



# The Monon South Trail

## Economic Impact Projection



**EPPLEY CENTER FOR PARKS  
AND PUBLIC LANDS**

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Monon South Trail  
Economic Impact Projection Final Report  
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## Executive Summary



*Image Credit: Radius Indiana / Monon South Trail*

In partnership with Radius Indiana, the Eppley Center for Parks and Public Lands initiated a project to evaluate the potential economic impact of the Monon South Trail via an Economic Impact Projection project that would identify, quantify, and summarize the potential economic opportunities and benefits of the trail.

There are four components of the Economic Benefit Analysis project. First, a review of literature provides a holistic understanding of the benefits of rail trails, summarizing and categorizing findings. Second, the evaluation of economic outcomes in similar communities is discussed through a comparative case study. Third, the perceived opportunities of the MST were identified through three listening sessions held with targeted community members in towns along the trail. Finally, the potential economic impact of the MST on local communities was quantified, by examining the identified impact of seven comparison trails, including four in the state of Indiana. The calculated projected economic impact was primarily based upon non-local trail user as the primary driver of local economic development via “new” money entering and circulating within the community.

While motivations for constructing rail trails range from recreation, improving health, and transportation to economic development through tourism, this project focused on economic benefits. The communities along the MST route are home to a variety of events and amenities that, combined with the trail, may help draw visitors to the area. Some of these features are summarized and recommendations made on how to best capitalize on these assets to draw new trail users into MST trail communities.

In general, long-distance trails provide economic benefits by drawing travelers on the trail into communities where they spend money on lodging, food, local attractions, gift shops, and other items, and by increasing nearby property values (Wolter et al., 2018, Lipscombe & Geddis, 2000). In conducting this economic benefits project, the project team evaluated and synthesized multiple forms of data (i.e., summative/synthesis, qualitative, quantitative) to wholistically describe the potential economic effects to a wide variety of interested parties, including local residents, elected officials, community leaders, and current and prospective business owners.

In addition to a review of the literature and related economic studies, a series of three stakeholder listening sessions were held in support of the Monon South Trail economic benefit project. These meetings brought together civic and business leaders to generate feedback about the amenities they believed currently add value to their town as well as potential amenities that would both benefit the community and attract trail visitors. Two sessions were held in person, and one session was held virtually. A recurring theme in these discussions was the need for additional lodging across sites. There was also a significant desire for eateries – every town mentioned a sports bar/microbrewery as a desired amenity – and a recurring interest in spurs and connections to various already existing features – other trails, natural and cultural resources, and even schools.

Most of the trail specific amenities that were mentioned incorporated historical and/or cultural elements of the area. For example, there were several mentions of incorporating the region's cultural history (particularly railroad history) and natural history into business, development, and trail enhancement opportunities; interpretive panels along the trail were identified as desired amenities in every focus group. The potential amenities identified by listening sessions participants should be interpreted as opportunities for investment to prospective business owners, entrepreneurs, and business/economic development organizations.

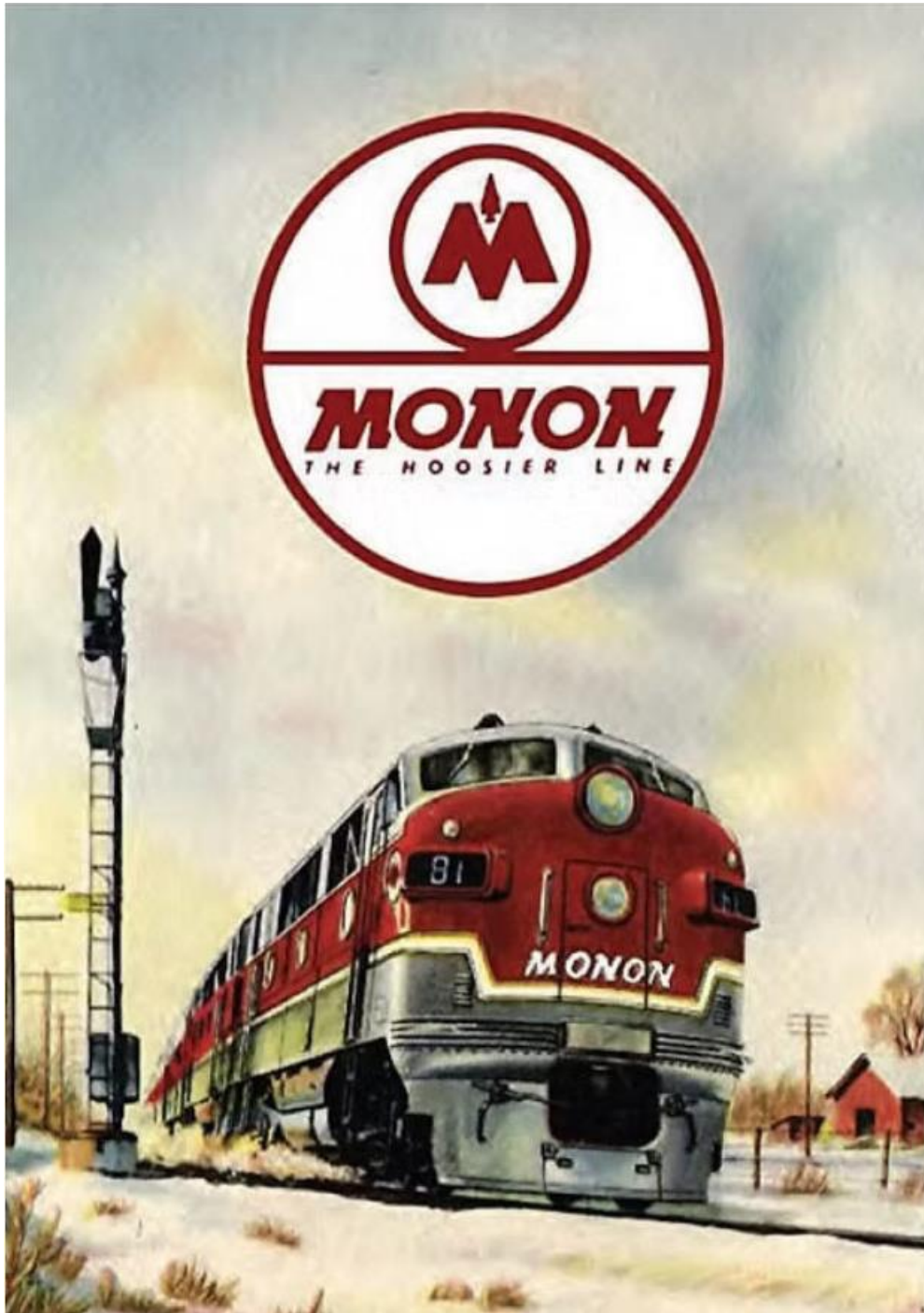
The economic impact projection utilized a general model economic impact from the key metrics of the (1) number of trail users, particularly non-local users; (2) average daily user spending; and (3) the capture rate of dollars spent in the local area and multipliers. Relevant measures from similar organizations or results of other studies were used as proxies to project anticipated ranges of key measures. This is particularly relevant given that the Monon South Trail is under development and does not yet have regular or consistent visitor counts.

Our findings for the Monon South Trail indicate that these users are expected to range between 25,000-93,000 non-local users annually, representing 22-30% of all users, while local visitors are likely to account for 70-78% of trail users who use the trail to achieve health and wellness (physical and mental), recreational, and community benefits. Per day, non-local users are expected to spend \$42-103 in spending categories such as meals, shopping/entertainment, transportation, and lodging. Collectively, this will result in \$34,200-\$111,400 annual spending per mile of trail. As a result, given the trail's projected total planned length (62 miles), the total projected spending among this group is expected to range from \$2,083,000-\$6,433,000, after adjusting for inflation.

Ultimately, after accounting for capture rate and multipliers, the projected range of economic impact is \$2,120,000-\$6,909,000. These projections align with published findings that demonstrates that rail trails drive positive economic impacts and that non-local and overnight users, in particular, comprise the highest spenders (S.E. Group, 2019, Synergy Research, 2012; Williams, 1994, Schwecke, 1989).

The findings of this Economic Impact Projection illustrate the well-documented community benefits of long-distance recreation rail trails and underscore the significant economic potential of the Monon South Trail. By attracting non-local users, the trail is expected to generate substantial economic impact annually. Additionally, conversations with civic and business leaders highlight opportunities for investment in amenities that align with local heritage and visitor interests. As demonstrated by comparable rail trails, development and promotion of the MST can maximize these benefits, supporting both economic growth and community wellbeing. With continued planning and investment, the MST has the potential to become a key driver of economic development in the region.

## Introduction



*Image Credit: Radius Indiana / Monon South Trail*

In early 2024, Radius Indiana reached out to the Eppley Center for Parks and Public Lands, seeking partnership for a new project that would conduct systematic research and analysis of the economic benefits, contributions, and opportunities presented by the construction of the Monon South Trail.

The Monon South Trail (MST) is an under-development 62-mile rail trail, spanning a distance between Mitchell, Indiana, and the border of Clark-Floyd counties. Encompassing eight communities across the “Uplands” region of southern Indiana (Lawrence, Orange, Washington, and Clark counties), the MST project seeks to connect towns, landscapes, populations, recreation facilities, and vistas across the Uplands. Previously, in 2023, an Eppley Center project team supported and led the development of five, 5-year park and recreation system master plans for the towns of Borden, Mitchell, New Pekin, Orleans, and Salem, all of which connect along the MST. Park system master plans support the management of park systems by describing current recreational assets, garnering community input on current and prospective park and recreation system features, and guiding future planning.

The current extension of the project, “Monon South Economic Benefits Project” seeks to expand upon this previous work through an evidence-based lens, featuring an in-depth investigation into the potential economic benefits and effects associated with multi-use rail trails. This inquiry aligns with extant evidence that recreational trail tourism drives economic activities; in fact, the work by Lukoseviciute et al. (2022) suggests that in comparison to other recreational activities like wildlife viewing, “recreational trail tourism might be number one in output generation and number two in job creation” (p. 382). In investigating these prospective outcomes, this project seeks to better inform MST stakeholders about the economic opportunities associated with the new trail.

Radius Indiana is a regional economic development organization serving as a catalyst for government, business, and academic collaboration. It markets and promotes southern Indiana as a highly competitive, vibrant ecosystem with an increasingly attractive quality of life.

## Methods



*Image Credit: Indiana Department of Natural Resources*

The overarching objective of this project was to examine economic opportunities and outcomes associated with the future Monon South Trail by identifying, quantifying, and summarizing the potential economic benefits of the Monon South Trail along its entire 62-mile length. Attainment of this objective included the examination of the following components:

1. **Review of Economic Benefit Literature** – Describe economic benefits of rail trails holistically, based on a literature review that summarizes and categorizes findings descriptively in the areas of rail trail and user characteristics as well as economic impact methodologies and results.
2. **Comparable Community Outcomes** – Evaluate economic outcomes associated with rail trails constructed in similar communities by conducting a comparative case study.
3. **Community-Identified Opportunities** – Identify perceived opportunities of the MST among targeted community members through a listening session approach.

4. **Quantify Potential Economic Impact** – Examine the potential economic impact of the MST on local communities via an economic impact approach.

In conducting this economic benefits project, the project team sought to evaluate and synthesize multiple forms of data (i.e., summative/synthesis, qualitative, and quantitative) in order to wholistically describe the potential economic effects to a wide variety of interested parties, including local residents, elected officials, community leaders, and current and prospective business owners. Table 1 provides a detailed summary of this design plan.

**Table 1**

*Analysis Approach & Findings Summary*

Objective Component	Analysis Approach
<p><b>1. Review of Economic Benefit Literature</b> Describe economic benefits of rail trails wholistically, based on a literature review that summarizes and categorizes findings descriptively in the areas of rail trail and user characteristics as well as economic impact methodologies and results.</p>	<p>Summative (narrative) literature review in three identified sections</p>
<p><b>2. Comparable Community Outcomes</b> Evaluate economic outcomes associated with rail trails constructed in similar communities by conducting a comparative case study.</p>	<p>Mixed-method comparison of similar rail trails, predominantly relying on available secondary data</p>
<p><b>3. MST Community-Identified Opportunities</b> Identify perceived opportunities of the MST among targeted community members through a listening session approach.</p>	<p>Qualitative narrative of key themes identified in listening session proceedings</p>
<p><b>4. Quantify Potential Economic Impact</b> Examine potential economic impact of the MST on local communities via an economic impact approach.</p>	<p>Mixed-method, employing an identified approach to understand the potential economic impact of the MST. Supplemented and put in context with findings from other objective components (particularly the literature review and comparative case study)</p>

## Approach

### 1. Review of Economic Benefit Literature

There is a substantial amount of research, both scholarly and applied, on the topic of multi-use rail trails. In this first part of the project, a literature review summarizes and categorizes the economic benefits of trails. This literature review examined three topics: (1) Descriptive evidence of rail trail characteristics and users that may inform future economic growth opportunities in the MST region, (2) methodologies for evaluating economic impact of recreational trails, and (3) published results of those previously conducted economic models or outcomes association recreational trails, which will inform the project team's efforts in meeting objective component #4 by confirming the reliability of results to other documented findings (*Quantify Potential Economic Impact*).

The first component of the literature review identifies descriptive evidence that would inform the MST communities about the prospective user base. For example, research indicates that recreational trail use is roughly equal among men and women (Bichis-Lupas & Moisey, 2001; Wolter et al., 2017) and in a systemic review encompassing 62 studies on rail trails, at least half indicated cyclists (56%) and/or walkers (52%) as a predominant user group (Scherrer et al., 2021). Other relevant data in this part of the literature review is identifying other user metrics, such as identifying patterns in the split of local resident and non-resident use, visitor spending by category, and more. For example, one study by Manton et al. (2016), found that day trip users predominantly spend money on gasoline and food/drink (39% of spending), gasoline (33%), and bike rentals (13%). To that end, the literature review also sought to understand local vs. non-resident use, as non-local visitors' expenditures are important both because they tend to spend more and because they represent "new money" entering the local economy. Literature findings like these are summarized in the Review of Economic Benefit Literature section of this report to better understand the potential MST user group.

There are several approaches for assessment of economic impact of trails; in the second component of the literature review, the project team identifies best practices for evaluating long-distance trails (spanning several counties), taking into account factors such as ease of use, accuracy, effectiveness, affordability, relevance, and economic sectors included. Known models evaluated in this section of the literature review include models such as the (Input-Output) I-O model, Social Accounting Matrix (SAM) model, and the Rail-Trail Impact Assessment Method (RTIAM). As part of this literature review section, approaches for conducting these analyses for use in part four of the project are identified.



*Image Credit: Radius Indiana / Monon South Trail*

Finally, economic outcomes associated with trails are generally well documented and go back for more the 30 years, although some literature indicates that data is more limited for trails in rural and less developed areas (Lukoseviciute et al, 2022). By exploring literature from reputable and relevant sources, the project team identified economic impact metrics by which to compare results of the project’s MST economic impact modeling (during objective component #4). For example, in Manton et al.’s (2016) study of international greenway users, they found that, in today’s dollars, the average day user spent \$23.78 and overnight trip user spent \$259. However, in the literature review and in conjunction with objective component #2 (*Comparable Community Outcomes*), the project team sought to identify results from comparable cases, as the Manton et al. (2016) study centered on a convenience sampling approach of international trail users.

