

GREAT AMERICAN RAIL-TRAIL[®]

ECONOMIC POTENTIAL OF
THE GREAT AMERICAN RAIL-TRAIL
MAY 2022



THE GREAT AMERICAN RAIL-TRAIL®

Spanning more than 3,700 miles, the Great American Rail-Trail® promises an all-new American experience. The trail travels through 12 states and the District of Columbia, connecting trail users and communities between Washington D.C. and Washington state.

As the nation's first cross-country multiuse trail, the Great American Rail-Trail will be entirely bikeable and walkable, connecting travelers of all ages and abilities with America's diverse landscapes and communities. It will be hosted primarily by rail-trails—public paths created from former

railroad corridors—as well as other multiuse trails, offering a route across the nation that is completely separated from vehicle traffic.

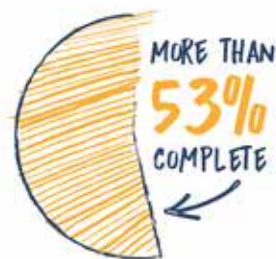
The Great American Rail-Trail is currently 53% complete, with more than 150 existing trails hosting the route and approximately 88 gaps yet to be connected. Upon its completion, the Great American will serve more than 50 million people within 50 miles of its route, as well as the millions from across the country and the world who will explore America's diverse places via the trail.

THE VISION REMAINS:



~50,000,000

PEOPLE WITHIN 50 MILES OF THE TRAIL



150+
EXISTING TRAILS
HOSTING ROUTE

88
TRAIL GAPS



Definitions

GDP Contribution: the wealth generated by the new spending brought into the community by visitors. It includes the value of the goods and services produced minus the cost of producing them. Income is a part of GDP.

Labor Income: wages supported by visitors' spending in the community. Wages are created from direct spending at businesses by visitors, as well as the ripple effect throughout the community as employees at those businesses spend money in the community.

Jobs: employment supported by visitor spending in the community as a result of the trail. Part-time and seasonal jobs are included proportionally. A person can hold more than one job, so job count is not necessarily the same as the count of employed persons.

Tax revenue: expected new state and local taxes earned as a result of the trail and associated economic activity.

Trips: the number of times someone travels one direction along the trail. A "point to point" excursion along the trail counts as one trip; an "out and back" excursion counts as two trips. Trail counters record trips, not users.

Users: the number of people who use the trail. On average, users equal a little more than half of trips.

Visitors: users who come from at least 50 miles away to use the trail. The number of visitors underpins the estimates of spending and economic impact.

Visitor spending: the amount of money visitors spend during their visit to the trail. This spending represents new money brought into the community.

HOW WE MEASURE ECONOMIC IMPACT

Headwaters Economics partnered with Rails-to-Trails Conservancy to conduct an independent economic impact analysis of the Great American Rail-Trail®. Economic impact analyses are based on the idea that something—whether a new trail, new business, or a new policy—can attract new money by enticing visitors who otherwise would not have come to the area. This new money, in turn, supports local businesses that employ residents, pay taxes, and support other businesses. These analyses require measuring the number of visitors drawn to the area and how much they spend.

The analysis was conducted in 2021-2022 using four data elements: 1) existing trail count data; 2) original statistical models to estimate trail users; 3) a literature review of spending estimates and trail use characteristics; and 4) economic impact estimates from the IMPLAN economic modeling program. The economic benefits presented in this report rely on three underlying assumptions. First, we assume that communities will capitalize on the trail with businesses like gear shops, restaurants, and lodging; signage directing users to these local businesses; and marketing the community as a welcoming stop for trail users. Second, we assume that the increase in outdoor recreation observed during the pandemic will persist. This assumption is supported by data from Rails-to-Trails Conservancy's [national network](#) of trail counters and the Outdoor Industry Association's [national survey](#) on participation in outdoor recreation. Finally, we assume that the route in this assessment will be built and maintained at a level of quality that is connected to other segments; has a safe separation from vehicles; and has a surface that is sufficiently maintained to allow most skills and abilities to walk, bike, and roll. This analysis does not assume that all segments would be paved.

The statistical modeling to estimate the number of trail users was conducted at the county level, using trail counter data from 57 locations across the U.S. to calibrate the model. In counties where trail counter data were available, we used the actual trail use. Where counter data were not available, we built on a statistical model developed by Rails-to-Trails Conservancy to predict use. The model uses communities of a similar size, climate, wealth, and population density. Due to the inherent variability and uncertainty underlying statistical modeling, we calculated the likely range of predicted use, and throughout the report provide the mid-point. The numbers provided in this analysis report the impact of a trail that is 100% complete. In states where the Great American Rail-Trail is not yet completed, the benefits today are proportional to the percentage of trail that is complete.

We relied on 30 existing studies of long-distance trails across the U.S. to estimate the share of users that are visitors versus locals, the share of visitors who are overnight versus day users, and spending profiles for overnight and day visitors. Where recent data were available for a specific trail segment we used segment-specific data. Otherwise, we applied averages from the literature.

