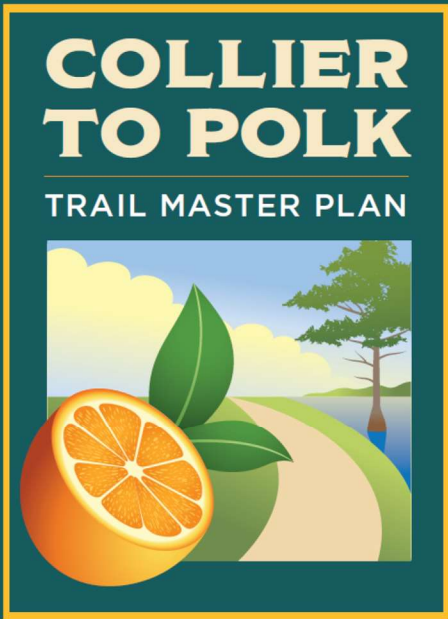


APPENDIX **A**

Regional Multi-use Trail Corridor State of Practice Scan



FDOT District One

Regional Multi-Use Trail Corridor

State of Practice Scan

NOVEMBER 2023



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This document was prepared for FDOT District One by Kimley-Horn and Associates.

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Opening

The Florida Department of Transportation (FDOT), District One is conducting a planning effort to evaluate the development of a regional multi-use trail system from Collier County to Polk County with the goals of connecting rural towns through Florida's Heartland counties and providing connections to parks, preserves, wildlife corridors, heritage sites, and other destinations. There are several factors that led to this planning effort which will be more fully addressed in the culminating regional trail system Master Plan that will be completed by Summer of 2023. Among these drivers is implementation of District One's recently completed Active Transportation Plan (January 2022). Through the survey conducted as part of the plan, trails were identified as the type of bicycle and pedestrian facility where the most District One residents (96%) are comfortable riding a bicycle.

This state of practice scan consists of an overview of studies and statistics regarding the potential economic impacts and benefits that might be derived from a regional trail system. To that end, this scan includes a focus on long-distance trail systems that might serve as representative examples to consider during development of the Master Plan. While each trail system has its own unique geography, demographics, and catalysts for development, parallels can still be drawn for the purpose of understanding the potential benefits that might accrue from investment in a Collier to Polk regional trail system.

The primary emphasis in this scan is on paved, multi-use trails. While the proposed system may ultimately include unpaved segments in certain locations, the majority of the trail is anticipated to be paved.

This report provides:

- A summary of key takeaways that will be useful to consider during Master Plan development
- Representative statistics that illustrate the breadth of benefits a trail system can provide
- Background on the Florida trail planning and development context
- Brief case profiles for four planned and constructed regional trail systems
- A review of related concepts to consider regarding the economics of regional trail systems
- An overview of benefits beyond economics that suggest the role of trails in helping to improve quality of life for residents and communities

Summary of Takeaways

Many lessons can be drawn from the case examples and individual statistics in this scan, but principal takeaways include the following:

- There is significant potential for positive economic impact from investment in regional trail systems
- A fully connected long-distance trail system will likely deliver greater returns economically than an equivalent length of unconnected trail segments
- Promoting and partnering with individual towns along a trail can dramatically elevate its success and bring heightened value to communities
- Leveraging assets and destinations in the vicinity of a trail is critical to enhancing the experience of trail users and maximizing the return on public investment
- A trail can be an important mechanism to tell the story of and engage users with a region's natural and cultural history

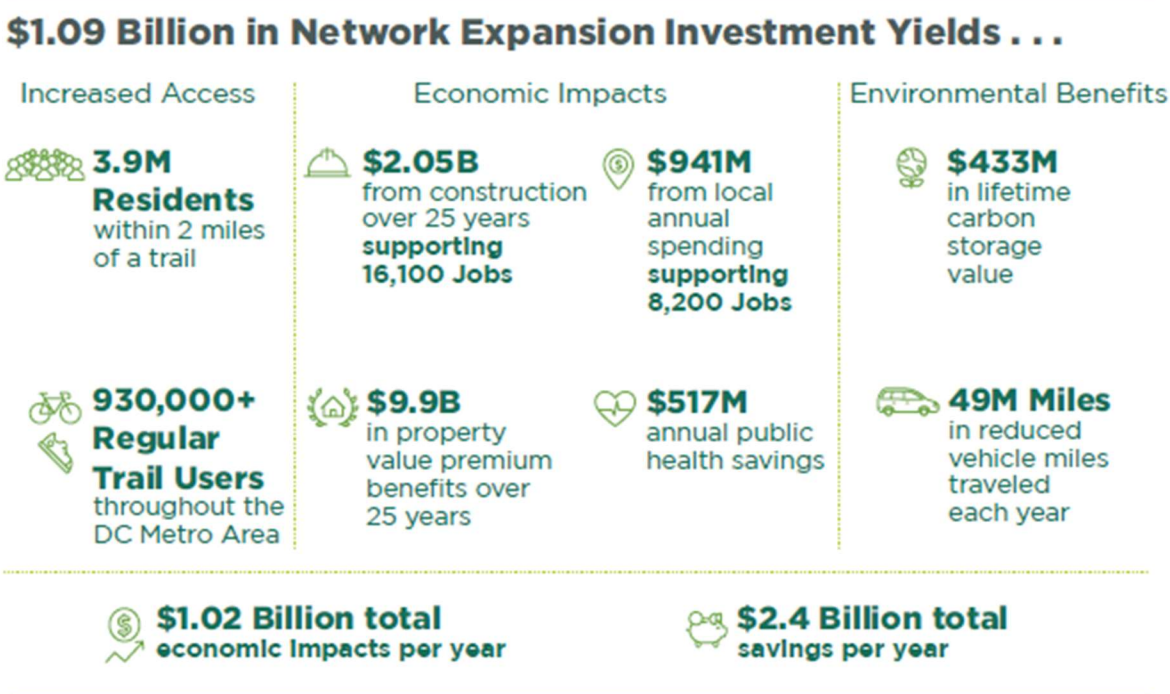
- Regional trail planning should define and consider an appropriate trail impact zone to help accurately document the geographic “influence” of the facility

It will be important to consider these factors during development of the Master Plan for the proposed Collier to Polk regional trail system.

Background

Trails and trail networks support economic growth, facilitate safe and improved access to open space, promote healthy living, and provide options for affordable transportation. These benefits improve the quality of life for the areas that trails traverse and connect. Investing in regional trail systems is typically premised on the likelihood that a range of these benefits will be returned to the areas where they are developed. **Figure 1** provides an illustration of the benefits identified for the multi-use trail system throughout the Washington D.C. area, which include economic impacts, increased access, and environmental benefits.