## 2. Comparable Community Outcomes

Another source of comparative data is specifically identifying and evaluating a set of relevant case studies to inform potential economic outcomes for the MST. These case studies employ both descriptive and explanatory approaches, wherein the descriptive approach seeks to describe each case with sufficient contextual details and the explanatory approach seeks to understand cause-and effect relationship (i.e., contributing

factors to other trails' usage or economic outcomes; Hancock & Algozzine, 2017). These case studies describe each rail trail context, particularly its relevant people (i.e., stakeholders, organizations), places (trailhead, features, and length), events (particularly community events that take place on or incorporate the trail), and other trail outcomes (Hancock & Algozzine, 2017).

This portion of the project identified several comparable existing rail trails for mixed-method comparison (i.e., both quantitative and qualitative comparison). A moderate number of cases allows for a thorough examination of each case while still enabling meaningful comparisons across different contexts. Identifying and comparing the under-construction MST with existing rail trails in similar regions (e.g., rural, small, Midwestern) facilitates identification of patterns across cases that would be relevant to the MST (Goodrick, 2014).

Although the project team collected some primary data via community listening sessions, the case study project prioritized use of documented secondary data sources. To this end, local case studies sometimes result in incomplete or unavailable data. During case identification, analysis, and reporting, the Case Study section of this report describes existing study limitations and methods to supplement with contextual data.

### 3. Community-Identified Opportunities

The third objective component identified perceived opportunities of the MST among targeted community members through a listening session approach. Together with Radius Indiana project leads, listening sessions were conducted with local community, civic group, and business leaders to discuss ideas, options, and thoughts about economic and community improvement opportunities related to the trail.

The Eppley Center conducts listening sessions similar to the process of focus group mediation, although in a more approachable fashion. Listening sessions are helpful to understand collective and discordant views, as well as the meaning behind these views (Gill et al., 2008). This group meaning-making process supports identification of patterns in thinking and examination of controversial issues; it also provides an opportunity for targeted groups to express their views on a topic or set of circumstances (Dilshad and Latif, 2013). Listening sessions were facilitated by an Eppley project team moderator (Gill et al., 2008).

The first set of listening session questions were arranged to move from general to specific, and from the topic of most importance to less important topics (Gill et al., 2008). Strong

questions are generally open-ended and of a qualitative nature, rather than those that can be answered in a binary (simple yes/no) manner (Dilshad and Latif, 2013). The ideal size range of a group is between six and twelve members, and participants were selected purposively rather than randomly (Dilshad and Latif, 2013). During the course of the listening session, facilitator(s) asked questions and observed rather than participating in the discussion actively, steered conversation back on topic as necessary, and prevented dominance by particular group members by encouraging all participants to contribute to the conversation (Gill et al., 2008).



*Image Credit: Radius Indiana / Monon South Trail*

Strengths of listening sessions include understanding of nuanced viewpoints and experiences of the participants (Gill et al, 2008); they generate rich data with minimal time investment by participants (Dilshad and Latif 2013). In contrast to individual interviews, they may result in valuable information from the interaction between the participants. For this reason, they are potentially more inclusive of members who may be reluctant to be

interviewed alone (Gundumogula, 2020). A limitation of this approach is that results are generally descriptive of the group participants, rather than generalizable to the general population. Still, group sessions are an affordable, flexible method of research that can be used to strengthen results garnered from quantitative data collection methods (Gundumogula, 2020). In the case of the MST project, which primarily evaluates quantitative data, they facilitate a wholistic understanding of potential economic benefits to the region.

#### 4. Quantify Potential Economic Impact

Finally, the last component of this project utilizes many elements of the prior project components to evaluate the potential economic impact of the MST. This step utilizes previous findings—particularly the second section of the literature review, which evaluates economic impact techniques for ease of use, accuracy, effectiveness, affordability, relevance, and economic sectors—to inform an approach for evaluation of the MST. This component compares the MST’s identified, potential economic impact with that of other studies in order to better understand the validity of results. However, a limitation of this approach is the lack of primary data, i.e., economic impact analyses of rail trails generally survey their trail’s users; this data is out of scope and unavailable (trail construction is not complete). As a result, this component of the project will focus on identifying potential economic impacts based on comparative case study data of other trails.

# 1. Review of Economic Benefit Literature



*Image Credit: Radius Indiana / Monon South Trail*

## Characteristics of Long-Distance Trails

Long distance trails come in a variety of forms. The Monon South Trail is a “rail trail,” meaning it is being constructed along the route of an abandoned rail line as opposed to new terrain construction. In this case, the former Monon rail line that ran through the entire length of the state of Indiana from Chicago, Illinois, to Louisville, Kentucky. Rail trails tend to be paved, flat, and straight with fewer changes in elevation and direction than new terrain or nature trails, which tend to meander more or follow the contours of the land and intentionally pass by natural features such as scenic vistas or lakes. Rail trails are typically characterized by substantial length and passing through various regional landscapes and communities that were served by the former rail line (Taylor, 2015). Motivations for

constructing rail trails range from recreation, improving health, and transportation to economic development through tourism.

Trails are expected to be economic drivers by drawing travelers on the trail into communities where they spend money on lodging, food, local attractions, gift shops, and other items, both necessary and optional, and by increasing nearby property values (Wolter et al., 2018, Lipscombe & Geddis, 2000). There are three ways to measure this economic impact – direct effects of spending, indirect effects, and induced effects. Direct effects are the actual dollars spent by tourists in their transactions. Indirect effects are the secondary spending done by the businesses where tourists spend money, largely to the suppliers of these businesses. The induced effects of tourism spending include the increased consumer spending by employees of these businesses. The more of that spending that occurs within the local community, the larger the induced effects. A sophisticated analysis model will calculate a multiplier that incorporates an estimate of the number of times indirect and induced spending will be re-spent through the community until its effects are no longer felt, creating a formula that can be applied to direct spending and measure economic impact.

While actual dollars of the economic impact of trails vary greatly, there is often a clear impact. Economic impact study results have ranged from \$1.6 million annually on the 35-mile Virginia Creeper Trail in Virginia (\$45,714 per mile) with an estimated 27 jobs created to \$131.8 million on the 262-mile Yellowstone-Grand Teton Loop in Wyoming (\$503,053 per mile) with over 1,500 jobs created (Depew & Smith, 2023).

## Trail Usage and Tourism

To estimate economic activity by trail users, it is important to understand who trail users are, their motivations for using the trail, and how they use the trail. Tables 2 and 3 compare usage and demographic information on the users of several trails which are similar to the Monon South Trail and are used for analysis throughout this project. Three of these trails are also rural, long-distance trails in Indiana – the Cardinal Greenway, the Pumpkinvine Trail, and the Nickel Plate Trail. Of note, the Nickel Plate Trail referenced in this report refers to the trail that transverses Kokomo to Rochester and was included as part of the 2017 Indiana Trails Study (Wolter et al., 2017).

**Table 2***Trail Usage and Demographic Data*

Trail <sup>1</sup>	Year of Study	Annual Users (est.)	Visitor/Local Resident (est.)	Demographics				
				Male	Female	Under 35	35-65	Over 65
Heritage Rail Trail	2022	264,000	23% Visitor <sup>2</sup>	53%	47%	15%	57%	28%
Missisquoi Valley Rail Trail	2019	80,000	20% Visitor	N/A	N/A	N/A	N/A	N/A
Cardinal Greenway	2017	30,000	30% Visitor	56%	44%	8%	63%	29%
Pumpkinvine Trail	2017	108,000	26% Visitor	58%	42%	15%	55%	30%
Nickel Plate Trail	2017	23,000	29% Visitor <sup>3</sup>	64%	33%	14%	61%	25%
Katy Trail	2012	500,000	67% Visitor <sup>4</sup>	75%	25%	*5		

<sup>1</sup> Annual Users estimate for the Cardinal Greenway and Nickel Plate Trail were projected based on seasonal counts reported for some months of the year and adjusted based on estimating four months of peak use (summer); four months of moderate use, and four months at low use. See section “4. Economic Impact Project: Methods” for additional explanation.

<sup>2</sup> Visitors are defined as residents outside York County.

<sup>3</sup> Visitors are defined as those travelling more than 7 miles to use the trail.

<sup>4</sup> Visitors are defined as living 30 or more miles away.

<sup>5</sup> Age bracket information was not reported – only an average age of 52 for all users surveyed.

**Table 3***Trail Activities and Motivations*

Trail	Primary Activity			Primary Motivation		
	Biking	Running	Walking	Physical Activity	Recreation	Transportation
Heritage Rail Trail	39%	12%	29%	72%	26%	>1%
Missisquoi Valley Rail Trail	N/A	N/A	N/A	N/A	N/A	N/A
Cardinal Greenway	66%	13%	22%	63%	15%	>1%
Pumpkinvine Trail	72%	12%	16%	64%	21%	3%
Nickel Plate Trail	59%	18%	23%	65%	13%	2%
Katy Trail	84% <sup>6</sup>	9%	20%	N/A	N/A	N/A

The economic impact and visitor use data collected and reported for these trails differs but by looking at this group in aggregate, patterns emerge about the type and frequency of usage that can be anticipated on the Monon South Trail. These variations and explained in the footnotes. Missing data in the tables indicated a data point that was not measured or reported. Spending and economic impact of some of these trails are illustrated more in the Comparative Case Studies section of this report.

Of note, with the exception of the Katy Trail (67%), all trails in this user analysis estimate between 20% and 30% of users are out-of-town visitors. The remainder are local residents. A significant majority of trail users are male (53%-75%) and between the ages of 35 and 65 (55%-63%). A surprisingly low number of trail users are under 35 and a surprisingly high number are over the age of 65.

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<sup>6</sup> “Primary” activity was not surveyed; all activities on a single visit are included, resulting in a total of greater than 100%.

The most common activity on long-distance trails is biking with as many as 84% of Katy Trail users saying that they biked. Bicycling as a primary activity averaged 66% of users on the Indiana trails in this analysis. The primary motivation for trail users on all trails is physical activity (63%-72%). And use for transportation is almost non-existent.

The Indiana Trails Study, which included the Cardinal Greenway, Pumpkinvine Trail, and Nickel Plate Trail, asked trail neighbors, or local residents who live near the trail, how they used the trail with 71% saying walking was their primary activity and 15% said biking (Wolter et.al., 2018). Given this vast difference in usage between residents and all users, it is reasonable to conclude that the primary motivation of local residents for using their local trail is physical activity, leaving a sizable portion of out-of-town visitors whose main motivation is recreation, including tourism.

Given this data, a picture of the type of trail user Monon South communities can expect becomes clearer. 20-30% of trail users will be out of town visitors with the average of these visitors being on a bicycle, male, between the ages of 35-65, and travelling long distances if not the entire length of the trail on their trip. Understanding this typical visitor profile should help clarify their desires as visitors and tourists and their potential spending behavior.

While local residents may use the trail more often for physical activity and transportation purposes, they are far less likely to have significant economic impact on the community without the need for lodging or many other services and less likely to eat at restaurants while on the trail. Bicyclists and thru-hikers are far more likely to stay overnight, eat at restaurants, visit local attractions, and drive economic impact.

## Amenities and Attractions

In addition to understanding who is visiting, it is important to understand why the typical trail tourist is visiting to be able to fully cater to their needs and, in the process, maximize their economic impact. Tourism on rail trails tends to be driven by desire to experience regional scenic landscapes and the historical and cultural heritage of the region and communities (Blackwell, 2002). In addition to bicycling being the most frequent activity on rural trails comparable to the Monon South Trail (Taylor, 2015), thru-hiking is also increasingly popular as a trail activity. Thru-hiking signifies travelling the entire length of a long-distance trail in a single trip (Wilson, Hill, and Gomez, 2024) and potentially a more immersive way to experience a regional trail with different needs for lodging and supplies. The Appalachian Trail has seen an almost 70% increase in thru-hiking (Appalachian Trail Conservancy, n.d.) and the Pacific Crest Trail thru-hikers have increased almost 400% (Pacific Crest Trail Association, n.d.) since 2000.

Overnight visitors, particularly long-distance bikers and thru-hikers, spend significantly more than day trippers while using a trail. As a result, trails with more overnight trips have diverse lodging options, well-maintained restrooms, water, bike storage and tools located at local parks near the trail. (Depew & Smith, 2023). In addition, the largest single expenditure, comprehensive of all trail users is likely to be food, since all visitors need to eat at some point but not all visitors will stay overnight. The Indiana Trails Study found that visitors on predominately rural trails self-report spending an average of \$1,840 per year on food while they are using the trail (Wolter et.al., 2018) so a variety of restaurants would encourage spending. Other amenities that may draw long distance trail users to stop at a particular location include (benches, attractions, lighting, etc.) and locating restaurants and lodging near these amenities may encourage further spending due to convenience.

Attractions that highlight unique aspects of the community including historical and cultural heritage are important (Blackwell, 2002). These might include wineries, museums, unique downtowns or “Main Streets”, and local festivals. Prime examples of events that have the capacity to draw trail travelers to Monon South communities include the Orleans Dogwood Festival, Star Valley Strawberry Festival in Borden, Persimmon Festival in Mitchell, and New Pekin’s signature event, the oldest continuous 4<sup>th</sup> of July Celebration in the U.S.

## Signage

Clear and easily visible directional and informational signage as well as maps, both online and in print, are critical for directing tourists to local businesses, point of interest, and enhancing the overall experience of their journey and increasing their likelihood to spend money in the community. (Lamont & Causley, 2010, Beierle, 2011, Chung et al., 2011).



*Image Credit: Radius Indiana / MST*

Once off the trail, connections via side paths, sidewalks, or bike lanes with clear directional signage to local businesses or business districts lead to greater spending by trail tourists (Öner, 2017).

## Marketing and Branding

Consistency of branding and marketing efforts should enhance the experience for long-distance trail travelers. This should be a core mission of Southern Indiana Trailways.

Communication and promotions of the trail, as well as updates about maintenance and events, is most effective when done on social media or websites, (including local, regional, and state tourism web pages and social media accounts and a website and social media specific to the trail (Camp, et. al., 2016), such as for the Monon South Trail (<https://www.mononsouth.com>) and the managing Southern Indiana Trailways (<https://www.southernindianatrailways.org>). On some trails, over 80% of bicycle tourists stated they found out about businesses or attractions through the internet and social media (ECONorthwest, 2020). Signage and maps are also effective marketing tools for trail users, directing them to nearby lodging, shopping, and attractions.

## Management

The long distance of rail trails almost certainly means the trail will cross multiple boundaries, be it counties, towns or cities, and occasionally states, meaning many political jurisdictions will be involved in the administration of the trail. Coordination and collaboration by these jurisdictions are critical to ensure a consistent and positive experience for trail users. Collaboration of shared resources such as funding; trail maintenance; conflict management and law enforcement; consistency of branding; and coordinated marketing of the trail. In addition, each community contains various stakeholders who may have differing objectives and thoughts about usage of the trail and must be carefully managed not only locally, but in a coordinated way across the trail region to avoid conflict (Scherrer, et. al., 2020). Fortunately, upon completion, the trail will be managed by the non-profit Southern Indiana Trailways who should be in a position to help coordinate local jurisdictions to provide a consistent experience for long-distance trail users.

