

# Economic Benefits of Trails



Economic impact studies document the many and substantial economic benefits generated by trails. This guide identifies major studies, summarizes key findings of each and provides hyperlinks to the studies.

## Summary

Trails stimulate business creation, influence corporate location decisions, boost spending at local businesses, increase property values, reduce medical costs by encouraging exercise, and generate tax dollars. They also of course provide low or no-cost recreational opportunities and transportation options to the public. These economic benefits of trails are not a matter of speculation. Rather, they have been documented in an array of economic impact studies conducted across the United States. The reader may conclude from the evidence presented that trail projects are appropriately viewed as investments and productive community assets.

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## BACKGROUND

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### Key Economic Benefits

The trail studies described in this guide collectively identify a variety of trail benefits:

- Trails increase the value of nearby properties.
- Trails boost spending at local businesses. Communities along trails, often called trail towns, benefit from the influx of visitors going to restaurants, snack shops and other retail establishments. On longer trails, hotels, bed and breakfasts, and outdoor outfitters benefit.
- Trails make communities more attractive places to live. When considering where to move, homebuyers rank walking and biking paths as one of the most important features of a new community.
- Trails influence business location and relocation decisions. Companies often choose to locate in communities that offer a high level of amenities to employees as a means of attracting and retaining top-level workers. Trails can make communities attractive to businesses looking to expand or relocate both because of the amenities they offer to employees and the opportunities they offer to cater to trail visitors.
- Trails reduce medical costs by encouraging exercise and other healthy outdoor activities.
- Trails revitalize depressed areas, creating a demand for space in what were once vacant buildings.
- Trails provide transportation options and cut fuel expenses, offering reliable means of transportation for short distance trips. Nearly half of all car trips are less than 3 miles and more than a quarter are one mile or less.
- Trails provide low or no-cost recreation to families with low costs relative to other recreational services that could be provided by government.
- Trails increase tax revenues in the communities in which they are located.
- These benefits represent a huge economic return on the money invested into trail projects. The costs of land acquisition for trails, trail construction and maintenance are far outweighed by the economic benefits generated by trails.

### Related Benefits

While this guide focuses on economic benefits, it is not meant to diminish the importance of the environmental and social benefits of trails.

Related guides at [ConservationTools.org](http://ConservationTools.org) include:

- Economic Benefits of Biodiversity
- Economic Benefits of Conservation
- Economic Benefits of Parks
- Economic Benefits of Smart Growth and Costs of Sprawl

### Organization of Guide

This guide presents an inventory of studies. The heading of each section is the title of the study and is hyperlinked to the [ConservationTools.org](http://ConservationTools.org) library listing where the study can be viewed or downloaded. The organization responsible for the study is given, followed by a summary of the key economic findings of the study.

## GENERAL STUDIES AND REPORTS

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### [Greenways & Trails: Bringing Economic Benefits to New York](#)

*The Business Council of New York State, Inc.*

- Business leaders say quality of life issues are highly important when deciding where to locate a new factory or office. Trails and greenways enrich the overall quality of life of a community, making it a more desirable place to live and work by offering residents a place to relax and exercise at lunchtime, an alternative to commuting by automobile, and safe, nearby places to spend time with their families.
- Trails provide a good return on investment. A study of Maryland's Northern Central Rail Trail found the state received \$303,000/year in trail-related tax income to while the trail's management and maintenance costs were \$192,000/year.
- Underground utilities may provide an additional source of revenue to help pay for trail improvements and maintenance. Nationwide, 40% of rail trails do double duty as utility corridors. The Town of Lloyd in the Hudson Valley received \$400,000 to allow fiber optic cable to be laid under its five-mile rail-trail.
- Homebuyers ranked walking and bicycling paths third amongst 42 features they found important.
- Greenways and trails can be catalysts for community revitalization, transforming eyesores such as abandoned rail corridors or neglected waterfronts into the community centerpieces. Community trails often become a focus of community pride and a means of preserving and celebrating what is special about a community.
- A litter-strewn 2.8-mile stretch of abandoned rail corridor between in Fulton County, NY is now the Johnstown-Gloversville Rail Trail. It is the pride of the communities and a very pleasant place to spend an afternoon. The Fulton County Regional Chamber of Commerce, which sponsored the rail-trail project, hopes to expand it another 14 miles and market it as a tourist destination with tourist information centers at both ends.
- In Dunedin, Florida, after the abandoned CSX railroad was transformed into the Pinellas Trail, the downtown went from a 35% storefront vacancy rate to a 100% storefront occupancy with a waiting list for available space.
- Since the Katy Hiking and Biking Trail opened in Marthasville, a small, quiet town in Missouri, more than a dozen new businesses have opened and renewed civic pride has led to numerous beautification projects. The western half of the trail generates \$3 million annually in local revenue.
- Since the opening of the Yough River Trail, the once plentiful vacant buildings in Connellsville, Pennsylvania are now scarce. Many professionals are moving into the downtown and the newly formed Connellsville Festival Committee is busy organizing events.
- In Vermont, tourists stay about one day longer in Stowe than in the state's other resort areas. This extra day and the revenue it generates are attributed to the Stowe Recreation Path, a 5.5-mile multi-use trail.

