



THE CAROLINA THREAD TRAIL (The Thread) is a network of greenways and conserved corridors that links 15 counties in North and South Carolina and is a collaborative project of unprecedented scale. The Thread connects our region and places of interest, and conserves our most significant natural areas.

Benefits of Greenways and Trails

Greenways and multi-use trails – like the Carolina Thread Trail – have had an enormous impact on the economic, physical and social well-being of communities across America. Despite tremendous examples and success stories across the country, a lack of information on the impact a trail may have on its specific community can often make it difficult to encourage governments, businesses, stakeholders or residents to financially support the construction of new trails and greenways. Quantifying the wide diversity of benefits trails have after establishment may be an even more challenging task due to the broad and multi-faceted manner in which communities can be positively affected. This compilation of facts and opinions is meant to synthesize much of the dispersed information available on greenways and trails—with particular focus in the Carolinas.

Contents

I. Economic Impact

a. Business and Development

- i. Development
- ii. Bike-Related
- iii. Trail Use and Spending

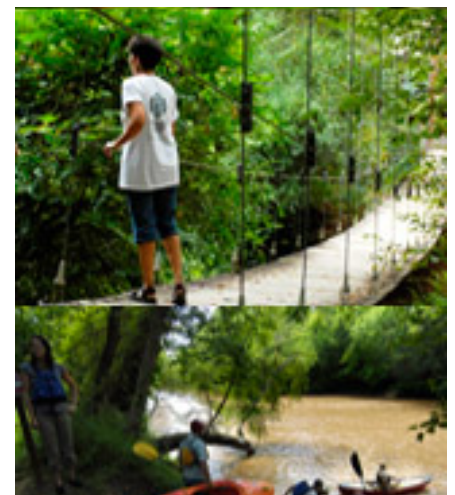
b. Real Estate

c. Tourism

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Economic Impact

Business and Development

Trails bring in development.

“Active Outdoor Recreation” contributes \$730 billion annually to the U.S. economy, supports 6.5 million jobs, and generates \$88 billion in annual state and national tax revenue. Active recreation is defined as bicycling, trail activities, paddling, snow sports, camping, fishing, hunting, and wildlife viewing. – *Outdoor Industry Foundation Study (2006) in Evidence of many varieties of economic benefits linked to trails (2011)*



Every 300 miles of new greenway infrastructure in North Carolina results in, “economic stimulus from upfront construction is \$174M supporting 1,600 jobs and from increased tourism activity is \$128M supporting 1,600 jobs”. – *WalkBikeNC: North Carolina Statewide Pedestrian and Bicycle Plan (2013)*

“While money spent on a trail trip is money not spent elsewhere, the real benefit is that it is money spent in rural towns and in more economically disadvantaged areas.” – *Evidence of many varieties of economic benefits linked to trails (2011)*

“Although the trails are small income generators compared to manufacturing, health services, and other large sectors of the local economy, their impacts are concentrated in communities dependent on trail activity, and spread to other businesses in population centers and commercial hubs of the region.” — *Economic Impact of Recreational Trail Use in Different Regions of Minnesota (2009) in Evidence of many varieties of economic benefits linked to trails (2011)*

In reference to Orange County greenways, “The (greenway) paths are ‘extremely valuable to the region,’ said Elizabeth Rothbeind, an economic-development and communications specialist with the planning council.” – Dan Tracy, Orlando Sentinel (2011)

“[T]he Silver Comet Trail is currently responsible for about \$57 million in direct spending per year, and will be responsible for about \$86 million in direct spending per year once it is

expanded. These direct expenditures in turn generate considerable spillover impacts throughout the Region and State.” –Silver Comet Trail Economic Impact Study (2013)

“Direct recreational and tourism spending associated with the Silver Comet Trail at its current size, plus the spillover impacts that result from that spending produce about \$3.5 million per year in tax revenues for the State; while in its expanded form, that amount increases to about \$5 million per year.” –Silver Comet Trail Economic Impact Study (2013)

On the Greenville Health System Swamp Rabbit Trail in Greenville, SC, “[m]ultiple businesses reported a range of annual revenue from \$200,000 to \$400,000 from trail users. One business over the past two years reported a 20% increase in revenue related to trail use. One business reported that 75% of Saturday business is related to trail use and 40% of business during the week is related to trail use. Multiple businesses reported a range from 5% to 90% of customers are trail users.” –*Greenville Health System Swamp Rabbit Trail: Year 2 Findings (2013)*