## Monon South Trail Nearby Events and Attractions

Long-distance visitors can have a substantial economic impact on trail communities by bringing new spending to local businesses and increased attendance. The following is a list of significant events and attractions along the Monon South Trail that may be of interest to these visitors and a brief overview of current promotional methods.

### Mitchell

#### *Persimmon Festival*

The Persimmon Festival takes place during the last week of September each year and is Mitchell's signature event. The festival kicks off with the annual Tri Kappa Candlelight Tour at Spring Mill State Park and has live music, food trucks, amusement rides, and a Grand Parade. The festival has its own website- <https://persimmonfestival.org/>- and Facebook

page and runs press releases on area radio stations and newspapers, and with listings on various regional tourism bureaus such as Limestone Country (Lawrence County Tourism). The City of Mitchell’s website appears to be under construction, so no information is available there.

### *Spring Mill State Park*

Spring Mill State Park is located approximately 3 miles east of Mitchell with nature activities, cave tours, hiking, mountain biking, and swimming, a restored Pioneer Village that dates back to the early 1800s and the Gus Grissom Memorial Museum honoring this famous and local NASA astronaut. The Spring Mill Inn is now open after extensive renovations with lodging and dining. A pedestrian connector is anticipated to be added from the Monon South Trail to the park. As an Indiana State Parks property, the park is extensively promoted through State of Indiana websites and other media, regional tourism bureaus, listings on travel sites such as Trip Advisor, and travel writers’ recommendations.

### *Gus Grissom Boyhood Home*

This museum dedicated to the life of Astronaut and Mitchell native Virgil “Gus” Grissom and is located in the house where he grew up. Grissom was killed when the Apollo 1



*Image credit: Layne Elliott, Epley Center*

Command Module caught fire during a pre-launch test in 1967 and memorials to him can be found throughout the city. The museum has its own website- <https://www.gusgrissomboymhome.com/> - and Facebook page and listings on travel sites such as Trip Advisor and various regional tourism bureaus including Limestone Country. Directional signage is located along various driving routes including Indiana State Road 37.

### *Mitchell Opera House*

Originally built in 1906 and completely restored in 2015, the historic Mitchell Opera House enjoys a rich tradition of community events, film screenings and live music entertainment. And is ideally located a mere three blocks from Mitchell's main Monon South trailhead. The Opera House has its own website and Facebook page, listing on travel sites such as Trip Advisor and regional tourism and economic development bureaus such as Limestone Country, and as a concert venue, listings on various ticket sale and resale sites.

## Orleans



*Image credit: Radius Indiana / Monon South Trail*

### *Dogwood Festival*

Each year, in late April, Orleans celebrates the spring blooming of the dogwoods with the Dogwood Festival. The event spans for over a week and includes a community walk and run, a carnival, art displays, live music, vendors, a chili cook-off, a murder mystery dinner, a parade, and multiple additional activities. The festival has its own website-

<http://orleansdogwoodfestival.com/> and Facebook page, listing on the Town of Orleans website's Events page, press releases on area radio stations and newspapers, and listings on various regional tourism bureaus such as Visit Indiana and Visit French lick West Baden.

### *Fall Fun Fest*

Held every fall in Congress Square, includes a 5K walk/run, Harvest Fair, classic car show, children's activities, corn hole, beer garden, live entertainment, food, more. Promoted on its Facebook page, press releases on area radio stations and newspapers, and with listings on various regional tourism bureaus such as Visit Indiana and Visit French lick West Baden.

### *Historic Congress Square*

The Historic Orleans Town Square, known as Congress Square, was part of the original town plat from 1815. Congress Square is an important community institution in Orleans, and a center of activity for educational, social, political, and business events. Congress Square is mentioned on the Town website's History section and the Historic Orleans website. The Square is also part of the Orleans Historic District listing on the National Register of Historic Places and has its own Indiana Historical Marker which is searchable on the Indiana Historical Bureau and other websites and databases.

### *Historic District*

Three sites in the town are listed in the National Register of Historic Places: Jenkins Place, the Shindler-Stetson House, and the Orleans Historic District. The Historic District is the site of 21 notable sites, all of which are included on a self-guided walking or driving tour of the area. The tour is listed on the Historic Orleans and Historic Orange County websites. A link to Historic Orleans can be found on the Town website's Events page.

## Salem

### *Old Settlers' Day*

The first Old Settlers' Days festival was held in 1875, and the tradition continues to this day. The festival is held during the fall on the grounds of the John Hay Center, centered around the Pioneer Village. Visitors re-enact the roles of early 1800s settlers throughout the village. There are also artisan and food booths, as well as musical performances. It is promoted through its Facebook page, the John Hay Center website, press releases on local radio and newspaper, and on some local tourism and economic development bureaus and the Washington County Chamber of Commerce.

### *LM Sugarbush Maple Syrup Festival*

This festival takes place during late February and early March each year, just after the maple trees have been tapped and syrup is in full production. The location is at a 140-acre family farm in Salem that has been in operation since 1981. The festival features food (pancakes, waffles, and barbecue), farm tours, live music, craft and food vendors, and other activities. The festival is mainly promoted through LM Sugarbush's website- <http://www.lmsugarbush.com/> and Facebook page.

### *The Depot Railroad Museum*

The Depot Railroad Museum reflects the history of the Monon Line, which was built through Salem in the 1950s. Inside the museum is antique furniture, railroad equipment, tools, signs, and advertisements. There are also a worker's motor car and a baggage wagon on display. In the museum basement is a historic model railroad of Washington County. The Depot is promoted through its social media pages, local directional signage, and listing on regional tourism bureaus such as Discover Southern Indiana.



*Image credit: Radius Indiana / Monon South Trail*

### *John Hay Center*

The John Hay Center is a collection of multiple facilities, a campus, of historical interest. The campus was dedicated in 1971 and is maintained by the Washington County Historical Society. Over the years, the campus has grown, and collections have been added, making it a destination for people who would like to learn more about the history of the Salem area. The campus includes the Stevens Memorial Museum, Pioneer Village, and John Hay House. The Center is promoted through its website – <https://johnhaycenter.org/> - and social media pages, directional signage throughout town, and listings on tourism bureaus such as Visit Indiana and Discover Southern Indiana and travel sites such as Trip Advisor. Events at the Center are also promoted with press releases in local newspaper and radio.

### *Lake Salinda*

Lake Salinda, 88-acres in size, is owned by the City of Salem. It is located just two miles south of the city. Fishing is popular at Lake Salinda, both in tournaments and for leisure. Additional activities available include walking/jogging trails, picnicking, and a summer day camp. The Lake is promoted through a page on the City of Salem’s website, listings on regional tourism bureaus such as Discover Southern Indiana, and Visit Washington County, and on fishing report and information sites such as Fishbrain.com.

### *Twin Creek Valley Preserve*

Located about eight miles northwest of downtown Salem and two miles east of Campbellsburg, the property is owned by the city of Salem and stewarded and maintained by the Nature Conservancy through a conservation easement. This natural area is dominated by a mesic oak forest and, because of its karst topography, features limestone glades, rock outcroppings, waterfalls, and aquatic caves. Hiking is available along an old road system that is closed to vehicular traffic but makes a loop through the park. The preserve is promoted through the Nature Conservancy’s website, the City of Salem’s website, and regional tourism bureaus such as Visit Washington County.

## **New Pekin**

### *4<sup>th</sup> of July Parade and Celebration*

This celebration has been going on annually since 1830 and is believed to be the longest-running Independence Day celebration in the United States. The 4th of July Celebration is historically and economically important in New Pekin, and remains a major event for the town, drawing 10,000 to 15,000 people to the area. The celebration includes a parade, music, games, speeches (sometimes by noted figures such as Congress members, governors, and college presidents), food, a carnival, contests, and more. Each year the

United States Declaration of Independence is read. The celebration has its own website- <https://pekinfourthofjuly.com/home> and Facebook page, listings on many state and regional tourism bureaus such as Visit Indiana and Explore Southern Indiana, press releases and feature stories on local and regional media outlets including radio, news sites, and television (Louisville, KY and Indianapolis). Large signs at the entrances to town on IN 60 announce New Pekin as the home of the celebration.



*Image credit: Radius Indiana / Monon South Trail*

### *Campbell-Gill House*

This historic home was built by James Campbell, a local entrepreneur, around 1863. It was built as an inn over a spring, with the intention of attracting guests interested in fishing. The inn was eventually converted into a single-family home. In the early 1870s, the annual 4th of July Celebration was held there. It was added to the National Register of Historic Places in 2019 and has a searchable listing. The house also has a brief listing on the John Hay Center (Salem) and Indiana Landmarks websites.

## Borden

### *Star Valley Strawberry Festival*

The Star Valley Strawberry Festival held at the Borden Community Park highlights the heritage and history of the strawberries which once were a major crop in the area. The festival moved to Borden and was renamed after many years of being called the Starlight Strawberry Festival and held in nearby Starlight, Indiana. Attended by 12,000 people annually. The strawberry festival is a regional festival that includes a 5K run/walk, craft booths, music, festival games, kids' bouncers, a build-your-own strawberry shortcake bar, and a variety of food. The festival is promoted through its Facebook page and the tourism directory on the town's website, listings and articles on travel sites such as FestivalNet.com and Southern Indiana Trip Ideas, and press releases with articles in local media outlets and regional television (Louisville).

### *Huber's Orchard and Winery*

Huber's Orchard and Winery is a significant tourist draw located approximately three miles south of Borden that should easily appeal to trail visitors. Huber's offers a winery, distillery, u-pick orchard, farm market, cafes, a Family Fun Park, live music, and an event venue for weddings and meetings. The winery and distillery have tasting rooms open year-round as is the event center. Huber's is well known throughout Southern Indiana and is promoted through its website- <https://www.huberwinery.com/>, social media pages, directional signage, billboards, traditional print and online advertising, and listings on regional tourism bureaus and travel site such as Trip Advisor.

### *Borden Community Park*

Borden Community Park is located in the eastern portion of town and ideally located adjacent to the Monon South Trail. The park is the event ground for several festivals and events. The park is 41 acres and is bisected by the Muddy Fork, a scenic creek crossed by a bridge constructed in 2022. The section north of the creek includes two basketball courts, small shelter, grass volleyball areas, four softball/baseball fields, pickleball courts and a large shelter, a playground and large open fields. Two miles of paved walking trails wind through the park and seating benches are scattered throughout. South of the Muddy Fork is a large open field, also surrounded by paved walking trail with a new amphitheater, grass and bleacher seating in the center. In October of 2023, Borden received a \$150,000 grant from Community Foundations of Southern Indiana to construct an ADA compliant playground and restrooms, which will involve reconstruction and expansion of the existing playground. Goals still exist for completion of the dog park and splash pad. The park is promoted on the town's website, the Friends of Borden Community Park Facebook page,

indirectly through promotions of various events held at the park such as the Star Valley Strawberry Festival, and with directional signage.

### *Star Valley Event Center*

The Star Valley Event Center is a planned multi-purpose facility to be constructed with funding from Indiana's READI grant program. The facility will sit on the south side of Borden Community Park next to the amphitheater. The Event Center will include internal/external restrooms, a kitchen/concessions area, a tourism office, and an event/meeting space. Together, the Event Center and Outdoor Amphitheater will support a calendar of year-round indoor and outdoor events.

### *Muddy Fork Reservoir*

This reservoir is planned and has recently received federal funding for engineering and design and is expected to be filled with water in the future. The reservoir will be located on the Dry Fork of Muddy Fork Creek approximately one-half mile east of town and just a few hundred yards from the trail. Once the reservoir is established, recreational activities are intended to be established and connections made to the Town and Deam Lake. New facilities may include camping, fishing, hiking, kayaking, canoeing and other water-related activities. Other facilities that may be included would be camping sites, utilities, parking, signage, a pavilion, dock, and a canoe launch. Once constructed, the reservoir will be a significant facility easily accessible by trail users looking for outdoor recreation experiences and should be heavily promoted.

## Regional

In addition to local events and attractions within trail communities, Southern Indiana is heavily forested and contains large scale natural properties owned by the Indiana Department of Natural resources, US Forest Services, and private entities which may be of interest to many trail users, enhancing their experience by offering additional outdoor recreation opportunities including camping and hiking and serving to draw them to spend more time in the area and return on subsequent visits. State and federally owned sites have extensive descriptions and their own pages on their parent agencies' websites as well as listings on travel sites such as Trip Advisor and tourism bureaus like Visit Indiana and other regional bureaus. Significant regional natural properties include:

### *Clark State Forest*

Clark State Forest is located due northeast of Borden and east of New Pekin. It was established in 1903 and is Indiana's oldest state forest. Recreational activities include

hiking, camping, picnicking, boating and fishing at seven lakes within the forest, hunting, and a shooting range.

#### *Deam Lake State Recreation Area*

Deam Lake is located about 12 miles to the east of Borden and New Pekin. The lake itself is 194 acres in size. It is managed by the Indiana Department of Natural Resources (IDNR). Besides the lake, the Recreation Area includes a campground and multiple trails. The lake was constructed in 1965 and features camping, hiking, boating, fishing, and swimming with cabins available for rent.

#### *Hoosier National Forest*

Hoosier National Forest is a large Federal property covering much of south-central Indiana with units just west of Mitchell and Orleans. The recreation amenities at Hoosier National Forest include hiking, biking, and equestrian trails; camping; and fishing at nearby Monroe Lake in Monroe County. The 13,000-acre Charles C. Deam Wilderness Area, part of the Forest, is in the southeastern part of Monroe County and adjoining counties.

#### *Bluespring Caverns*

Bluespring Caverns is located southwest of Bedford and approximately eight miles northwest of Mitchell and the current western terminus of the Monon South Trail. The caverns are open from March through October and is home to the longest navigable underground river in the U.S. It offers boat tours, a hiking trail, and a picnic shelter. Bluespring is promoted through its website – <https://www.bluespringcaverns.com/> and Facebook page, directional signage and billboards, traditional print and online advertising, listings on regional tourism bureaus and travel sites such as Trip Advisor and is extensively written about by independent travel reviewers.

#### *Cave River Valley Natural Area*

Cave River Valley Natural Area is located about 13 miles northwest of Salem and two miles north of Campbellsburg. The area, 315-acres in size, is managed by Spring Mill State Park in partnership with the Fish and Wildlife Division, the Nature Conservancy, and the Division of Nature Preserves. Cave River Valley is considered a primitive site, with no marked trails. Guided hikes with naturalists are offered for visitors to explore the property. Cave tours are also available, as is unguided cave exploration with proper permits. As a unit of Spring Mill State Park, the area is described on the Park's website. It also has listings on some regional tourism bureaus such as Visit Washington County and articles and blog posts on various travel sites such as AllTrails, Visit Indiana, and the Indiana Karst Conservancy.



*Image credit: Radius Indiana / Monon South Trail*

## Recommendations

Almost all of these facilities are well known locally and well promoted within their respective communities. Many are also featured by regional travel bureaus and travel blogs and websites. Expanded marketing and promotional efforts should focus on drawing non-regional visitors to the area through a coordinated effort that highlights the unique attractions along the trail route.

Consistency of branding and marketing efforts should enhance the experience for long-distance trail travelers. This should be a core mission of Southern Indiana Trailways. Communication and promotions of the trail, as well as updates about maintenance and events, is most effective when done on social media or websites, (including local, regional, and state tourism web pages) and social media accounts and a website and social media specific to the trail (Camp, et. al., 2016).

