# An Economic Impact Analysis of the Coast to Coast Trail

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**Prepared by**

**Tampa Bay Regional Planning Council**

**And**

**East Central Florida Regional Planning Council**

**5/15/2017**

## About the Regional Planning Councils

The East Central Florida Regional Planning Council (ECFRPC) was established in 1962 as an area-wide association of local governments. It is one of Florida's ten regional planning councils and serves governments and organizations located within Brevard, Lake, Orange, Osceola, Seminole, Sumter and Volusia counties. Council staff provides technical assistance in the areas of land use and environmental planning, emergency preparedness, geographic information systems (GIS), health, housing, urban design, transportation and economic and fiscal analysis among others. Because of the ECFRPC, member governments have received more than $10.6 million in federal grants since 2011. This represents a return on investment of $2.53 for every dollar paid in assessments

Established as Florida's first regional planning council in 1962, the Tampa Bay Regional Planning Council (TBRPC) provides a forum to foster communication, coordination and collaboration among its member governments. Serving six counties (Citrus, Hernando, Hillsborough, Manatee, Pasco and Pinellas) and their cities therein, the Council provides a wide range of services, including:

- Economic Modeling and Analysis
- Economic Development District
- Community Visioning and Planning
- Spatial Growth Modeling
- Telework Tampa Bay
- Hurricane and Hazard Preparedness Planning
- The Official Hurricane Guide
- GIS Mapping Services
- LEPC: Hazardous Materials
- Technical Assistance to Local Governments
- Agency on Bay Management
- Bay Soundings Quarterly Environmental Journal
- Regional Information Center

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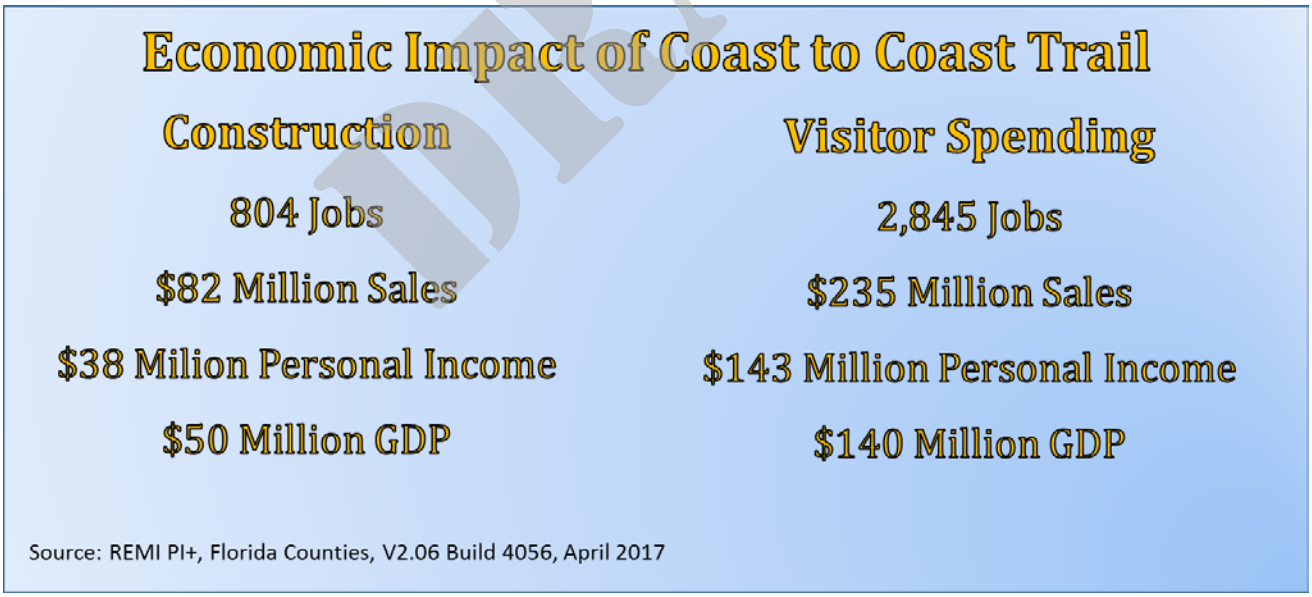
Beginning with TBRPC in 1999, the RPCs have been using Regional Economic Models, Inc products to provide economic analysis services to government agencies, non-profits and the private sector. (REMI) Policy Insight economic model to calculate the economic effects of a variety of policies and investments. The REMI model builds on the strengths of four major modeling approaches: Input-Output, General Equilibrium, Econometric, and Economic Geography. More detailed information about the model can be found at www.remi.com.

Any questions about this economic impact analysis should be referred to Randy Deshazo via e-mail at randy@tbrpc.org, or Luis Nieves-Ruiz, AICP. He can be reached at (407)245-0300, ext. 308 or via e-mail at luis@ecfrpc.org.