Figure 1: Projected Benefits of Multi-Use Trails in Washington D.C.



Source: Capital Trails Coalition, The Economic, Health, and Environmental Benefits of Completing the Capital Trails Network

A wide range of similar statistics illustrate the potential value of investing in regional trail systems:

- According to the American Association of State Highway and Transportation Officials, greenways, sidewalks, and bicycle facility construction creates 17 jobs for every \$1 million spent which is a greater employment impact than any other type of transportation facility.¹
- A North Carolina study found that the annual economic impact of bicyclists was nine times the initial one-time public expenditure to build bicycle facilities.²

- The longer a trail is, the farther people will travel to visit it, the longer they will stay, and the more money they will spend³.
- 42% of Americans would be more likely to ride a bicycle if motor vehicles and bicycles were physically separated.⁴
- Trails are one of the most desired community amenities among prospective homebuyers.⁵
- According to Florida's 2016 Statewide Comprehensive Outdoor Recreation Plan (SCORP), hiking/walking trails and biking paths/trails are the most desired outdoor recreation facilities among Sunshine State residents.⁶

The Florida Context

There are hundreds of miles of existing connected trail systems and standalone trails in Florida. The Official Florida Transportation Map highlights and promotes major existing Florida trails that collectively encompass over 1,000 paved miles, many of which are components of regional trail networks. Added to this is the extensive mileage of other local trails and shared use paths that, in many cases, facilitate access to regional systems.

The Florida Transportation Plan (FTP) notes trails as a crucial component of the state's multimodal transportation network and identifies *trail condition* as a progress indicator. The FTP includes a strategy to: **Complete and connect statewide, regional, and local trail networks to provide an integrated system of high-quality trail corridors for pedestrians and bicyclists.**

The Florida Greenways and Trails System (FGTS) is planned by the Florida Department of Environmental Protection (FDEP) Office of Greenways and Trails (OGT). The FGTS is guided by a plan that provides a blueprint for connecting major trails into broader regional systems and an overall statewide network. The FGTS includes Priority and Opportunity Land Trail Networks. In partnership, FDOT administers the Florida Shared-Use Nonmotorized (SUN) Trail Network, which aligns with FDEP's Priority Land Trail Network, and consists of planned corridors that are eligible for SUN Trail funding.

Through the FGTS and SUN Trail programs, emphasis is placed on **defining and completing regional trail systems** such as the Florida Coast to Coast Trail, St. Johns River to Sea Loop Trail, and Capital City to Sea Trails. At 250 miles long, the Florida Coast to Coast Trail represents the most extensive organized effort in Florida to entirely connect a paved long-distance regional multi-use trail of its size. Further information on this trail is provided on Page 15.

The **FLORIDA GREENWAYS AND TRAIL ACT** establishes Florida public policy to “provide the means and procedures for establishing and expanding a **statewide system of greenways and trails for recreational and conservation purposes** and which shall be designated as the “Florida Greenways and Trails System” (Section 260.012, Florida Statutes). Further, under **SUN TRAIL LEGISLATION**, it is declared that “the development of a **nonmotorized trail network will increase mobility and recreational alternatives** for Florida’s residents and visitors, **enhance economic prosperity, enrich quality of life, enhance safety, and reflect responsible environmental stewardship**” (Section 339.81, Florida Statutes).

In addition to statewide efforts to plan and develop trail systems, multiple Federal programs have supported the development of trails for many years in Florida. Transportation Alternatives (previously Transportation Enhancements), the Recreational Trails Program, and Safe Routes to School are among the Federal programs that have helped to fund trails and

bicycle and pedestrian facilities. In many cases, these programs have helped fund systems in smaller, rural communities. They are also often focused on providing facilities to improve safety for bicyclists and pedestrians.

Local government investments in sidewalks, multi-use paths, bicycle lanes and trail systems has also resulted in an expansive network of active transportation facilities around Florida that tie into regional trail systems. When local investment is paired with other funding, communities can realize major improvements to their trail networks. In Sarasota County, for example, which is close to the proposed trail network under study, the Legacy Trail was started with local funding and private investment. Because of the success of this initial phase of the trail, the County began to expand the trail in partnership with the Sarasota/Manatee MPO and the Trust for Public Land. Eventually, the Legacy Trail became part of the regional Gulf Coast Trail network, which is a component of the FGTS Priority Trail network and SUN Trail network. The recent extension of the trail was funded with local investment (a bond referendum), while the construction of trail bridges over state roads is funded through FDOT.

Florida has historically had one of the highest levels of statewide economic activity based on spending by local park and recreation agencies. In 2017, the state grossed over \$10 billion in total transactions, as shown in **Figure 2** which summarizes the top 10 states for impacts of local park and recreation agency spending. This was tied to over 71,000 jobs and \$2.58 billion in related labor income.

Figure 2: Impacts of Local Park and Recreation Agency Spending on the U.S. Economy (2017)

State	Economic Activity (transactions)	Employment (jobs)	Labor Income
California	\$16,036,598,747	109,665	\$5,176,100,922
Florida	\$10,082,946,211	71,466	\$2,585,692,228
Illinois	\$10,044,757,210	78,772	\$3,500,248,927
New York	\$9,167,329,779	56,479	\$3,121,526,974
Texas	\$8,703,708,284	62,519	\$2,854,359,898
Georgia	\$5,448,738,404	37,469	\$1,574,843,900
Colorado	\$4,358,843,200	34,046	\$1,384,958,813
Ohio	\$4,339,345,388	34,546	\$1,580,660,242
Minnesota	\$4,074,433,210	28,312	\$1,330,618,132
Washington	\$3,769,241,437	24,825	\$1,212,367,004

Sources: IMPLAN, Center for Regional Analysis — George Mason University for the National Recreation and Park Association, U.S. Census Bureau

Trail Systems in Smaller Communities and Rural Areas

The proposed Collier to Polk regional trail system would cross through as many as ten counties with a total length ranging up to 250 miles. The system is proposed to be anchored by two higher population counties, Collier with nearly 400,000 residents and Polk with nearly 750,000. These two counties, and the addition of trail segments that might cross through the

eastern sides of Charlotte and Lee counties, would encompass the most populated counties along the potential route. **Much of the trail system is expected to traverse very rural areas within Florida's Heartland, creating opportunities for non-motorized transportation in smaller communities.** Glades County and Hardee County, for example, have approximately 12,000 and 25,000 residents respectively, populations that are much lower than the counties on each end of the proposed system.