Currently, most of these events and attractions have only a Facebook page, if any social media presence at all. Social media forums can quickly rise and fade in popularity with many of them targeting and appealing to specific audiences. Facebook is heavily used by some demographic segments but less used by others. Alternate social media such as Instagram and YouTube, generally used more by younger people than Facebook, should also be utilized and frequently coordinated to tie together attractions and events into a

regional draw that creates appeal for the entire trail route and communicates to more varied demographic groups. Most trail communities have a Facebook or other social media page that announces local events. These pages, the main Monon South social media pages, and the pages of events and attractions should share, like, and tag each other's related posts to increase exposure and paint a rich picture of activity and attractions along the trail that is enticing to potential visitors. It would be advisable for Southern Indiana Trailways to designate a social media manager to coordinate and assist all entities in this cohesive social media campaign.

The Monon South website, <https://www.mononsouth.com>, currently utilized for project and construction updates and providing information about the communities along the trail route, should become the "nerve center" for promotional efforts by maintaining an events calendar that includes festivals and celebrations and other happenings in trail communities along with a comprehensive list of attractions that may appeal to visitors. The site could also add a news feed that includes articles written about the trail and trail communities, focused on travel writers and bloggers. Southern Indiana Trailways also has a website, <https://www.southernindianatrailways.org>. Since a web search for the trail will place [mononsouth.org](https://www.mononsouth.com) at the top of search results and is the most likely place web searchers will look for information, [southernindianatrailways.org](https://www.southernindianatrailways.org) should become the main project update website while marketing and promotions should be the main function of [mononsouth.com](https://www.mononsouth.com).

Clear and easily visible directional and informational signage on the trail as well as maps, both online and in print, are critical for directing tourists to local events, businesses and points of interest. The signage should be branded and consistent across communities.

## Methodologies for Evaluating Economic Impact of Long-Distance Trails

There are several approaches for assessing the economic impact of recreational trails. Approaches vary depending on the type of trail and assessment factors such as ease of use, availability of data, accuracy, effectiveness, affordability, relevance, and economic sectors included.

### Data Sources & Measures

Most economic impact studies are initiated after a trail has been opened and is under active use. This facilitates analysis using real user data. Metrics frequently employed in analyses with respect to direct user spending include "hard goods," "soft goods," and overnight spending, in addition to demographic and trail use characteristics (Rails-to-Trails

Conservancy, 2005). Examples of demographic and trail use characteristic measures frequently collected include user age, gender, purpose of trip, distance traveled, origin and destination as well as stops made along trail, frequency of use, residency status (e.g., local vs. out-of-town user) and daytrip vs. overnight use, among others (Oswald, 2015). Hard spending represents spending on long-term physical equipment, such as bicycles, clothing, and other sports and recreation gear. Soft spending includes short-term consumables such as water, food, and snacks. Using this method, York County Parks (Pennsylvania) conducted surveys approximately every five years, resulting in seven total analyses since 1999, allowing them to view changes in economic impact over time, viewing increases in visitation, spending, and number of businesses adjacent to the trail. Documentation of this methodology is readily available for other entities to replicate and use in their own trail economic impact assessments, resulting in a body of studies employing these methods (York County Parks, 2022; Oswald, 2022; Bowker, 2007).

Another similar approach is the Rail-Trail Impact Assessment Method (RTIAM) created by Oswald et al. (2015), which the authors applied to a case study of the Buffalo Valley Rail Trail in Pennsylvania. To explore the economic impacts of the Buffalo Valley Rail Trail, they used a survey of users to determine whether use of the trail influences expenditures on recreational goods or visits to local establishments (e.g., dining and food stands, farmers market, library, pool/park). Out-of-town visitors were asked the primary purpose of the visit to the area, whether the visit involved an overnight stay in a hotel (and if so, how many nights and estimated spending per night). To capture the potential economic value of the trail to local users, the survey also included a willingness-to-pay question, which asked how much users would be willing to pay in increased property taxes for a hypothetical expansion to the trail. Although spending in this case was not separated by hard and soft goods spending, this method is similar to that of the Rails-to-Trails Conservancy and is relatively easy and cost-effective to implement.

Another category of economic impact measures is indirect economic impacts; however, measures in this category are less common, although not infrequently, applied. The concept behind indirect impacts is that any initial spending has a ripple effect throughout the broad economy. Indirect economic impacts often feature the use of known multipliers (Oswald, 2015). A multiplier is a ratio of total effects to direct effects, allowing for the inclusion of secondary effects that represent the economic impact of a trail beyond the local impact (Archie, 2024). A multiplier uses a formula to account for the population density of the greater region and/or state. Another example of indirect impact evaluation was deployed by the Great Allegheny Passage Conservancy (2021). In that study, researchers estimated “induced benefits,” which they define as regional household spending from income generated by direct and indirect benefits. As opposed to using a

multiplier, they used specific data for industry-specific spillover, i.e., estimates of the spending from employees and business owners operating in “trail adjacent” industries. In both cases—indirect impacts using methods such as multipliers or induced impact calculations—the validity of the results can become harder to substantiate due to the underlying assumptions and their impact on the purported economic impact.

Other forms of data include publicly available data, such as the U.S. Census Bureau and Bureau of Labor Statistics’ Longitudinal Employer-Household Dynamics (LEHD) program data, which provides geographically detailed employment information by industry and tracks changes over time. This form of data is particularly useful for longitudinal analysis because it indicates local employment in a geographic area and can demonstrate changes over time (i.e., before and after the construction of a rail trail; Great Allegheny Passage Conservancy, 2021).

### Data Collection Methods

Beyond the types of data and measures frequently evaluated in a rail trail economic impact study, the variety of methodologies also warrant attention. Many methodologies rely upon an assumption that the trail is open with active users. Data is frequently collected via trail use surveys, wherein users are intercepted along the trail and asked questions about themselves, their trail use, and spending. Intercept surveys not only reduce attrition and reduce researcher-participant “distance” in the data collection process (i.e., unfamiliarity with the study or research team), but also because “direct mail, email and web-based survey methods.... require a previously existing database of trail users” in the community, and they typically cannot identify out of town visitors well (Rail-to-Trails Conservancy, 2020). In all data collection strategies, but particularly intercept as it often unexpectedly interrupts a participant, it is important to adhere to the project’s outlined objectives and avoid lengthy surveys.

Another frequently employed data collection method is automatic or manual counts of users. This can be used not only to identify counts during active data collection periods, but also allows for extrapolation to estimate user counts on other days of the week and times of the year. However, when conducting an analysis of count totals, it is important to consider not just day of the week and time of day but also temperature, precipitation, as well as seasonal changes in use (Oswald, 2015). Counts are frequently coupled with other methods; in the case of the Buffalo Valley Rail Trail in Pennsylvania, the research team conducted automatic and manual counts of trail users as well as surveys to determine trail demand and user spending (Oswald, 2015). To that end, methodologies like surveys and user counts can be conducted repeatedly to examine changes over time. York County Parks (Pennsylvania) has conducted surveys approximately every five years, resulting in

seven total analyses since 1999, allowing them to view changes over time and examine increases in visitation, spending, and number of businesses adjacent to the trail.

Other data collection methods include interviews or focus groups with targeted stakeholders, such as local business owners or municipal leaders. In addition to surveys, The Great Allegheny Passage (2021) report conducted interviews and focus groups with business owners and managers, asking such questions as, “Did you originally open your business to serve or sell products to people traveling on the Great Allegheny Passage?” (to which 44% of business in the trail’s “Impact Zone” answered “yes”).

Similarly, a 2001 report from West Virginia presents the results of a 10-month project that, in part, sought to inventory existing recreation opportunities in the Greenbrier River Trail corridor, such as 14 historic/cultural sites; 28 recreation areas, facilities and businesses; and a total of 87 lodging accommodations (i.e., in the forms of available lodging at cabins, bed & breakfasts, motels; Busbee, 2001). This exhaustive inventory was applied to a United States Geological Survey (USGS) 15-minute quadrangle map depicting the trail corridor and the amenities accessible from it. This type of recreational opportunity inventory may be particularly relevant to rail trail projects that are in proposal or development stages (i.e., do not yet have active users). Archie (2024) also emphasizes the importance of amenities—i.e., those place-based attributes that enhance a location as a place of residence, as research indicates relationships between amenities, quality of life, and economic performance, especially in rural areas. Amenities can be characterized in three ways, including (a) natural (e.g., scenic beauty, public lands, waterways, open space, wildlife), (b) rural character (e.g., atmosphere, social networks, community feeling), and (c) culture and heritage (e.g., historic sites, education and engagement opportunities, arts and cultural traditions and resources).

Similarly, relying on existing, published fundings of reputable institutions can provide context to rail trail policy or implementation. For example, the National Association of Realtors and National Association of Homebuilders conducted a 2002 study of more than 2,000 new homebuyers who had bought a primary residence in the past two years (Eastin, n.d.). According to an analysis published on American Trails, respondents indicated access to walking/jogging/bike trails as the second highest rated amenity following highway access as a factor that influenced their move to a new community. On that survey question, trail access out-ranked sidewalks on both sides of the street, nearby parks and playgrounds, shops within walking distance, and other proximate amenities such as golf-courses, club houses, or baseball/softball fields. Similarly, when posed with a series of statements, after “I wish my home were larger” (64% agreement), “I wish I could walk more places from my home” was the statement with the second-highest level of agreement

(27%) among respondents. Methodologies like these—surveying the public, households, or other defined groups—provide an opportunity for data collection regarding rail trails in lieu of an active and open trail in a community.

## Economic Impact Models

There exists a wide variety of models for evaluating the economic impact of rail trails. In a systematic review of recreational trail economic impact analyses, Lukoseviciute et al. (2022) concluded that input-output analysis (I-O) is the most suitable approach to study the economic impact of long-distance trails (i.e., roughly longer than 30 miles). In this model, analysis covers all economic sectors and uses visitors' total expenditures per economic sector as well as the contribution of the entire tourism sector, including its contribution to other sectors to arrive at an impact assessment at a regional level. Software such as IMPLAN (IMpact analysis for PLANning) can complete this analysis, pooling relevant databases and conducting the I-O model calculations. Notably, several other studies have employed this model in the context of recreational trails (e.g., for the Virginia Creeper Rail Trail, several trails in Minnesota). The Social Accounting Matrix (SAM) model is an extension of the I-O model and relies on large statistical datasets. It expands upon the I-O framework by including economic and social structure data as of a point in time; these metrics include industry-to-industry transactions and information about the factors of production and institutions.

In contrast, Lukoseviciute et al. (2022) recommend that the Keynesian multiplier approach or Ad hoc model may be the most appropriate approach in studying the economic impact of shorter distance trails, especially if teams are seeking to primarily use primary source data or more accessible data. A Keynesian-type model works at all spatial scales and has a relatively low operational cost, although it can be time-consuming to collect all the data. It uses employment, income or output data, tourist spending estimates, tax data, and multipliers to evaluate impact on tourism sectors. Mayer et al. (2010) used this method to evaluate tourism across six German national parks, highlighting that required variables include the total number of visitor days per year, average daily expenditure per visitor by economic sector, direct and indirect multipliers for each sector, the regional average income per capita, and the share of visitors with high recreational site affinity. The Ad hoc is similar to the Keynesian, as it can also be run based only on surveys, is useful for small-scale studies, and does not utilize large statistical inputs; however, its reliance on surveys as its data source also results in its time-consuming reputation (Lukoseviciute et al., 2022).

Still, more approachable ways of determining economic impacts can be distilled down to several key metrics, typically using an input-output model. Archie (2024) characterized a

general model for visiting spending impacts as inclusive of (a) the number of visitors, particularly or exclusively emphasizing nonlocal use in order to understand incremental economic impact of a trail, (b) average spending per visitor with respect to daily expenditures, group size, and length of visit, (c) capture rate of dollars spent in the local area, which is generally 70-80% for tourism and payroll-heavy operations, respectively, and (d) multipliers, which estimate the number of times a dollar circulates in the local area (e.g. 1.2, 1.7). Notably, this approach also emphasizes that in lieu of available data from own visitors, averages from similar organizations or results of other studies can also be used as proxy measures, particularly the case of planned trails where site-specific data is unavailable.

One key distinction when discussing economic impact models is that while “economic impact” may be primarily defined according to dollars attracted from outside the area, “economic significance” (or economic effects) includes dollars spent by all visitors and the amount of economic activity those contributions support.

## 2. Comparable Community Outcomes



*Image credit: Radius Indiana / Monon South Trail*

In order to understand the potential economic impact of the Monon South project, a review of existing economic impact studies on similar trails has been undertaken. While no two trails or trail systems are alike, it is important to recognize that similarities exist across different trail systems. However, rail trails, like the American railroad network itself, serve all the varied parts of the country, can be short or long, and have many other factors like climate, urban or rural development, and so on. To best find comparative studies, the following criteria were chosen for selection:

- Only trails at least 20 miles long were included, to match the long-distance nature of the Monon South project.
- Only studies that served semi-rural or rural areas primarily were included; many rail trails are urban projects, while the Monon South will serve primarily rural areas. Some trails included did begin in suburban areas but extended into rural areas and were included.
- Studies that assessed overall economic impact were included, and those that didn't were excluded.

- Studies that addressed different kinds of visitor stays to use the trail (local, travelling, etc.) were included. Those that either did not address the visitor’s travel interaction with the trail or didn’t address the different economic interactions of these different kinds of visitors, were not included.

The result was a list of four studies on the following trails: the Katy Trail (Table 4), the Missisquoi Valley Rail Trail (Table 5), Torrey C. Brown (Northern Central Railroad) Trail (Table 6), and the Elroy-Sparta Trail (Table 7). The closest trails to the Monon South project’s geography and population were the Elroy-Sparta Trail and the Katy Trail, while the Torrey C. Brown is the farthest. The studies, however, were inconsistent in reporting methodology for information provided. Some reported on economic impact for “direct” and “related” expenses, while others addressed “hard” and “soft” goods, and others just asked about spending generally. Some studies addressed broader economic impact – jobs, tax revenues, and so on – while most only looked at spending from a very simple perspective.

Overall, the studies reported a positive economic impact from the trails. The simplest studies: even the 1988 Elroy-Sparta Trail study signified that, based on extrapolating from visitor spending, people spent an estimated extra \$1,257,000 (\$3,420,040 in 2024) on their trips. This early study, however, did not look more deeply into other types of spending, nor did it address direct and indirect spending. All studies indicated as well that visitors who were not from the area spent more money; hotel users were the highest spenders, while campers spent more than local users, but less than those in hotels.

For the studies that did address job creation and support – the Katy Trail study, Torrey C. Brown study, and Missisquoi Valley Rail Trail study, all trails supported jobs in industries related to the trail. The Missisquoi Valley Rail Trail study indicated the fewest jobs (31.9) supported by the \$1,991,000 in spending, while the Katy Trail – the longest trail on this list – indicated 367 jobs and \$5,128,000 in payroll was supported by the trail. The Torrey C. Brown Trail report, in particular, also noted additional tax revenues. The trail supported 262 jobs, but also \$304,142 in revenue to the state – more than supported the use of the trail. However, this trail is also in a far more densely populated area in Maryland than the other three trails, although it is also the shortest.

