

An Economic and Impact Analysis of the Coldwater Mountain Bike Trail

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II. Executive Summary

The Economic and Impact Analysis of the Coldwater Mountain Bike Trail reveals encouraging opportunity for this facility in generating positive economic output. An analysis of outdoor recreation and specifically biking trends shows that across almost all demographics the sport is timely and has experienced strong growth both nationally and regionally.

To better understand specific attributes of possible users of the trail, an online survey of the International Mountain Bike Association's (IMBA) southern region division – Southern Off-Road Bicycle Association (SORBA) members was conducted. Eight hundred thirty nine (839) total responses were received and analyzed. Interest in the trail was very positive. Most survey responses indicated a very dedicated group that typically bikes close to home but also is not adverse to longer, overnight trips with several individuals accompanying. With the most common answer for frequency of biking adventures at more than 40 times per year, survey responders demonstrated an avid interest in the sport.

Survey responses also revealed unfamiliarity with the Forever Wild Trust that owns the Coldwater site. Establishing a better identity and brand between the Trust and the wildlife and conservation initiatives that it supports is paramount to not only leveraging scarce financial resources, but also marketing the many attributes found within Alabama.

Comparisons were made between the Anniston-Oxford area and other locations with similar trails in other parts of the U.S. to gauge market and spending potential. The local area compares favorably. Higher concentrations of bikers appear to be positively related to more urban areas versus rural. Potential usage was strong when considered within a 100 mile radius, a distance accessible by bikers that are seeking a day trip with no overnight lodging.

Economic impact was calculated based on a range of possible annual visitors of 50,000, 100,000, and 150,000. These scenarios were labeled as low, normal, and optimistic. Economic impact variables included spending for a local trip with no lodging and an overnight trip with lodging. Economic impact was based on multiplier induced total spending and tax revenues (sales, income, and lodging). The potential economic impact is encouraging.

A conclusion follows that discusses strengths and weaknesses of the analysis.

III. Introduction

The purpose of this study is to examine economic aspects to the local and surrounding community of the recently opened Coldwater Mountain Bike Trail in the Anniston-Oxford area of Calhoun County, Alabama. This analysis includes the economic impact expected to be derived from the facility in the following three categories: direct, indirect, and induced. The research was provided through the Center for Economic Development and Business Research at Jacksonville State University. The Calhoun County Community Development Corporation (CDC) initiated the request for the analysis. Joe Jankoski (CDC) and Mike Poe (Northeast Alabama Bicycle Association) provided input for development of the study.

The analysis investigates outdoor activities and adventure over the last decade by various demographic characteristics in an attempt to gauge the scope of national and regional trends within the industry. Several bicycle trail systems were identified for review and the market environment for outdoor recreation explored.

Trends in demand for outdoor recreation at national and state levels are discussed. Rates of growth for various activities are summarized as a comparison to mountain biking and specific patterns are identified within geographic categories within Alabama. Market and spending potential comparisons are developed between Anniston-Oxford, Alabama and Albemarle, NC, a location of similar geographic and demographic characteristics where a significantly enhanced facility was completed in mid 2011. Information from bicycling facilities in different states along with specific user data is provided for more comprehensive comparison.

A financial analysis is provided as a basis for the economic impact model. A survey was disseminated to individuals on the regional email list for the International Mountain Bike Association's (IMBA) southern region division – the Southern Off-Road Bicycle Association

(SORBA). Survey responses from 839 individuals are tallied and economic relationships presented and discussed. Further, the extent that respondents are familiar with Forever Wild was surveyed. Forever Wild owns the Coldwater Mountain Property and is permitting it to be developed as a recreational area. See Appendix A.

Finally, a conclusion for the study is supported by the financial analysis as well as expected future trends for the industry and the facility specifically.

A. Trends in Outdoor Recreation

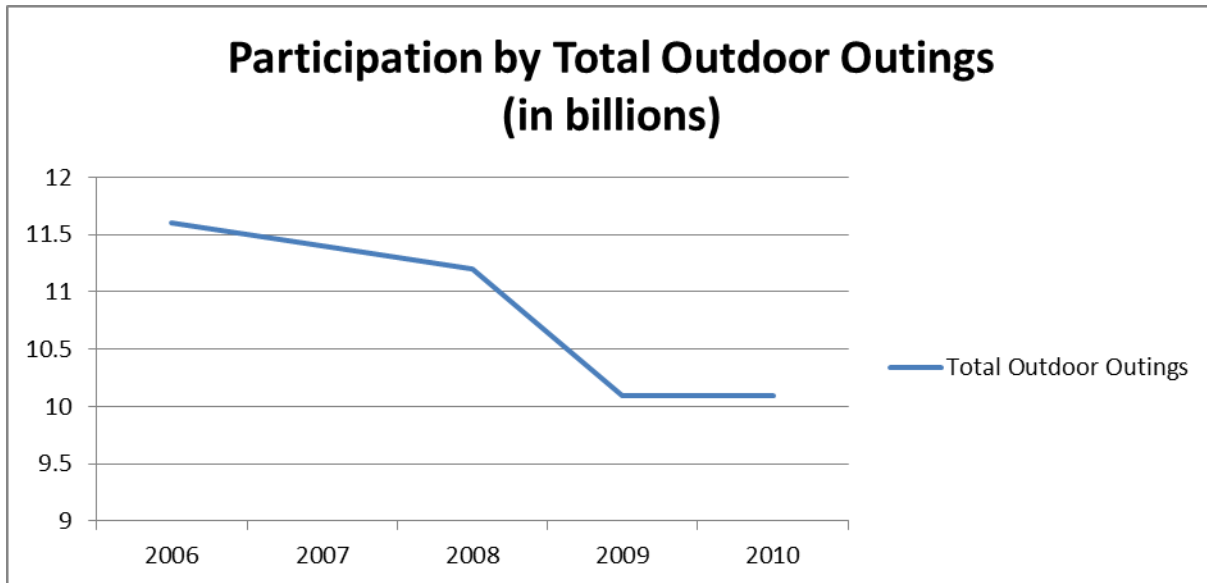
Bicycling is a national sport that has regional dimensions. From an observation of the number of biking facilities across the U.S. participants are willing to travel to visit (Cordell, 2004; Bikes Belong, 2011a). With lack of mobility less likely to be mentioned as a reason for not visiting a facility or a destination, trends in recreation are addressed from both a national and regional perspective. National recreation trends provide a measure of broad areas of interest in recreational activities and offer a basis for demographic evaluation. Regional trends, on the other hand, narrow the importance of specific activities and reflect competitive pressures that local facilities face that offer similar activities. Youth participation is considered as a basis for future trends in growth of the industry on a national and regional basis.

1. National Trends in Outdoor Recreation

Americans of all ages enjoy recreational activities, as evidenced by consumer expenditures dedicated to such activity. According to the Outdoor Foundation participation survey

<http://www.outdoorfoundation.org/pdf/ResearchParticipation2011Topline.pdf>), trends in outdoor participation have remained steady over the last five years with participation rates holding at approximately 48 to 50 percent for Americans age six and older. Referring to Graph 1, total number of outdoor outings for all types of outdoor recreational activities is steady at a level of 10 billion to almost 12 billion per year.

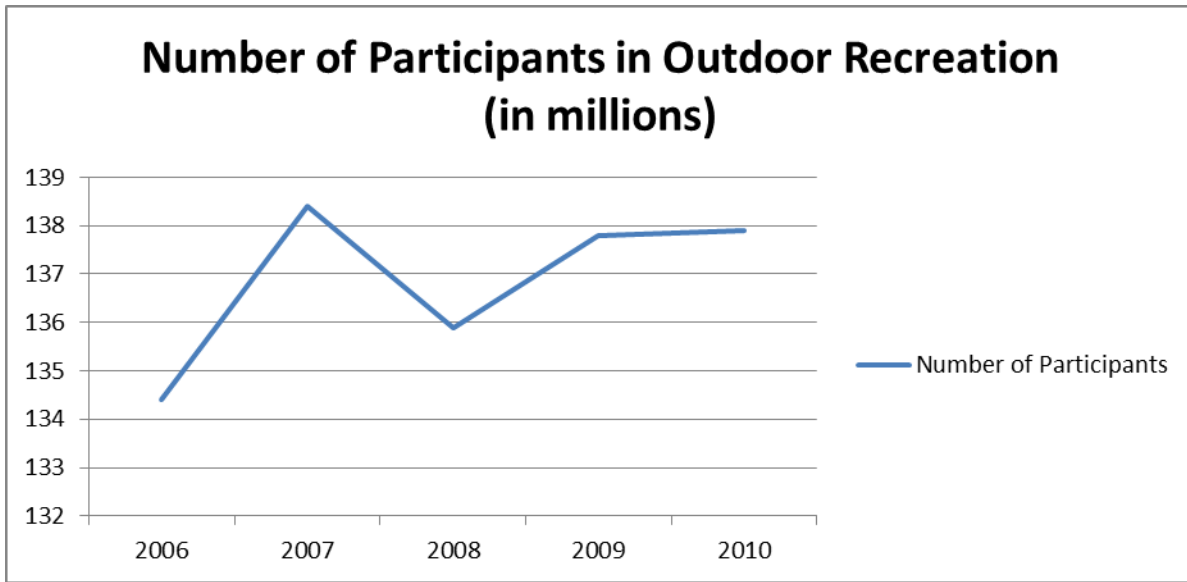
~ GRAPH 1 ~



Source: The Outdoor Foundation

While the number of total outings that Americans engage in annually is steady with a slight decline, the overall number of participants is increasing. This suggests that nationally more and more individuals are pursuing outdoor recreational activities, even though the number of total outings per individual appears to be slightly declining. A dip in participation from 2007 to 2008 coincides with the beginning of economic difficulties in the U.S., but growth in participation in 2009 and 2010 indicates that this impact was brief. See Graph 2.