Conventional thought might suggest that *large metropolitan areas* with robust transit service and extensive bicycle and pedestrian facilities would be where non-motorized transportation use is the highest. However, in its report *Active Transportation Beyond Urban Centers*, the Rails to Trails Conservancy notes that, according to the National Household Travel Survey (NHTS), between 6.9 and 9.6 percent of all trips taken in rural communities are done by bicycling and walking.⁷ Rural Americans walk at a rate that is between 58 and 80 percent of the overall national rate and bike between 74 and 104 of the national average. As part of this research, five rural community types were adapted from the USDA Economic Research Service's Rural Urban Commuting Area classifications:

- Large Rural Core: towns of 10,000 to 50,000, often rural centers,
- Outer Large Rural: smaller communities from which many people travel to Large Rural Core towns for work, shopping, services, or school,
- Small Rural Core: towns of 2,500 to 10,000, often county seats
- Outer Small Rural: smaller communities from which many travel to Small Rural Core towns for work, shopping services, or school
- Isolated Rural: communities without strong economic and social links to a town of more than 2,500.

The data suggests that residents in four of these five categories of rural communities walk more frequently than people living in outlying suburbs of metropolitan regions. Smaller towns can provide viable options for people of all ages to walk and bicycle more comfortably due to lower volumes of traffic. Active transportation in small towns can sometimes benefit from the fact that many of these towns were designed and developed prior to the prevalence of the automobile, so their form may inherently favor walking and riding a bicycle.

The Economics of Trails

There are many trails and trail systems nationwide within and connecting a wide range of environmental, cultural, and community settings. While no single regional trail network is a clear parallel to the proposed Collier to Polk regional trail system, one purpose of this scan is to highlight certain long-distance trails that provide a window into the potential economic impact and other benefits that might come from such a system. An important consideration in selecting the highlighted trails was whether sufficient documented information was available to identify potential economic impacts and benefits. Some agencies and non-profit organizations provide studies over time regarding a given facility's economic value and impact, while others may only conduct a single standalone assessment.

For this scan, four regional trail systems are highlighted (**Figure 3**). These include the Great Allegheny Passage, with the most comprehensive economic impact documented over time, and the Razorback Regional Greenway, Erie Canalway Trail, and Missouri Katy Trail. These trails were highlighted because of their length and diversity of experiences. Each also includes at least some segments that traverse rural areas similar to much of the proposed Collier to Polk regional trail system. Finally, they are helpful in illustrating the current state of practice in regional trail systems.

Figure 3: Highlighted Regional Trail Systems At-a-Glance

Trail System	Length	Counties (# traversed)	Location
Great Allegheny Passage	150 mi.	5	Washington D.C. to Pittsburgh, PA
Razorback Regional Greenway	46 mi.	2	Fayetteville, AR to Bella Vista, AR
Erie Canalway Trail	365 mi.	13	Buffalo, NY to Albany, NY
Missouri Katy Trail	240 mi.	9	Clinton, MO to Machens, MO

What are direct, indirect, and induced economic impacts?

Direct economic impacts are comprised of the spending by trail users at businesses such as restaurants, retail shops, or accommodations within a certain proximity to a trail. Often, these impacts are the primary income of many trail businesses.

Purchases made by the trail businesses are considered **indirect economic benefits**. These would include local services for laundry or cleaning of hotels, wholesale retail inventory, and food and other restaurant supplies.

Induced economic impact is the economic impact created by the spending of wages from those with income created from direct and indirect spending. For instance, the living expenses of a bed and breakfast operator.

[END Inset Box]

Great Allegheny Passage

The Great Allegheny Passage (GAP) is a 150-mile trail that provides connectivity between the Washington, DC area and Pittsburgh, PA (**Figure 4**). The trail traverses five counties and two states.

- Allegany County, MD (pop. 66,710)
- Somerset County, PA (pop. 73,407)
- Fayette County, PA (pop. 127,244)
- Westmoreland County, PA (pop. 352,561)
- Allegheny County, PA (pop. 1,256,024)

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Keystone Viaduct, Great Allegheny Passage (Source: gaptrail.org)



The trail was initially begun in 1978 with the full 150 miles completed in 2013. Due to its history and location, the GAP is one of the country's most popular long distance trail systems. There have been multiple economic evaluations published going back to 1998 that have analyzed the trail's economic impacts on the communities it connects and the region at-large.

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Figure 4: Early Map to Promote the Great Allegheny Passage Trail



The earliest economic impact analysis of the GAP, which was in 1998, reported \$7.9 million worth of direct annual impacts, increasing to \$40.7 million by 2009, and \$50 million in 2012. The most recent Economic Impact Report cites a total of **\$121.2 million in total annual tourism impacts in 2019**, made up of \$74.66 million direct, \$21.57 million indirect, and another \$24.95 million of induced impact. **Figure 5** provides an overview of the changes in direct economic impact of the GAP across four studies during a period of 21 years.

Figure 5: Great Allegheny Passage Trail Direct Economic Impact

Study Year	Direct Economic Impact
1998	\$7.9 million
2009	\$40.7 million
2012	\$50 million
2019	\$74.66 million

As the GAP studies have evolved over time, they have become more robust, addressing further dimensions to analyze the trail. For example, the GAP Economic Impact Report published in 2021 defined a **Trail Impact Zone (TIZ)** to expand assessment criteria.⁸ The TIZ is the geographic area where most direct trail user spending occurs. It is generally a study area that is formed by aggregating Census Block Group geographies that are located either on or within a half-mile of the GAP pathway. Using Census-designated boundaries allows for use of data tied to those identified areas to evaluate the trail within a consistent geography.

Beyond studying the economic impact of the GAP, an ambitious Trail Town program was established in 2007 to facilitate economic growth along the trail. The Trail Town program came about as a partnership between the builders of the GAP (Allegheny Trail Alliance), the

Pennsylvania Department of Conservation and Natural Resources, and The Progress Fund, a non-profit community development finance agency. The goal was to establish sustainable development regionally, along the trail. **By 2011, established GAP Trail Towns experienced 60 new or expanded businesses, and The Progress Fund had provided or helped to leverage about \$7 million in loans or other investments to Trail Town businesses.** Other related efforts undertaken by the Trail Town Program have included data collection, economic research, planning efforts, marketing, kiosks and signage, bike racks, and the creation of a sustainable business network.⁹ Today, there are currently 18 designated GAP Trail Towns, each offering a suite of traveler support services, local attractions, and unique experiences to travelers. This program and Florida's Trail Town program, established by FDEP (page 18), suggest the value of focusing on the role of the regional trail system in transforming communities.