In Greenville, SC, “[a]nnual revenue for bike stores [on the Swamp Rabbit Trail] resulting from trail users ranged from \$50,000 to \$700,000. One bike store reported 100% of business is because of the trail, a 150% increase from the previous year.” –*Greenville Health System Swamp Rabbit Trail: Year 2 Findings (2013)*

“The West Orange, Little Econ, and Cady Way trails in Orange County supported 516 jobs and an estimated economic impact of \$42.6 million in 2010.” —*East Central Florida Regional Planning Council (2011) in Evidence of many varieties of economic benefits linked to trails (2011)*

“The Mispillion River Greenway 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.” –*Enhancing America’s Communities (2002)*

According to Sandy Beal, Chairman & CEO of Ruby Tuesday’s, the “restaurant headquarters recently moved to downtown Knoxville for its location on the beautiful greenbelt and trail system –*Business Analysis Report: Impacts of the Pere Marquette Rail-Trail on the Economy and Business Community of Midland and Isabella Counties, Michigan (2002)*

“In studies conducted by the Maryland Department of Transportation, a \$191,893 investment in Maryland’s Northern Central Rail Trail increased state revenues by \$303,750 the same year the trail opened.” –*Analysis of Economic Impact of the Northern Central Rail Trail (1994)*

The Bike Industry thrives.

“In a nationwide online survey of nearly 100 U.S. bicycle retailers whose shops are near newly constructed bike paths and trails... nearly 60% of bike shop owners surveyed said the new bike paths and trails near their shops have had a positive impact on bike and equipment sales at their stores. Almost 20% of those respondents said their sales increased by 10–25% as a result of the new trails, and another 7% estimated that their sales have increased 50% or more since the trails or paths were completed. Speaking generally, 85% of retailers polled said they believe that paths and trails increase bike and equipment sales at bike shops nationwide, and 45% believe sales increase dramatically in areas where new paths and trails are built.” –*Trails to Sales Survey, Bikes Belong (2006)*

“Value of bike-related activity in Portland, OR in Sept 2008: Total economic activity is approximately \$90 million, with the largest segment in the retail sector (60%).” –*The Value of the Bicycle-Related Industry in Portland (2008)*

“The 1999 Michigander Bike Tour held in mid-Michigan and southwest Michigan generated \$207,000 of local spending. Event participants spent on average \$233 per travel party.” –*Business Analysis Report: Impacts of the Pere Marquette Rail-Trail on the Economy and Business Community of Midland and Isabella Counties, Michigan (2002)*

“1999 Tandem Rally cyclists who visited Midland County as special event participants reported spending \$2,500 per year on cycling; Michigander participants reported spending \$748 per year on cycling. These individuals were exposed to the many trail-related businesses in Midland County during their visit.” –*Business Analysis Report: Impacts of the Pere Marquette Rail-Trail on the Economy and Business Community of Midland and Isabella Counties, Michigan (2002)*

On the Pere Marquette Rail-Trail, “A local bike store doubled their business with the construction of the rail-trail.” –*Business Analysis Report: Impacts of the Pere Marquette Rail-Trail on the Economy and Business Community of Midland and Isabella Counties, Michigan (2002)*

When asked about the advantages and disadvantages of being close to the Swamp Rabbit Trail in Greenville, SC, a local biker described the following advantages “Creates awareness of bike shops; lots of traffic into stores because of trail; economic impact on Greenville; increase in service to repair bikes from trail use” and noted “none” as the disadvantages. –*Greenville Health System Swamp Rabbit Trail: Year 2 Findings (2013)*

A bike store on the Swamp Rabbit Trail in Greenville, SC claims that “[t]he trail has increased awareness of cycling, particularly in women. [We] moved [our] store to be near the trail.



[The trail] brings people to town and increases tourism for Greenville. [it is a] source for locals and visitors to use bikes on the trail.” –*Greenville Health System Swamp Rabbit Trail: Year 2 Findings (2013)*

Trail Use and Spending increase.

