhance the user experience for encourage a wide range of visitors. In Scenario 3, the trail becomes a multi-attraction experience with upgraded amenities, a nature reserve and an enhanced layout (such as an additional trailhead or a footbridge). These three levels of development are distinct in their ability to attract users and in the types of users they will attract. Nevertheless, this economic impact study concludes that at any level of development, Bedford and Fulton County residents will both realize an economic benefit from the development of the Pike2Bike trail.

The economic impact numbers are the direct output of inputs to the IMPLAN model based on estimated construction spending and visitor spending. However, the potential economic impacts that could not be entered into a computer software program are still relevant to the effective overall economic impact of the proposed Pike2Bike trail. These potential impacts should not be overlooked and include:

- Visitor spending at other attractions in the area
- Farmers and agricultural workers forming profitable partnerships
- New business investment, formulation, development, and profitability
- Increased health and wellness among local residents that choose to bike and did not bike before





Beyond the impacts listed above, the Pike2Bike trail has an extraordinary amount of community support and enthusiasm. During the course of this study, the community has remained fully engaged, attending meetings, providing comments, and helping to shape the vision for the trail. While many different opinions have been heard, few if any have suggested that trail should not be developed. The demand for the development of this trail, in some form, is evident among local residents and potential visitors. 🌲





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APPENDIX C

SEPARATION OF IMPACTS BY COUNTY

		Scenario 1: Safety First			Scenario 2: Multi-User			Scenario 3: World-Class		
		Fulton	Bedford	Total	Fulton	Bedford	Total	Fulton	Bedford	Total
CONSTRUCTION	Total	\$3,508,941	\$1,243,905	\$4,752,846	\$4,744,367	\$1,364,524	\$6,108,891	\$6,064,000	\$2,743,949	\$8,807,949
	Jobs	39.3	11.7	51	52.9	12.9	65.8	67.7	26	93.7
	Wages	\$1,389,723	\$601,805	\$1,991,528	\$1,886,881	\$660,161	\$2,547,042	\$2,409,524	\$1,327,531	\$3,737,055
	Taxes	\$119,021	\$46,138	\$165,159	\$157,885	\$50,612	\$208,497	\$202,646	\$101,778	\$304,424
OPERATIONS	Total	\$28,867	\$340,738	\$369,605	\$115,468	\$1,368,953	\$1,484,421	\$259,803	\$3,066,645	\$3,326,448
	Jobs	0.53	5.01	5.54	2.13	20.04	22.17	4.8	45.3	50.1
	Wages	\$10,669	\$133,238	\$143,907	\$42,677	\$532,953	\$575,630	\$96,025	\$1,199,144	\$1,295,169
	Taxes	\$3,770	\$35,594	\$39,364	\$15,083	\$142,367	\$157,450	\$33,938	\$320,346	\$354,284