The spending and visitation estimates were input into IMPLAN, a regional economic modeling software, to estimate the jobs, income, tax revenue, and contributions to GDP likely from the completion of the Great American Rail-Trail.

For complete methods and definitions, see <https://headwaterseconomics.org/outdoor-recreation/great-american-rail-trail>.



ECONOMIC POTENTIAL

The completion of the Great American Rail-Trail® will help amplify the benefits—on a mass scale—that trails provide. In addition to offering places for physical activity and recreation, connecting diverse communities with safe walking and biking routes, and promoting a closer connection to nature, the Great American will help communities along the route realize new economic potential.

The cross-country route will serve as a catalyst for economic growth. Hundreds of communities along the route will experience new opportunities for business development and tourism thanks to the Great American Rail-Trail, all while

contributing to the growth of the country's burgeoning outdoor economy—one of the fastest-growing sectors in the United States.

To fully realize the economic opportunity of the Great American Rail-Trail, communities will need to plan for and invest in the trail. Eighty-eight gaps remain to be completed and infrastructure like trailheads and signage are needed. States and communities can support tourism-ready businesses along the route. Such investments could generate more than \$229.4 million in visitor spending, \$104 million in labor income, and \$22.8 million in new tax revenue.

This independent economic analysis finds that the Great American Rail-Trail® could generate annually:



25.6M TRIPS



\$229.4M
IN VISITOR SPENDING



2,500
NEW JOBS



\$22.8M
IN NEW TAX REVENUE



\$104M
IN LABOR INCOME



\$161M
GDP CONTRIBUTION

WASHINGTON

554 miles
\$24.9M
visitor spending
1.6M trips

NEBRASKA

590 miles
\$14.5M
visitor spending
1.7M trips

INDIANA

215 miles
\$13.1M
visitor spending
1.5M trips

MONTANA

427 miles
\$16.0M
visitor spending
1.1M trips

ILLINOIS

194 miles
\$18.8M
visitor spending
2.1M trips

PENNSYLVANIA

172 miles
\$31.6M
visitor spending
1.7M trips

GREAT AMERICAN RAIL-TRAIL

brought to you by
rails-to-trails
conservancy

————— EXISTING TRAILS
***** TRAIL GAPS

IDAHO

90 miles
\$13.4M
visitor spending
500,000 trips

IOWA

467 miles
\$14.3M
visitor spending
1.7M trips

WEST VIRGINIA

8.7 miles
\$800,000
visitor spending
40,000 trips

MARYLAND

200 miles
\$43.3M
visitor spending
8.6M trips

WYOMING

510 miles
\$13.2M
visitor spending
900,000 trips

OHIO

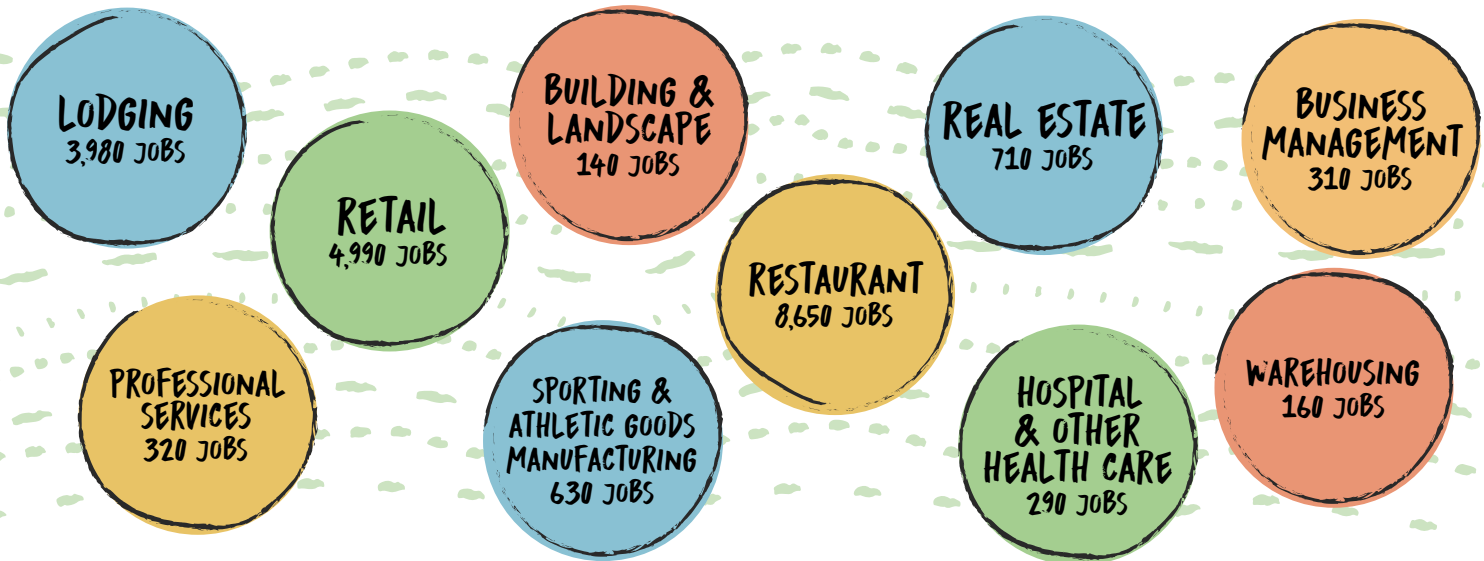
335 miles
\$13.3M
visitor spending
1.6M trips