“On average...trail users spend \$19 apiece while they are out and about, frequently on a meal or beverage. The vast majority of people....take to the trails for recreation, typically by biking, running or walking.” –Dan Tracy, Orlando Sentinel (2011)

“Visitors to Ohio’s Little Miami Scenic Trail spend an average of \$13.54 per visit just on food, beverages and transportation to the trail. In addition, they spend an estimated \$277 per person each year on clothing, equipment and accessories to use during these trail trips. The total economic benefit is impressive considering there are an estimated 150,000 trail users per year.” –*Trail Users Study, Little Miami Scenic Trail (1999)*

~ TABLE 11 ~ Economic Impact for Selected Trail Systems				
Trail System & State(s) located	Total Bicycle Users	Local User Daily Expenditure	Non-Local User Daily Expenditure	Total Annual Dollar Impact
Jackson Hole (Wyoming)	222,535	\$7	\$126	\$17 Million Non-Local \$1.1 Million Local
Virginia Creeper Trail (Virginia & Maryland)	130,172	\$30	\$119	\$2.5 Million (Direct Expenditure)
Washington & Old Dominion (Virginia)	1,707,353	Not Available	\$74	\$7 Million
Central Florida (Florida)	1,700,000	No Separation of Users Each Averages \$19		\$32.3 Million (Direct) \$42 Million Total
Greater Allegheny Passage (Maryland & Pennsylvania)	800,000+	\$13	\$98	\$40.8 Million (Direct)
Chequamegon Area (Wisconsin)	22,630	No Separation of Users Each Averages \$27		\$630,000 (Direct) \$1.3 Million Total

Source:
 Kaliszewski, N. (2011). Jackson Hole Trails Project Economic Impact Study. University of Wyoming.
 Tracy, D – The Orlando Sentinel (2011). Bike trails pump \$42M into Central Florida economy study
 Virginia Department of Conservation (2004). Impacts of Trails and Trail Use.
 University of Wisconsin Extension (1997). Mountain Biking in the Chequamegon Area of Northern Wisconsin and Implications for Regional Development.
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 Lemanski, Ursula (2005). Economic Benefits of bicycle and Pedestrian Facilities. National Park Service Rivers & Trails Program

—An Economic and Impact Analysis of the Coldwater Mountain Bike Trail (2012)

“For purposes of expenditures per day, we took an average of local and non-local expenditures for each of these selected trails with data available: Jackson Hole, Virginia Creeper, and Allegheny. The average for local expenditures is \$16.67 per day. In addition to the above data for local spending, data for non-local spending also includes Washington & Old Dominion. The average for non-local expenditures is \$104.25.” – *An Economic and Impact Analysis of the Coldwater Mountain Bike Trail (2012)*



The Teton County trail system generated an estimated \$18 million in economic activity in 2010, with \$1.1 million spent by local trail users and \$17 million by non-local trail users:

“Employment and wages relating to the trail system in Teton County totaled \$3.6 million with approximately 213 workers employed in the summer and fall of 2010.” —*Jackson Hole Trails Project Economic Impact Study (2011) in Evidence of many varieties of economic benefits linked to trails (2011)*

“365,720 annual users recorded in 1999 by the adjacent NCR Trail, which indicates the tremendous economic impact this trail is expected to have on York County.” —*Economic and other benefits of the Heritage Rail Trail (2008)*

Estimates for the Coldwater Mountain Bike Trail are as follows:

“With 50,000 users a year, estimated \$1,988,867 in total economic impact, with 100,000 users a year, estimated \$3,977,735 in total economic impact, with 150,000 users a year, estimated \$5,966,602 in total economic impact. Includes direct economic spending, sales taxes, income taxes, and lodging taxes per year.” —*An Economic and Impact Analysis of the Coldwater Mountain Bike Trail (2012)*

“In the months following the opening of the Mineral Belt Trail in Leadville, Colorado, the city reported a 19 percent increase in sales tax revenues.” —*Enhancing America's Communities (2002)*

“The 1999 Midwest Tandem Rally held in Midland County generated \$260,000 of local spending. Event participants spent on average \$566 per travel party.” —*Business Analysis Report: Impacts of the Pere Marquette Rail-Trail on the Economy and Business Community of Midland and Isabella Counties, Michigan (2002)*

“In another important 1999 study, it was determined that the Great Allegheny Passage brought in \$14 million in direct economic benefit (rentals, meals, lodging, trinket purchases) even as it was only half completed.” —*An Economic Study for the Allegheny Trail (1999)*

“In the Great Allegheny Passage: annual direct spending attributed to trail users was \$40.8 million in 2008, up from \$7.26 million in 2002; total annual wages attributed to trail user spending: \$7.5 million; since 2007, 93 new trail-related businesses opened in the Trail Towns while 19 businesses closed, for a net gain of 47 new businesses; 77% of businesses opened since 2007 remain in operation; Business owners attribute 25% of revenues to their proximity to the trail.” —*Great Allegheny Passage Economic Impact Study (2007–2008) in Evidence of many varieties of economic benefits linked to trails (2011)*

Real estate markets benefit...