Notable limitations, however, were that the studies ranged wildly in methodologies and in how they modeled impact. Some used a similar methodology for data collection from the Rails and Trails Conservancy, but all relied on in-person surveys. The Katy Trail used the most sophisticated methodology and thus produced the clearest results. However, these

studies did not distinguish between different economic and visitation motivations; while some did mention that some folks were there for history, none addressed whether visitors were there for railroad history or for general history. It is possible that more specific visitation motivations – and further investigating specific visitation reasons, could help paint a clearer economic picture of trail users.

The tables below summarize each trail with respect to physical features, key economic impact data, and study methodologies and limitations. Unless otherwise indicated, all numbers in the “Economic Impact” sections of each table are represented in dollars.

**Table 4***Katy Trail Features Summary*

Katy Trail (2012)					
State	Length	Route	Surface	Date of Completion	Number of Users/Year
Missouri	240 Miles	Machens, MO to Clinton, MO	Compacted Limestone Gravel	1999 (current trail)	400,000
Managing Agency	Missouri State Parks		Funding Source	National Trails System Act Missouri State Parks	
Communities Along Route	Many, including: St. Charles, Weldon Spring, Boonville, and Sedalia			Trailheads	28
Amenities	Wineries, Restaurants, Shops, B&B's, Hotels, Campgrounds				
Economic Impact					
Total Economic Impact		Jobs Supported and Payroll		Total Value Added to Local Community	
18,491,000		367/5,128,000		8,204,000	
Average Daily Spending (individual)		Average Group Spending (3.21 Visitors)		Local Day User Spending (2.07 visitors)	
Daily Direct <sup>7</sup>	Related Expenses <sup>8</sup>	Direct	Related Expenses	Direct	Related Expenses
45	56.82	182.50	147.14	18	309
Nonlocal Day User Spending (2.82 visitors)		Hotel/Motel/B&B User Spending (3.90 visitors)		Camping User Spending (7.85 visitors)	
Direct	Related Expenses	Direct	Related Expenses	Direct	Related Expenses
56	355	700	504	231	376
Methodology	<ul style="list-style-type: none"> <li>• 1 Page Screener collected at trailheads</li> <li>• Money Generation Model Version 2</li> <li>• Party Level Sampling</li> <li>• 501 mailed in surveys, 997 groups sampled on site</li> </ul>				
Limitations	Segmentation of large trail, definition of local and nonlocal users				

<sup>7</sup> Money spent directly during the trip, such as food, lodging, etc.

<sup>8</sup> Cost of equipment and clothing, per day of the trip

**Table 5***Missisquoi Valley Rail Trail Features Summary*

Missisquoi Valley Rail Trail (2019)					
State	Length	Route	Surface	Date of Completion	Number of Users/Year
Vermont	26.4 Miles	St. Albans, VT to Richford, VT	Crushed stone with stone dust (2/3), asphalt	1995/2002 (bridge)	78,813
Managing Agency	Vermont Agency of Transportation		Funding Source		
Communities Along Route	St. Albans, Green's Corners, Sheldon Springs, Sheldon Junction, Enosburg Falls, North Enosburgh, East Berkshire, Nutting Corners, and Richford			Trailheads	6
Amenities	Restaurants, gas, parks, camping, lodging, shopping				
Economic Impact					
Total Spending		Jobs Supported and Payroll		Total Tax Revenue	
1,991,000		31.9 jobs		208,000	
Average Daily Spending (individual)		Average Group Spending		Local Day User Spending	
Daily Direct	Related Expenses	Direct	Related Expenses	Direct	Related Expenses
N/A	N/A	N/A	N/A	11.32	
Nonlocal Day User Spending		Non-Local Overnight Users			
Direct	Related Expenses	Direct	Related Expenses		
70.14		176.98			
Methodology	MGM2 model used Based on benchmarking study from estimate of users and responses				
Limitations	Full report not available (only memoranda)				

**Table 6***Torrey C. Brown Rail Trail Features Summary*

Torrey C. Brown Rail Trail (Northern Central Railroad Trail) (1993)					
State	Length	Route	Surface	Date of Completion	Number of Users/Year
Maryland	19.7 mi	Upper Marlboro, MD to MD-PA border	Crushed Limestone	1984	450,000
Managing Agency	Maryland DNR		Funding Source	Maryland DNR	
Communities Along Route	Freeland, Bentley Springs, Parkton, White Hall, Monkton, Sparks, Phoenix, Paper Mill			Trailheads	9
Amenities	Restrooms, picnic areas, fountains, hotels, bike facilities, nature center				
Economic Impact					
Sales Due to the Trail:		Jobs Supported and Payroll		State Tax Related to Trail	
3,380,013		262		304,142	
Average Individual Spending		Average Group Spending		Local Day User Spending	
Hard Goods <sup>9</sup>	Soft Goods <sup>10</sup>	Direct	Related Expenses	Direct	Related Expenses
203	6.30	N/A	N/A	N/A	N/A
Nonlocal Day User Spending		Hotel/Motel/B&B User Spending		Camping User Spending	
Direct	Related Expenses	Direct	Related Expenses	Direct	Related Expenses
N/A	N/A	N/A	N/A	N/A	N/A
Methodology	On site survey method Dollar figures from follow-up questions asked of participants Very simple calculations				
Limitations	Older Methodology Older Tech Could only reach people at one point in time with in-person surveys More suburban vs rural focus				

<sup>9</sup> Hard goods defined as specific good such as bicycles, clothing, etc. purchased for use on the trail

<sup>10</sup> Soft goods were not specifically defined in the study, but generally refer to services

**Table 7***Elroy-Sparta Trail Features Summary*

Elroy-Sparta Trail (1988)					
State	Length	Route	Surface	Date of Completion	Number of Users/Year
WI	32.5	Elroy to Sparta, WI	Compacted Limestone Gravel	1967	80,000
Managing Agency	Wisconsin DNR		Funding Source	Wisconsin DNR (passes for use)	
Communities Along Route	Elroy, Sparta, Norwalk, Kendall, Wilton			Trailheads	Elroy and Sparta
Amenities	Interpretive waysides, rest areas, bike rentals, trailhead parking, picnicking, restroom, camping, and water facilities				
Economic Impact					
Total Economic Impact (spending)		Jobs Supported and Payroll		Total Value Added to Local Community	
1,257,000 (in 1988 dollars) 3,420,039 (in 2024 dollars)		N/A		N/A	
Average Daily Spending (individual)		Average Group Spending		Local Day User Spending	
Daily Direct	Related Expenses	Direct	Related Expenses	Direct	Related Expenses
14.88	N/a	62.34	N/A	9.44	N/A
Nonlocal Day User Spending		Hotel/Motel/B&B User Spending		Camping User Spending	
Direct	Related Expenses	Hotel	B&B	Direct	Related Expenses
N/A	N/A	33.25	30.65	11.57	N/A
Methodology	Asked directly questions; total spending multiplied by average spending over all users.				
Limitations	First study, lack of tech for methodology, changes in culture (especially trail use) between 1988 and today, only looking at direct expenses				

### 3. Community Identified Opportunities

#### Introduction and Methods

From October 15, 2024-October 17, 2024, a series of three stakeholder listening sessions were held in support of the Monon South Trail economic benefit project. These meetings were intended to bring civic and business leaders together to garner feedback about the amenities they believed added value to their town and about potential amenities they believed would attract trail visitors. Two sessions were held in person, and one session was held virtually. Table 8 summarizes the session locations, and the attendance at each.

**Table 8**

*Attendance by Listening Session*

Session Location	Date	Attendance
Orleans	Tuesday, October 15	3
Salem	Wednesday, October 16	5
Virtual	Thursday, October 17	2

The sessions started with a warmup icebreaker activity, where participants were invited to share what most excited them about the Monon South Trail’s development. This was followed by a project update provided by the Eppley team and a preliminary discussion. Then, the attendees began the main activity, where they were invited to list—and identify on a map—both (a) existing and (b) potential amenities in their town(s), according to four category classifications:

1. Natural and public recreation (access points to public lands, viewpoints, waterways, open space, parks, farmers markets),
2. Culture and heritage (historic sites, education and engagement opportunities, and cultural resources),
3. Facilities and businesses (particularly public facing, i.e., restaurants, shops), and
4. Lodging (B&Bs, motels, cabins, and camping opportunities).

These four amenity groupings are based on the work of Archie (2024) and Busbee (2001). Participants’ written responses, as well as Eppley Center team notes, were recorded after the conclusion of the listening sessions.

## Findings

The overall counts of amenities identified by participants were tallied by town, category, and status (i.e., existing or potential). The following lists summarize those findings.

### **Existing Amenities:**

- Natural and Public Recreation: 21
- Culture and Heritage: 13
- Facilities and Businesses: 37
- Lodging: 12

### **Potential Amenities:**

- Natural and Public Recreation: 11
- Culture and Heritage: 11
- Facilities and Businesses: 21
- Lodging: 12

### **All Identified Amenities:**

- Natural and Public Recreation: 32
- Culture and Heritage: 24
- Facilities and Businesses: 58
- Lodging: 24

## Mitchell

Listening session participants identified several amenities in Mitchell, particularly existing amenities related to tourism, such as nearby Spring Mill State Park and the Gus Grissom historic sites. According to participant feedback, Mitchell has several lodging options in the area, as well as several restaurants and businesses that can support outdoor recreation.

However, Mitchell was described as in need of several amenities, such as outfitters and bike shops, to support the trail. Additionally, participants from Mitchell indicated that they had interest in adding several spurs to various amenities in the area, such as Spring Mill State Park, highlighting the importance of these existing amenities. Table 9 shows a summary of the number of amenities identified by participants from Mitchell, by amenity category. A full list of specific businesses, lodging, cultural and natural sites in Mitchell,

Indiana, as identified by listening session participants, can be found in Appendix A. The Mitchell mapping activity is presented in Map Activity, Figure 4.

**Table 9**

*Existing and Potential Amenities by Type in Mitchell, Indiana*

Town	Status	Category	Count
Mitchell	Existing	Culture & Heritage	6
Mitchell	Potential	Culture & Heritage	0
Mitchell	Existing	Facilities & Businesses	14
Mitchell	Potential	Facilities & Businesses	6
Mitchell	Existing	Lodging	5
Mitchell	Potential	Lodging	2
Mitchell	Existing	Natural & Public Recreation	6
Mitchell	Potential	Natural & Public Recreation	5

## Orleans

Listening session participants identified fewer existing amenities in Orleans. Participants noted existing Airbnb-style options for lodging but shared a desire for additional amenities such as camping and hotels in the area. As with all locations, there was a desire for a sports bar and/or brewery, but most of the business amenities that were identified by participants already existed in the community (excluding a bike rental location), though are not necessarily located near the planned trail (see: Map Activity, Figure 1).

Notably, like Mitchell, a trail connection to existing resources was identified as a priority by listening session participants. For example, the town owns a reservoir, and a spur trail was suggested as a potential point of connection. There was also a note that it would be beneficial to connect the location to its railroading history. However, most of the natural and cultural amenities identified by participants were existing sites (rather than identified as potential amenities), and several participants communicated a desire to highlight those natural and cultural amenities already present. Table 10 outlines a summary of the number of amenities identified by participants from Orleans, by amenity category. A full list of specific businesses, lodging, cultural and natural sites identified in Orleans, Indiana, as identified by listening session participants, can be found in Appendix B.

**Table 10***Existing and Potential Amenities by Type in Orleans, Indiana*

Town	Status	Category	Count
Orleans	Existing	Culture & Heritage	2
Orleans	Potential	Culture & Heritage	1
Orleans	Existing	Facilities & Businesses	6
Orleans	Potential	Facilities & Businesses	3
Orleans	Existing	Lodging	2
Orleans	Potential	Lodging	3
Orleans	Existing	Natural & Public Recreation	4
Orleans	Potential	Natural & Public Recreation	3

### Salem and New Pekin

While there were a few listening session comments regarding Salem or New Pekin amenities specifically, several participants provided feedback about the two towns as a combined “unit;” as a result, some data are presented jointly. Participants shared that Salem has some lodging options – notably, a Knights Inn, and various smaller, bed and breakfast type locations – but there was a general desire for further lodging options in both towns, such as camping or more developed lodging amenities. As with other locations, there were several existing businesses identified by participants; notably, the historic square, where many of these businesses are located, was highlighted as a key resource from a tourism and economic development perspective. However, a bike rental location, as well as microbrewery/sports bars, were identified as particularly desirable potential amenities.

Notably, attendees from Salem indicated that there was already a present railroad museum – something which could connect to the railroad story of the trail. Several cultural locations, such as the Piper Flight Museum and Steven’s Museum, were also mentioned, and participants here had a desire to add other interpretive cultural elements on topics ranging from nature to indigenous history to music. The participants from Salem and New Pekin also indicated a range of natural resource sites, as well as other recreation amenities such as the Salem Speedway, that would benefit from this trail; however, only one spur from the trail to a site was mentioned. Table 11 displays a summary of the number of amenities identified by participants from Salem and New Pekin, by amenity category. A full list of specific businesses, lodging, and cultural and natural sites in the two

towns, as identified by listening session participants, can be found in Appendix C; results of New Pekin’s and Salem’s map exercises are presented in Map Activity, Figures 2 and 3.

**Table 11**

*Existing and Potential Amenities by Type in New Pekin, Indiana and Salem, Indiana*

Town	Status	Category	Count
New Pekin	Existing	Culture & Heritage	0
New Pekin	Potential	Culture & Heritage	1
New Pekin	Existing	Facilities & Businesses	0
New Pekin	Potential	Facilities & Businesses	3
New Pekin	Existing	Lodging	0
New Pekin	Potential	Lodging	3
New Pekin	Existing	Natural & Public Recreation	0
New Pekin	Potential	Natural & Public Recreation	0
Salem	Existing	Culture & Heritage	1
Salem	Potential	Culture & Heritage	5
Salem	Existing	Facilities & Businesses	1
Salem	Potential	Facilities & Businesses	1
Salem	Existing	Lodging	0
Salem	Potential	Lodging	0
Salem	Existing	Natural & Public Recreation	1
Salem	Potential	Natural & Public Recreation	1
Salem & New Pekin	Existing	Culture & Heritage	4
Salem & New Pekin	Potential	Culture & Heritage	0
Salem & New Pekin	Existing	Facilities & Businesses	14
Salem & New Pekin	Potential	Facilities & Businesses	1
Salem & New Pekin	Existing	Lodging	5
Salem & New Pekin	Potential	Lodging	2
Salem & New Pekin	Existing	Natural & Public Recreation	10
Salem & New Pekin	Potential	Natural & Public Recreation	1

## Virtual

The virtual session only highlighted potential amenities. Participants identified a desire for more lodging in the form of bed and breakfasts and campgrounds, as well as a variety of trailside amenities like bathrooms and drinking fountains, although as with others,

additional restaurants were listed as potential amenities. Some of these desired amenities are in fact already in progress; the trailheads being constructed along the Monon South Trail typically provide drinking fountains, restrooms, trash cans, and bicycle repair stations.

The only recreation site that was suggested in this session was a golf course, and cultural sites that were desired include educational waysides, informational booths, and promotional spaces. Notably, this aligns with other locations that had indicated a desire for interpretive content along the trail. Table 12 illustrates the potential amenities identified by virtual session participants, by amenity category. A full list of specific suggestions, as identified by listening session participants, can be found in Appendix D.