WASHINGTON, DC

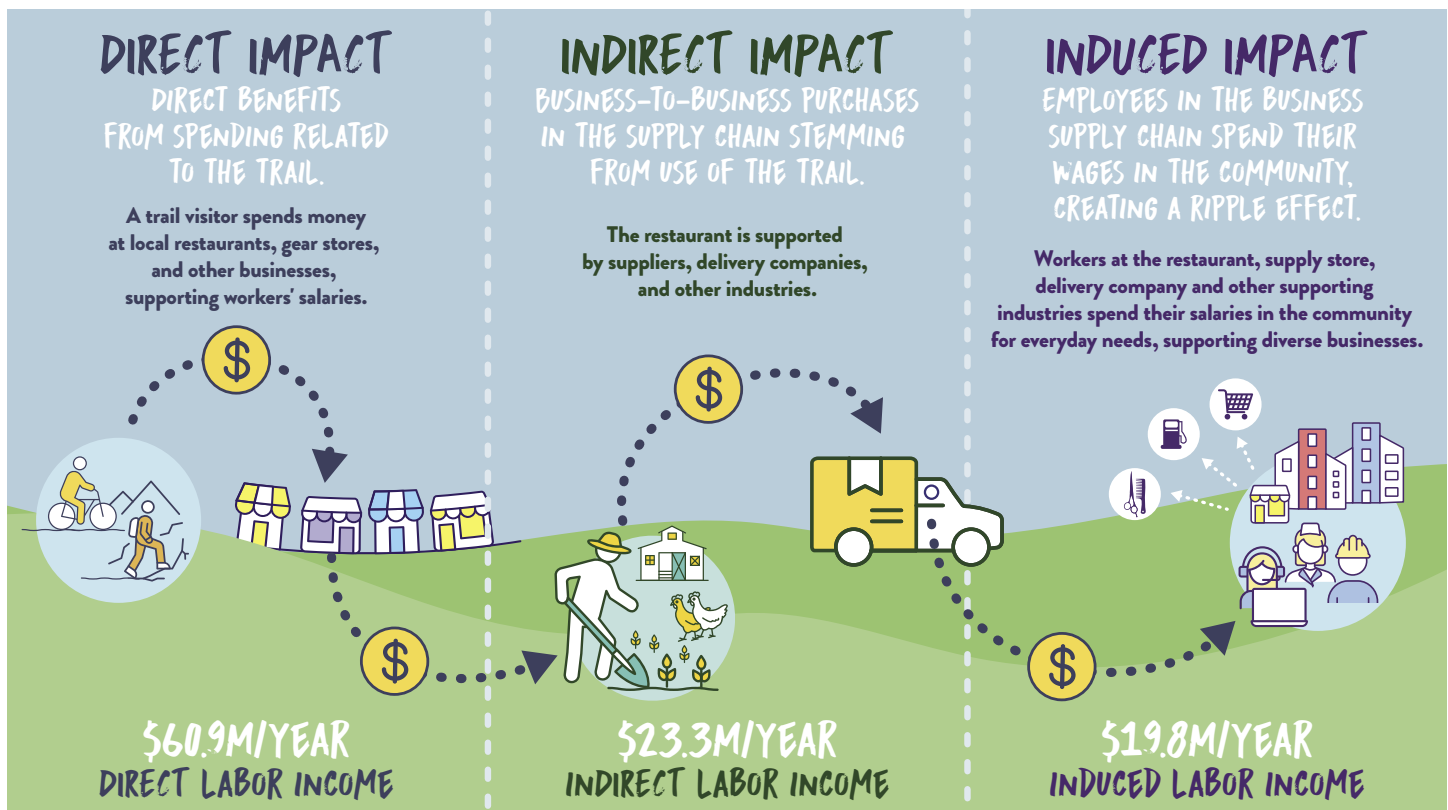
7.5 miles
\$12.4M
visitor spending
2.5M trips

DIVERSE INDUSTRIES ARE SUPPORTED

Over ten years, the Great American Rail-Trail® will create more than **25,000 jobs across diverse sectors** ranging from restaurants and retail to manufacturing, professional services, and health care. Investments in the Great American Rail-Trail can help revitalize communities, attract businesses and entrepreneurs, and keep residents, especially in rural places. In communities where the trail is not yet complete, it can help create new business opportunities and diverse jobs.