## **The Economic Benefits of Trails**

### *American Hiking Society*

- Trails allow communities to increase commerce, support and create jobs, increase property values, reduce commuter costs and provide low-cost health benefits.
- It took only one season after the opening of the 35-mile Missouri River State Trail for the trail to positively impact local communities. After one season, 61 businesses along the trail found the trail positively impacted their businesses. Eleven reported the trail strongly influenced their decision on where to locate and 17 increased their business size since the trail opened.
- The Washington State Trails Plan estimated that trail users in Washington state spent more than \$3.4 billion on equipment, which generated tax revenues of \$13.8 to \$27.6 million.
- Along the Baltimore and Annapolis Trail Park in Maryland, six trail-related stores have opened and two others have re-located next to the trail to attract new customers.
- In a 1995 survey, 73% of metro-Denver real estate agents believed a home near a trail would be easier to sell. Twenty-nine percent of those living near a trail said proximity to a trail influenced their home purchase.

- Fifty percent of all car excursions are less than three miles, a distance that could easily be walked or biked. The use of trails instead of cars reduces gas and auto care costs and improves air quality.
- Walking or hiking a few times per week can improve a person's health and lower health care costs. A National Park Service study compared people who lead sedentary lifestyles to those who exercise regularly. The exercisers filed 14% fewer healthcare claims, spent 30% fewer days in the hospital, and had 41% fewer claims greater than \$5,000.

## **Implementing Trailed-Based Economic Development Programs: A Handbook For Iowa Communities**

*Iowa Department of Transportation*

This guide provides seven steps communities can use to capitalize on the economic development opportunities a new recreation trail can bring to a community. Communities should understand community capacity and design; identify target markets based on trail characteristics, determine their relationship to the trail system; choose trailhead sites based on desired user markets and impacts; locate trailheads within town boundaries to concentrate economic impacts, build off existing markets and cultivate partnerships.

Several case studies of communities that have successfully incorporated trails into their economic development are provided, including:

- Once a popular summer resort that had to deal with slow winters, Traverse City, Michigan opened a network of ski trails in the 1950s. Now, large numbers of visitors without winter recreation trails in their hometown visit Traverse City each year. This is, in part due to a marketing program that targets families, packaging recreation with attractions like cherry orchards, festivals, arts and crafts, historic hotels and resorts, and natural scenery. There have also been extensive media relation campaigns that invite travel writers from warmer climates to try new winter sports.
- The Elroy-Sparta State Trail in Sparta Wisconsin was one of the nation's first rail trails, and since its opening in the 1960s, several other rail trails have opened in the area. The trail boasts 100,000 to 120,000 users each year, many from out of state. The businesses of Sparta, the self-proclaimed "Bicycling Capital of America", support their town's identity by means such as hotels and campgrounds that offer free trail passes, restaurants that serve healthy food to bicyclists, tour packages with lodging, bike rental and shuttles, and a variety of stores that serve bicycling needs.
- When Mrs. B's Historic Lanesboro Inn opened in Lanesboro, Minnesota soon before the Root River State trail opened, it was the area's first bed and breakfast. There are now ten. Fifty to sixty percent of Mrs. B's guests are trail users. According to Mrs. B's management, a critical mass of lodging, restaurants and activities are necessary to create a tourist economy around a trail.
- The Maryland Northern Central Rail Trail, near Baltimore, has 450,000 annual users and an annual economic impact of \$3,380,000. Almost all visitors live near the trail.