## Executive Summary

The Tampa Bay Regional Planning Council (TBRPC) and the East Central Florida Regional Planning Council (ECFRPC) have prepared an economic impact analysis of the Coast to Coast Trail. Crossing through Pinellas, Pasco, Hernando, Sumter, Lake, Orange, Volusia, Seminole and Brevard Counties, the Coast to Coast Trail is a 250 mile multi-use corridor spanning Central Florida between the Gulf of Mexico and the Atlantic Ocean. The trail connects local, state and federal trails and links 12 communities through Central Florida. In 2015, approximately 1.4 million visitors patronized the trail. TBRPC and ECFRPC collected data from the nine counties that maintain data on visitors to trail segments comprising the trail through central Florida, developed a methodology to forecast economic impacts and applied it to the available data. This analysis considers the economic impact of those visitors and anticipated growth in trail patronage through 2025.

Over the next ten years, TBRPC and ECFRPC expect that trail use will grow to 1.7 million visitors. Visitor spending has a direct impact on employment. Whether it is buying supplies and food or spending the night at a hotel, spending activity will also generate jobs. Over a ten year period visitors will generate an annual average of 259 jobs in a variety of industries, but mostly in food and accommodation as well as retail jobs in sporting goods. The spending from these visitors will also generate a cumulative economic impact of $235 million in sales (output), 143 million in personal income and add $140 million to the counties' gross domestic product (GDP). In addition to these, the construction of the trail gaps will generate 804 jobs, $82 million in sales, $38 million in personal income and add $50 million to the area's GDP.

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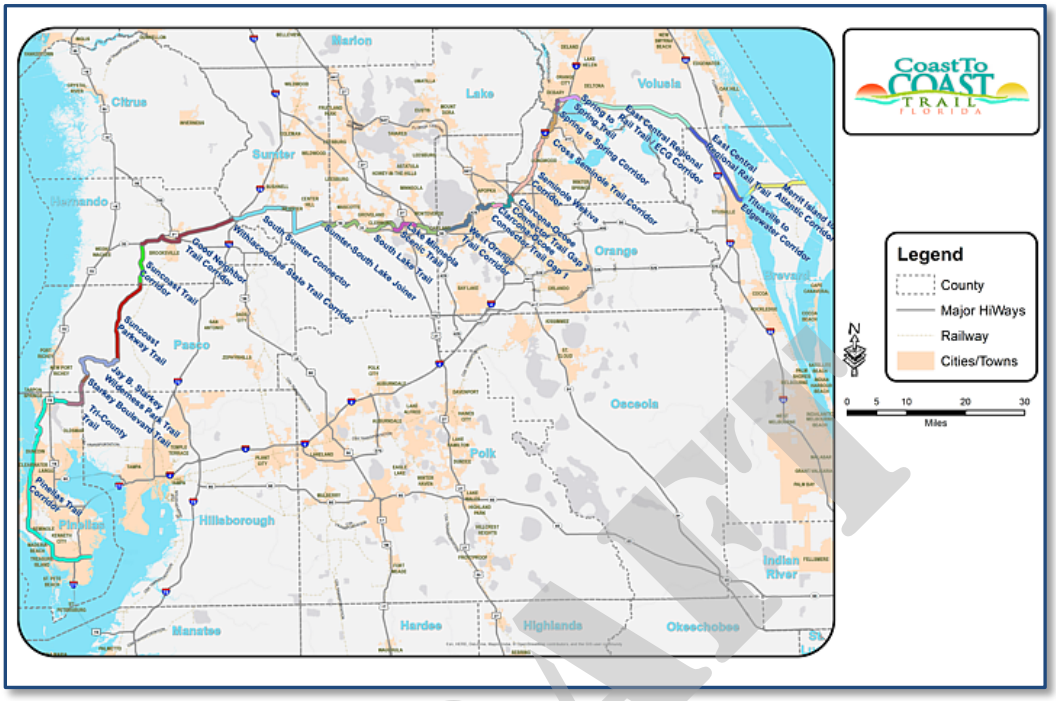
## Introduction

The Coast to Coast Trail (C2C) is a 250 mile multi-use corridor traversing nine Central Florida counties and connecting the Gulf of Mexico and the Atlantic Ocean. The C2C connects local, state and federal trails and links 12 communities through Central Florida. In 2015, approximately 1.4 million visitors patronized the trail.




Since 2015, the TBRPC and the ECFRPC have been working in partnership with other regional stakeholders to make this project a reality. As part of this process, the RPCs conducted an economic impact analysis of the trail based on trail-visitor expenditures and trail gap construction costs. This economic analysis considers the economic impact of those visitors and anticipated growth in trail patronage through 2025. These include the direct, indirect, and induced effects created by these economic activities. The direct effect measures the expenditures on products and labor. As an example, let us say a visitor rents a bike to go on the trail. On the other hand, the indirect effect comes when a business purchases goods and services from suppliers. Finally, the economy also benefits when the business employees use their wages to buy goods and services. This is called the induced effect. The indirect and induced economic impacts are often referred to as the economic ripple effect.

## Literature Review and Previous Case Studies

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According to a 2009 Rails-to-Trails Conservancy patronage study of 14 northeastern trails, 54 percent of trail users are 45 and over[1] while a 2011 study of Orange County trail users showed that more 40 percent were older than 45.

As the Rails-to-Trails survey revealed, a slim majority (55-45%) of users are male, and tend to be 'local' residents, although rural trails are more frequently patronized by a majority of 'non-local' users. A 2004 study of Virginia Creeper Trail users found that in addition to being largely male and over 45, trail users were well educated (65% were college educated) and affluent (average income is $72,315)[2]. Along the Allegheny trail, one third of trail users reported household incomes of $100,000 or more and 80% said they were over the age of 35[3].