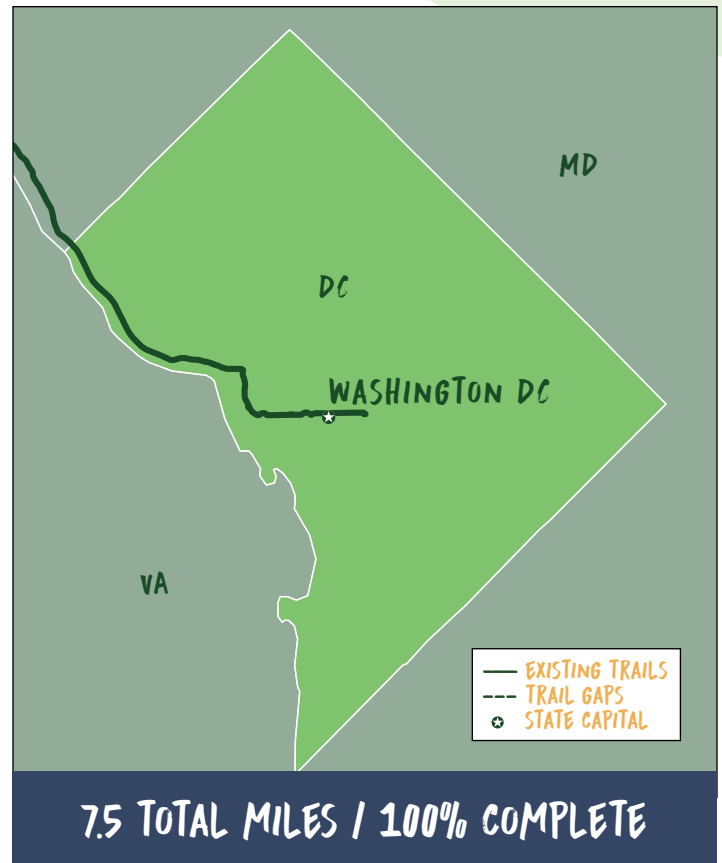


The Great American Rail-Trail is expected to generate more than **\$104 million in labor income each year**. These wages are supported by trail visitors when they spend money at local businesses, directly supporting workers. In turn, those businesses purchase supplies from other businesses, creating indirect impacts. When employees at those businesses spend their wages on everyday needs, a ripple effect is created throughout the community.



WASHINGTON, DC

The easternmost endpoint for the Great American Rail-Trail® begins in Washington, D.C., at the steps of the U.S. Capitol. Heading west through the National Mall, the route is hosted by trails featuring some of America's most renowned landmarks and a portion of Rock Creek Park, the oldest urban park in the National Park Service. After traveling through historic Georgetown, the route in D.C. connects into Maryland near Fletcher's Cove, a well-known fishing and outdoor recreation area of the Chesapeake & Ohio Canal National Historical Park.



In Washington D.C., the trail is estimated to generate annually:

\$1.1M
in new
tax revenue

\$7.2M
GDP contribution

\$12.4M
in visitor
spending

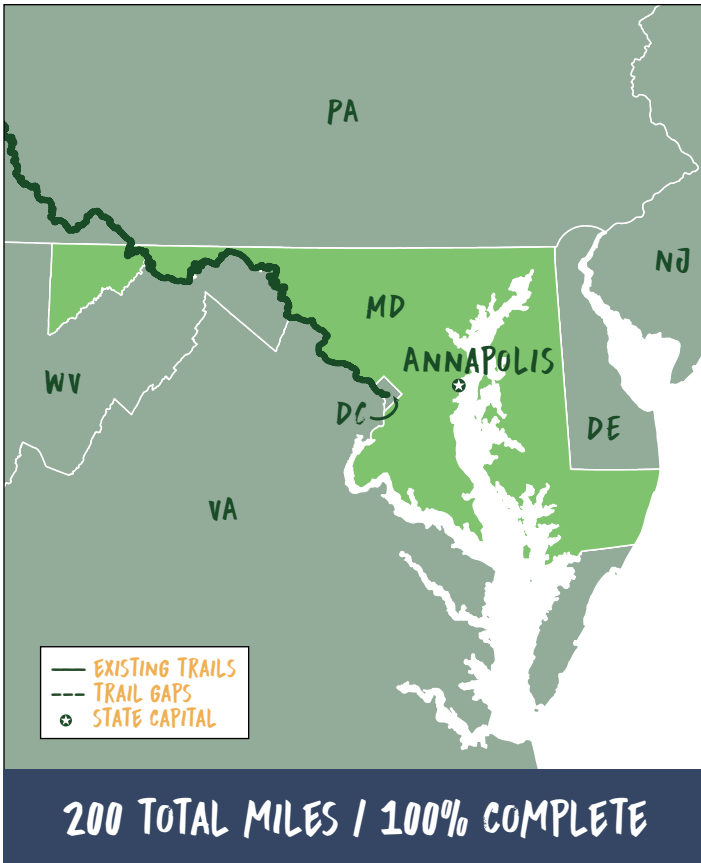
2,500,000
trips

80
new jobs

\$4.6M
in labor income



MARYLAND



A majority of the Great American Rail-Trail® host route in Maryland pays homage to the state's days as a central player in the Canal Era, which peaked in the mid-19th century. Carried by the Chesapeake & Ohio Canal National Historical Park (C&O Canal Towpath) for some 180 miles, the Great American Rail-Trail route through Maryland features hundreds of locks, lock houses and other canal structures that once transported coal, lumber and agricultural products to market and provided opportunities for employment and commerce in the Potomac River Valley.