## **STUDIES OF PENNSYLVANIA TRAILS**

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### **Benefits of Greenways: A Pennsylvania Study**

*Pennsylvania Greenways Partnership Commission*

In Pennsylvania, greenways protect natural resources and rural legacy, provide communities with economic opportunities and prosperity, conserve historic and cultural resources, provide opportunities for public recreation, health and fitness; enable outdoor educational opportunities, assist in the planning and shaping of communities, and provide alternative and safe modes of transportation.

According to the Pennsylvania Department of Conservation and Natural Resources, nearly one-fifth of Pennsylvania's tourists are traveling primarily for outdoor recreation activities. As an example of the economic impact of outdoor tourism on trails, the report highlights how the Pittsburgh to Cumberland Trail Corridor has encouraged economic growth. The Pittsburgh to Cumberland Trail is a 150-mile motorized vehicle free route that connects with the 184.5-mile C&O Canal Towpath at Cumberland,

Maryland to create a 334.5-mile traffic and motorized vehicle-free route between Pittsburgh and Washington, DC.

- The trail has 500,000 visitors a year and continues to grow. Businesses along the trail, such as restaurants and bed and breakfasts have been able to flourish and grow because of this tourism.
- According to Hank Parke, Executive Director for the Somerset County Chamber of Commerce, "Several properties near the trail in Somerset County, that were once in dire disrepair have been purchased and renovated into bed and breakfast operations. There has also been a mushroom effect associated with the changes to these properties for adjacent and nearby land. Quite simply, these locations had no meaning before the trail went in."
- Spending in trail head communities by trail users in 1998 ranged from \$5.4 to \$14.1 million". In contrast, maintaining the greenway costs, on average, approximately \$1,000 per mile per year
- Realtors have found that proximity to the trail is a key factor in home sales.

## **The Great Allegheny Passage Economic Impact Study (2007–2008)**

*The Progress Fund's Trail Town Program, Laurel Highlands Visitors Bureau, and the Allegheny Trail Alliance*

- The Great Allegheny Passage (GAP) is a 132-mile system of biking and hiking trails that connects Cumberland, MD to McKeesport, PA (near Pittsburgh, PA).
- On average, owners of businesses near or along the trail indicated that one-quarter of their gross revenue was directly attributed to trail users and two-thirds reported that they experienced at least some increase in gross revenue because of their proximity to the trail. Over one-quarter of all businesses that were surveyed mentioned that they have expanded, or plan to expand, their operations or staff numbers because of the impact of the trail.
- In general, lodging and hotel establishments and outdoor and trail related businesses reported larger increases in their estimated annual revenue than other business types.
- Among those surveyed, between 2007 and 2008, \$23,878,495 in revenue was attributed to the trail and \$4,372,190 of wages were paid to employees of these businesses.
- In 2007, all businesses on or around the trail had estimated trail attributed revenue of \$32,614,703 and distributed \$6,273,927 in wages. Despite the hard economic times, in 2008 these figures increased to estimated receipts and wages of \$40,677,299 and \$7,500,798, respectively.
- Two-thirds of the trail users stated that they/their group had/planned to make purchases or rent equipment in the communities along the trail or trailhead that day.
- Four in ten trail users that were surveyed planned an overnight stay as part of their trip. Overnight trail users spent an average of \$98 a day in the trail communities.
- Non-overnight trail users spent an average of \$13 a day in the trail communities.
- All trail users traveled an average of 131 miles to reach the trail. Overnight trail users traveled an average of 289 miles to reach the trail.
- Over three-quarters of the overnight trail users stated recreation was their primary purpose for trail use. Over half of local and day trip users reported health or fitness as their primary reason for trail use.
- Surveyed trail users were from nearly every state in the continental United States and parts of Canada.