While the majority of trail users, according to Rails-to-Trails, are motivated by health and fitness (56%), recreation is the primary motivation of 38 percent of users. 29 percent of trail users use a trail more than once a week, and 22 percent use a trail at least once a month. Orange County trail users most frequently (56.5%) use the trail about once a month.

Most users in Orange County and in the Rails-to-Trails survey spend between one hour and two on a trail at any given time[4]. Biking was the primary activity for half of users, while 32 percent were walking, according to Rails-to-Trails.

Spending on trails, according to Rails-to-Trails, typically varies between $4.11 to $30.30 a day[5] with an overall average of $16.30[6]. In one study, focusing on 2007-2008 on the Allegheny trail, nearly forty percent of trail users planned an overnight stay in trail communities, spending $98/day on the trail and in lodgings[7]. Other visitors spent an average of $13 a day. A 2011 study of Orange County trail use indicated an average spending pattern of about $20/day per visitor. Only 4% of visitors spent one or more nights on the trail.

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## Methodology, Inputs and Assumptions

To estimate the economic impact of the C2C, the RPCs used both visitor expenditure and construction estimates. The visitor spending figures were generated using trail count data provided by the counties and the average spending figures from the *Economic Impact Analysis of Orange County Trails Study* completed by the ECFRPC in 2011. In addition to this number, the RPCs also used some of the costs that will be incurred to complete the construction of the C2C by bridging various gaps found within the system.

### Generating Visitor Estimates

The first part of this analysis was to estimate the amount of visitors using the trails annually. The RPCs contacted staff from the nine central Florida counties within the C2C Trail (Brevard, Hernando, Lake, Orange, Pasco, Pinellas, Seminole, Sumter and Volusia) to get this information. Most counties rely on parking lot counts and intercept surveys or 'guestimates' while two large counties, Orange and Seminole, use counters to determine the number of people riding the trail[8]. In this case, the RPCs turned the counts into visitors by dividing the number by half. The final visitation numbers are summarized in Figure/Table #1. Based on this information, the RPCs estimate that 1.4 million people visited the trails in 2015.

*Table #1 Total Number of Trail Visitors in 2015*

| | Total Visitors |
|---|---|
| **Brevard** | 9,600 |
| **Hernando** | 31,908 |
| **Lake** | 45,000 |
| **Orange** | 349,542 |
| **Pasco** | 15,973 |
| **Pinellas** | 608,405 |
| **Seminole** | 278,816 |
| **Sumter** | 15,380 |
| **Volusia** | 52,000 |
| **Total** | 1,406,624 |

Sources: Participating Counties, RPC calculations

Because this study also considers the multiyear impacts of the trail, the RPCs also forecasted visitor usage statistics for the year 2025. The 2025 numbers were estimated by taking each county's historic ten-year growth rate in bed tax collection divided in half (Table 2 presents the Bed Tax revenues for 2015 and estimated for 2025). While there are other potential means of forecasting future trail use, the growth rate in bed tax collection was a conservative measure to ground the estimate in some empirical relationship to tourism trends. Because of undercounting concerns in Brevard and Pasco counties and the potential network effects of these trails in populated areas, the RPCs adjusted their visitor growth rates for 200% over the forecast period.

*Table #2 County Bed Tax Revenues*

| | 2015 Bed Tax | 2025 Bed Tax Estimate |
|---|---|---|
| **Brevard** | $9,600 | $28,800 |
| **Hernando** | $31,908 | $37,233 |
| **Lake** | $45,000 | $50,897 |
| **Orange** | $349,542 | $440,151 |
| **Pasco** | $15,973 | $47,919 |
| **Pinellas** | $608,405 | $814,118 |
| **Seminole** | $278,816 | $292,096 |
| **Sumter** | $15,380 | $25,435 |
| **Volusia** | $52,000 | $59,741 |

Sources: The Economic Impact of Orange County Trails, RPC calculations

The total number of visitors was divided between resident users and overnight visitors to develop expenditure profiles. According to the *Economic Impact Analysis of Orange County Trails study*, day-trippers spend about $20 a day. The same study estimates that about 4% of trail visitors are

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overnight visitors (staying at least one night in the area). We assumed that these overnight visitors will stay only one night and spend an additional $100 in accommodations. This number was estimated using a sample of daily rates for hotels along the trail, and is not seasonally-adjusted. Finally, the 2025 spending was estimated by using PI+ built-in modeling features for fixed 2015 dollars throughout all forecast years to ensure internal consistency in the methodology.

The following two tables take anticipated spending in 2015 and in 2025—with interpolated data in between those two years---and comprise the basis for the REMI economic impact analysis of ongoing visitor spending between 2015 and 2025.