~ GRAPH 2 ~



Source: The Outdoor Foundation

Overall annual increases in participation are very good in activities involving running and jogging and consistent, but increasing at a less rapid rate, for adventure sports including canoeing, kayaking, rafting, climbing, etc. For youth aged six years to 24 years, running and bicycling are the two most popular outdoor activities in terms of both participation rate and frequency of participation. In 2010, 25.8 percent of youth engaged in running and jogging activities, while 22.4 percent engaged in bicycling. For each runner the average number of outings per year is 89.4 and for each bicyclist the average number of outings is 67.7. Youth trends from 2008 – 2010 reflect strong growth in active sports, such as triathlons, kayaking, and adventure racing with more passive activities such as fishing and skateboarding experiencing declines.

Youth participation overall, with the exception of diverse populations, has not changed very much in recent years, but participation has shifted to more competitive activities. Males are slightly more active in outdoor recreation with

those in higher income demographics (over \$100,000 annual family income) more likely to participate. Strong increases in the levels of outdoor participation among African American / Black and Hispanic demographics are evident, with participation increasing from 8 percent to 10 percent and 7 percent to 9 percent, respectively, from 2009 to 2010.

For adults aged 25 years and older, 15.1 percent participate in fishing activities and 14.7 percent run or jog. By frequency of participation each runner averages 86.1 outings per year and each bicyclist averages 50.5 outings per year. For all age groups aged six years and over, outdoor participation growth by activity from 2009 – 2010 is strongest for triathlon (63.7 percent growth) and weakest for sailing (- 10.9 percent growth). Table 1 lists those outdoor activities that have experienced at least a 20 percent rate of growth from 2009 to 2010 and reflects the level of participation from 2007 to 2010. The level of participation for BMX Bicycling, in fact, shows one of the highest rates of growth, increasing by 30.8 percent from 2009 to 2010. Appendix (1) offers a comparison of mountain biking participation levels across each state, along with the percentage of residents within each state that meets recommended physical activity requirement levels.

~ TABLE 1 ~
National Outdoor Participation by Activity (in 000's) with 20+ Percent Growth

Activity	2007	2008	2009	2010	09-10 change
Adventure Racing	698	920	1,089	1,339	23.0%
Bicycling (BMX)	1,887	1,904	1,811	2,369	30.8%
Boardsailing	1,118	1,307	1,128	1,617	43.4%
Climbing	2,084	2,288	1,835	2,198	19.8%
Kayaking (Sea)	1,485	1,780	1,771	2,144	21.1%
Kayaking (white water)	1,207	1,242	1,369	1,862	34.6%
Skiing (freestyle)	2,817	2,711	2,950	3,647	23.6%
Telemarking (downhill)	1173	1,435	1,482	1,821	22.9%
Triathlon (off road)	483	602	666	929	39.5%
Triathlon (road)	798	1,087	1,208	1,978	63.7%

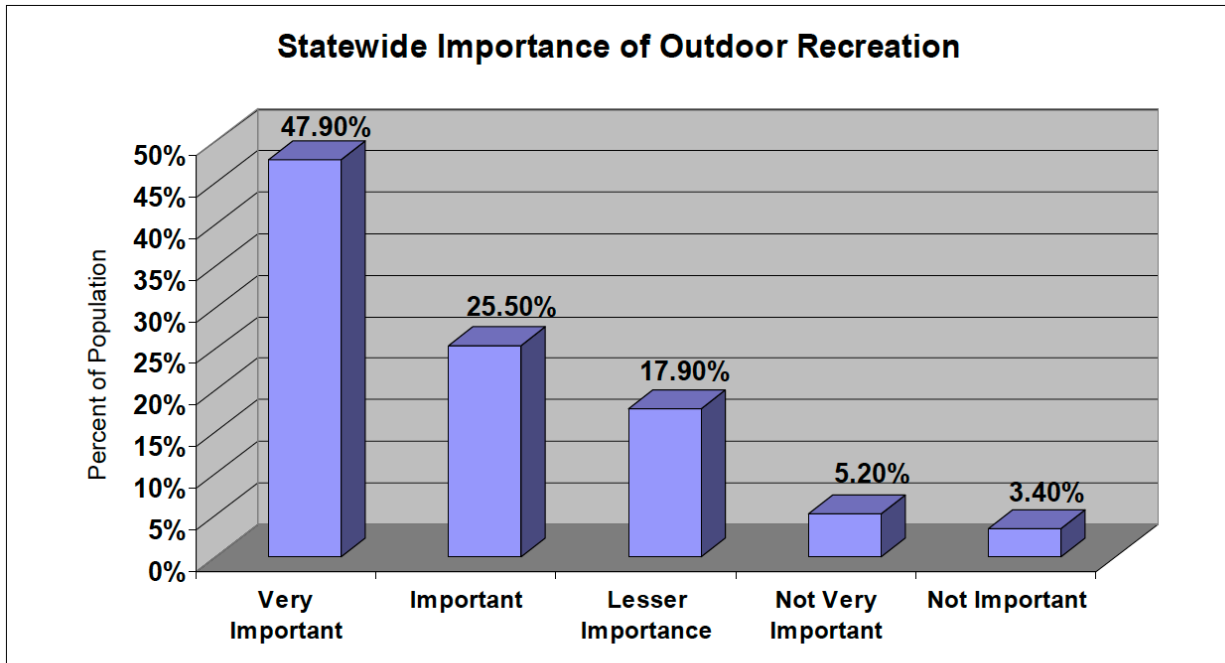
Source: The Outdoor Foundation

Other national research finds that outdoor recreation evolves over time. Activities of interest and equipment used after World War II into the 1970's are not necessary equivalent to today. Cordell, et al (2004) found that while the percentage change in participants for outdoor recreation has grown the percentage change in the total days dedicated to such recreation has overall increased at a faster rate. In a national survey most people ride for exercise and recreation (League of American Bicyclists, 2002), a finding replicated by Green (2003). Generally, the greatest growth has been in activities that are not very challenging physically – viewing and studying nature.

2. Alabama Trends in Outdoor Recreation

National trends offer a needed overview of the extent that a larger population participates in various activities. However, heterogeneous terrain, demographic differences, and support for recreation suggest that comparisons of national and regional numbers may be unreliable. Overall, Alabamians strongly support outdoor recreation. In a statewide survey by the Troy University Center for Business and Economic Services of 2,507 households, which included 6,985 household members, 48 percent responding that outdoor recreation is very important to their households and 26 percent responding that it is important. A very small percentage, 5 percent and 3 percent, respectively, responded that outdoor recreation was not very important or not important. See Figure 1 for results of the importance of outdoor recreation in the lives of Alabamians.

~ FIGURE 1 ~



Source: Troy University Center for Business and Economic Services, 2008 SCORP Survey Analysis.

According to survey results from the Alabama Statewide Comprehensive Outdoor Recreation Plan, 2008-2012, the highest percentage of the Alabama population that participates in outdoor recreational activities is concentrated in walking for pleasure, various forms of swimming and beach activities, and football. Active sports are achieving large increases in participation, as a result of positive correlations with healthy lifestyles (The Outdoor Foundation, 2006; League of American Bicyclists, 2002).

Current participation percentages for mountain bike trail riding are slightly lower than per capita norms for other adventure sports activities. For each mountain trail biker, the average participation was 31.1 times per year. However, a potential exists to better introduce this sport to Alabamians, especially given the strong participation levels nationally and that approximately three out of four Alabamians rank outdoor recreation important or very important.