In Maryland, the trail is estimated to generate annually:

\$5.8M
in new
tax revenue

\$31.6M
GDP contribution

\$43.3M
in visitor
spending

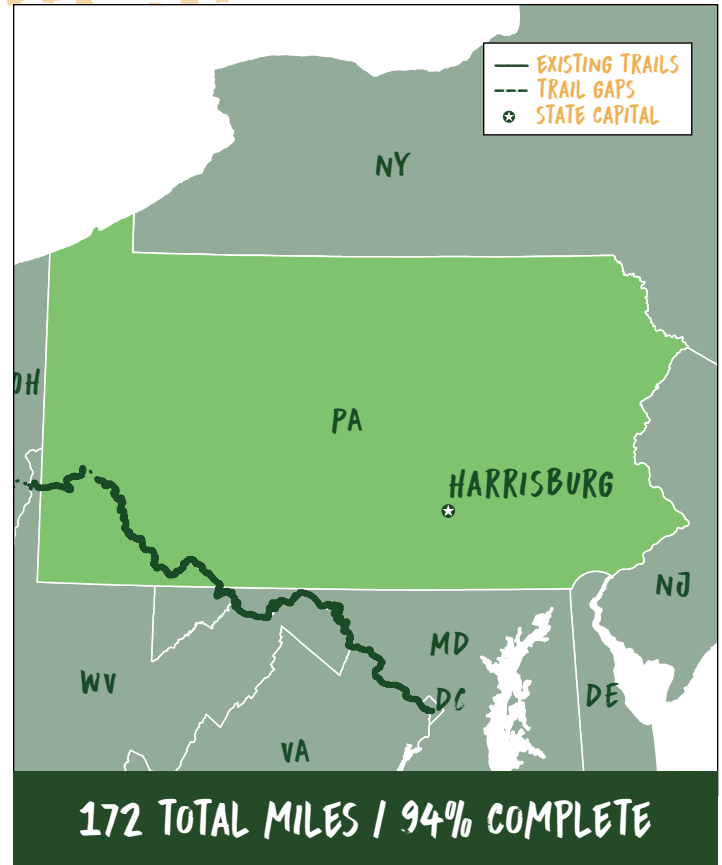
8,600,000
trips

430
new jobs

\$19.7M
in labor income

PENNSYLVANIA

In Pennsylvania, the Great American Rail-Trail® is hosted by trails that showcase the state's history and heritage, from its days before the country formally came into being to its heyday as an industrial powerhouse. Beginning at the Maryland-Pennsylvania border on the 150-mile Great Allegheny Passage (gaptrail.org), the route travels to Pittsburgh and through downtown on the Three Rivers Heritage Trail.



In Pennsylvania, the trail is expected to generate annually:

\$2.8M
in new
tax revenue

\$24.3M
GDP contribution

\$31.6M
in visitor
spending

1,700,000
trips

370
new jobs

\$16.7M
in labor income



WEST VIRGINIA

In West Virginia, the Great American Rail-Trail® travels through the Northern Panhandle through the town of Weirton along the Ohio River. West Virginia contains the least number of miles along the Great American Rail-Trail of any state across the route. The West Virginia section is located along the Cleveland to Pittsburgh corridor of the proposed 1,500-mile [Industrial Heartland Trails Coalition](#).



In West Virginia, the trail is expected to generate annually:

\$100,000
in new
tax revenue

\$400,000
GDP contribution

\$800,000
in visitor
spending

40,000
trips

10
new jobs

\$300,000
in labor income



OHIO



Several iconic trails play host to the Great American Rail-Trail® in Ohio, including the Ohio & Erie Canal Towpath Trail and the Ohio to Erie Trail. The Ohio & Erie Canal Towpath Trail connects two major metropolitan areas and one of the country's most-visited national parks. In Clinton, the Great American route branches off on the Ohio to Erie Trail, which—connecting to Cincinnati through Columbus—is composed of many trails that link the state's diverse communities, including that of the largest population of Amish in the country. Along the route, commemorative sites pay homage to the state's rich historical attributes, including the role that it played with the Underground Railroad and as an innovator in American aviation.



In Ohio, the trail is expected to generate annually:

\$1.3M
in new
tax revenue

\$10M
GDP contribution

\$13.3M
in visitor
spending

1,600,000
trips

160
new jobs

\$6.5M
in labor income

INDIANA

A dozen trails will host the preferred route of the Great American Rail-Trail® in Indiana—which will take a diagonal trajectory across the state from Richmond to the Chicago metropolitan area. The route is hosted by well-loved trails such as the Cardinal Greenway, which connects the eastern side of the state to urban Muncie and Marion, and the Nickel Plate Trail—which features the famous bucolic corn-belt landscapes the Hoosier State is known for.