“Trails consistently remain the number one community amenity sought by prospective homeowners.” —*National Association of Homebuilders (2008) in Evidence of many varieties of economic benefits linked to trails (2011)*

Major Charlotte real estate developer Lat Purser stated that, “proximity to the 17-mile Swamp Rabbit trail was a major consideration in my firm’s recent investment in a 150-unit apartment project in Greenville, S.C., a city that has embraced transportation alternatives.” —*To city, state leaders: Bike, walking trails worth the investment (2013)*

Every 300 miles of new greenway infrastructure in North Carolina results in, “Property value gains from proximity to bicycle and pedestrian infrastructure [would be a] \$64M one-time increase in property value and \$640,000 annual increase in property tax revenues. —*WalkBikeNC: North Carolina Statewide Pedestrian and Bicycle Plan (2013)*

“Greenways offer numerous economic benefits to Mecklenburg County, including higher real property values, increased tourism and recreation related revenues, and cost savings for public services. Greenways have been shown to increase the value of adjacent properties by as much as 5 to 20 percent. For example, within a new development in Apex, North Carolina, new lots situated on greenways were priced \$5,000 higher than comparable lots off the greenway. In Charlotte, national builders typically charge premiums ranging from \$1000 to \$5000 for \$120,000-\$200,000 homes bordering open space and greenways” —*Mecklenburg County Greenway Master Plan 2009*

“Parent and vom Hofe found that from a real estate perspective, trails can have significant, positive spillover effects on property values when these properties are located within reasonable distances to the trails. To be more specific, housing prices went up by nine dollars for every foot closer to the trail entrance [in Cincinnati]. Ultimately, the study concluded that for the average home, homeowners were willing to pay a \$9,000 premium to be located one thousand feet closer to the trail” —*New Research Finds that Homeowners and City Planners Should 'Hit the Trail' When Considering Property Values (2011)*



“The Crosland Land Company, Charlotte, NC, surveyed 800 new and older Charlotte area homebuyers in 1993 and found that ‘walking/biking paths that meander’ was the second most important amenity to buyers across all price points and buyer types.” –*Mecklenburg County Greenway Master Plan 2009*

“Realizing the selling power of greenways, developers of the Shepherd’s Vineyard housing development in Apex, North Carolina added \$5,000 to the price of 40 homes adjacent to the regional greenway. Those homes were still the first to sell.” –*Prime Location on the Trail (1999)*

“A 1998 study of property values along the Mountain Bay Trail in Brown County, Wisconsin shows that lots adjacent to the trail sold faster and for an average of 9 percent more than similar property not located next to the trail.” –*Recreation trails, Crime, and Property Values: Brown County’s Mountain-Bay Trail and the Proposed Fox River Trail (1998)*

In a June 2013 Facebook post, Milestone Realty realtor Monica Posse promoted various amenities associated with a south Charlotte home “Great Matthews location! Almost 1/2 acre with wooded privacy area in back. Home has fresh paint and new carpet. Open floorplan features kitchen with large breakfast area and overlooks den with fireplace. N[ighbor]hood has walking to trails to Squirrel Lake Park with access to the [Four Mile Creek] Greenway, Disc Golf, playground and fishing pond.” –Monica Posse, Facebook (2013)

Tourism sees a spike...