*Table #3 Total Visitor Expenditures in 2015*

| | Resident Visitors | Annual Spending | Non-Resident Visitors | Annual Spending | Total Visitors | Total Annual Spending |
|---|---|---|---|---|---|---|
| **Brevard** | 9,216 | $184,320 | 384 | $46,080 | 9,600 | $192,000 |
| **Hernando** | 30,632 | $612,634 | 1,276 | $153,158 | 31,908 | $638,160 |
| **Lake** | 43,200 | $864,000 | 1,800 | $216,000 | 45,000 | $900,000 |
| **Orange** | 335,560 | $6,711,206 | 13,982 | $1,677,802 | 349,542 | $6,990,840 |
| **Pasco** | 15,334 | $306,683 | 639 | $76,671 | 15,973 | $319,462 |
| **Pinellas** | 584,069 | $11,681,385 | 24,336 | $2,920,346 | 608,405 | $12,168,109 |
| **Seminole** | 267,663 | $5,353,267 | 11,153 | $1,338,317 | 278,816 | $5,576,320 |
| **Sumter** | 14,764 | $295,286 | 615 | $73,822 | 15,380 | $307,590 |
| **Volusia** | 49,920 | $998,400 | 2,080 | $249,600 | 52,000 | $1,040,000 |
| **Total** | 1,350,359 | $27,007,182 | 56,265 | $6,751,795 | 1,406,624 | $33,758,977 |

**Source:** Various county governments and RPC calculations.

*Table #4 Total Visitor Expenditures in 2025 (Forecast)*

| | Resident Visitors | Annual Spending | Non-Resident Visitors | Annual Spending | Total Visitors | Total Annual Spending |
|---|---|---|---|---|---|---|
| **Brevard** | 27,648 | $552,960 | 1,152 | $167,584 | 28,800 | $720,544 |
| **Hernando** | 35,743 | $714,866 | 1,489 | $216,652 | 37,233 | $931,518 |
| **Lake** | 48,861 | $977,219 | 2,036 | $296,163 | 50,897 | $1,273,382 |
| **Orange** | 422,545 | $8,450,899 | 17,606 | $2,561,186 | 440,151 | $11,012,085 |
| **Pasco** | 46,003 | $920,050 | 1,917 | $278,836 | 47,919 | $1,198,887 |
| **Pinellas** | 781,554 | $15,631,073 | 32,565 | $4,737,257 | 814,118 | $20,368,330 |
| **Seminole** | 280,412 | $5,608,250 | 11,684 | $1,699,674 | 292,096 | $7,307,924 |
| **Sumter** | 24,417 | $488,344 | 1,017 | $148,001 | 25,435 | $636,344 |
| **Volusia** | 57,351 | $1,147,021 | 2,390 | $347,624 | 59,741 | $1,494,645 |
| **Total** | 1,724,534 | $33,610,785 | 71,856 | $10,452,976 | 1,796,390 | $44,943,657 |

Sources: The Economic Impact of Orange County Trails, RPC calculations

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### Construction Costs ("Closing the Gap")

The analysis considers the one-time impacts of construction from ongoing user activity as separate and temporary. Once construction complete, capital projects impacts dissipate. These construction numbers were collected from Coast to Coast documents. The table below lists each of the gaps in the Coast to Coast Trail that were analyzed for construction impacts.

*Table #5 Current Coast to Coast Trail Gaps and Total Construction Costs*

| Gaps | County | Cost |
|---|---|---|
| Starkey | Pinellas/Pasco | $3.9M/$2.0M |
| Good Neighbor | Hernando | $2.745M |
| South Sumter Connecter | Sumter | $11.407M |
| South Lake | Lake | $12.630M |
| Seminole/Volusia | Seminole/Volusia | $1.100M |
| Orange | Orange | $9.387M |
| Space Coast | Brevard (East Central Gap) | $7.35M |
| **Total** | **All Counties** | **$50.509M** |

Source: Florida Coast-to Coast Connector Economic Benefits and Market Report

Based on this information, there will be a $50.5 million in new construction investments that were input over a three year estimated period from 2015-2017. While the actual construction phasing may vary, the REMI model requires that these investments are allocated per year in order to calculate their economic impacts.

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## Integrating Economic Opportunity Costs into the Model

People have choices on where to spend their limited resources, such as time or money. In economics, this is referred to as an opportunity cost or a benefit that a person could have received, but gave up to take another action. Since most of the C2C trail visitors are local visitors, they could have easily choose to spend their leisure money purchasing other recreational activities such as going to a movie or a restaurant. REMI PI+ facilitates a comparison of spending on trail visits versus a 'counterfactual' alternative, which is what those visitors might spend their money on if they do not use the trail.

It is important to note that the opportunity costs variable was not used for non-resident trail visitors expenditures because these people come from outside the region and therefore have dispensed with the opportunity to spend their money on other "local" activities.

## Simulation Results

Results from the REMI analysis are divided into construction and visitor spending impacts. While visitor spending impacts are given over an eleven year period (2015-2025), and presented in a range of tables, construction impacts are given below as one time temporary impact for the entire region.

*Table #6 Summary of Construction Impacts 2015-2025*

| Economic Indicators | Economic Impact |
|---|---|
| Total Employment | 804 |
| Total Personal Income | $38 Million |
| Total Output | $82 Million |
| Total Gross Domestic Product | $50 Million |

Source: REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

The following Summary Table accounts for all economic activity generated by visitor expenditures, taking into account opportunity costs. The annual average over the eleven year period and a cumulative figure for Employment, Personal Income, Output and Gross Domestic Product are provided.