In Indiana, the trail is expected to generate annually:

\$1.1M
in new
tax revenue

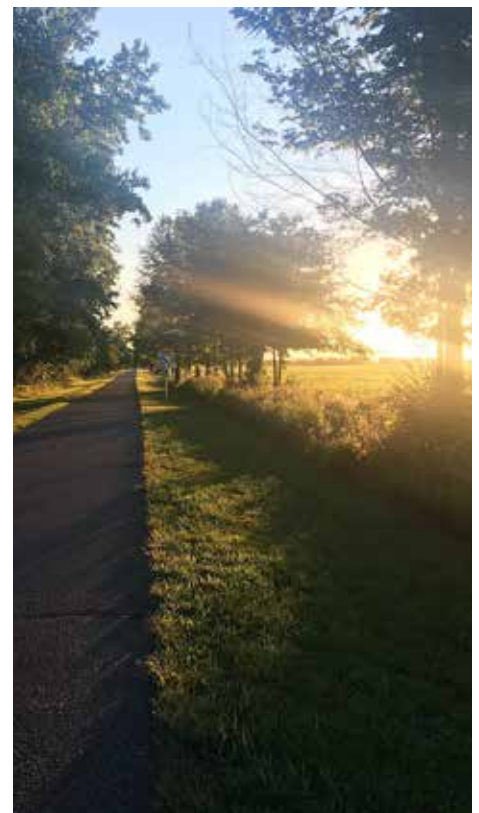
\$9.1M
GDP contribution

\$13.1M
in visitor
spending

1,500,000
trips

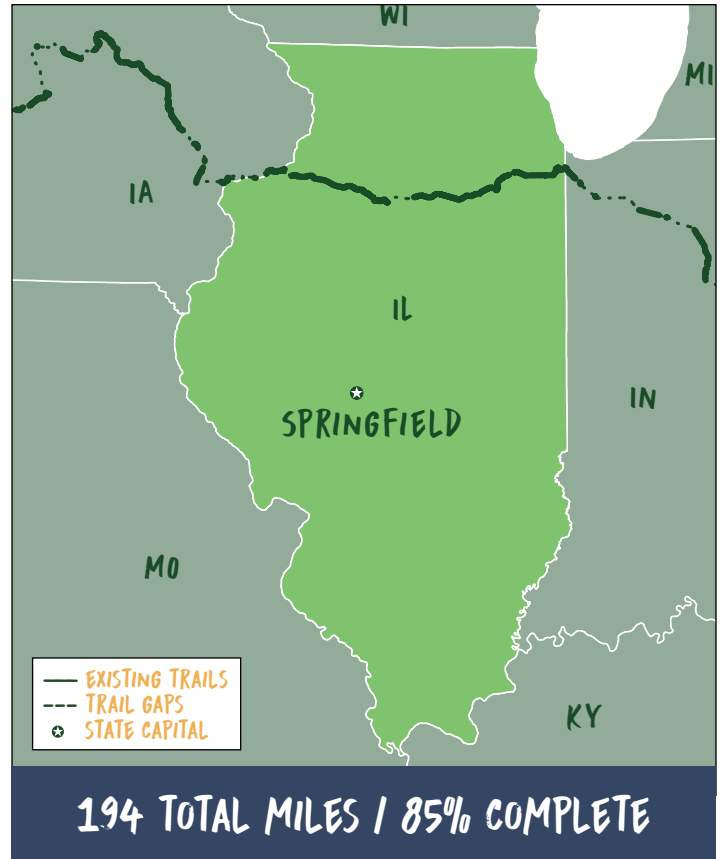
150
new jobs

\$6.2M
in labor income



ILLINOIS

In Illinois, the preferred route of the Great American Rail-Trail® is poised to stretch across the northern part of the state from the Chicago metropolitan area to the Mississippi River. Existing trails that host a majority of the route include the Hennepin Canal Parkway, which still contains many of the old locks and aqueducts from its namesake, the early-20th-century Hennepin Canal, and the Illinois & Michigan Canal State Park Trail, which traverses the I&M Canal National Heritage Corridor, designated in 1984 as the first National Heritage Area in the United States. Toward the end of the Great American route in Illinois, the Great River Trail features the river communities along the mighty Mississippi—including the Quad Cities of East Moline and Rock Island.



In Illinois, the trail is expected to generate annually:

\$2.3M
in new
tax revenue

\$15.3M
GDP contribution

\$18.8M
in visitor
spending

2,100,000
trips

200
new jobs

\$9.6M
in labor income

Western Illinois is home to two iconic trails: the Hennepin Canal Parkway and the Illinois & Michigan Canal State Trail, crossing historic locks and bridges and passing picturesque farms. A gap of 15 miles between the trails remains to be completed.

“With the rewatering of the I&M canal, the city of Ottawa has greatly increased the amount of bikes and hikers coming to our town. Any revitalization of the I&M canal and connecting trails would be essential to the promotion of economic development and tourism in our community.”