**Table 12**

*Existing and Potential Amenities by Type According to Virtual Participants*

Town	Status	Category	Count
Virtual	Existing	Culture & Heritage	0
Virtual	Potential	Culture & Heritage	4
Virtual	Existing	Facilities & Businesses	0
Virtual	Potential	Facilities & Businesses	7
Virtual	Existing	Lodging	0
Virtual	Potential	Lodging	2
Virtual	Existing	Natural & Public Recreation	0
Virtual	Potential	Natural & Public Recreation	1

### Map Activity

In addition to the lists generated, the main activity also involved participants placing stickers on a map of their town or city indicating existing amenities along the same four categories: natural and public recreation, culture and heritage, facilities and businesses, and lodging.

The goal of this project was to engage listening session participants with the layout of the trail in relation to their town and to consider existing and potential amenities in relation to this layout. The resulting maps are not as robust as the more detailed lists that the participants generated in the other activity – i.e., not every point mentioned in the tables is

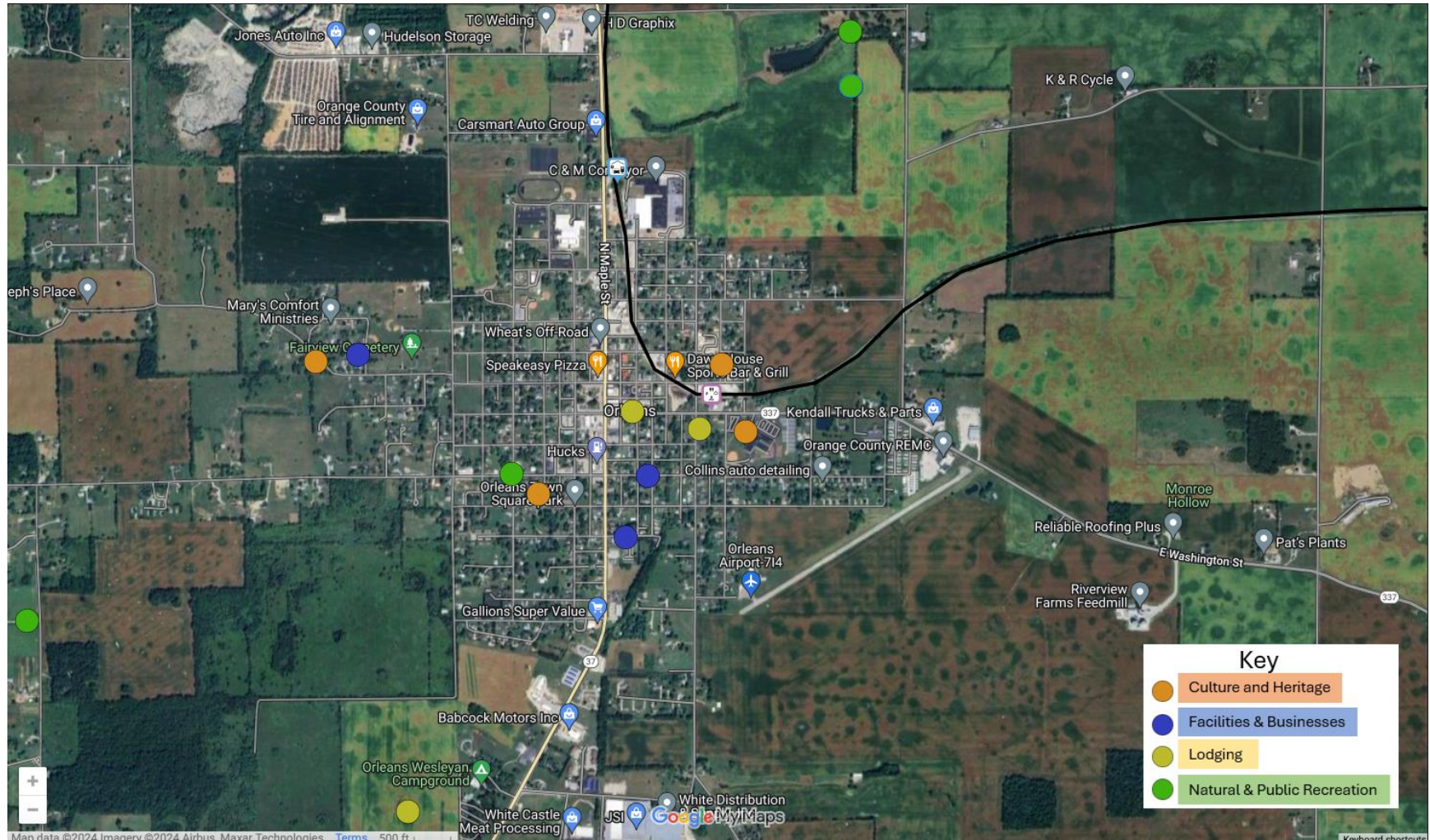
represented in the maps. Of note, the locations indicated by participants were based on their memories and may or may not be exactly location accurate; still, it can be assumed that most identified locations are within the general area indicated.

The trail route goes through (or to, in the case of Mitchell) the downtown area in most of the towns, with the exception of Orleans, where the trail route goes well into the town, but not quite to the town center. Nevertheless, there are a variety of amenities of all types located near the trail. In Orleans, culture and heritage and lodging amenities, two of each category, were the types located closest to the trail route (Figure 1). While facilities and businesses and natural and public recreation sites were identified, they were not indicated as being near the trail. In New Pekin, the closest sites were businesses and facilities and natural and public recreation (Figure 2). Given the small size of New Pekin, all but one amenity is near the trail, which would run through the center of town, however, no lodging was indicated, and the only cultural and historical point of interest lies outside of town and further from the trail. Salem (Figure 3) and Mitchell (Figure 4) had the most amenity types located within walking distance of the trail – at least one of each of the four categories. Given that these two are the larger towns, this is perhaps unsurprising. In the natural and recreation category, Salem participants identified trails to the north and to the south of town, while the Monon South Trail would go east-west through town. It may be beneficial to connect the existing north-south trails to the new trail, in order to expand options in all directions through Salem. Mitchell had the most identified existing amenities of all types. While some are near the trail, many more, particularly in the facilities and businesses and culture and heritage categories, are further to the west. While not within a block or two, many of those amenities are nevertheless within a short walk of the trail.

In all municipalities, existing amenities of a variety of categories were identified, but regardless of the amenities that currently exist, all groups identified potential sites that would be of interest for them to see in their towns and which may be of benefit to trail users and vice versa.

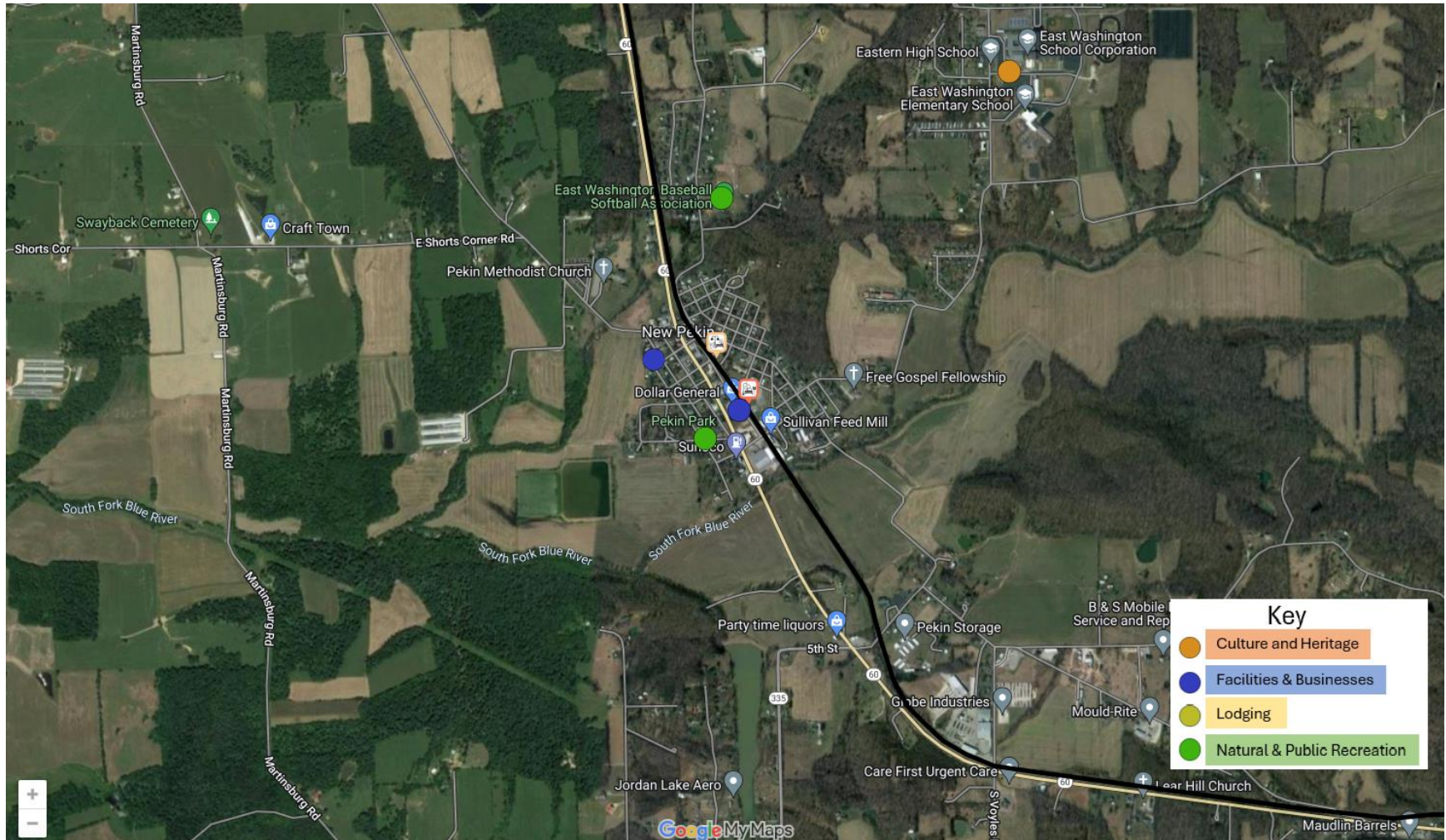
**Figure 1**

*Orleans, Indiana with Existing Amenities Indicated*



**Figure 2**

*New Pekin, Indiana with Existing Amenities Indicated*



**Figure 3**

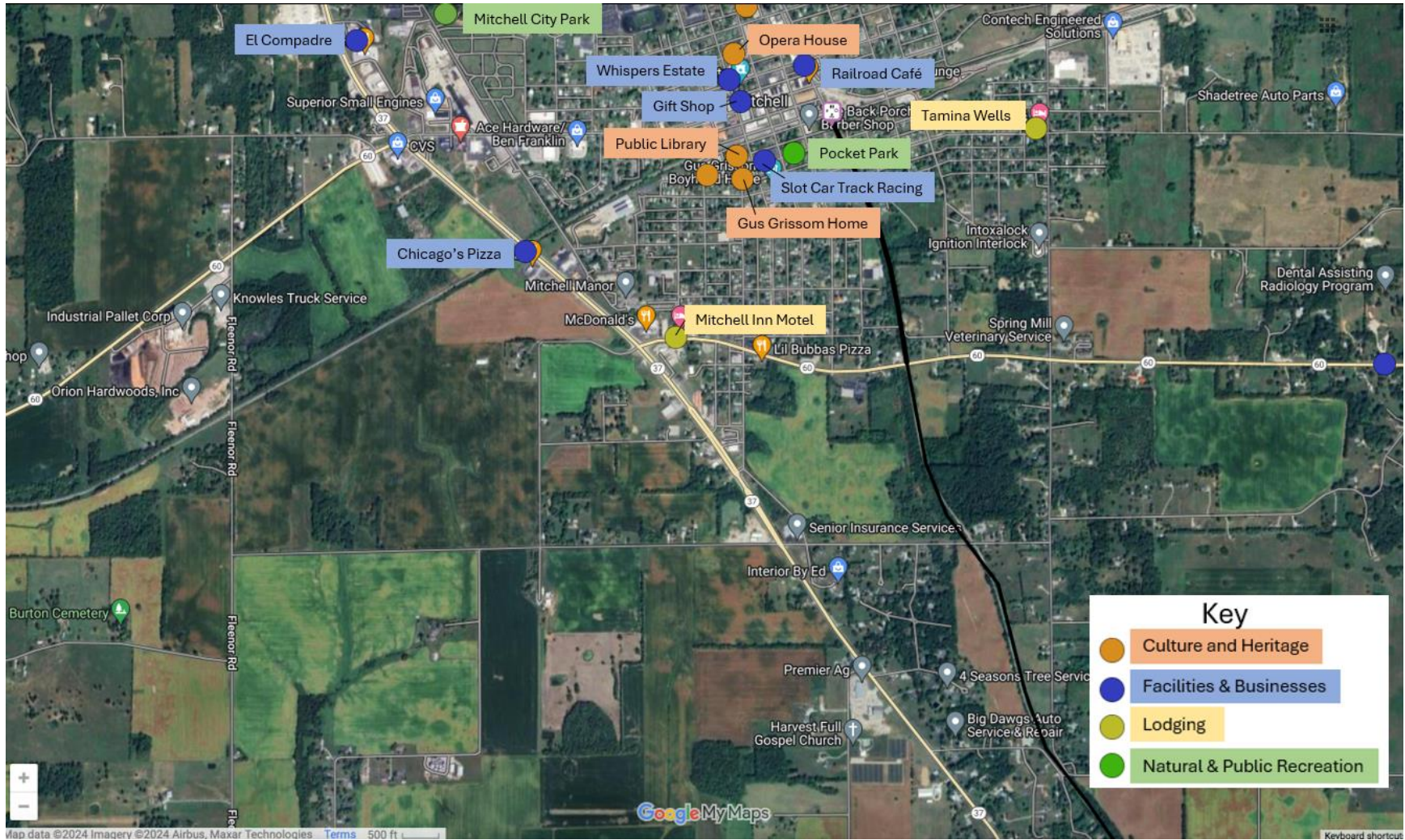
*Salem, Indiana with Existing Amenities Indicated*



Note. Additional detail labeling the locations provided by listening session participants.

**Figure 4**

*Mitchell, Indiana with Existing Amenities Indicated*



Note. Additional detail labeling the locations provided by listening session participants.

## Summary

Taken together, participants from the three listening sessions and from five municipalities identified the existing and potential amenities summarized in Table 13.