*Table #7 Summary of Visitor Expenditure Impacts 2015-2025*

| Economic Indicators | Economic Impacts | |
|---|---|---|
| | Annual Average | Cumulative |
| Employment | 259 | 2,845 |
| Personal Income | $13 Million | $143 Million |
| Output | $21 Million | $235 Million |
| Gross Domestic Product | $13 Million | $140 Million |

Source: REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

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## Employment Impacts

The employment estimate is comprised of all full-time and part-time positions generated by visitor demand for goods and services. Employment refers to jobs created in each year, they are not cumulative. Because the REMI model is dynamic and incorporates factors such as increasing firm productivity and competition for labor, the employment created by the trail slips in the later years of the analysis, even though spending may increase throughout the forecast.

*Table #8 Total Employment per Year for all Coast to Coast Trail Counties*

| Total Employment | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Region** | 204 | 222 | 239 | 245 | 254 | 262 | 271 | 277 | 283 | 291 | 297 |
| **Brevard** | 2 | 2 | 3 | 3 | 3 | 4 | 4 | 4 | 4 | 5 | 5 |
| **Hernando** | 3 | 4 | 4 | 4 | 4 | 4 | 5 | 5 | 5 | 5 | 5 |
| **Lake** | 5 | 5 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 7 | 7 |
| **Orange** | 86 | 92 | 96 | 97 | 99 | 100 | 101 | 103 | 104 | 105 | 107 |
| **Pasco** | 3 | 4 | 5 | 5 | 6 | 6 | 7 | 7 | 8 | 8 | 8 |
| **Pinellas** | 81 | 89 | 95 | 100 | 105 | 110 | 115 | 119 | 123 | 127 | 131 |
| **Seminole** | 17 | 19 | 21 | 21 | 22 | 22 | 23 | 23 | 23 | 24 | 24 |
| **Sumter** | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| **Volusia** | 6 | 6 | 7 | 7 | 7 | 8 | 8 | 8 | 8 | 8 | 8 |

Source: REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

## Industries with Greatest Employment Impact

In any tourism oriented economic impact, some industries will benefit more from tourism spending than others. The following table lists the industries with positive employment impacts, listed in declining order.

*Table #9 Employment by Industry Sector*

| Industry | Percentage |
|---|---|
| **Accommodation and Food Services** | 53% |
| **Arts, Entertainment, and Recreation** | 18% |
| **Transportation and Warehousing** | 13% |
| **Administrative and Waste Management Services** | 6% |
| **Construction** | 5% |
| **Retail Trade** | 2% |
| **Professional, Scientific, and Technical Services** | 1% |
| **Management of Companies and Enterprises** | 1% |
| **Real Estate and Rental and Leasing** | 0% |
| **Total** | 100% |

Source: REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

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### Personal Income

Personal income is wages and all transfer payments. Dollars are given in millions of fixed 2015 units. The following figures represent personal income generated in each year and are not cumulative.

*Table #10 Personal Income by Year for all Coast to Coast Trail Counties*

| Personal Income (Thousands) | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Region** | 5,904 | 7,602 | 9,055 | 10,399 | 11,691 | 13,001 | 14,262 | 15,662 | 16,986 | 18,286 | 19,697 |
| **Brevard** | 97 | 128 | 153 | 177 | 201 | 225 | 249 | 276 | 304 | 334 | 367 |
| **Hernando** | 98 | 131 | 162 | 192 | 220 | 249 | 277 | 308 | 337 | 366 | 398 |
| **Lake** | 281 | 359 | 421 | 475 | 524 | 569 | 611 | 656 | 700 | 743 | 792 |
| **Orange** | 2,340 | 2,881 | 3,311 | 3,688 | 4,027 | 4,333 | 4,619 | 4,949 | 5,253 | 5,552 | 5,883 |
| **Pasco** | 238 | 324 | 401 | 477 | 554 | 645 | 730 | 825 | 916 | 1,005 | 1,101 |
| **Pinellas** | 1,805 | 2,416 | 2,984 | 3,542 | 4,103 | 4,717 | 5,327 | 5,997 | 6,629 | 7,246 | 7,908 |
| **Seminole** | 759 | 976 | 1,158 | 1,312 | 1,456 | 1,594 | 1,720 | 1,858 | 1,991 | 2,122 | 2,261 |
| **Sumter** | 43 | 59 | 72 | 84 | 96 | 108 | 119 | 132 | 145 | 158 | 173 |
| **Volusia** | 244 | 327 | 394 | 454 | 509 | 561 | 609 | 661 | 711 | 760 | 815 |

Source: REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

### Output

Often referred to as total sales volume, output measures the gross level of business revenue which includes both the costs of labor and materials (intermediate inputs) and value added (compensation and profits). Since business output is the broadest measure of economic activity, it tends to generate the largest numbers.