## **Schuylkill River Trail 2009 User Survey and Economic Impact Analysis**

*Rails to Trails Conservancy*

- The Schuylkill River Trail is a multi-use pathway that generally follows the course of the Schuylkill River from Pottsville to Philadelphia, Pennsylvania. The trail is composed of rail-trail and canal

towpath sections and a small number of connectors that utilize shared roads. There are an estimated 802,239 annual trail users.

- Seventy eight percent of respondents to a 2007 trail use survey purchased hard goods (bikes, bike accessories, clothing, etc.) in the past year in conjunction with their use of the trail. The average expenditures on hard goods were \$406.31.
- Fifty percent of the survey respondents purchased soft goods (water, soda, candy, ice cream, lunches, etc.) in conjunction with their most recent trail visit. Of those who made a purchase, the average amount per person per trip was \$9.07.

## **Ghost Town Trail 2009 User Survey and Economic Impact Analysis**

### *Rails to Trails Conservancy*

- The Ghost Town Trail is a 36-mile multi-use pathway in Pennsylvania between Ebensburg in Cambria County and Saylor Park in Black Lick, Indiana County with an estimated 75,557 annual user visits.
- A 2009 survey found that, between April and October, \$1.7 million was spent on soft goods (meals, beverages, ice cream) and overnight accommodations in conjunction with a trail visit.
- Eighty-eight percent of those surveyed had purchased hard goods (bikes, bike accessories, clothing, etc.) in the past year in conjunction with their use of the trail. The majority of these purchases were bicycles and bike supplies and the average expenditure was \$357.63. This amount is close to the average dollar amount spent by users on other trails in Pennsylvania.
- Twelve percent of respondents had stayed overnight in conjunction with their visit, spending an average of \$78.04 per night on lodging.

## **Perkiomen Trail 2008 User Survey and Economic Impact Analysis**

### *Rails to Trails Conservancy*

- The Perkiomen Trail is a 19-mile multi-use trail between Green Lane Park in Upper Frederick Township, Pennsylvania and Oaks in Upper Providence Township, Pennsylvania, where it connects to the Schuylkill River Trail. Along its route, the trail follows the Perkiomen River, passing through some of the most scenic areas in Montgomery County.
- A 2008 trail user survey found that the purchase of soft goods (water, soda, candy, ice cream, lunches, etc.) was less significant along the Perkiomen Trail than other Pennsylvania trails, with 46.7 percent of the survey respondents indicating they purchase none of these items in conjunction with their most recent trail visit. Of those who did make a purchase, the average amount per person per trip was \$11.09.
- The Perkiomen Trail is used primarily by local residents. Only 3% of trail users reported staying overnight as part of their trail experience. Forty-four percent of these stays were at area campgrounds.

## **Heritage Rail Trail County Park 2007 User Survey and Economic Impact Analysis**

### *York County Department of Parks and Recreation*

- The Heritage Rail Trail County Park is a 21-mile corridor that runs from historic downtown York to the Pennsylvania/Maryland state line, where it connects with the 20-mile North Central Rail Trail in Maryland.
- In a 2007 user survey, more than 85% of survey respondents purchased hard goods (defined as bike, bike accessories, auto accessories, shoes or clothing) in conjunction with their trail use, for an average of \$367.
- Seventy-two percent of survey respondents purchased soft goods (water, soda, candy, ice cream, lunches, etc.) with an average expenditure per person per trip of \$12.66.

## **Trail Utilization Study: Analysis of the Trail Systems Within the Oil**

## **Heritage Region**

*Oil Region Alliance of Business, Industry & Tourism and Allegheny Valley Trails Association*

- Over sixty miles of trails in the Oil Heritage Region of Venango County span through Oil Creek State Park, Two Mile Run County Park and along the Allegheny River. Between July 2006 and October 2006, an estimated 82,930 people used the trails. Seventy eight percent were from Pennsylvania. Of the Pennsylvanians, 23% were from the Oil Heritage Region. Seventy-five percent of surveyed trail users cited the trails as their main reason for coming to the area.
- Non-local trail users spent an average of \$32.93 per person per day or \$88.49 per group, while users from the Oil Heritage Region spent a daily average of \$3.71 per person, or \$10.91 per group. The 82,930 users who visited the trails between July and October 2006 created an economic benefit of \$2.22 million within the Oil Heritage Region. During all of 2006, there were an estimated 160,792 trail users who created an estimated overall economic impact of \$4.31 million.