“In North Carolina’s Outer Banks alone, bicycling is estimated to have an annual economic impact of \$60 million and 1,407 jobs supported from the 40,800 visitors for whom bicycling was an important reason for choosing to vacation in the area.” –*WalkBikeNC: North Carolina Statewide Pedestrian and Bicycle Plan (2013)*

“The Mineral Wells to Weatherford Rail-Trail near Dallas, Texas attracts approximately 300,000 people annually and generates local revenues of \$2 million.” –*A Guide to Transportation Enhancements (1999)*

“Feeney (1998) found that rails to trails averages are 11,787 visits per mile.” – *Mohawk-Hudson Bike-Hike Trail: Analysis of Use, Regional Benefits & Economic Impact (1998)* In *An Economic and Impact Analysis of the Coldwater Mountain Bike Trail (2012)*

“Individual net economic value for recreation access to the [Virginia Creeper Trail (VCT)] was estimated at US\$23–US\$38 per person per trip. Aggregate net economic value of the VCT to users was estimated at US\$2.3 million to US\$3.9 million. Economic impacts measure the commercial benefits to local communities of VCT tourist (non-local user) spending. VCT tourists spend about US\$1.2 million directly in the two-county community around the trail. This tourist spending in the local economy generates about US\$1.6 million in total economic

activity. The combined aggregate net economic value and total economic impacts of the VCT indicate that the trail is a highly valuable asset both to users of the trail and to people in the local community who benefit economically from tourist expenditures.” –*Estimating the economic value and impacts of recreational trails: a case study of the Virginia Creeper rail trail (2007)*

“It should be noted that the more rural trails still attract a significant number of non- local visitors, similar to that seen on the busy Washington & Old Dominion Trail per mile. The economic impacts of visitor spending on their local economies are therefore significant, despite the lower total usage. In 2011 dollars, estimated total economic output generated from visitor spending on the New River Trail and Virginia Creeper Trail was \$2.8 million and \$2 million, respectively, supporting 50 and 27 jobs annually. These numbers align with the \$2 million economic output estimated for the proposed Ecusta Rail Trail.” –*Ecusta Rail Trail Planning Study and Economic Impact Analysis (2012)*

“Bicycle recreation currently supports more than \$924 million in tourism and resident spending each year, of which nearly \$533 million is direct impact occurring annually, such as travel, equipment sales, and restaurant expenditures.” —*The Economic Impact of Bicycling in Wisconsin (2001) in Evidence of many varieties of economic benefits linked to trails (2011)*

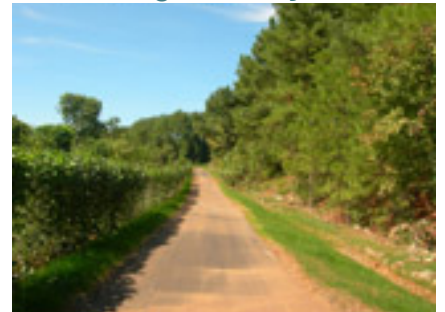
Community Living

We build connections...

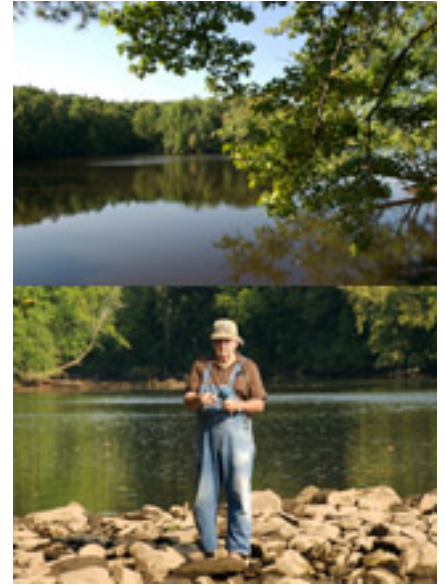
Major Charlotte real estate developer Lat Purser notes that “[i]t is increasingly evident that people are choosing places to live where they can safely walk and bike to school, to work, to restaurants, shopping and parks”. –*“To city, state leaders: Bike, walking trails worth the investment” (2013)*

“A trail network can be a significant alternative for a safe and healthy commute to work, school, or other everyday activities. There is broad agreement among experts that the use of trails (by walkers, runners, cyclists, skaters, etc.) contributes to the well- being of individuals and communities.” - *Marion County Residents use Indianapolis Greenways (2008)*

In response to an economic trail projection study believed to be far-fetched in its estimates “Sen. Andy Gardiner, R-Winter Park... who has supported the idea since its inception, said the dubious economic estimate has no impact on his opinion because he has witnessed the success of the Orange County trails. ‘Regardless of the report,’ he said, ‘I’m a believer in what I’ve seen.’” -*\$50 million Coast-to-Coast connector marketed on shaky math (2013)*