*Table #11 Total Sales (Output) by Year for all Coast to Coast Trail Counties*

| Output (Thousands) | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Region** | 14,204 | 16,267 | 17,899 | 19,179 | 20,406 | 21,623 | 22,713 | 23,932 | 25,078 | 26,183 | 27,389 |
| **Brevard** | 129 | 169 | 203 | 232 | 260 | 290 | 318 | 349 | 380 | 411 | 444 |
| **Hernando** | 188 | 213 | 234 | 250 | 264 | 279 | 291 | 305 | 319 | 332 | 346 |
| **Lake** | 266 | 322 | 360 | 384 | 401 | 416 | 427 | 441 | 456 | 471 | 489 |
| **Orange** | 8,113 | 8,952 | 9,551 | 9,970 | 10,347 | 10,694 | 11,005 | 11,365 | 11,713 | 12,062 | 12,460 |
| **Pasco** | 191 | 254 | 305 | 348 | 389 | 433 | 473 | 516 | 557 | 597 | 637 |
| **Pinellas** | 4,279 | 5,018 | 5,678 | 6,268 | 6,872 | 7,510 | 8,095 | 8,734 | 9,323 | 9,876 | 10,462 |
| **Seminole** | 675 | 899 | 1,065 | 1,179 | 1,283 | 1,374 | 1,446 | 1,528 | 1,600 | 1,669 | 1,750 |
| **Sumter** | 71 | 85 | 97 | 106 | 114 | 122 | 129 | 137 | 145 | 154 | 162 |
| **Volusia** | 291 | 356 | 406 | 443 | 476 | 505 | 530 | 558 | 584 | 611 | 639 |

Source: REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

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### Gross Domestic Product

Gross Domestic Product is the value of all goods and services produced in the region. Dollars are given in millions of fixed 2015 units. The following figures represent GDP generated in each year and are not cumulative.

*Table #12 Total GDP Increases by Year for all Coast to Coast Trail Counties*

| GDP (Thousands) | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Region** | 8,061 | 9,420 | 10,497 | 11,345 | 12,149 | 12,944 | 13,656 | 14,449 | 15,193 | 15,912 | 16,662 |
| **Brevard** | 74 | 97 | 117 | 134 | 151 | 169 | 186 | 205 | 224 | 243 | 263 |
| **Hernando** | 103 | 121 | 135 | 146 | 156 | 166 | 174 | 184 | 193 | 202 | 211 |
| **Lake** | 150 | 188 | 214 | 231 | 244 | 255 | 263 | 273 | 283 | 294 | 305 |
| **Orange** | 4,655 | 5,220 | 5,624 | 5,909 | 6,160 | 6,389 | 6,593 | 6,827 | 7,053 | 7,278 | 7,521 |
| **Pasco** | 113 | 154 | 189 | 218 | 245 | 274 | 301 | 329 | 357 | 384 | 410 |
| **Pinellas** | 2,417 | 2,897 | 3,323 | 3,704 | 4,092 | 4,503 | 4,880 | 5,291 | 5,671 | 6,028 | 6,394 |
| **Seminole** | 341 | 486 | 595 | 672 | 743 | 805 | 855 | 911 | 961 | 1,008 | 1,060 |
| **Sumter** | 39 | 48 | 55 | 61 | 67 | 72 | 76 | 82 | 87 | 92 | 97 |
| **Volusia** | 167 | 210 | 244 | 269 | 291 | 311 | 328 | 347 | 365 | 383 | 401 |

Source: REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

## Conclusions

Like many trails around the United States, the Coast to Coast Trail will stimulate the economies of the counties that comprise it. However, even though rural counties stand to gain just as the more urban counties, those counties with greater numbers of visitors will benefit most. As with other network effects, the trail will benefit even the most rural areas because visitors traveling there are either headed to those counties as a destination or will now travel through the county to arrive at some other destination. In either case, visitors will use the amenities and patronize the businesses along the way.

Compared to the potential costs of maintenance and repair on the trail—between $1,500 and $2,500/mile a year[9]--or about $375,000 to $625,000 a year for the entire 250 mile trail, the returns on investment to personal income or Gross Domestic Product provide an economic justification for the trail.