Razorback Regional Greenway

Northwest Arkansas has been investing in the creation of a regional trail system for 30 years. At the heart of the existing system is the now 46-mile Razorback Regional Greenway (**Figure 6**), a shared-use trail that spans from south of Fayetteville to the city of Bella Vista. In 2018, a partnership published a study regarding the economic and health impacts of the expanding cycling infrastructure in the region.¹⁰ It was estimated that **bicycling accounted for \$137 million worth of benefits to Northwest Arkansas.** A large segment of that economic benefit is derived from bicycle tourism. The study found that visitors to the area annually spend more than \$25 million at local businesses while residents in the community spend over \$20 million on bicycle-related expenses.

Fayetteville, Arkansas along the Razorback Regional Greenway (Source: bikearkansasmagazine.com)



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Figure 6: Map of the Razorback Regional Greenway

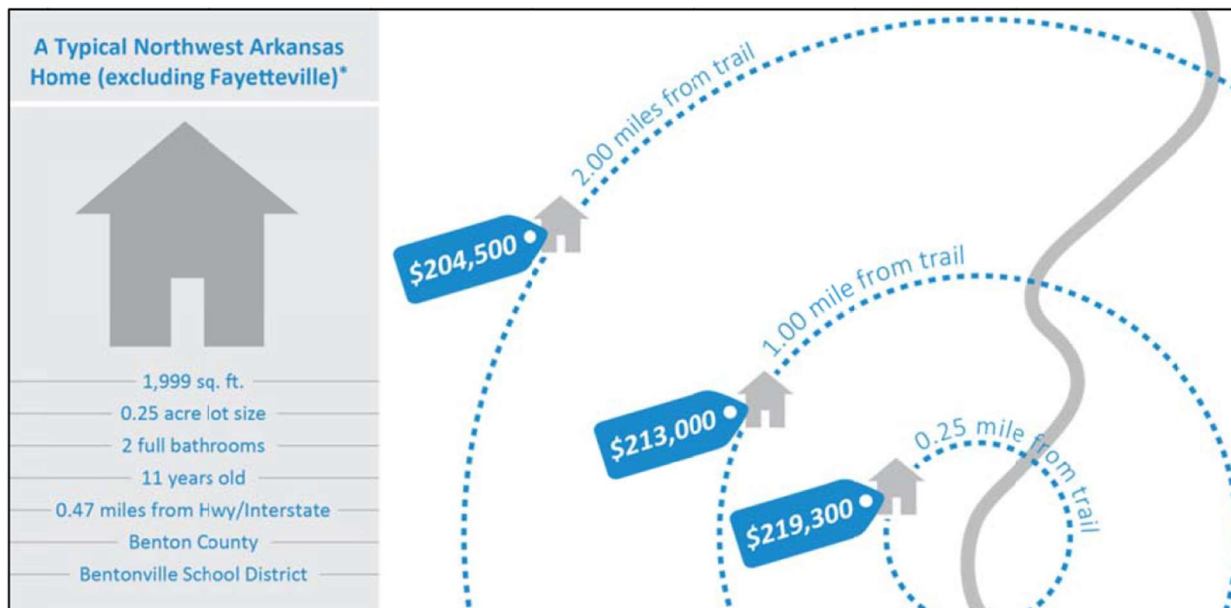


Courtesy: Rails-to-Trails Conservancy (www.railstotrails.org/magazine)

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Other notable impacts recorded by the study include the quantitative health benefits of the community's cycling (totaling around \$86 million/year) and the property value impacts that found **houses within a quarter mile of the Razorback Regional Greenway were worth an average of \$15,000 more than those homes two miles or farther from the trail.** The study found that, "...[excluding] Fayetteville... when considering houses within one mile of bike trails, regional homeowners see approximately \$1,173,000 of increased property value per mile of trail construction when compared with houses a mile further from the trail" (**Figure 7**).

Figure 7: The Impact of Razorback Regional Greenway on Home Values



Source: Economic and Health Benefits of Bicycling in Northwest Arkansas

Further, the Northwest Arkansas Report cited trails as a significant factor in attracting and retaining talent to the work force in the region. The bicycle infrastructure is viewed as an important ingredient for the area's high quality of life. It has also been a catalyst for "cycling culture" in the region which is evidenced by the draw that this area is for major events like the 2022 UCI World Cyclo-Cross Championships.¹¹ The Square 2 Square Bicycle Ride is also held twice a year to encourage residents of all ages to ride bikes and experience the greenway.

Erie Canalway Trail

The Erie Canalway Trail (ECT) is a 365-mile trail that generally runs the width of New York state, connecting Buffalo to Albany. The trail comprises the east-west spine of the Empire State Trail, and Albany is where the ECT connects to the north-south spine, running south to Manhattan as the Hudson River Valley Greenway and north to the Canadian border on the Champlain Valley Trail. The map of the Erie Canalway National Heritage Corridor (**Figure 8**) shows the broader regional area that the ECT crosses.

A 2014 economic impact study concluded that 2.5% of an estimated 1.6 million trail visits were made by people living outside of the 35 adjacent counties. The income generated from this subset of trail users is estimated to be approximately \$55.8 million in new sales and \$16.7 million in labor income associated with 731 newly created jobs. These **non-resident visitors were also found to spend an average of \$531.47 per visit per person**, which contrasts with the average of \$26.37 spent per resident.

Overall, the 1.6 million ECT visitors spending totaled an estimated \$253 million, \$28.5 million of which comprised local, state, and federal taxes. This economic activity also supported 3,440 total jobs.



The ECT is within the congressionally designated Erie Canalway National Heritage Corridor (**Figure 8**) which focuses on the role of New York's canals as a transportation network that shaped the Empire State. Much of the trail follows the original path of the Erie Canal, and trail visitors

have the opportunity to learn more about the history in the small towns along the corridor. The canal system has been in continuous operation since 1825, and the ECT leverages significant opportunities for historic interpretation and the economic benefits that come from heritage tourism.

Little Falls, NY, along the Erie Canalway (Source: eriecanalway.org)



Figure 8: Excerpt of Map of Erie Canalway National Heritage Corridor

Erie Canalway National Heritage Corridor

Designated by Congress in 2000, the National Heritage Corridor extends along New York's canals from one end of the state to the other. As you travel, you will discover distinct regional differences that will keep you coming back to experience all that the Canalway Corridor has to offer.



Middleport

Buffalo to Rochester (90 miles)

Find charming towns connected by water and trail along the longest section of the Erie Canal that still follows much of its original path.