3. Outdoor Recreation Comparisons in Alabama

The aforementioned Alabama Statewide Comprehensive Outdoor Recreation Plan, 2008-2012 considers various outdoor activities among 12 regions divided throughout the state. The survey tallies the recreational needs that responders stated and ranks them from one to twenty, with one representing most important and twenty representing least important. The need for bicycling and related bike trails was ranked six on a scale of one to twenty in importance - evidence of an activity where demand exists but supply of adequate facilities is not available.

Table 2 indicates the rank of each recreational need for selected adventure activities according to statewide averages. See Appendix B for a complete listing of all

recreational areas that were surveyed in the 12 geographic areas of the state.

~ TABLE 2 ~ Stated Outdoor Recreational Needs by Selected Categories in Alabama	
Activity	State Rank
Walking / Jogging Trails	3
Bicycle Trails	6
Hiking Trails	7
Camping Sites	12
ATV Trails	19
Horse Riding Trails	20

Source: Alabama Statewide Comprehensive Outdoor Recreation Plan, 2008-2012

B. Market and Spending Potential of Bicycling

An analysis of the potential of a market is important when determining how well an area is likely to support an industry. Market potential is measured by the level of participation within similar entities compared to a national average; it is the likely demand for a product or service within the area analyzed. Spending potential measures the level of spending per household in all areas pertaining to an industry (e.g. biking). Spending potential is taken one step further by considering supply and demand of retail offerings related to biking as a way of supporting how likely the local market might support an expanded retail base from increased biking activity.

For this analysis we have selected Albemarle, NC, a city of similar size and market to the Anniston-Oxford, AL area for comparison. Bicycling market potential is analyzed across three geographic radii – 5 miles, 50 miles, and 100 miles. This analysis allows for comparison of the Coldwater Trail to both a market with similar potential and national averages that define the economic direction of the industry.

Albemarle, North Carolina, is a rural town in the south central portion of the state. Much like the Anniston-Oxford area, Albemarle's economic roots were originally centered in the agricultural, regional mercantile, and textile trades. Approximately 9 miles from the city is the Uwharrie National Forest home of the Wood Run Mountain Bike Trail System. Wood Run was originally old logging roads until 2009, when the Forest Service with the help of IMBA/SORBA began making alterations in the environmental characteristics of the existing "trails" and plans for additional trails and features. While the existing trails were used by mountain bike riders, this project helped make Wood Run more conducive and appealing for bicycle riding, especially to mountain bikers. The Wood Run trails were "officially" dedicated in fall of 2011. Twenty two miles of trails are offered with trails for bikers from beginners up to more advanced and expert mountain bike riders.

While not an exact match with the Anniston/Oxford area within the 5 mile radius, this area is similar. It has a southern population, a similar climate, and the trails are open year round. Within the 50 radius, it is much more similar and offers sufficient retail and lodging for bikers to include local camping areas. Additionally, both areas offer other recreational and/or sight-seeing venues to compliment the biking trails. Within the 100 mile radius, many other opportunities are available for bikers and their families – both local and the over-night travelers.

Another similarity between the two areas is that within a 100 mile radius, there are a number of other biking trail systems and many active biking clubs in existence. As seen in much of the literature regarding the biking enthusiast, many bikers along with their friends will take four to five days and go to several different trails for a day or so each. This is something akin to the retail strategy of having multiple competing stores reasonably close together as a magnet for more potential shoppers in an area.

In a telephone conversation with Deborah Walker, District Ranger at the Uwharrie National Forest, she stated that “while our forest is a multi-use recreational area (i.e. camping, hiking, fishing, nature trails, etc.), the number of trail bicycle riders has significantly increased since the improvements were completed. Additionally, more and more of our over-night campers are now bringing their bikes with them.” The National Forest Service has not done a trail user survey so trail user numbers are not available at this time.

While the demographics within the 5 mile radius are somewhat smaller than the Anniston area, the larger 50 mile and 100 mile radii are much more comparable. Additionally, much like Anniston-Oxford, Albemarle has a number of larger population centers within the 50 mile and 100 mile radii which make the two areas – economically and demographically – quite similar.

With the majority of travelers likely residing within a 50 and 100 mile radius of the Coldwater Trail we closely analyzed the economic potential within the Anniston-Oxford, AL market in comparison to the economic potential of Albemarle, NC. This analysis reflects the similarities of the two markets and reflects the comparative economic potential of the trail

systems in NC to the Coldwater Trail. Refer to Table 3 for a complete analysis of bicycle market potential within a 5 mile radius.

~ TABLE 3 ~ Bicycling Market Potential in 5 Mile Radius: Anniston, AL and Albemarle, NC			
ANNISTON-OXFORD AL			
Adult population in 2011:		37,750	
Market Potential			
Type of Biking	Expected Adult Participation	Percent Participation of Total Population	Market Potential Index (MPI)
Mountain	1,099	2.9%	79
Road	2,769	7.3%	76
Spending Potential			
	Spending Potential Index (SPI)	Average Spent Per Household	Total Spent on Biking
Biking	66	\$12.66	\$254,452
	Demand	Supply	Retail Gap
Sporting Goods Stores	\$2,069,012	\$4,558,421	(\$2,489,409)
ALBEMARLE, NC			
Adult population in 2011:		18,134	
Market Potential			
Type of Biking	Expected Adult Participation	Percent Participation of Total Population	Market Potential Index (MPI)
Mountain	501	2.8%	75
Road	1341	7.4%	76
Spending Potential			
	Spending Potential Index (SPI)	Average Spent Per Household	Total Spent on Biking
Biking	61	\$11.62	\$110,987
	Demand	Supply	Retail Gap
Sporting Goods Stores	\$1,595,431	\$1,270,158	\$325,273

Source: ESRI

Within a 50 mile radius the population and market potential of Albemarle jumps significantly relative to Anniston-Oxford owing to the proximity to several large markets with that radius of the location in North Carolina. Within this more populated area a higher percentage participate in both mountain and road biking, giving Albemarle a market potential index almost equal to national averages.

Spending potential jumps significantly for the Albemarle market within a 50 mile radius, with households spending almost \$19 on average for biking goods and services compared to \$13 in the Anniston-Oxford, AL area. A big advantage, however, for the Anniston-Oxford area is that there is much more demand for sporting goods and related retail items, suggesting that a retail demand exists within the geographic area that may play a role in supporting higher levels of activity in bike riding. Refer to Table 4 for a complete analysis of bicycle market potential within a 50 mile radius.

~ TABLE 4 ~
**Bicycling Market Potential in 50 Mile Radius:
Anniston, AL and Albemarle, NC**

ANNISTON-OXFORD, AL			
Adult population in 2011:		666,796	
Market Potential			
Type of Biking	Expected Adult Participation	Percent Participation of Total Population	Market Potential Index (MPI)
Mountain	15,555	2.3%	63
Road	41,423	6.2%	64
Spending Potential			
	Spending Potential Index (SPI)	Average Spent Per Household	Total Spent on Biking
Biking	68	\$12.96	\$4,367,540
	Demand	Supply	Retail Gap
Sporting Goods Stores	\$46,047,914	\$43,449,462	\$2,598,452
ALBEMARLE, NC			
Adult population in 2011:		1,957,245	
Market Potential			
Type of Biking	Expected Adult Participation	Percent Participation of Total Population	Market Potential Index (MPI)
Mountain	70,847	3.6%	98
Road	182,808	9.3%	96
Spending Potential			
	Spending Potential Index (SPI)	Average Spent Per Household	Total Spent on Biking
Biking	98	\$18.70	\$18,918,226
	Demand	Supply	Retail Gap
Sporting Goods Stores	\$151,247,909	\$159,035,097	(\$7,787,188)

Source: ESRI

Within a 100 mile radius the populations are almost identical but the Anniston-Oxford area shows a strong market and spending potential for biking. This is important in that 100 miles represents a drive of approximately two hours one way and may be used as a proxy for a biking trip of one half to one day in duration.

Anniston-Oxford has a higher market potential index relative to Albemarle with each household spending over \$18 on average for biking goods and services compared to \$17 in the Albemarle market. A very large, positive retail gap supports a growth in the retail part of this market, where demand is unmet by existing supply. Refer to Table 5 for a complete analysis of bicycle market potential within a 100 mile radius.