## **Pine Creek Rail Trail 2006 User Survey and Economic Impact Analysis**

*Rails to Trails Conservancy*

- The Pine Creek Rail Trail is a 62.6-miles trail in north-central Pennsylvania that passes through forests, rich farmland and historical villages in the heart of the Pine Creek Valley, the "Grand Canyon of Pennsylvania".
- Eighty-two percent of survey respondents purchased hard goods (bikes, bike accessories, clothing, etc.) in the past year in conjunction with their trail use with an average expenditure of \$354.
- Eighty-six percent purchased soft goods (water, soda, candy, ice cream, lunches, etc.) at an average purchase per person cost on their most recent trail outing of \$30.
- Fifty-seven percent of survey respondents had an overnight stay in conjunction with a trail excursion.

## **STUDIES OF TRAILS IN OTHER STATES**

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### **A Cost-Benefit Analysis of Physical Activity Using Bike/Pedestrian Trails**

*Health Promotion Practice*

- A cost-benefit analysis of the use of bike and pedestrian trails use in Lincoln, Nebraska to reduce health care costs associated with inactivity was conducted using data from the city's 1998 Recreational Trails Census Report and other literature.
- Annual trail use cost per capita was \$209.28 (\$59.28 for construction and maintenance, \$150 for equipment and travel). Annual direct medical benefits of trail use were \$564.41. So, for every \$1 invested in trails there were \$2.70 in medical benefits. An analysis of the different parameters that could affect the cost-benefit ratio found that equipment and travel costs were the factors most likely to affect the ratio. However, even for the highest costs, every \$1 invested in trails resulted in a greater return in direct medical benefits. Cost-benefit ratios ranged between 1:1.65 and 1:13.40.

### **Maximizing Economic Benefits From A Rails-To-Trails Project in Southern Western Virginia-A Case Study of the GreenBrier River Trail**

*The Nick Joe Rahall Appalachian Transportation Institute, Marshall University in collaboration with Marshall University Park Resources and Leisure Services, and The West Virginia Trails Coalition*

On the Greenbrier River Trail corridor in West Virginia, during a 17-day period in October 2000:

- An overwhelming majority of trail users were highly educated, white-collar professionals with high income levels.

- Two-thirds of the trail users were from outside of West Virginia.
- Ninety-three percent of trail uses were from visitors staying in the area from one to four days.
- Fifty-eight percent of visitors spent between \$100 and \$500 in the area.
- About 93% of the trail users indicated that they were highly likely to plan a return trip.
- Out-of-state visitors spent a total of \$82,315.

## **The Washington & Old Dominion Trail: An Assessment of User Demographics, Preferences, and Economics**

*Virginia Department of Conservation*

- This report looks at trail use; user demographics and preferences; economic benefits to users, and economic impacts to the local communities of the Washington and Old Dominion Trail (W&OD), a 45-mile long transportation and recreation corridor running west from Arlington, VA to Purcellville, VA.
- Annually, about 1.7 million adult W&OD users spent a total of about \$12 million related to their recreational trail use. Of that amount, about \$7 million was spent directly in the northern Virginia economy by both locals and non-locals.
- Local trail users accounted for about 1.6 million visits and about \$5.3 million of spending directly related to use of the trail.
- Nonlocal visitors spent about \$199 per group trip and \$74 per person to visit. Of this amount, \$41.50 per group and \$15 per person was spent in the northern Virginia economy directly related to trail use. Overall, the estimated \$1.4 million in nonlocal spending generated about \$1.8 million in local economic impacts.