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Missouri Katy Trail State Park

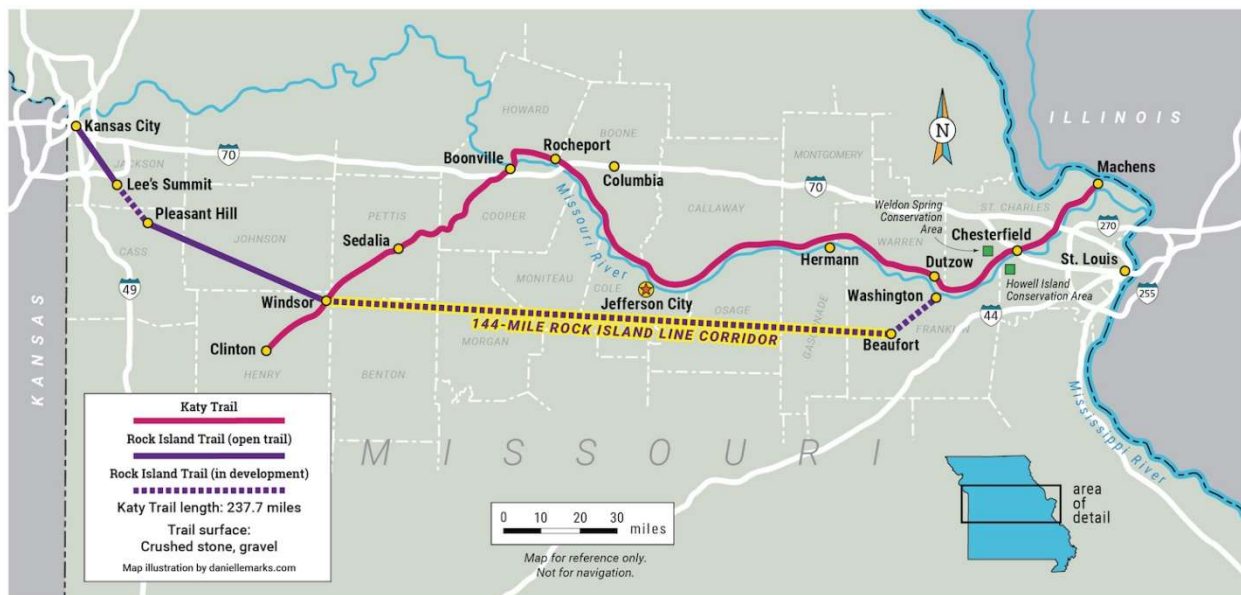
The Missouri Katy Trail State Park, built on the former corridor of the Missouri-Kansas-Texas Railroad, is an approximately 240-mile linear park that travels generally east-west through nine counties in central Missouri. The trail is one of the country's longest rails-to-trails project with the full 240-mile stretch completed by 1990. The trail's western terminus is in the town of Clinton, traveling to the northeast until crossing the Missouri River near Boonville. From that point, the trail largely follows the Missouri River, running along the north bank.

As of the 2012 economic report, the Katy Trail saw about 400,000 visitors that contributed to total economic impacts of \$18,491,000. Local day visitors spent about \$56.69 per party per trip, compared to non-local day visitors, who spent about \$161.73 per party per trip.

As part of the web presence for the project, **an online story map was created that focuses on the natural features that the trail traverses.** There is a particular focus on the geology and natural history of the region. This is instructive for the proposed regional trail system and the opportunity to highlight natural areas and use a trail as a "classroom" for public awareness and education.

An important emphasis for a regional spine trail system is consideration of spur connections. The existing Missouri Rock Island Trail (MORIT) is a 47-mile trail spur in western Missouri that connects the Katy Trail State Park with the Kansas City area as shown in **Figure 9**. A 144-mile eastern extension is also in development and will travel to the east, generally parallel to the Katy Trail, but through different terrain, providing trail visitors a significantly different experience.

Figure 9: Rock Island Trail Spur and Katy Trail



Source: Rails-to-Trails Conservancy (railstotrails.org)

Sedalia, MO, along the Katy Trail (Source: railstotrails.org)



Other Trail Systems

Beyond these regional systems, another example with documented economic impacts is the **Vermont Trail and Greenway Network**, a collection of trails comprised of those managed by the Catamount Trail Association, Green Mountain Club, Kingdom Trails Association, and Vermont All-Terrain Sportsman Association (VASA). The 2016 report *Economic and Fiscal Impact Analysis of the Vermont Trails and Greenway Council Member Organizations*¹² estimated 409,750 user days per year on the network's trails.

The trails were estimated to create over \$31 million of economic activity, about \$15 million of which can be considered “net new” to the state. The estimate of total jobs, sales, and earnings are summarized in **Figure 10**.

Figure 10: Annual Economic Impact of Vermont Trail and Greenway Network (2016)

	Direct	Indirect	Total
Jobs	292	73	365
Sales	\$ 15,073,291	\$7,340,400	\$22,413,691
Earnings	\$ 5,957,056	\$ 2,918,958	\$8,876,014
		Total (Sales + Earnings)	\$31,289,705

Within Florida, the economic impacts of select trails and trail systems have also been studied. This includes a report developed by the East Central Florida Regional Planning Council (ECFRPC) which estimated that the **West Orange Trail, Little Econ Greenway, and Cady Way Trail collectively supported 516 jobs and had an estimated economic impact of \$42.6 million in 2010**.¹³

Of the three trails, the West Orange Trail is the longest and has played a role in helping to drive growth in the western part of the county and in Winter Garden. The West Orange Trail

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is just over 22 miles long, running from the Lake County line (where it connects to the South Lake Trail) to the southeast portion of Lake Apopka and north to its current terminus, near the southwest corner of Wekiwa Springs State Park. Notably, the trail is a key segment of the Florida Coast to Coast Trail.

Winter Garden, FL, along the West Orange Trail (Source: downtownwg.com)



Florida's Coast to Coast Trail is a developing 250-mile multi-use corridor that stretches the width of the peninsula, from the Gulf of Mexico to the Atlantic Ocean. It is the most advanced and organized effort in Florida to develop a paved, long-distance, multi-use trail. Upon completion, it will travel through nine counties and provide links between many Central Florida communities, ultimately connecting St. Petersburg to Titusville. As part of the Shared-Use Nonmotorized (SUN) Trail Program, there are several programmed projects to address the trail's gaps, as shown in **Figure 11**. This map illustrates the important practice of continuously documenting regional trail development status. The strong support for investing in completion of the Florida Coast to Coast Trail suggests the potential for developing other regional trail systems in Florida.

The Tampa Bay Regional Planning Council (TBRPC) and the ECFRPC conducted an economic impact study in 2017 that estimated the number of trail visitors will grow to 1.7 million by 2025 and create 259 jobs annually.¹⁴ **The Florida Coast to Coast Trail is estimated to generate \$235 million in sales, \$143 million in personal income, and add \$140 million to the combined gross domestic product (GDP) of the counties it crosses over the ten years from 2015-2025.** Additionally, the construction associated with completing the trail's gaps will generate over 800 jobs, \$82 million in sales, \$38 million in personal income and add \$50 million to the GDP of the counties it traverses.