In reference to a new trail coming to Pickens, SC, "It's going to draw a lot of people to the area," said Pickens Mayor David Owens. "When they come in, they're going to eat, they'll buy gas. That's what it's all about for us, to draw people into town." -*From Possible Abandonment to Community Ambition-South Carolina Cities to Purchase Rail Corridor. Rails to Trails Conservancy (2013)*



"Our mission is to improve the quality of life and economy of the City of King's Mountain through collaborative efforts of local, state, and federal agencies, as well as local business and industry, by providing natural resource based recreational opportunities" – *King's Mountain Gateway Trail website (2013)*

In Duluth, MN, a city ranked the third best place to run by Runner's Magazine, the town prioritizes spending for the trail because people prioritize the trail as a community amenity. Linda Krug, councilor at large, says "People are coming to Duluth to make Duluth their life, a place where they want to live because of all the different amenities we offer and that trail system is really, really, important." –*Millions in grants to improve Duluth trails (2013)*

Infrastructure and Environment

We develop more sustainably...

"Three-fourths of Americans believe that being smarter about development and improving public transportation are better long-term solutions for reducing traffic congestion than building new roads" –*Growth and Transportation Consumer Survey (2007)*

Every 300 miles of new greenway infrastructure in North Carolina results in, "Commuting gains from increased usage of bicycle and pedestrian infrastructure 4.9M fewer car miles driven, \$167,000 in emissions cost avoidance, \$800,000 not spent on gasoline, \$325,000 in congestion cost avoidance. -*WalkBikeNC: North Carolina Statewide Pedestrian and Bicycle Plan (2013)*

"Analysis of existing and post Ludlam Trail destination accessibility has identify the following key findings: 261 students will gain access to area schools, 6,389 residents will gain access to parks, 186 residents will gain access to bus stops, and 23,900 residents will gain access to transit stations Commuters at the Dadeland North Metrorail Station adjacent to the Ludlam Trail corridor" — *Trail Benefits Study: Ludlam Trail Case Study (2011)*

Health and Wellness

Trails help us live longer and stronger...

With an increase in 300 miles of greenway infrastructure in North Carolina, “Health care cost reduction from usage of bicycle and pedestrian infrastructure [would be] \$76M”. –

WalkBikeNC: North Carolina Statewide Pedestrian and Bicycle Plan (2013)

Recent reports have estimated the annual direct medical cost of physical inactivity in North Carolina at \$3.67 billion, plus an additional \$4.71 billion in lost productivity. However, every dollar invested in pedestrian and bicycle trails can result in a savings of nearly \$300 in direct medical expenses. Of North Carolinians surveyed, 60% would increase their level of physical activity if they had better access to sidewalks and trails.” – *WalkBikeNC: North Carolina Statewide Pedestrian and Bicycle Plan (2013)*

Referring to the nearly 3-mile walk/bike path built as a part of the Ravenel bridge in Charleston, SC, Bikes Belong says, “[a]fter the path was built, local researchers surveyed the users. Sixty-seven percent of Wonders Way users said that they exercise more since the opening of the path. This increase was even more pronounced for black users—85% became more active thanks to Wonders Way. For a state with one of the highest obesity rates in the U.S., this is big news.” – *The Federal Investment in Bicycling: 10 Success Stories (2013)*

In Lincoln, Nebraska: “Per capita annual cost of using the trails was \$209 (\$59 construction and maintenance, \$150 equipment and travel). Per capita annual direct medical benefit of using the trails was \$564. The cost-benefit ratio was 2.94, which means that every \$1 investment in trails for physical activity led to \$2.94 in direct medical benefit.” — *A Cost-Benefit Analysis of Physical Activity Using Bike/Pedestrian Trails (2004)*

According to a 2011 study in Miami-Dade County Florida, “The development of Ludlam Trail will save the community between \$1.68 million and \$2.25 million annually in direct medical costs related to lack of physical exercise while leading to approximately 4,931 to 6,579 area residents becoming new exercisers. Residents within the Ludlam Trail Study Area can expect to lose or keep off between 32,664 and 109,939 pounds of weight annually by burning between 2.19 million and 7.39 million calories (kilocalories) per week while exercising on Ludlam Trail.” — *Trail Benefits Study: Ludlam Trail Case Study (2011)*

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