## **NCR Trail 2004 User Survey and Economic Impact Analysis**

*Maryland Department of Natural Resources and Gunpowder State Park*

- In a survey of trail users of Maryland's 20-mile Northern Central Rail Trail, 89.5% of users were Maryland residents. Twenty eight percent traveled more than 20 miles to reach the trail.
- Eighty-two percent of survey respondents purchased hard goods (bikes, bike accessories, clothing, etc.) in the past year in conjunction with their use of the trail at an average cost of \$333.12. While these types of purchases are not annually recurring, even with the most conservative usage estimate, they amount to millions of dollars in sales.
- Sixty-two percent of respondents purchased soft goods (water, soda, candy, ice cream, lunches, etc.) on their most recent trail outing at an average purchase price of \$9.41 per person.

## **The Virginia Creeper Trail: An Assessment of User Demographics, Preferences, and Economics**

*Virginia Department of Conservation*

- The Virginia Creeper Trail (VCT) is a 34-mile long rail trail whose midpoint is the town of Damascus, Virginia, which is known as "Trail Town, USA" because it is located at the intersection of five major trails.
- A trail survey was conducted between November 1, 2002 and October 31, 2003. During this time period, there were an estimated 130,172 trail users.
- The average distance traveled to reach the VCT was 154 miles.
- On a scale of 1 (no benefits) to 4 (high benefits), users gave health and fitness an average rating of 3.81
- The total economic impact from VCT trips is estimated at \$1.59 million. These trips annually support approximately 27.4 new full time job equivalents.
- Primary overnight trips created the most impact on the local economy, \$114,398 per 1,000 person-

trips

- Primary day trips account for \$23,606 spent per 1,000 person trips
- Local trail users spent just under \$200 annually on items directly related to their use of the VCT, mostly within the local economy.

## **GUIDANCE ON IDENTIFYING THE ECONOMIC IMPACTS OF TRAILS**

### **Economic Impacts of Protecting Rivers, Trails, and Greenway Corridors: A Resource Book**

*Rivers, Trails and Conservation Assistance Program, National Park Service*

Rivers, trails, and greenway corridors (linear open spaces connecting recreational, cultural and natural areas) have the potential to create jobs, enhance property values, expand local businesses, attract new or relocating businesses, increase local tax revenues, decrease local government expenditures, and promote a local community. This resource book aims to encourage local professionals and citizens to use economic concepts as part of their effort to protect and promote greenways; provide examples of how greenways and parks have benefited local and regional economies, and demonstrate how to determine the potential economic impacts of river, trail, and greenway projects. Although this is a 1995 resource with older case studies, it is included in this guide because it provides good resources for how citizens and government officials can incorporate the economic benefits of trails, greenways and rivers in their communities.

### **Trail User Survey Workbook: How to Conduct a Survey and Win Support for Your Trail, Sample Surveys and Methods**

*Rails to Trails Conservancy*

This manual helps the reader implement a trail user survey and determine the economic impact a trail has on local communities. It discusses how to:

- Establish project goals: Typical goals are determining trail use characteristics (reasons for trail visits, trail activities, times of visits), trail user demographics, trail users' perceptions of the trail, and spending related to trail activities.
- Determine who to interview: This is most often trail users, but can also include adjacent business and property owners.
- Choose a data collection methodology (leave questionnaires to be returned to a drop box or by mail, in person surveys)
- Create a questionnaire: Carefully choose questions that will help achieve the goal. Questions should be close ended to aid in analysis and should not take up more than one side of one page. The more difficult questions to answer should be at the end. Four sample questionnaires are included.)
- Collect and analyze data: a template for analyzing the data in Microsoft Excel is provided. Economic impacts are most useful when presented as spending by all trail users for a year. For this, trail use counts (by volunteers placed at specific points on a trail or by infrared counters) are essential. Three categories accurately reflect trail users spending associated with trail used; hard goods (e.g. bikes and clothing) purchased over the past 12 months, soft goods (consumables such as meals and snacks) purchased on the most recent trail visit, and overnight accommodations.
- Produce a report: At a minimum, reports should include an executive summary and tables or graphs containing the responses to each question.

## Comments

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