Wayne A. Eichelkraut Jr.
Commissioner of Finance
City of Ottawa

IOWA



The first state in the nation to put the Railbanking Act of 1983 to use, Iowa has a long history of leadership in trail development. Its rich network of trails includes well-established pathways such as the picturesque Cedar Valley Nature Trail—one of the state’s first rail-trail conversions and the state’s Great American Rail-Trail® gateway trail—and the nationally renowned High Trestle Trail with its famous mine-shaft-themed art installation. These trails will join with dozens of other trails to create a 465-miles-plus route from Davenport to Council Bluffs.



In Iowa, the trail is expected to generate annually:

\$1.2M
in new
tax revenue

\$8.9M
GDP contribution

\$14.3M
in visitor
spending

1,700,000
trips

170
new jobs

\$5.8M
in labor income

NEBRASKA

The Great American Rail-Trail® crosses from Iowa into Nebraska on the iconic Bob Kerrey Pedestrian Bridge—a 3,000-foot cable-suspension structure over the Missouri River. The preferred route of the Great American Rail-Trail in Nebraska weaves through the urban areas of Omaha and Lincoln, connecting these population centers to the western, more rural, part of the state along one of the longest and most famous rail-trails in the country—the Cowboy Recreation and Nature Trail.



In Nebraska, the trail is expected to generate annually:

\$1.3M
in new
tax revenue

\$9.9M
GDP contribution

\$14.5M
in visitor
spending

1,700,000
trips

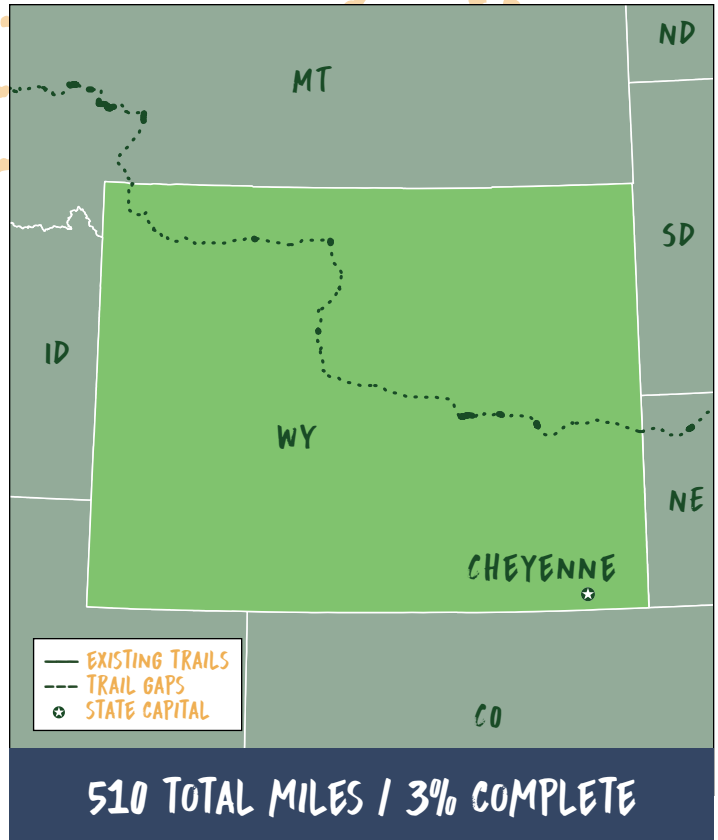
170
new jobs

\$6.1M
in labor income



WYOMING

Wyoming trails have the potential to host an incredible stretch of the Great American Rail-Trail® route, with the state's unique landscapes and already world-renowned outdoor recreation assets. Working closely with state and local officials and trail developers, RTC has identified a preferred route through the state that prioritizes opportunities for economic development. Important community connectors, such as the developing Casper Rail Trail, AI's Way in Glenrock and the Platte River Trail with its pioneer history, are helping to build momentum for statewide trail development.



In Wyoming, the trail is expected to generate annually:

\$900,000
in new
tax revenue

\$7.0M
GDP contribution

\$13.2M
in visitor
spending

900,000
trips

150
new jobs

\$4.5M
in labor income



MONTANA



The preferred route of the Great American Rail-Trail® through Montana will connect communities already well-known for their outdoor recreation assets—including Livingston, Bozeman, Three Forks, Butte, and Missoula. History abounds along the route as well: The area around the state's Great American gateway trail—the developing Headwaters Trails System in Three Forks—has a history stretching to Sacajawea and the 1804–1806 Lewis and Clark Corps of Discovery expedition; and in Livingston, the Highway 89 South Pedestrian Trail travels through the original gateway town for the country's first national park: Yellowstone.



The Route of the Olympian travels 30 miles over former rail grades in Mineral County, Montana. As the region's economy transitions from timber to tourism, the completion of the Great American Rail-Trail will create new opportunities to attract visitors and residents.

"As our region's economy changes, it will become even more important to have multiuse trails connecting our towns, drawing visitors, and creating opportunities for recreation. As an employer, more trails will help me attract customers and talent."