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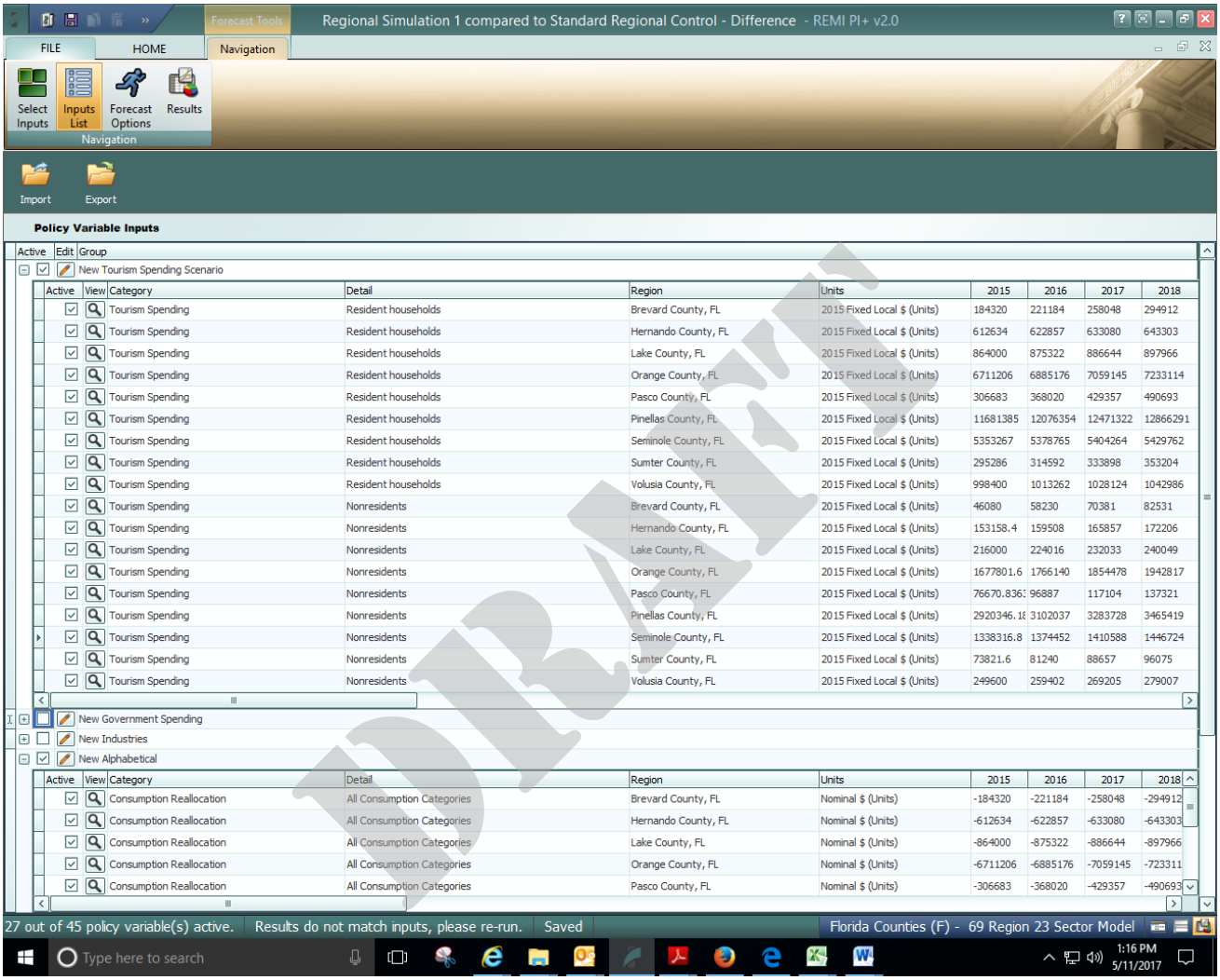
# Appendix

## Modeling Economic Impacts

As described in the methodology section, TBRPC used REMI PI+ to calculate the impacts of visitor spending and their opportunity costs. Visitor spending was input into PI+ using the Tourism spending routine. The following screenshot depicts the variables used in preparing both consumer spending and consumption reallocation.

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## Tourism Spending Categories

The following Table depicts which spending categories are used in visitor spending and some sample data from the study.

| Category | Units | Year 1 | Year 2 |
|---|---|---|---|
| **Retail Trade** | 2009 Fixed National $ (B) | 0.00001522 | 0.00001826 |
| **Transportation and Warehousing** | 2009 Fixed National $ (B) | 0.00003292 | 0.00003951 |
| **Real Estate and Rental and Leasing** | 2009 Fixed National $ (B) | 4.133E-06 | 4.959E-06 |
| **Administrative and Waste Management Services** | 2009 Fixed National $ (B) | 5.493E-06 | 6.592E-06 |
| **Arts, Entertainment, and Recreation** | 2009 Fixed National $ (B) | 0.0000248 | 0.00002975 |
| **Accommodation and Food Services** | 2009 Fixed National $ (B) | 0.0000451 | 0.00005412 |
| **Other Services, except Public Administration** | 2009 Fixed National $ (B) | 2.687E-06 | 3.224E-06 |

## County Level Results

**Brevard**

| Brevard | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 2 | 2 | 3 | 3 | 3 | 4 | 4 | 4 | 4 | 5 | 5 |
| **Personal Income** | Thousands of Current Dollars | 97 | 128 | 153 | 177 | 201 | 225 | 249 | 276 | 304 | 334 | 367 |
| **Output** | Thousands of Current Dollars | 129 | 169 | 203 | 232 | 260 | 290 | 318 | 349 | 380 | 411 | 444 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 74 | 97 | 117 | 134 | 151 | 169 | 186 | 205 | 224 | 243 | 263 |

REMI PI+, Florida Counties, V2.06 Build 4056, April 2017

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## Hernando

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 3 | 4 | 4 | 4 | 4 | 4 | 5 | 5 | 5 | 5 | 5 |
| **Personal Income** | Thousands of Current Dollars | 98 | 131 | 162 | 192 | 220 | 249 | 277 | 308 | 337 | 366 | 398 |
| **Output** | Thousands of Current Dollars | 188 | 213 | 234 | 250 | 264 | 279 | 291 | 305 | 319 | 332 | 346 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 103 | 121 | 135 | 146 | 156 | 166 | 174 | 184 | 193 | 202 | 211 |