**~ TABLE 5 ~
Bicycling Market Potential in 100 Mile Radius:
Anniston, AL and Albemarle, NC**

ANNISTON-OXFORD, AL

Adult population in 2011: 5,995,691

Market Potential

Type of Biking	Expected Adult Participation	Percent Participation of Total Population	Market Potential Index (MPI)
Mountain	211,293	3.5%	95
Road	534,043	8.9%	92

Spending Potential

	Spending Potential Index (SPI)	Average Spent Per Household	Total Spent on Biking
Biking	95	\$18.18	\$55,527,290
	Demand	Supply	Retail Gap
Sporting Goods Stores	\$515,016,760	\$462,435,163	\$52,581,597

ALBEMARLE, NC

Adult population in 2011: 5,966,501

Market Potential

Type of Biking	Expected Adult Participation	Percent Participation of Total Population	Market Potential Index (MPI)
Mountain	199,571	3.3%	90
Road	522,417	8.8%	90

Spending Potential

	Spending Potential Index (SPI)	Average Spent Per Household	Total Spent on Biking
Biking	89	\$17.01	\$52,397,229
	Demand	Supply	Retail Gap
Sporting Goods Stores	\$441,208,746	\$413,728,201	\$27,480,545

Source: ESRI

Table notes apply to Tables (3-5):

- 1. MPI measures relative likelihood of participation from within specified radius to a national average of 100.**
- 2. SPI is household based and represents amount spent on bicycling relative to national average of 100.**
- 3. Sporting goods stores are not isolated for comparison but are included with other stores within a similar classification.**
- 4. “Demand” represents retail potential and “supply” represents actual retail sales. A positive retail gap indicates that demand is greater than existing stores can support. A negative retail gap indicates that actual sales exceed the demand within the designated radius.**

1. Bicycling Success Stories that Support Local Economies

The site at Albemarle, NC is an example of a relatively young trail system within an area not dissimilar to the Coldwater location. Other entities around the U.S. offer examples of partnerships between local, state, federal, and private funding sources and benefits to both users of the trail systems and local economies. These findings are consistent with documented trends across the country that shows numerous benefits to physical outdoor activity (The Outdoor Foundation, 2006, 2011; Fairfield Advantage, 2010).

A number of trends are documented that relate to biking facilities and the local community. Direct correlations have been established between increases in home prices and proximity to biking facilities. Surveys of existing facilities show that most local merchants report an increase in commerce from biking activity, where approximately three out of five trail users are concerned about their health as an impetus for riding. At Forks Area Trail System in Clarks Hill, SC about 80 percent of its users are local, most of who did not bike before the trail was built. However, now the 200-300 users per day that visit the 35 mile long course have helped support a double digit increase in bike store sales and service, an astonishing trend given that two out of three users of the trail did not bike before it was built (Peel, 2011; Bikes Belong, 2006, 2011a and 2011b).

C. Coldwater Mountain Bike Trail Survey

In an attempt to capture the interest in the Coldwater Mountain area and Forever Wild wilderness tract, a survey was developed and disseminated to gauge the number of potential users. 10,850 email recipients consisting of members or affiliates of IMBA/SORBA were sent an email with a direct link to the survey. A total of 839 surveys were completed and submitted. See Table 6 for a complete description of survey responses.

~ TABLE 6 ~ Survey Link Data Response			
Survey Link Available	Survey Link Ended	Direct Link Recipients*	Surveys Completed
May 7, 2012	May 21, 2012	10,850	839

Survey developed by Jacksonville State University and implemented by IMBA/SOEBA on May 10, 2012. Additional surveys received from IMBA/SORBA Facebook page.

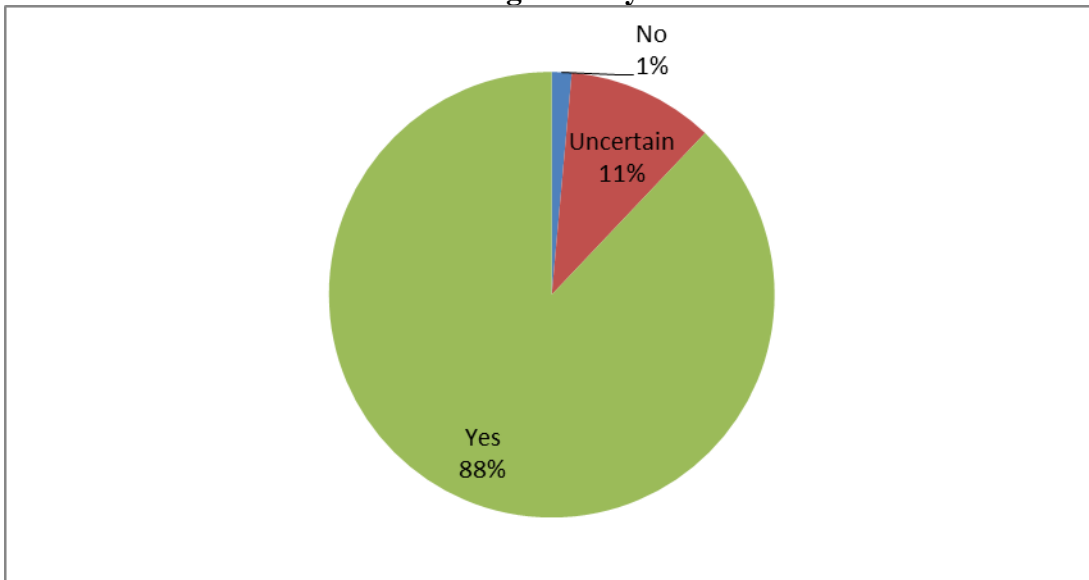
1. Survey Instrument

A survey instrument was developed to gather information pertaining to the several areas of the mountain biking industry with a specific emphasis on the likelihood of using the trail; frequency and type of participation of mountain biking; mountain biking ability; factors that influence choice of destination; financial; and demographic information. See Appendix D for the complete survey instrument that was utilized in the analysis.

2. Economic Analysis

The completed survey offers strong indication that biking enthusiasts and potential participants are a diverse group that actively seeks new adventure. According to Figure 2, support for the Coldwater Bike Trail System is overwhelmingly positive, with 88 percent of respondents expressing an interest in the site. Given that the survey responses were not limited to a narrow group of individuals located near the facility suggests that the excitement and challenge from a new course represents an opportunity to attract myriad visitors wanting adventure.

~ FIGURE 2 ~
Would You Be Interested in Mountain Biking on the Coldwater Mountain Biking Trail System?

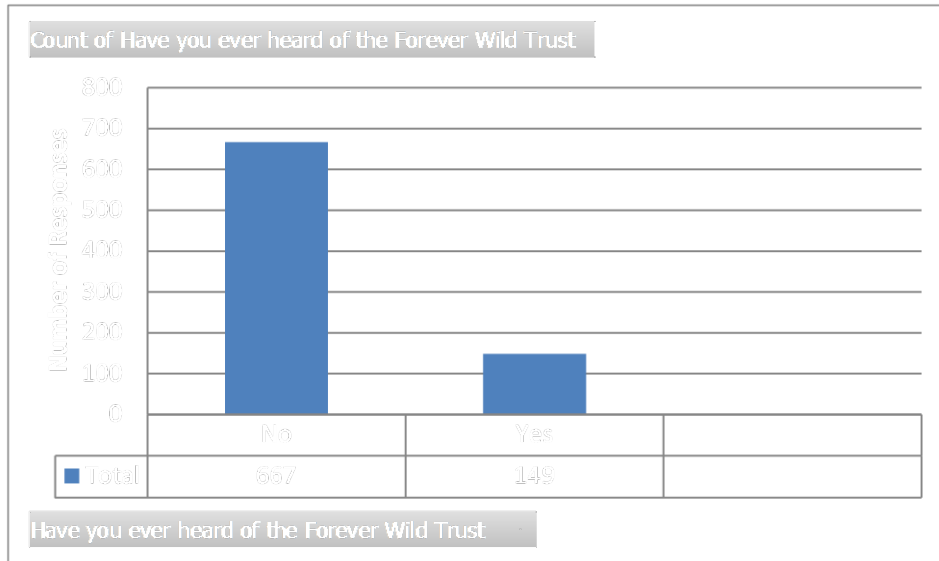


Source: Coldwater Mountain Bike Trail Survey - 2012

However, according to Figure 3 respondents are not as familiar with the Forever Wild Trust that owns the property. Out of 816 responses, 667 (or 81.74 percent) said that they had not heard of the Trust, while 149 (or 18.26 percent) reported that they have heard of the Trust. While the brand image and reputation of the course itself will

invariably be the basis for success and growth, leveraging of scarce financial resources is extremely important and crucial to marketing not only the facility but also to educating the public and potential trail users about the state’s natural resources and beauty.