—Brooke Lincoln
Owner, the 50,000 Silver Dollar

In Montana, the trail is expected to generate annually:

\$800,000
in new
tax revenue

\$9.8M
GDP contribution

\$16.0M
in visitor
spending

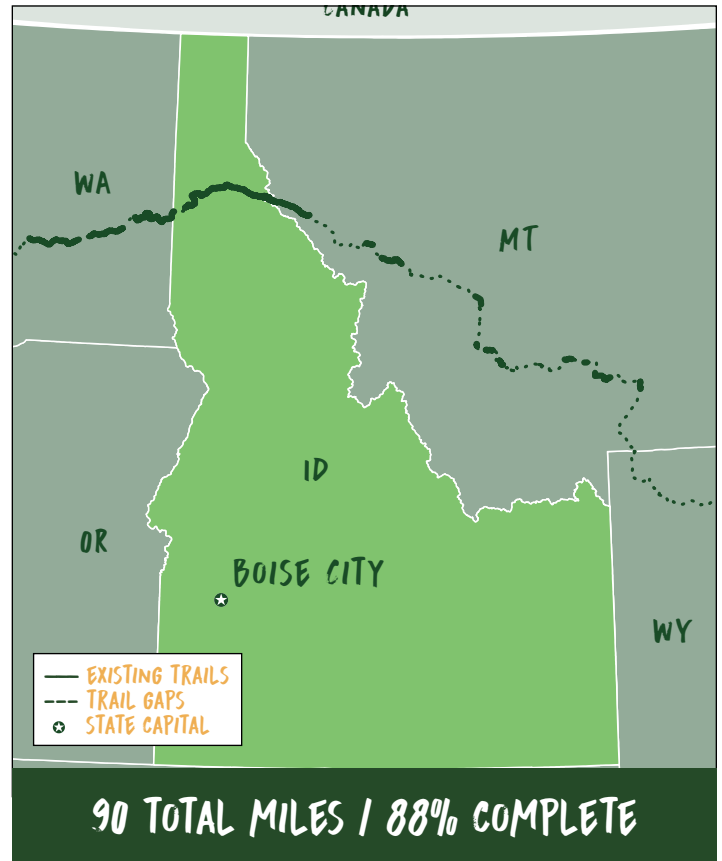
1,100,000
trips

210
new jobs

\$7.0M
in labor income

IDAHO

Idaho is primed to carry the Great American Rail-Trail® across its state, with the vast majority of the preferred route already existing. When complete, the trail will create a seamless connection from Mullan to Plummer and the Idaho-Washington border. The host trails that make up a majority of this route include the NorPac Trail and the Trail of the Coeur d'Alenes—the latter of which was part of a historic environmental mitigation and cleanup effort led by the Coeur d'Alene Tribe. Known for their exceptional views of the rugged and beautiful Idaho landscape, the trails have helped to spur outdoor tourism and recreation across the Idaho Panhandle.



In Idaho, the trail is expected to generate annually:

\$1.1M
in new
tax revenue

\$8.1M
GDP contribution

\$13.4M
in visitor
spending

500,000
trips

160
new jobs

\$5.4M
in labor income



WASHINGTON

Washington State's history of trail development has resulted in some of the country's most iconic and well-used trails, making it the ideal western terminus for the Great American Rail-Trail®. The preferred route will begin at the Idaho–Washington border on the developing Palouse to Cascades State Park Trail, an epic rail-trail that travels in segments across most of the state, ending in Cedar Falls. From here, a variety of trails in King County carry the Great American Rail-Trail into the Seattle area, where the trail will ultimately continue west to the Pacific Ocean along the burgeoning Olympic Discovery Trail.



In Washington, the trail is estimated to generate annually:

\$3.2M
in new
tax revenue

\$19.4M
GDP contribution

\$24.9M
in visitor
spending

1,600,000
trips

240
new jobs

\$11.8M
in labor income

Since the **Old Milwaukee Road** was first built through eastern Washington in 1911, the rail line has been an important part of the region's identity. Today, residents impacted by the 2020 Babb Road Fire are coalescing around the trail.

"There are no cheap silver bullets in economic development, but a long distance trail comes close; it brings in tourist dollars while also creating local activity in the towns it runs through, helping sell shoes, bikes and pumping up streetscape vitality. That's just some of what the Great American Rail-Trail can do for our state."

Jon Snyder
Senior Outdoor Recreation
and Economic Development Policy
Advisor to Gov. Jay Inslee

GREAT AMERICAN RAIL-TRAIL®



THE GREAT AMERICAN RAIL-TRAIL® PROMISES AN ALL-NEW AMERICAN EXPERIENCE. THROUGH 12 STATES AND THE DISTRICT OF COLUMBIA, THE TRAIL WILL ATTRACT 25.6 MILLION TRIPS AND GENERATE MORE THAN \$229.4 MILLION IN SPENDING ANNUALLY.

This report was produced by Headwaters Economics in partnership with Rails-to-Trails Conservancy. For complete methods, analysis, and regional case studies, see <https://headwaterseconomics.org/outdoor-recreation/great-american-rail-trail>.