**Table 13**

*Summary of Number of Amenities Indicated by Town/City*

Town / City	Status	Category	Count
Mitchell	Existing	Culture & Heritage	6
Mitchell	Potential	Culture & Heritage	0
Mitchell	Existing	Facilities & Businesses	14
Mitchell	Potential	Facilities & Businesses	6
Mitchell	Existing	Lodging	5
Mitchell	Potential	Lodging	2
Mitchell	Existing	Natural & Public Recreation	6
Mitchell	Potential	Natural & Public Recreation	5
New Pekin	Existing	Culture & Heritage	0
New Pekin	Potential	Culture & Heritage	1
New Pekin	Existing	Facilities & Businesses	0
New Pekin	Potential	Facilities & Businesses	3
New Pekin	Existing	Lodging	0
New Pekin	Potential	Lodging	3
New Pekin	Existing	Natural & Public Recreation	0
New Pekin	Potential	Natural & Public Recreation	0
Orleans	Existing	Culture & Heritage	2
Orleans	Potential	Culture & Heritage	1
Orleans	Existing	Facilities & Businesses	6
Orleans	Potential	Facilities & Businesses	3
Orleans	Existing	Lodging	2
Orleans	Potential	Lodging	3
Orleans	Existing	Natural & Public Recreation	4
Orleans	Potential	Natural & Public Recreation	3
Salem & New Pekin	Existing	Culture & Heritage	4
Salem & New Pekin	Potential	Culture & Heritage	0
Salem & New Pekin	Existing	Facilities & Businesses	14

Town / City	Status	Category	Count
Salem & New Pekin	Potential	Facilities & Businesses	1
Salem & New Pekin	Existing	Lodging	5
Salem & New Pekin	Potential	Lodging	2
Salem & New Pekin	Existing	Natural & Public Recreation	10
Salem & New Pekin	Potential	Natural & Public Recreation	1
Salem	Existing	Culture & Heritage	1
Salem	Potential	Culture & Heritage	5
Salem	Existing	Facilities & Businesses	1
Salem	Potential	Facilities & Businesses	1
Salem	Existing	Lodging	0
Salem	Potential	Lodging	0
Salem	Existing	Natural & Public Recreation	1
Salem	Potential	Natural & Public Recreation	1
Virtual	Existing	Culture & Heritage	0
Virtual	Potential	Culture & Heritage	4
Virtual	Existing	Facilities & Businesses	0
Virtual	Potential	Facilities & Businesses	7
Virtual	Existing	Lodging	0
Virtual	Potential	Lodging	2
Virtual	Existing	Natural & Public Recreation	0
Virtual	Potential	Natural & Public Recreation	1

Additionally, during the listening session, certain amenities were indicated as “top amenities.” These were what were considered the most important spaces according to the participants. The locations in Table 14 were identified as high-priority existing or potential amenities by participants.

**Table 14***Top Amenities*

Town / City	Status	Name	Category
Mitchell	Existing	Spring Mill Inn	Lodging
Mitchell	Existing	Spring Mill State Park	Natural & Public Recreation
New Pekin	Potential	Pub & Microbrewery	Facilities & Businesses
Salem & New Pekin	Existing	Steven's Museum	Culture & Heritage
Salem & New Pekin	Existing	The Depot	Culture & Heritage
Salem & New Pekin	Existing	Historic Square Downtown Salem	Facilities & Businesses
Salem & New Pekin	Existing	Heritage Park	Natural & Public Recreation
Salem & New Pekin	Existing	Lake Salinda	Natural & Public Recreation
Salem & New Pekin	Existing	Riley's Place Playground	Natural & Public Recreation
Salem & New Pekin	Existing	YMCA	Natural & Public Recreation

**Key Takeaways**

Notably, a recurring theme was the need for additional lodging across sites. Only limited developed lodging facilities exist in the towns surveyed, with most located in Mitchell. However, there were no identified lodging options located within 1-2 blocks of the trail in Mitchell or New Pekin, and New Pekin had no lodging options. There was also a significant desire for eateries; every town mentioned a sports bar/microbrewery as a desired amenity. There was also a recurring desire for spurs and connections to various already existing features – other trails, natural and cultural resources, and even schools. This highlights the mobility potential of the trail between locations, and specifically the potential of those affiliated with those institutions to use the trail.

Most of the trail specific amenities that were mentioned incorporated historical and/or cultural elements of the area. For example, there were several mentions of incorporating the region’s cultural history (particularly railroad history) and natural history into business, development, and trail enhancement opportunities. Connecting with those who have information about these resources – such as local railroad historical societies or nature groups – may be a worthwhile investment and partnership. To that end, waysides or interpretive panels along the trail were identified as desired amenities in every focus group.

Additionally, the existing amenities identified in “Top Amenities” are well-regarded institutions according to listening session participants. The regard or success of these institutions in their respective towns serve as key data points to inform development in other parts of the trail or may warrant emphasis with respect to trail promotion or planning efforts. To that end, the potential amenities identified by listening sessions participants should be interpreted as opportunities for opportunity or investment to prospective business owners, entrepreneurs, and business/economic development organizations.

## 4. Economic Impact Projection

There are several approaches for assessing the economic impact of recreational trails, and approaches vary depending on the type of trail and assessment factors such as ease of use, availability of data, accuracy, effectiveness, affordability, relevance, and economic sectors included. This projection estimate followed the approaches described by Archie (2024) and Chang (2001). This approach utilizes a general model economic impact from the key metrics of the (1) number of trail users, emphasizing non-local use to understand the incremental economic impact of a trail; (2) average daily user spending; and (3) both the capture rate of dollars spent in the local area (which is generally 70% for tourism operations) and multipliers. This approach emphasizes that in lieu of available data from one's own users—in-person intercept surveys of users is most common—relevant measures from similar organizations or results of other studies can be used as proxies. This is particularly relevant given that the Monon South Trail is under development and does not yet have regular or consistent visitor counts.

Non-local trail users of the Monon South Trail are projected to comprise 22-30% of all users, representing an anticipated range of 25,000-93,000 non-local users, who are estimated to spend approximately \$42-103 per person per day. This is equivalent to \$34,200-\$111,400 of annual spending per mile of trail. For a trail of the Monon South Trail's projected final length (62 miles), this is associated with \$2,083,000-\$6,433,000 in total spending, when adjusting for inflation.

After accounting for capture rate and multipliers, the projected range of economic impact is \$2,120,000-\$6,909,000 in total projected economic impact. These projections align with prior findings that development of rail trails results in positive economic impacts and that this impact is driven by non-local and overnight users, who comprise the highest spenders (S.E. Group, 2019, Synergy Research, 2012; Williams, 1994, Schwecke, 1989).



*Image credit: Radius Indiana / Monon South Trail*

## Methods

Using seven comparison trails, including four from the state of Indiana, this projection model sought to estimate key metrics including the number and percentage of non-local trail users, spending per annual visitor, total annual spending of non-local trail users, and total economic impact projected, accounting for factors such as capture rate and multipliers. For each of these metrics, an interquartile range (IQR) among the comparison trails was identified to determine the final estimate. The interquartile range represents the middle 50% of a spread of numbers, is a measure of dispersion, and is resistant to outliers (Frery, 2023). The goal of using interquartile range is to eliminate the highest and lowest total spending of the seven trails, to eliminate anomalies or possible outliers, and to provide a middle range estimate (Wan et. al., 2014).

The seven comparison trails included in this projection are:

- Heritage Rail Trail, Pennsylvania
- Missisquoi Valley Rail Trail, Vermont
- Katy Trail, Missouri
- Cardinal Greenway Trail, Indiana
- Pumpkinvine Nature Trail, Indiana
- Nickel Plate Trail, Indiana
- Monon Trail (at 91<sup>st</sup> Street), Indiana

Four Indiana Trails were included because they are in-state and most are rural trails, similar to the Monon South Trail. The other three comparison trails were included for the availability of data and because they used a similar computational approach that allowed for standardized comparisons across all trails. Six of the seven were also included in other sections of this report, due to their identification for relevance ("Trail Usage and Tourism" and "Comparative Case Studies" sections) and/or availability of data from the Indiana Trails Study (Wolter et al., 2017). Only the Monon Trail (employing 91st Street user data) was not previously included in other sections of this report but was included in these economic calculations due to its location in Indiana, as well as its prevalence and use. Table 15 summarizes the seven trails and trail studies included in these economic impact calculations.

**Table 15***Comparison Trails and Characteristics*

	Comparison Trails						
	Heritage	Missisquoi	Cardinal	Pumpkin-vine	Nickel Plate	Monon (91 <sup>st</sup> )	Katy
State	PA	VT	IN	IN	IN	IN	MO
Length (in Miles)	26.5	26.4	62	17.6	35.4	19.7	240
Year of Study	2022	2019	2017	2017	2017	2017	2012
Included in Literature Review: Characteristics of Long-Distance Trails	Yes	Yes	Yes	Yes	Yes	No	Yes
Included in Literature Review: Comparative Case Studies	No	Yes	No	No	No	No	Yes

**Visitor Counts**

Visitor counts were based on available data from the trails' economic impact or user impact studies (Heritage, Missisquoi, Pumpkin Vine, and Katy Trails). For others, annual users were projected based on seasonal counts reported for some months of the year (Cardinal, Nickel Plate, and Monon Trails). Use was extrapolated based on estimating four months of peak use (summer); four months of middle use, at approximately 80% of peak use (spring/fall); and four months of low use in the coldest months, at 50% of peak use.

**Spending Estimates**

Spending estimates are based on available data and were calculated based on values reported in the published economic impact findings for each trail. The current projection sought to standardize the estimates for comparison by using a standard multiplier calculation, inflation rate, population calculation method, and any variables other than values directly reported in the comparison studies – i.e., percentage of visitors at each trail and estimates of spending per spending category.

The categories of meals, shopping and entertainment, transportation, and lodging were utilized to calculate total spending. All comparison trails reported results included

reported a value for at least three of these spending categories (York County Parks, 2022; S.E. Group, 2019; Wolter et al., 2017; Synergy Group, 2012). All included a spending estimate for meals and shopping, all but one included an estimate for transportation costs, and three studies included lodging. One trail (Missisquoi) also had a category for entertainment, though at \$5, this value was relatively low. This value was included in the spend calculation for Missisquoi and was folded into the shopping category for consistency. The values that were missing an explicit pre-existing estimate (transportation for the Heritage Rail Trail, and lodging for the four Indiana trails) were estimated based on the following assumptions and calculations.

For those that did not include a lodging value, an estimate was calculated using a standard estimate of total days spent in the area, assuming that 3% of visitors stay overnight for one night, and using a lodging cost of \$125. 3% of overnight stays is likely an underestimate, as the lowest percentage reported among the comparison trails that included a direct overnight number was 5% (S.E. Group, 2019), and those that reported the average number of days for an overnight stay reported average stays longer one night. However, this rate was chosen as a conservative estimate given the nascent status of the Monon South Trail and limited lodging options along the trail compared to other amenities (see: Listening Session Feedback). This resulted in an average of \$4 per non-local trail user on lodging, in line with most of the studies that included such a calculation of their own. For the Heritage Rail Trail transportation cost, the lowest value of any of the other trails was used, that is, a \$2 per user average.

Spending was calculated based on the number of reported non-local trail users multiplied by reported/estimated per user spending, then, to account for the fact that the trails are variable lengths, divided by that trail's length (in miles) and multiplied by 62 (the length of the MST in miles) to project the value over the length of the MST.

### *Inflation*

To adjust for inflation, an inflation rate of 3.4% was used based on the average inflation from 2017 to 2024 (U.S. Inflation Calculator, which uses Bureau of Labor Statistics' values). Four of the trail assessments included were conducted in 2017; the rest were conducted in 2012, 2019, and 2022. Because 2017 was both the mean and median year of studies included in the assessment, the inflation rate since that year was chosen in order to maintain a standard measure.

### *Capture Rate*

A capture rate of 70% was used for all trails as based on the estimated capture rate of tourism-related industries (Archie, 2024; Freeman, 2017). Capture rate is the "percentage of spending that accrues to the region's economy as direct sales or final demand" (Stynes,

1997). The purpose of using this metric is to account for the fact that not all spending is “captured” by the local economy, because local suppliers themselves often purchase the goods they sell from outside of the community.



*Image credit: Radius Indiana / Monon South Trail*

### *Multipliers*

To calculate the multiplier, the variables of population (in millions) and population density (in thousands per square mile) were utilized. Population and population density were calculated based on a summation of the counties through which each trail passes. This calculation was used based on the availability of data and in order to standardize the calculation across studies, as trail economic studies define “local” and “non-local” visitors in different ways, with county locality being one such measure. The ultimate equation used to calculate the multiplier was  $1.566 + 0.053 \times \text{natural log of the population, in millions} - 0.009 \times \text{population density, in thousands per square mile}$  (Chang, 2002). The ultimate multiplier values were fairly consistent and ranged from 1.45 to 1.55.

## Economic Impact and Total Spending

The total annual non-local trail user spending (adjusted for inflation) was multiplied by a capture rate of 0.7 and the calculated, trail-specific multiplier to determine the total estimated economic benefit of each trail and adjusted to account for trail length. Finally, an interquartile range of these values was calculated to determine a final estimate for the economic impact of the Monon South Trail.

## Results

Deploying this IQR comparable trails methodology, these findings project approximately 25,000-93,000 annual non-local users to the Monon South Trail, spending approximately \$42-103 per day of trail use. Their total annual spending is anticipated to range from \$2,083,000-\$6,433,000 (Table 16). On a per-mile basis, this is equivalent to \$34,200-\$111,400 per mile of trail. After accounting for the capture rate of this spending as well as employing relevant regional multipliers, the total economic impact projection ranges from \$2,120,000- \$6,909,000 for the Monon South Trail.

**Table 16**

*Summary of Visitors, Visitor Spending, and Economic Benefit*

	Comparison Trails							Interquartile Range Projection	
	Heritage Rail	Missisquoi	Cardinal	Pumpkin-vine	Nickel Plate	Monon (91st)	Katy	Quartile 1	Quartile 3
Annual Non-Local Users	60,700	16,000	9,000	28,000	6,600	23,800	335,000	12,500	44,400
Spend per Annual Non-Local User	\$33	\$97	\$61	\$40	\$43	\$109	\$412	\$42	\$103
Total Spending (62-Mile Equivalent)	\$4,684,000	\$3,632,000	\$534,000	\$3,967,000	\$502,000	\$8,182,000	\$35,638,000	\$2,083,000	\$6,433,000
Total Economic Impact (62-Mile Equivalent)	\$4,983,000	\$3,677,000	\$562,000	\$4,136,000	\$513,000	\$8,835,000	\$38,693,000	\$2,120,000	\$6,909,000

## Non-Local Users

All seven trails' reporting included an estimate of the percentage of total visitors that were non-local to the area, although they varied in their use of "local." Determinations used across the seven comparison trails included: a distance of >7 miles, a distance of >30 miles, and outside the county. Non-local visitor percentages ranged from 20-67% (with the Katy Trail as a high outlier), resulting in a projected 22-30% interquartile range for non-local trail users (Table 17). This results in an anticipated range of 25,000-93,000 non-local users of the Monon South Trail.