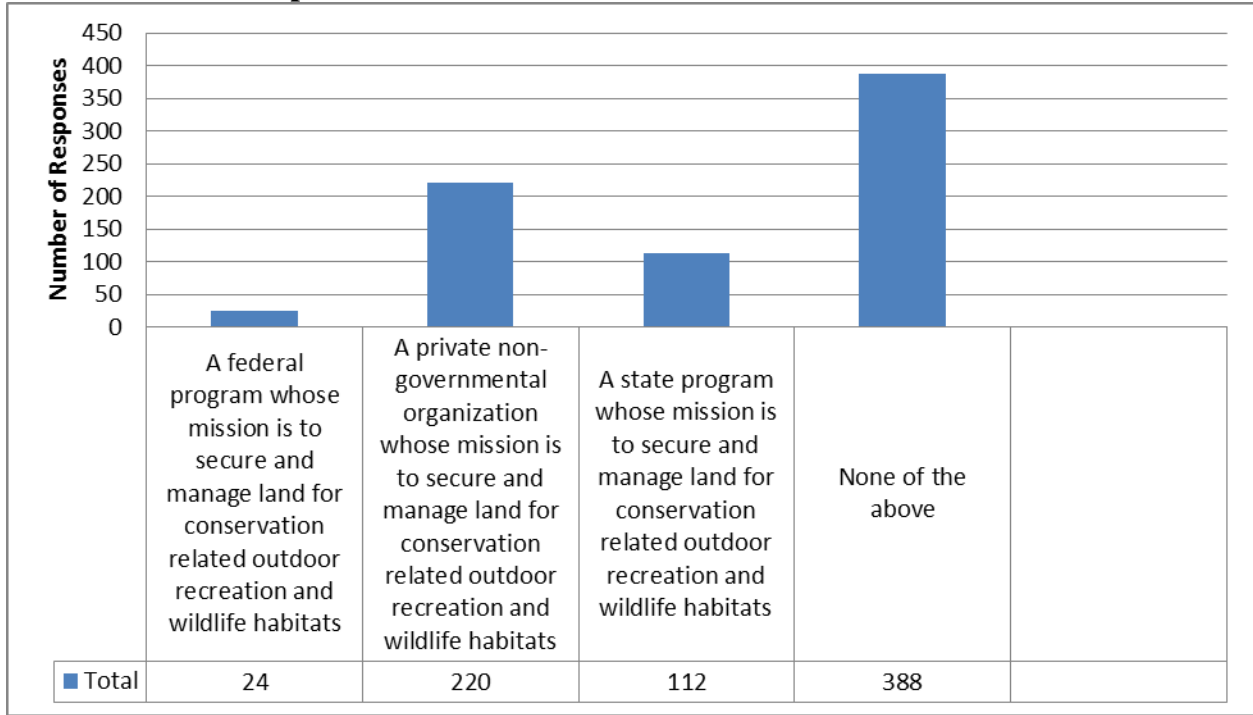
~ FIGURE 3 ~
Have You Ever Heard of the Forever Wild Trust?



Source: Coldwater Mountain Bike Trail Survey - 2012

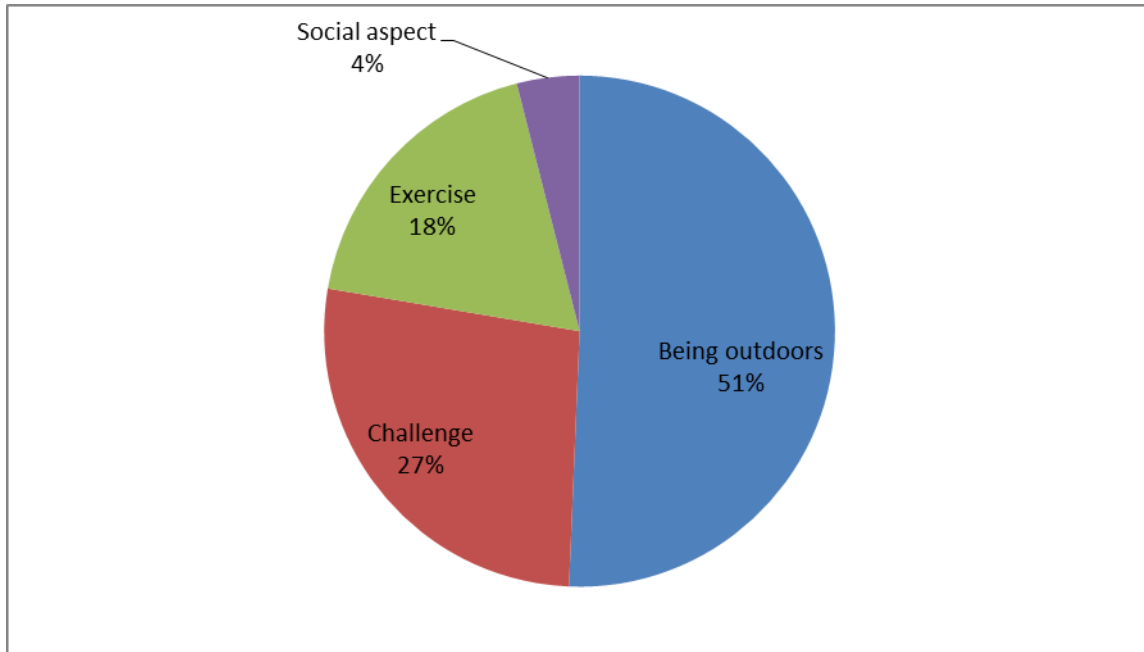
Respondents’ characterization of the function of the Forever Wild Trust found that most were unsure, with fully 52.15 percent reporting none of the above or something different than the choices provided. The second and third most frequent answers, respectively was that Forever Wild Trust is a private, non-governmental organization or a state program dedicated to land conservation and wilderness habitat. The least common response was that the Trust was a federal program dedicated to land conservation and wilderness habitat. Each answer choice was provided to respondents. See Figure 4 for complete further analysis.

~ FIGURE 4 ~
How Respondents Characterize Function of the Forever Wild Trust



Further, referring to Figure 5, the majority (51 percent) of survey respondents reported enjoying the scenery of being outdoors, with the challenge of the course and exercise following at 27 percent and 18 percent, respectively. This interest in being outdoors suggests that potential trail users need a better understanding of all potential benefits and amenities offered by the Forever Wild Trust in nature conservation and promotion, activities that are essential in maintaining the scenery that they enjoy. These efforts would be a move toward establishing a brand beyond just destination to include worthwhile efforts from both public and private entities at promoting and protecting the beauty found within the State of Alabama. These are areas that definitely need addressing.

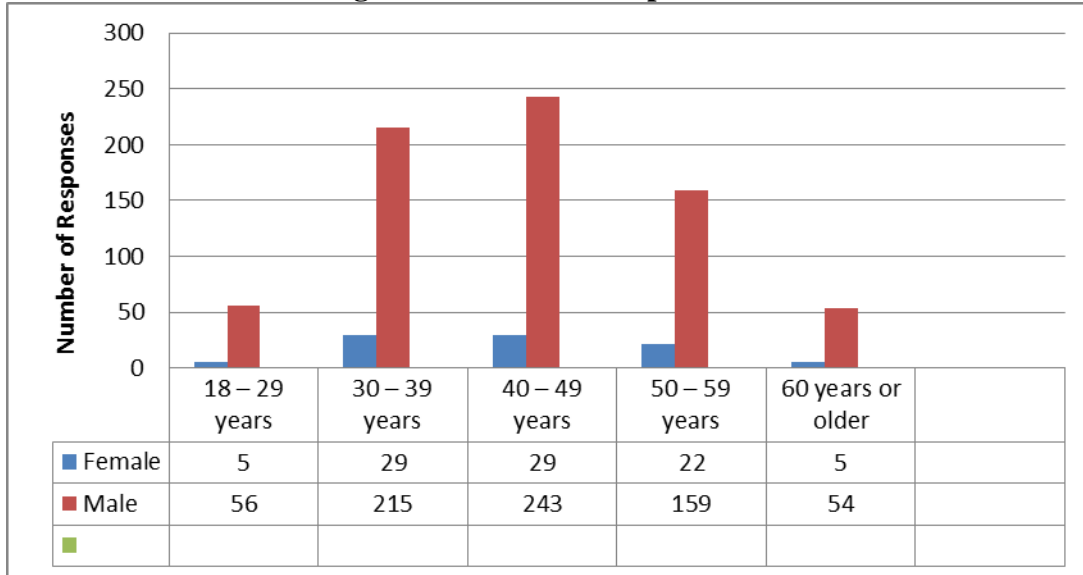
~ FIGURE 5 ~
What Do You Enjoy About Mountain Biking?



Source: Coldwater Mountain Bike Trail Survey - 2012

Most respondents to the survey were men by a wide margin, with a close concentration for both genders in the 40-49 age range and 30-39 age range. Those respondents between 18-29 years of age and over 60 years of age were almost identical for each gender but at a small percentage of the overall responses. The age distribution was bell-shaped with the highest concentration occurring within the 40-49 years of age median and declining toward the extremes. See Figure 6 for an illustration of responses by age and gender.