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Figure 11: Map of SUN Trail Florida Coast to Coast Trail – Connecting the Gaps



One of Florida's oldest trails, the **Fred Marquis Pinellas Trail**, opened in 1990 with five designated miles. The trail now stretches nearly 54 miles from St. Petersburg north to Tarpon Springs, also passing through South Pasadena, Largo, Clearwater, Dunedin, and Palm Harbor. Among Florida communities, Dunedin is now widely recognized as one of the most successful at maximizing the economic opportunity of its location along a trail. Forward Pinellas and its predecessor, the Pinellas County Metropolitan Planning Organization, have conducted multiple surveys going back to 1999 to understand the perspectives of trail users. In its 2019 survey, **over 75% of survey respondents indicated that they use the trail 2 or more days a week with 27% using it 5 or more days a week.**¹⁵ This suggests the importance that a trail, once established, can have for residents and communities.

Fred Marquis Pinellas Trail in Dunedin, FL



The Value of Trail Towns

As noted in the profile for the Great Allegheny Passage, designating and supporting the establishment of trail towns can be an important strategy to take advantage of a long-distance trail's presence within the communities it traverses. Many towns have been transformed by the presence of a multi-use trail. As noted above, important Florida examples include Winter Garden (West Orange Trail) and Dunedin (Pinellas Trail):

- The West Orange Trail has been a key component behind the transformation of Downtown Winter Garden. The success of this effort led to recognition in 2018 as a winner for *Great Places in Florida* by the Florida Chapter of the American Planning Association.
- Dunedin's transformation has been significant as well. Downtown business occupancy rates were 30% before the Pinellas Trail but have typically been at or near 100% since the trail opened over two decades ago. Bob Ironsmith, Dunedin's longstanding Economic & Housing Development Director, describes the trail as an "economic engine" for the community.

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In response to the growing emphasis on the transformative value of trails for communities, FDEP's Office of Greenways and Trails established the **Florida Trail Town Program**, designating Dunedin as the Sunshine State's first official Trail Town in 2018. Since then, FDEP has designated an additional 11 communities statewide as Trail Towns (**Figure 12**).

A Trail Town is a vibrant destination where people come together. It is a place where trail users can venture off a hiking, biking, equestrian or paddling trail to enjoy the amenities and unique heritage of the community, benefiting the town economically and socially.

– FDEP's Trail Towns Guidelines and Self-Assessment

Figure 12: Florida's Designated Trail Towns

Trail Town	Trail(s)
Dunedin	Pinellas Trail
Titusville	Florida Coast-to-Coast Trail East Coast Greenway St. Johns River-to-Sea Loop
Malabar	Al Tuttle Trail Grapefruit Trails Turkey Creek
Vilano Beach	East Coast Greenway Florida Circumnavigational Saltwater Paddling Trail
Clermont	Florida Coast-to-Coast Trail South Lake Trail
Palatka	St. Johns River Blueway Bartram Trail
Inverness	Withlacoochee State Trail
Deltona	Florida Coast-to-Coast Trail St. Johns River-to-Sea Loop
Everglades City	Florida Circumnavigational Saltwater Paddling Trail
Winter Garden	West Orange Trail
Gainesville	Gainesville-Hawthorne State Trail Depot Park Bike Boulevards
DeBary	St. John's River-to-Sea Loop Florida Coast-to-Coast Trail Heart of Florida Loop

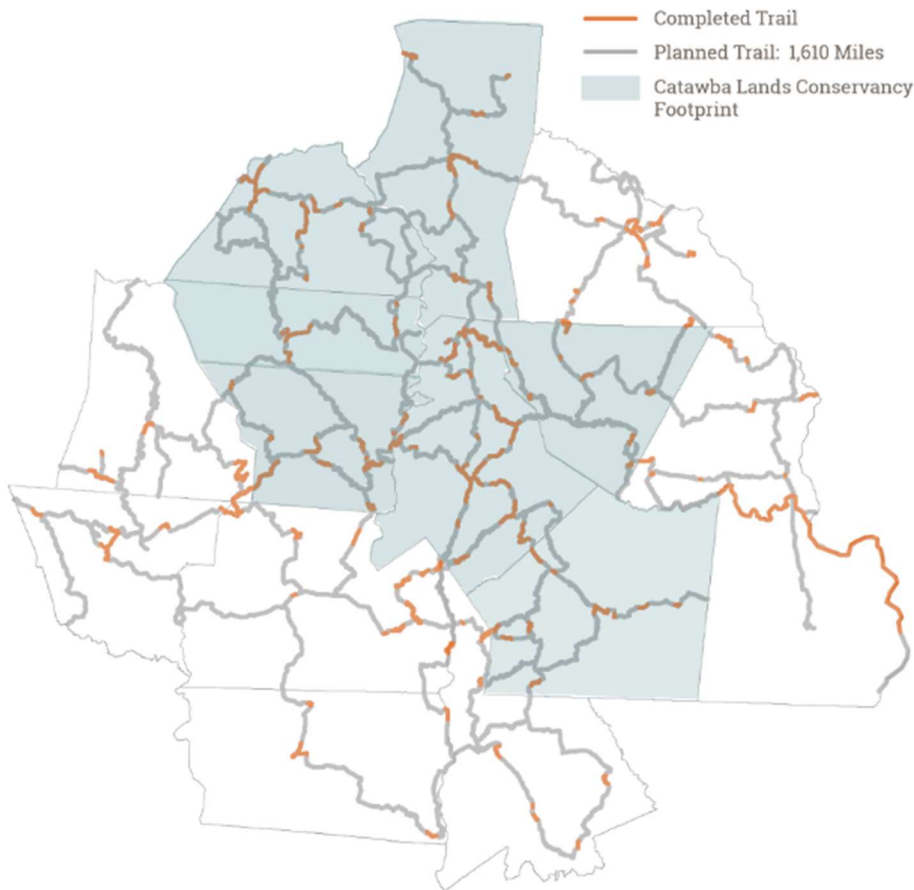
The current state of practice demonstrates that trails improve the economic vitality of communities. Trail networks serve public purposes such as growing a region's outdoor recreation and conservation spaces, and improving safety, mobility, and connections as components of a multimodal transportation network. Trails also spur local investment, economic and community development projects, and can serve as attractors and destinations for tourists. **Key business sectors that may directly support or be supported by a trail network include hospitality (food, beverage, accommodations), retail (goods and supplies), and recreation and entertainment (tours, festivals, events).** As part of the planning effort for the proposed Collier to Polk regional trail system, it will be important to identify candidate Trail Towns to derive the greatest possible public and private benefits.