**Table 17**

*Total Annual and Non-Local Trail Users*

	Comparison Trails							Interquartile Range Projection	
	Heritage	Missisquoi	Cardinal	Pumpkinvine	Nickel Plate	Monon (91st)	Katy	Quartile 1	Quartile 3
Visitor Counts									
Annual Users	264,000	80,000	30,000	108,000	23,000	198,000	500,000	55,000	231,000
% Non-Local	23%	20%	30%	26%	29%	12%	67%	22%	30%
<b>Annual Non-Local Users</b>	<b>60,700</b>	<b>16,000</b>	<b>9,000</b>	<b>28,000</b>	<b>6,600</b>	<b>23,800</b>	<b>335,000</b>	<b>12,500</b>	<b>44,400</b>
<b>Annual Non-Local Users (62-Mile Equivalent)</b>	<b>142,000</b>	<b>37,000</b>	<b>9,000</b>	<b>99,000</b>	<b>12,000</b>	<b>75,000</b>	<b>87,000</b>	<b>25,000</b>	<b>93,000</b>

## Daily and Annual Non-Local User Spending

The projected interquartile range of average daily spending—including meals, shopping/entertainment, transportation, and lodging—per non-local trail user is \$42-\$103. Table 18 shows these values by trail and the resulting calculations of daily total spend per non-local visitor and total daily spend after adjusting for inflation. Studies consistently found that overnight visitors spend more on average than day visitors, even aside from the additional spend of lodging costs. Meal, shopping, and transportation spending were all higher on average for non-local trail users who stayed overnight in the area than those who visited only for the day. Total annual spending among non-local trail users is anticipated to range from \$2,083,000-\$6,433,000. If spending along MST were to match that of the projection for the Katy Trail (comparison group maximum) the total annual non-local user spending would be as high as \$35,638,000. Given that the MST passes through several towns and counties, total spending per mile of trail was also calculated, so that municipalities and stakeholders could approximate the impact per mile of trail in their area; the projected IQR is \$34,200-\$111,400 per trail mile.

**Table 18**

*Daily and Total Annual Non-Local User Spending*

	Comparison Trails							Interquartile Range Projection	
	Heritage Rail	Missisquoi	Cardinal	Pumpkin-vine	Nickel Plate	Monon (91st)	Katy	Quartile 1	Quartile 3
Spending - Daily Visitor (\$)									
Meals	17	22	16	10	8	9	31		
Shopping / Entertainment	2	25	13	11	19	64	80		
Transportation	2	26	13	5	2	4	16		
Lodging	6	3	4	4	4	4	43		
Daily Expenditure per Person (\$)	27	76	45	30	32	81	170		
Number of Days in Area	1.11	1.05	1.03	1.03	1.03	1.03	1.57		
Spend per Annual Visitor (\$)	30	80	47	31	33	84	267	32	82
<b>Adjusted for Inflation (\$)</b>	<b>33</b>	<b>97</b>	<b>61</b>	<b>40</b>	<b>43</b>	<b>109</b>	<b>412</b>	<b>42</b>	<b>103</b>
<b>Total Annual Spending (\$, 62-Mile Equivalent)</b>	<b>4,684,000</b>	<b>3,632,000</b>	<b>534,000</b>	<b>3,967,000</b>	<b>502,000</b>	<b>8,182,000</b>	<b>35,638,000</b>	<b>2,083,000</b>	<b>6,433,000</b>
<b>Spending per Mile of Trail (\$)</b>	<b>80,400</b>	<b>59,300</b>	<b>9,100</b>	<b>66,700</b>	<b>8,300</b>	<b>142,500</b>	<b>624,100</b>	<b>34,200</b>	<b>111,400</b>

## Total Economic Impact

Total annual economic impact was calculated by multiplying total annual non-local trail user spending by a 70% capture rate and the trail’s multiplier. The values in Table 19 for population and population density are based on all counties through which a trail passes and represent population areas that span a range of rural to urban area. The final, resulting projected interquartile economic impact range is \$2,120,000–\$6,909,000 annually. However, if the MST’s total impact were to match that of the Katy Trail (comparison group maximum) the total economic impact projected would exceed \$38,000,000.

**Table 19**

*Total Economic Benefit of Non-Local Spending*

	Comparison Trails							Interquartile Range Projection	
	Heritage Rail	Missisquoi	Cardinal	Pumpkin-vine	Nickel Plate	Monon (91st)	Katy	Quartile 1	Quartile 3
<b>Economic Impact Calculation Values</b>									
Capture Rate									
Tourism-Related Activity	0.70	0.70	0.70	0.70	0.70	0.70	0.70		
Multiplier Calculation									
Population (Millions)	0.46	0.106	0.319	0.247	0.140	0.977	0.772		
Natural Log of Population	-0.784	-2.243	-1.144	-1.396	-1.965	-0.023	-0.259		
Square Miles	904	1742	2052	843	1035	396	5453		
Population Density (Thou. per Sq. Mile)	0.505	0.061	0.155	0.294	0.135	2.468	0.142		
Multiplier	1.52	1.45	1.50	1.49	1.46	1.54	1.55		
<b>Total Economic Impact of Non-Local Trail User Spending (2024 \$), 62-Mile Equivalent</b>	<b>4,983,000</b>	<b>3,677,000</b>	<b>562,000</b>	<b>4,136,000</b>	<b>513,000</b>	<b>8,835,000</b>	<b>38,693,000</b>	<b>2,120,000</b>	<b>6,909,000</b>

## Conclusion



*Image credit: Radius Indiana / Monon South Trail*

Recreational trails and long-distance rail trails provide a host of community benefits including enjoyment and recreation, health benefits (both mental and physical), and economic benefits. This project focused on economic benefits specifically through the economic development opportunity of tourism and its addition of new dollars entering the community. In a series of listening sessions held with individuals involved in community life in MST towns, people expressed excitement for the trail and for both the existing and potential amenities in their towns that could be supported by the trail's development. They saw many opportunities to connect the trail both physically and topically to local cultural and historical resources.

Evaluation of economic outcomes in similar communities, through the evaluation of seven economic impact studies of existing rail trails, found strong evidence for associated economic benefits. Using data from these comparison trails, the calculated economic impact was projected based upon non-local trail user spending (on meals, shopping, transportation, and lodging) as the primary driver of local economic development. This methodology projects approximately 25,000-93,000 non-local annual users of the Monon South Trail, spending approximately \$42-103 per day of trail use, with overnight visitors spending significantly more across all spending categories. Their total annual spending is expected to range from \$2,083,000-\$6,433,000. On a per-mile basis, this is equivalent to \$34,200-\$111,400 per mile of trail. After incorporating the capture rate of tourism-related spending, as well as employing relevant regional multipliers (based on local population), the total economic impact projection ranges from \$2,120,000-\$6,909,000 in annual benefits from the Monon South Trail to local communities.

This Economic Impact Projection project illustrates that rail trail amenities and recreational opportunities benefit both visitors and residents alike through its multi-method approach of reviewing economic benefit literature, examining outcomes of comparable trails and their communities, identifying economic opportunities with community leaders, and quantifying a projected economic impact. To that end, this project highlights the significant economic potential of the Monon South Trail, driven largely by tourism-driven spending by non-local visitors. Further investment and development of the MST is anticipated to augment both community wellbeing and economic growth in the region.

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# Appendices

## Appendix A

List of Amenities Identified for Mitchell, Indiana

Status	Name	Category
Existing	Mitchell Main Street USA	Culture & Heritage
Existing	Grissom Home & Memorial	Culture & Heritage
Existing	Mitchell Memorial	Culture & Heritage
Existing	Mitchell Opera House	Culture & Heritage
Existing	Public Library	Culture & Heritage
Existing	American Legion 250	Culture & Heritage
Existing	Pool Hall (The Break Room)	Facilities & Businesses
Existing	Whispers Estate	Facilities & Businesses
Existing	Antique shop	Facilities & Businesses
Existing	Gift Shop	Facilities & Businesses
Existing	Slot Car Track Racing Facility	Facilities & Businesses
Existing	Vacant mobile home park	Facilities & Businesses
Existing	The Mill	Facilities & Businesses
Existing	Chicago's Pizza	Facilities & Businesses
Existing	Coffee House	Facilities & Businesses
Existing	Current restaurants	Facilities & Businesses
Existing	Dairy Bell	Facilities & Businesses
Existing	El Compadre	Facilities & Businesses
Existing	Huckleberry's Bakery	Facilities & Businesses
Existing	Railroad Café	Facilities & Businesses

<b>Status</b>	<b>Name</b>	<b>Category</b>
Potential	Gas station	Facilities & Businesses
Potential	2 vacant buildings	Facilities & Businesses
Potential	Microbrewery/Sports Bar	Facilities & Businesses
Potential	Bike shop	Facilities & Businesses
Potential	Outfitter store	Facilities & Businesses
Potential	Parking at trailhead	Facilities & Businesses
Existing	Spring Mill Inn	Lodging
Existing	Beulah's Place	Lodging
Existing	Mitchell Inn Motel	Lodging
Existing	Motel	Lodging
Existing	Spring Mill Camping	Lodging
Potential	Open Space	Lodging
Potential	Campsites / Primitive Campground	Lodging
Existing	Spring Mill State Park	Natural & Public Recreation
Existing	Blue Jacket Trail	Natural & Public Recreation
Existing	City Park	Natural & Public Recreation
Existing	Friendship Park (Pocket Park)	Natural & Public Recreation
Existing	Mitchell Public Pool	Natural & Public Recreation
Existing	Pickleball Courts	Natural & Public Recreation
Potential	Blue Jacket Spur	Natural & Public Recreation
Potential	Grissom Memorial spur	Natural & Public Recreation
Potential	High school spur	Natural & Public Recreation
Potential	Spring Mill spur	Natural & Public Recreation
Potential	Trail connection to Spring Mill State Park	Natural & Public Recreation

## Appendix B

### List of Amenities Identified for Orleans, Indiana

Status	Name	Category
Existing	Central Business District	Culture & Heritage
Existing	Historic Congress Square	Culture & Heritage
Potential	Railroad History	Culture & Heritage
Existing	Coffee	Facilities & Businesses
Existing	Current Restaurants	Facilities & Businesses
Existing	Depot Bar and Grill	Facilities & Businesses
Existing	Eateries	Facilities & Businesses
Existing	Ice Cream	Facilities & Businesses
Existing	Speak Easy Pizza	Facilities & Businesses
Potential	Sports bar/microbrewery	Facilities & Businesses
Potential	Brewery	Facilities & Businesses
Potential	Bike Rentals	Facilities & Businesses
Existing	Airbnb	Lodging
Existing	Wesleyan campgrounds	Lodging
Potential	ADA compliant campground	Lodging
Potential	Campground	Lodging
Potential	Town lake campground	Lodging
Existing	Farmer's Market	Natural & Public Recreation
Existing	Lost River/Karst	Natural & Public Recreation
Existing	Reservoir (town owned)	Natural & Public Recreation
Existing	Town lake	Natural & Public Recreation
Potential	Fishing	Natural & Public Recreation

Status	Name	Category
Potential	Reservoir spur	Natural & Public Recreation
Potential	Sidewalk connections	Natural & Public Recreation

## Appendix C

### List of Amenities Identified for Salem, Indiana and New Pekin, Indiana

Town	Status	Name	Category
New Pekin	Potential	Kiosks	Culture & Heritage
New Pekin	Potential	Pub & Microbrewery	Facilities & Businesses
New Pekin	Potential	Restaurants	Facilities & Businesses
New Pekin	Potential	Bike/Camping Shop	Facilities & Businesses
New Pekin	Potential	Lodging	Lodging
New Pekin	Potential	Glamping Site	Lodging
Salem	Existing	Railroad Museum	Culture & Heritage
Salem	Potential	Art in the Park/Artist in Residence	Culture & Heritage
Salem	Potential	History waysides	Culture & Heritage
Salem	Potential	Human history (indigenous, settlement, etc.)	Culture & Heritage
Salem	Potential	Morgan's Raid/civil war	Culture & Heritage
Salem	Potential	Music, recording studio, medallions info	Culture & Heritage
Salem	Existing	H&R Bakery	Facilities & Businesses
Salem	Potential	Backpacking/bike rental outfitter	Facilities & Businesses
Salem	Existing	Historic walking trail	Natural & Public Recreation
Salem	Potential	Exercise equipment	Natural & Public Recreation
Salem & New Pekin	Existing	Steven's Museum	Culture & Heritage
Salem & New Pekin	Existing	The Depot	Culture & Heritage
Salem & New Pekin	Existing	Piper Flight Museum	Culture & Heritage
Salem & New Pekin	Existing	Community Learning Center	Culture & Heritage
Salem & New Pekin	Existing	Historic Square Downtown Salem	Facilities & Businesses
Salem & New Pekin	Existing	Ace Hardware	Facilities & Businesses
Salem & New Pekin	Existing	Dollar General	Facilities & Businesses
Salem & New Pekin	Existing	Ruler	Facilities & Businesses
Salem & New Pekin	Existing	Walmart	Facilities & Businesses
Salem & New Pekin	Existing	6 Scoops Ice Cream	Facilities & Businesses

Town	Status	Name	Category
Salem & New Pekin	Existing	J-C	Facilities & Businesses
Salem & New Pekin	Existing	Small Business Saturday Cookie Walk	Facilities & Businesses
Salem & New Pekin	Existing	Totally Baked Sweets	Facilities & Businesses
Salem & New Pekin	Existing	Casey's	Facilities & Businesses
Salem & New Pekin	Existing	Chinese Restaurant	Facilities & Businesses
Salem & New Pekin	Existing	Silver Fox Café	Facilities & Businesses
Salem & New Pekin	Existing	Tracy's Bar & Grill	Facilities & Businesses
Salem & New Pekin	Existing	Tumbleweed	Facilities & Businesses
Salem & New Pekin	Potential	Microbrewery/pub	Facilities & Businesses
Salem & New Pekin	Existing	Cobblestone	Lodging
Salem & New Pekin	Existing	Destination B&B	Lodging
Salem & New Pekin	Existing	Knights Inn	Lodging
Salem & New Pekin	Existing	Lanning House	Lodging
Salem & New Pekin	Existing	The Annex	Lodging
Salem & New Pekin	Potential	Lodging spaces	Lodging
Salem & New Pekin	Potential	Hobo Canyon campground	Lodging
Salem & New Pekin	Existing	Heritage Park	Natural & Public Recreation
Salem & New Pekin	Existing	Lake Salinda	Natural & Public Recreation
Salem & New Pekin	Existing	Riley's Place Playground	Natural & Public Recreation
Salem & New Pekin	Existing	YMCA	Natural & Public Recreation
Salem & New Pekin	Existing	Ball Parks	Natural & Public Recreation
Salem & New Pekin	Existing	Elizabeth Street Park	Natural & Public Recreation
Salem & New Pekin	Existing	Golf Course	Natural & Public Recreation
Salem & New Pekin	Existing	Pekin Park	Natural & Public Recreation
Salem & New Pekin	Existing	Safe Route Walking Trail	Natural & Public Recreation
Salem & New Pekin	Existing	Salem Speedway	Natural & Public Recreation
Salem & New Pekin	Potential	Lake Salinda Spur	Natural & Public Recreation

## Appendix D

### List of Potential Amenities Identified by Virtual Respondents

Status	Name	Category
Potential	Bed and Breakfasts	Lodging
Potential	Campgrounds	Lodging
Potential	Diners	Facilities & Businesses
Potential	Bathrooms	Facilities & Businesses
Potential	Bike Shops	Facilities & Businesses
Potential	Drinking Fountains	Facilities & Businesses
Potential	Laundry	Facilities & Businesses
Potential	Sanitation Stations	Facilities & Businesses
Potential	Trash	Facilities & Businesses
Potential	Golf Course	Natural & Public Recreation
Potential	Amish Tours	Culture & Heritage
Potential	Educational Waysides	Culture & Heritage
Potential	Information Booths	Culture & Heritage
Potential	Promotional Spaces	Culture & Heritage



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