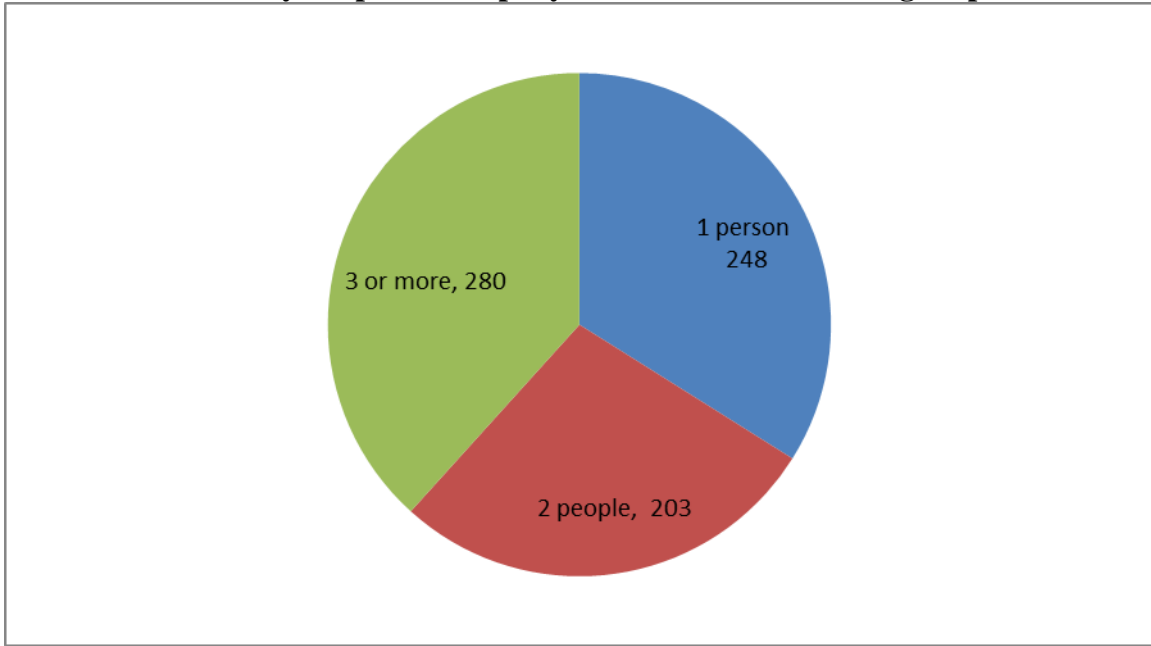
**FIGURE 6
Age and Gender of Respondents**



Source: Coldwater Mountain Bike Trail Survey - 2012

Coldwater Bike Trail Survey respondents indicated a fairly even distribution between those who bike alone as opposed to those who have one companion, two companions, or three or more companions with them. The survey did not specifically capture if respondents biked alone but 107 out of 838 responses were left blank. While this number does not indicate that those riders biked alone it may be considered a reasonable proxy for the number. Thus, from these results we will estimate that approximately 12 percent bike alone. 248 of 838 (or 29 percent) bike with one companion. 203 of 838 (or 24 percent) bike with two companions. The highest percentage of bikers, 280 of 838 total respondents, bike with three or more companions. This represents over 33 percent of these potential visitors will consist of a traveling party of four or more people. The economic effects for this statistic may be significant, especially when considering via how much is spent per person in a geographic region and the multiplied effect of that spending on local revenues and commerce.

~ FIGURE 7 ~
How Many People Accompany You on Mountain Biking Trips?



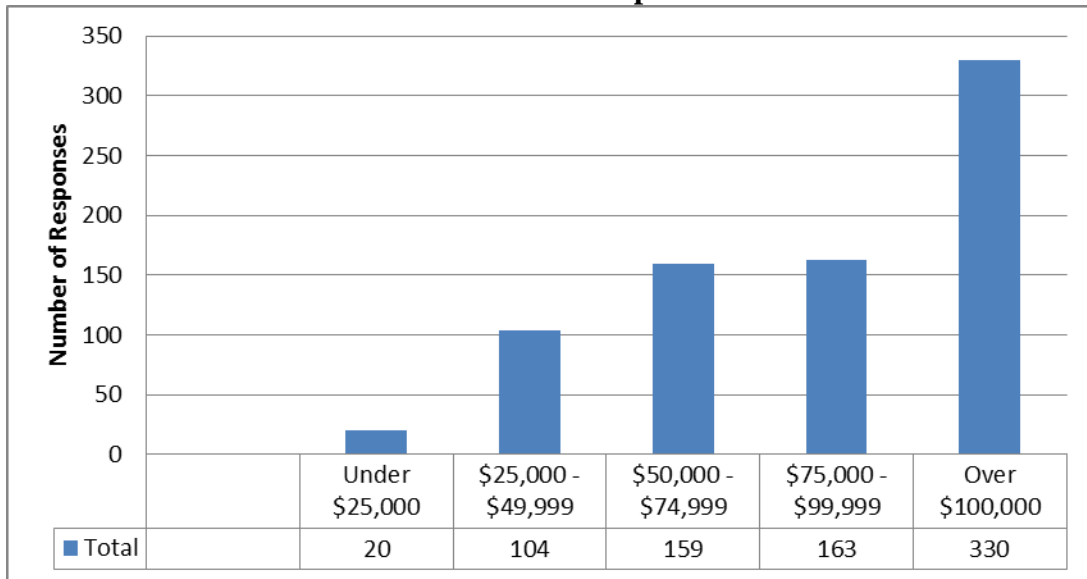
Source: Coldwater Mountain Bike Trail Survey - 2012

Income levels of respondents are reported in Figure 8. A total of 330 (or 42.53 percent of all respondents) reported household income levels in excess of \$100,000 annually. Other income levels were reported in decreasing frequency from higher income levels to lower income levels. Those with household incomes under \$50,000 comprise slightly less than 16 percent of total responses.

The marketing implications for age, gender, and household income concentrations of respondents are numerous. Assuming that marginal propensity to consume holds, higher levels of income produces higher levels of consumption. This means that local businesses will experience an effect where local demand increases not only for complimentary and supplementary goods, but also for production and consumption of other goods and services. The high concentration of potential male bikers within ages

30-50 represents further marketing opportunities to target general and niche activity within this demographic.

**~ FIGURE 8 ~
Income Levels of Respondents**



Source: Coldwater Mountain Bike Trail Survey - 2012

Survey respondents report very active biking participating rates. 561 out of 837 total respondents (or 67 percent) stated that they biked more than 40 times during 2011. The most common type of biking activity reported for each level of frequency and as a percent of the grand total was cross country biking. Dirt trail or rail trail mountain biking was consistently shown as the second most common biking activity. Cross country riding is typically considered to be that in which a variety of off-road terrain ranging from smooth surface to challenging trails with obstacles are encountered. This is the norm for mountain biking. Dirt trail or rail trail, although considered to be synonymous with cross country by some, is typically an off-road, smoother terrain including worn paths. Refer to Table 7 for a complete analysis of types of mountain biking and related frequency reported for 2011.

~ TABLE 7 ~
How Often Did You Go Mountain Biking During 2011?

Type of Biking Activity	10-19 times	20 – 29 times	30 – 39 times	More than 40 times	None or fewer than 10 times	Grand Total
Cross-country	38	62	45	425	15	585
Did not participate in mountain biking					7	7
Dirt trail or rail trail mountain biking	30	36	17	100	16	199
Downhill		1	1	8		10
Free riding		3	1	27	3	34
(blank)	1			1		2
Grand Total	69	102	64	561	41	837

Source: Coldwater Mountain Bike Trail Survey - 2012

According to most survey responses, outdoor scenery (51 percent of responses) and the challenge from the activity and course (27 percent of responses) are the primary attributes that survey respondents enjoy when they go mountain biking. 408 of 834 total responses indicated an advanced intermediate skill level, with intermediate the second most commonly reported skill level at 229 out of 834. For all four skill levels listed alphabetically in Table 8 being outdoors and the challenge of the course mirror grand total responses.

~ TABLE 8 ~
By Ability Level What Do You Enjoy About Mountain Biking?
Categories of enjoyment from riding

Mountain biking ability	Being outdoors	Challenge	Exercise	Social aspect, camaraderie	No Response	Grand Total
Advanced Intermediate	201	113	78	14	2	408
Beginner	20	4	7			31
Expert	71	60	24	10	1	166
Intermediate	130	46	44	9		229
(blank)						
Grand Total	422	223	153	33	3	834

Source: Coldwater Mountain Bike Trail Survey - 2012

Factors that influence the choice of destination appear to be heavily impacted by a friend or relative recommendation or the reputation of the site. Based on a scale of 1 to 5, with 1 NOT IMPORTANT and 5 VERY IMPORTANT, each of these factors was rated more than 4 in importance. Internet research and notification through a bike club were also major factors that affect destination, with average responses each totaling 3.75 and 3.71, respectively. A mountain biking event or an article featuring a site were both of importance in shaping destination decision making. More general information from general outdoor magazines, brochures, or travel agents appears to have much less impact in influencing destination choice. See Table 9 for a complete depiction in descending order on a scale of 1 to 5 of those factors that influence choice of destination.