## Lake

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 5 | 5 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 7 | 7 |
| **Personal Income** | Thousands of Current Dollars | 281 | 359 | 421 | 475 | 524 | 569 | 611 | 656 | 700 | 743 | 792 |
| **Output** | Thousands of Current Dollars | 266 | 322 | 360 | 384 | 401 | 416 | 427 | 441 | 456 | 471 | 489 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 150 | 188 | 214 | 231 | 244 | 255 | 263 | 273 | 283 | 294 | 305 |

## Orange

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 86 | 92 | 96 | 97 | 99 | 100 | 101 | 103 | 104 | 105 | 107 |
| **Personal Income** | Thousands of Current Dollars | 2,340 | 2,881 | 3,311 | 3,688 | 4,027 | 4,333 | 4,619 | 4,949 | 5,253 | 5,552 | 5,883 |
| **Output** | Thousands of Current Dollars | 8,113 | 8,952 | 9,551 | 9,970 | 10,347 | 10,694 | 11,005 | 11,365 | 11,713 | 12,062 | 12,460 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 4,655 | 5,220 | 5,624 | 5,909 | 6,160 | 6,389 | 6,593 | 6,827 | 7,053 | 7,278 | 7,521 |

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## Pasco

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 3 | 4 | 5 | 5 | 6 | 6 | 7 | 7 | 8 | 8 | 8 |
| **Personal Income** | Thousands of Current Dollars | 238 | 324 | 401 | 477 | 554 | 645 | 730 | 825 | 916 | 1,005 | 1,101 |
| **Output** | Thousands of Current Dollars | 191 | 254 | 305 | 348 | 389 | 433 | 473 | 516 | 557 | 597 | 637 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 113 | 154 | 189 | 218 | 245 | 274 | 301 | 329 | 357 | 384 | 410 |

## Pinellas

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 81 | 89 | 95 | 100 | 105 | 110 | 115 | 119 | 123 | 127 | 131 |
| **Personal Income** | Thousands of Current Dollars | 1,805 | 2,416 | 2,984 | 3,542 | 4,103 | 4,717 | 5,327 | 5,997 | 6,629 | 7,246 | 7,908 |
| **Output** | Thousands of Current Dollars | 4,279 | 5,018 | 5,678 | 6,268 | 6,872 | 7,510 | 8,095 | 8,734 | 9,323 | 9,876 | 10,462 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 2,417 | 2,897 | 3,323 | 3,704 | 4,092 | 4,503 | 4,880 | 5,291 | 5,671 | 6,028 | 6,394 |

## Seminole

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 17 | 19 | 21 | 21 | 22 | 22 | 23 | 23 | 23 | 24 | 24 |
| **Personal Income** | Thousands of Current Dollars | 759 | 976 | 1,158 | 1,312 | 1,456 | 1,594 | 1,720 | 1,858 | 1,991 | 2,122 | 2,261 |
| **Output** | Thousands of Current Dollars | 675 | 899 | 1,065 | 1,179 | 1,283 | 1,374 | 1,446 | 1,528 | 1,600 | 1,669 | 1,750 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 341 | 486 | 595 | 672 | 743 | 805 | 855 | 911 | 961 | 1,008 | 1,060 |

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## Sumter

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| **Personal Income** | Thousands of Current Dollars | 43 | 59 | 72 | 84 | 96 | 108 | 119 | 132 | 145 | 158 | 173 |
| **Output** | Thousands of Current Dollars | 71 | 85 | 97 | 106 | 114 | 122 | 129 | 137 | 145 | 154 | 162 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 39 | 48 | 55 | 61 | 67 | 72 | 76 | 82 | 87 | 92 | 97 |

## Volusia

| | Units | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Employment** | Individuals (Jobs) | 6 | 6 | 7 | 7 | 7 | 8 | 8 | 8 | 8 | 8 | 8 |
| **Personal Income** | Thousands of Current Dollars | 244 | 327 | 394 | 454 | 509 | 561 | 609 | 661 | 711 | 760 | 815 |
| **Output** | Thousands of Current Dollars | 291 | 356 | 406 | 443 | 476 | 505 | 530 | 558 | 584 | 611 | 639 |
| **Gross Domestic Product** | Thousands of Fixed (2015) Dollars | 167 | 210 | 244 | 269 | 291 | 311 | 328 | 347 | 365 | 383 | 401 |

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[1] Trail User Surveys and Economic Impact: A Comparison of Trail User Expenditures. 2009. Rails to Trails Conservancy.

[2] https://www.greenway.org/pdf/va_creepertrail_study.pdf

[3] http://www.dep.state.fl.us/gwt/economic/PDF/GAPeconomicImpactStudy200809.pdf

[4] https://www.railstotrails.org/resourcehandler.ashx?id=7591 and Economic Analysis of Orange County Trails.

[5] Trail User Surveys and Economic Impact: A Comparison of Trail User Expenditures. 2009. Rails to Trails Conservancy.

[6] https://www.railstotrails.org/resourcehandler.ashx?id=7591

[7] http://www.dep.state.fl.us/gwt/economic/PDF/GAPeconomicImpactStudy200809.pdf

[8] Data were collected from each county. Whether or not each county used counters was established at the time of data collection in February and March 2017.

[9] http://www.americantrails.org/resources/ManageMaintain/MilwMaintcost.html