The Influence of Regional Trail Systems

A trail impact zone (TIZ) was identified for the GAP Trail which was a generally linear area following the trail's corridor built upon Census Block Groups on or within a half-mile of the trail. A regional trail system can also be developed with consideration of a larger "web" of influence, inclusive of an impact zone that encompasses several counties. The benefits of trails are typically increased exponentially with the elimination of gaps, enabling communities and trail users at-large to access points and resources throughout the region. This also sets the stage for making spur connections to destinations that warrant connectivity, even if outside of the immediate impact zone.

For example, the Carolina Thread Trail (CTT) is a network of existing and planned trails throughout 15 counties in North Carolina and South Carolina. The trail is ultimately anticipated to be comprised of over 1,600 miles of trails, greenways, and blueways. Because of the broader form of the trail network, it is anticipated that the impacts of the CTT will benefit nearly three million people throughout a 15-county area (**Figure 13**). It will be important to not only plan for the potential alignment of the proposed Collier to Polk regional trail system as part of Master Plan development, but also to consider the broader zone of influence and impact.

Figure 13: Carolina Thread Trail



Source: carolinathreadtrail.org/who-we-are

Venues and Event Tourism

Certain segments of competitive cycling have been increasing in popularity, creating a need for trails to support different uses and disciplines. The popularity of mountain biking has been increasing due in part to reduced cost of entry and investments in trail infrastructure like man-made tracks allowing mountain-like trails to be built in areas remote from any true mountains. Other competitive cycling disciplines that have been growing include cyclocross and gravel riding, both of which are performed on mostly or completely unpaved trails. While the focus of the proposed Collier to Polk regional trail system will be on paved trails, unpaved trails can spur allied activities and events that will benefit nearby and connecting paved trails.

The United States is seeking to contend with other nations for opportunities to host international competitions on Union Cycliste Internationale (UCI)-approved courses. For instance, of the 15 rounds of the 2022-2023 UCI Cyclocross World Cup, two took place in the United States at Waterloo, Wisconsin and Fayetteville, Arkansas. In 2022, gravel riding has reached UCI-level recognition with its first certified series of events, with two taking place in the United States in Fayetteville, Arkansas and Amana, Iowa.

There are also regular national, regional, and local competitions, creating opportunities for many geographic areas to host high-profile cycling competitions on a regular basis if the infrastructure exists as viable venues.

Non-competitive rides or bike touring are also drivers of the bicycle economy that have been increasing in popularity in recent years. RAGBRAI, a seven-day touring event across the state of Iowa, attracts over 10,000 participants each year. The ride celebrates its 50th anniversary in 2023 and since its inception, has had enormous economic impacts statewide, historically generating over \$25 million in direct spending. With six overnight stops in addition to starting and ending locations and many locales along the route, small towns throughout Iowa provide goods and services to thousands of participants and spectators.

Cyclocross Racing (Source: Fayetteville-ar.gov)



In addition to large bicycle events, individual and small-group bike touring is growing as well. A few international studies have shown that an estimated 2.3 billion bicycle tourism trips generate the equivalent of more than \$48 billion per year in Europe. In Quebec cycling tourists average spending is the equivalent of \$152 per day.

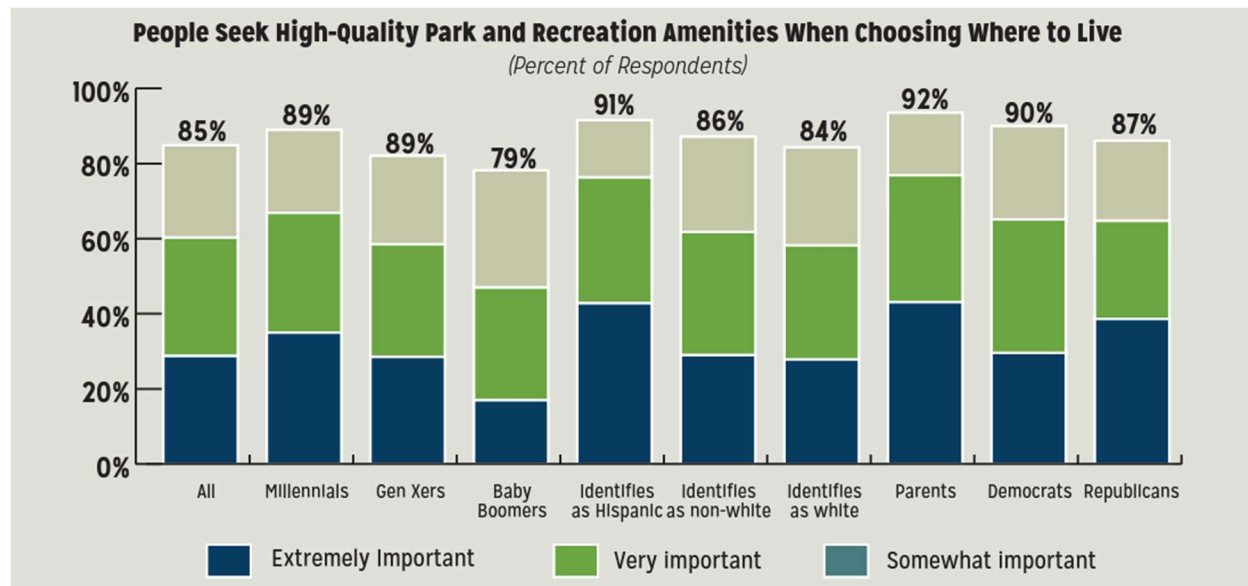
Bike Florida, a non-profit organization, states that one of its purposes is to bring bicyclists through “towns, trails and back roads to discover the vibrancy and natural beauty of Florida.” The organization provides a range of services with a core emphasis on organizing bicycle tours. For example, the planned 2023 Sunflower Tour incorporates significant trail segments, following much of the route of the Florida Coast to Coast Trail.

Real Estate and Property Values

Research focusing on the economics of trails, parks, and open space has consistently reported that there is a positive correlation between the economic value of homes and other properties that are in proximity to trails and other parklands. Higher home values not only

benefit the owners of these properties, but also add to the tax base of local governments. **Eighty-five percent of respondents to a survey conducted by the National Recreation and Park Association indicated that they seek high-quality parks and recreation amenities when choosing a place to live (Figure 14)**¹⁶.