~ TABLE 9 ~	
Importance of the Following Factors That Influence Choice of a Destination for a Mountain Biking Trip	
Importance in influencing choice of a destination for a mountain biking trip	1 NOT IMPORTANT - 5 VERY IMPORTANT (average response listed in descending order)
Recommendation from friend or relative	4.33
Reputation of destination	4.05
Internet research	3.75
Bike Club	3.71
Mountain bike race or event	3.49
Article in mountain biking magazine	3.43
Guidebook	3.07
Article in general outdoor magazine	2.89
Brochure	2.69
Travel Agent	1.70

Source: Coldwater Mountain Bike Trail Survey - 2012

Factors that influence potential trail users' choice of destination may be complimented by the extent that visitors are local or non-local. For this analysis we define local as those visitors that do not stay overnight and non-local as overnight visitors that require lodging. For example, if riders are willing to travel longer distances to a destination and a particular facility attracts more or less local or non-local visitors, marketing and promotion opportunities would abound through determining and targeting

that demographic. Referring to Table 10, a clear consensus of visitors does not exist across selected bike courses. Some trail systems have more local users and some have more nonlocal users.

~ TABLE 10 ~ Bicycle Trails User Statistics				
Trail System & State(s) located	Bicycle Users Only	Total Bicycle users	Local Bicycle Users	Non-Local Bicycle Users
Jackson Hole (Wyoming)	54%	222,535	40%	60%
Virginia Creeper Trail (Virginia & Maryland)	75%	130,172	58%	42%
Washington & Old Dominion (Virginia)	66%	1,707,353	95%	5%
Central Florida (Florida)	100%	1,700,000	Not Available	
Greater Allegheny Passage (Maryland & Pennsylvania)	88%	800,000+	60%	40%
Chequamegon Area (Wisconsin)	100%	22,630	5%	95%

Source:

Kaliszewski, N. (2011). Jackson Hold Trails Project Economic Impact Study. University of Wyoming.
Tracy, D – The Orlando Sentinel (2011). Bike trails pump \$42M into Central Florida economy study
Virginia Department of Conservation (2004). Impacts of Trails and Trail Use.
University of Wisconsin Extension (1997). Mountain Biking in the Chequamegon Area of Northern Wisconsin and Implications for Regional Development.
WMTH Corporation (2009). The Economic Impact of Biking.
Lemanski, Ursula (2005). Economic Benefits of bicycle and Pedestrian Facilities. National Park Service Rivers & Trails Program

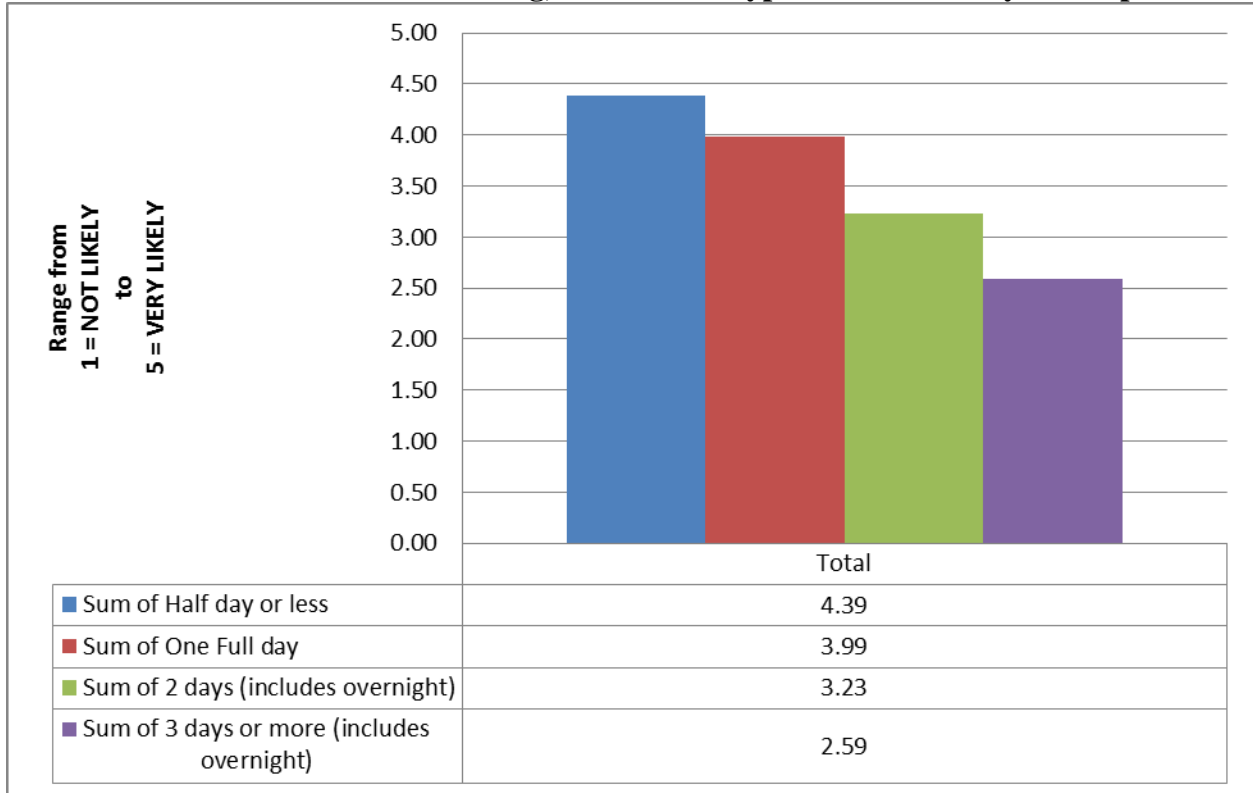
However, from a matrix devised in measuring trip duration for respondents when they go mountain biking, patterns emerge for the Coldwater Mountain facility. Our scale for support ranged along a continuum between 1 and 5, where 1 represents those NOT LIKELY to support or participate and 5 those VERY LIKELY to support or participate. An average of all 839 responses was calculated in reaching the scores shown in Figure 9.

Respondents were provided answer choices representing the following: half day or less; one full day; two days (includes overnight); and three or more days (includes overnight). Survey responses are listed in descending order of support or likely participation.

While no categories scored an average of 5 (representing most likely behavior), half day or less and one full day are both strongly favored with a score of 4.39 and 3.99, respectively. Trip duration of two days and three or more days, both including overnight travel, were reported with less likelihood when respondents go mountain biking. Respondents scored the choice of two days (including overnight) a score of 3.23, which is above the median level of 3.00. With 3.00 representing that point of indifference between not likely and very likely, we can project that a score of 3.23 is more likely than not likely and suggests that overnight travelers will represent a portion of total visitors. This is very important to any economic effect through consumption of lodging services. For three or more days the score of 2.59 is less than an approximate median value of 3, indicating indifference, and suggests that those respondents are less likely to take a trip of such duration. The survey does not allow us to project the percent of local versus non-local visitors, but we feel confident in surmising that approximately 90 percent of visitors will be one full day or less with no overnight stay. Approximately 10 percent will stay at least one night and require lodging.

~ FIGURE 9 ~

When You Go Mountain Biking, What is the Typical Duration of your Trip?



Source: Coldwater Mountain Bike Trail Survey - 2012

When spending is broken down into local and non-local categories the raw data indicate a healthy potential for demand for both items related to biking and unrelated to biking from visitors to the facility. Coldwater Bike Trail Survey respondents indicated that when they go mountain biking they spend on average \$60.87 per day on food, clothing, etc. (excluding lodging). For those that stay overnight and thus need lodging, an additional \$77.62 is spent per day for lodging. So for those visitors staying overnight and requiring lodging, the existence of the Coldwater Trail generates \$138.49 on average (that is \$60.87 plus \$77.62) in additional local spending per person. These numbers are relatively higher than local and non-local expenditures depicted in Table 11 from selected trail systems around the country. It is important to note that with these results

for the Coldwater Bike Trail Survey, respondents were avid biking enthusiasts that generally allocate more resources to the sport. Data from selected trail systems encompassed all bike trail users, many of whom might be novices who infrequently bike or otherwise use a trail system. Thus, resources allocated to the sport would very likely be less for those participants.