Figure 14: Importance of Park and Recreation Amenities in Choosing a Place to Live



Source: National Recreation and Park Association, 2019 Engagement with Parks Report

Studies in states like Ohio, Georgia, and Minnesota have demonstrated the impact of proximity to a trail on home value and the ability to sell:

- A 2011 study by the University of Cincinnati found that homes within 1000 ft. access to the Little Miami Scenic Trail increased in value by \$9,000.¹⁷
- RE/MAX Realty found that the **properties near the Atlanta BeltLine trail system were being sold within a day**, whereas prior to the BeltLine project, homes along the same corridor typically took two-to-three months to sell.¹⁸
- A University of Minnesota study found that, in the Minneapolis/St. Paul area, for every 1,312 feet closer a median-priced home is to an off-street bicycle facility, its value increases by \$510.¹⁹

Beyond Economics

As noted in the Opening, trails provide a wide range of benefits to communities beyond defined economic impacts. While many of these benefits stand on their own as helping to make the case for investing in trails, they all ultimately tie back to improved economic resilience of communities and regions.

Four of these benefit areas are briefly touched on below:

- Quality of Life
- Health and Wellness
- Access to Nature / Environmental Awareness

Quality of Life

Quality of life often refers to what the experience is like to live in a given place. A higher quality of life is typically associated with factors like healthy living, economic stability, and opportunity. Trails are often considered desirable community features that are tied to a high quality of life. In a quality of life overview produced by Headwaters Economics, the presence of trails and trail networks are documented as being very important for trail users and many who live near trails.²⁰ Among the studies and surveys highlighted to demonstrate this are:

- Whatcom Mountain Bike Coalition Rider Survey – **95% of long-time residents view the trails as an important factor in staying in the area**, and over 80% of residents report that the trail was an important factor in moving to the area.²¹
- Jackson Hole Trail Project Economic Impact Study – Over 80% of survey respondents agreed that well-maintained trail systems are important.²²
- Nebraska Rural Trails: Three Studies of Trail Impact – **Over 60% of survey respondents reported that the nearby trails had positive impacts on each community and the county**. Many respondents reported trails having had a positive impact on life in their community. Notably, more positive impacts were reported for questions that included impacts on the community as a whole rather than the individual.²³

Aside from overall importance to the community, other factors about trails that are considered in quality of life analyses are metrics such as the number of trail users and the frequency they use the facility, the level of use by commuters, and number of connections to schools. A 2017 study, for example, found that **bicycle commuting increased substantially between 2000 and 2010 in Minneapolis after the construction of 10 miles of paved paths**. The neighborhoods closest to the new paths and with the most commuting routes crossing the paths had the greatest increases in bike commuting rates.²⁴

Health and Wellness

The benefits of physical activity are well-known and active transportation modes provide many health benefits. In addition, indirect benefits can accrue to the local community and environment through the reduction of emissions from reduced vehicle use. Communities with access to safe routes for walking and bicycling have been documented to see beneficial impacts to overall health outcomes. Commutes by modes other than driving have been determined to increase in areas where trails are constructed in appropriate locations.

An Oregon State University study found that Oregon residents' engagement in one of 30 outdoor recreation activities in 2018 resulted in \$735 million to \$1.416 billion in cost of illness savings accrued to health insurers, providers, and participants.

Source: NRPA, The Economic

The U.S. Department of Health and Human Services reports that participating in moderately-intense physical activity an average of approximately 30 minutes per day (150 minutes a week) provides health protection from many chronic health conditions, including heart disease, stroke, diabetes, and others. In areas with significant trail infrastructure, the barrier is lowered for many people to meet a goal of 150 minutes of exercise per week. For instance, **the Northwest Arkansas Report estimated that cycling contributes \$86 million in total health benefits, \$79 million in reduced mortality benefits, and about \$6.8 million estimated benefit in avoided health care costs**. The report also established a forecast based on different scenarios of increasing the miles ridden by cyclists in the community. **It is estimated that for every 10% increase in miles ridden by northwest Arkansas residents,**

the community will see a benefit of one fewer death per year, resulting in \$8 million of reduced mortality benefits.²⁵

Access to Nature / Environmental Awareness

One of the opportunities that trails offer residents, visitors, and communities is increased access to natural areas and open spaces. **Many studies document the positive association between exposure to nature and improved mental and physical health.²⁶ Time spent in natural areas is also associated with a higher concern for protecting wildlife, natural lands, and the environment.²⁷** An intended goal of the proposed Collier to Polk regional trail system is to connect users to parks, preserves, and conservation areas with the purpose of increasing awareness and appreciation of the region's natural environment.

Projects like the Katy Trail serve as good examples of how to effectively highlight the natural and physical environment. The Missouri Geological Survey and Arizona Geological Survey partnered to create the Kay Trail's online story map that emphasizes geologic and cultural features. This effort even leverages use of a mobile app for geoscience, Flyover Country which is funded by the National Science Foundation, to provide interactive access to information about landscape features and more.

Conclusion

Facilitating and encouraging active transportation provides cost-effective and beneficial impacts to transportation, communities, and the environment. Trails can provide multi-faceted benefits to address the need for transportation choices, changing demographics, health concerns, and economic development. Trails can deliver potential benefits that well outweigh the initial cost to develop them. Communities beyond major urban centers are ambitiously pursuing and enjoying the benefits of trails, sidewalks, and active transportation facilities.

Florida is making investments in these projects through efforts like SUN Trail and the Florida Greenways and Trails Program. Federal resources have also been important under programs such as Transportation Alternatives and Safe Routes to School. Many local communities throughout Florida have invested in trails through standalone or matching funding.

Nonetheless, it remains critical for agencies to clearly articulate and communicate the need for public investment in trails, especially with the scale of a project like the proposed Collier to Polk regional trail system. The information included in this scan helps to explain why such investments are beneficial.

It is relevant to note that **some of the most successful trail funding and development efforts in Florida have been led by project champions.** Projects like the West Orange Trail and East Central Florida Regional Rail Trail, and even establishment of the SUN Trail program are just a handful of the efforts that have been advanced through the driving force of project champions. As the proposed Collier to Polk regional trail system moves through planning and beyond, it will be useful to identify local and regional champions throughout the broader project area. Champions might be elected officials, business leaders, agency staff, or citizen advocates. It will be appropriate to identify people who can be long-term voices for the trail system and have the desire and collaborative approach to champion the effort moving forward. The Master Plan will also address the potential role of non-profit support or “friends” groups.

From the Great Allegheny Passage to the Katy Trail, major regional trail systems are not merely serving individual residents and visitors but are helping to transform communities and define regions. Contrary to a potential conception that trails are most important to metropolitan areas, they can have particular value as an economic strategy for small towns and rural regions, especially when planned in close partnership with local municipalities. **This scan suggests that the effort to plan and undertake development of a project like the proposed Collier to Polk regional trail system would likely yield many enduring benefits to the areas that it would ultimately traverse and connect.**

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