**~ TABLE 11 ~
Economic Impact for Selected Trail Systems**

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

Source:

Kaliszewski, N. (2011). Jackson Hold Trails Project Economic Impact Study. University of Wyoming.
Tracy, D – The Orlando Sentinel (2011). Bike trails pump \$42M into Central Florida economy study
Virginia Department of Conservation (2004). Impacts of Trails and Trail Use.
University of Wisconsin Extension (1997). Mountain Biking in the Chequamegon Area of Northern Wisconsin and Implications for Regional Development.
WMTH Corporation (2009). The Economic Impact of Biking.
Lemanski, Ursula (2005). Economic Benefits of bicycle and Pedestrian Facilities. National Park Service Rivers & Trails Program

The trends in the economic activity generated from mountain biking are very positive. Biking is part of a strong national and regional trend of outdoor activity that has higher economic potential than some industries. The reason for this economic potential is that participants are typically high income users within a specific age category (30 to 50 years of age) that frequently travel with several individuals on numerous trips per year. While trips of shorter duration are more common than trips of longer duration, spending per day by patterns by those requiring or not requiring lodging, especially given the higher expected marginal propensities to consume of the typical participant, are encouraging for local merchants. Given that there are almost 6 million people within 100 miles of the Coldwater Bike Trail, there appears to be unmet demand for not only more trails and other, related facilities, but also more retail shops that provide biking and related merchandise. See Table 12 for a summary of the economic effects of the Coldwater Bike Trail.

~ TABLE 12 ~
Summary of Coldwater Bike Trail Economic Effects

Trends
<ul style="list-style-type: none"> • Strong national, regional, and local growth in biking recreation
<ul style="list-style-type: none"> • Positive retail gap (where demand exceeds supply) for biking related merchandise in both 50 and 100 mile radius. Almost 6 million people within 100 miles of Coldwater Trail
Coldwater Survey Results
<ul style="list-style-type: none"> • Strong support for trail with 88 percent expressing interest in using
<ul style="list-style-type: none"> • Typical user – high income male, aged 30-50 years of age
<ul style="list-style-type: none"> • Approximately 88 percent bike with one or more companions, and 33 percent bike with at least three companions. Biking more than 40 times per year is very common.
<ul style="list-style-type: none"> • Duration of bike trip – one day or less most common, but 1 full day and 2 days (with overnight) ranked as more likely than not likely.
Economic Consequences and Marketing Opportunities
<ul style="list-style-type: none"> • Large population base with demand for both more trails and related retail merchandise
<ul style="list-style-type: none"> • Specific demographic categories and high income produce targeted marketing opportunities given high spending potential
<ul style="list-style-type: none"> • \$138.49 average spending per day (including lodging) from survey results

D. Economic Impact Model

The economic impact model employed in this analysis measures how the effect of spending as a result of the Coldwater Bike Trail is not limited to just an initial level of spending but multiplies throughout the economy. Direct spending by biking participants and

trail users provide valuable revenue to local merchants, but spending by other merchants not directly involved in the initial transaction increase as a result of input purchases and stimulates additional spending. Finally, as direct and indirect effects manifest, induced effects occur. These induced effects represent the result of initial, direct spending and the secondary economic activity of suppliers in providing those resources to direct merchants that extends to households, municipalities, and others that will all purchase goods and services as spending multiplies throughout the economy. The culmination is total economic impact.

The model measures these effects according to direct, indirect, and induced in calculating the level of total economic impact. See Figure 10 for a graphical illustration of each economic effect.

~ FIGURE 10 ~
Economic Impact Model

Direct Effect – initial spending by visitors in local economy



Indirect Effect – purchase of these initial goods stimulates secondary spending of input purchases



Induced Effect – Direct and indirect effects stimulate spending in the local economy as household incomes grow and spend more on goods and services, thus further stimulating economic activity.



Total Economic Impact from Expenditures from Sales

+

Tax Revenue Impact (Sales, Lodging, Income)

= Total Economic Impact

Source: Crompton, 1995; Miller 1999; Chang 2001

1. Trends in Biking and Local Economic Impact

Research finds that growth opportunity in bike recreation is an ongoing trend benefitting local communities. From the creation of new bicycle trails new dollars of economic growth are being generated in those communities in addition to the positive effects realized on nearby properties as homeowners and business owners both are introduced to the potential of this activity (WMTH Corporation, 2009; Macdonald, 2011).

Biking is a popular activity. More than 1.5 as many individuals mountain bike as golf and by number of outings mountain biking is the most popular activity of children aged 6-17 (Northeast Mountain Biking Association, 2007). Targeting specific demographics is important when marketing an activity or a trail.

Fairview Advantage (2010) found that a strong link exists from biking to generating community economic impact. In a local competitive event analyzed for their study over 70 percent of cyclists traveled from more than 100 miles to compete and more than 80 percent stayed more than two nights. While these numbers are somewhat consistent with results tallied from the Coldwater Bike Trail Survey, more importantly, they indicate the passion that most participants have for the sport and the absence of boundaries that may otherwise limit the length and duration of travel.

Local economic impact for the Anniston-Oxford area is also supported from the warm climate and lack of disruption during most of the seasons. For example, most of the trails that are referenced in this study, especially Jackson Hole and the Wisconsin trails, are only open for about 5 to 6 months each year due to weather. The Virginia, Maryland & Pennsylvania trails are also limited during the winter season. Restrictions on the number of days that the sites are open are a relative disadvantage for those trails and a relative

advantage for Coldwater, especially during typical off-peak times of the year when northern areas are experiencing bad weather.

Attraction to this area of Alabama is strong with the number of biking and related events growing. Chief Ladiga Trail, Coldwater Mountain Bike Trail, Sunny King Criterium, and Cheaha Century Challenge are easily recognizable locations and events that epitomize the burgeoning interest in biking within Calhoun County and ecotourism developing statewide (Fleming, 2010).

2. Coldwater Bike Trail Economic Impact

In order to measure economic impact, spending resulting from the facility, event, or site is paramount to an analysis. Spending is composed of the dollar amount spent per person as a result of their visit to a site, but must also be considered by the number of potential visitors. The key factor to consider is that direct impact results from this initial level of spending by the number of potential or actual visitors. Existing data depict patterns of spending by local and non-local users at various locations across the U.S.

The Chequamegon Area Mountain Bike Association (CAMBA) bike system trail counts of 22,630 users found that they spent about \$27 per day within a 30 mile radius for a total direct expenditure of \$630,245. An additional sum of \$163,391 was spent by trail users outside the 30 mile radius (University of Wisconsin Extension, 1997). Tracy (2011) found that trail users at Winter Park in Central Florida spend an average of \$19 per person, an amount lower than that observed on the CAMBA trail system.

In a sample over a 12 month period in 2002-2003, the Virginia Creeper Trail (VCT) experienced 112,366 annual trips by locals and nonlocals. Locals represented 47 percent

of visits and nonlocals 53 percent. Approximately 91 percent of these visits were by day users, although that percentage falls to 30 percent when measured by non-locals who make the trip as a primary purpose (Virginia Department of Conservation, 2004). These numbers are slightly lower than 60.4 percent nonlocal visitors identified by Kaliszewski (2011) in a study in Wyoming.

Comparisons between local and non-local daily expenditures provide a basis for calculating economic impact from the range of visitors to an area. Referring to Table 13, differences between local and non-local do not follow a consistent pattern other than non-local expenditures are higher than local as a result of lodging and other overnight spending.

These results are depicted for selected trails from which data were available and from the Coldwater Bike Trail Survey. Results for the Coldwater Bike Trail Survey are very encouraging as local user respondents report that they would spend \$60.87 per day. Non-local or overnight users anticipate spending \$77.62 on lodging for a total of \$138.49, an amount higher than averages when compared to other sites. The fact that both local and non-local projected expenditures for Coldwater Bike Trail exceed averages tallied from their trails supports spending potential by high income participants that are avid biking enthusiasts.

~ TABLE 13 ~
Comparison of Local and Non-Local Expenditures for Selected Bike Trails and Coldwater Bike Trail.

Trail System & State(s) located	Local User Daily Expenditure	Non-Local User Daily Expenditure
Coldwater Bike Trail (Alabama)	\$60.87	\$138.49
Jackson Hole (Wyoming)	\$7	\$126
Virginia Creeper Trail (Virginia & Maryland)	\$30	\$119
Washington & Old Dominion (Virginia)	Not Available	\$74
Central Florida (Florida)	No Separation of Users Each Averages \$19	
Greater Allegheny Passage (Maryland & Pennsylvania)	\$13	\$98
Chequamegon Area (Wisconsin)	No Separation of Users Each Averages \$27	

Source:

Coldwater Bike Trail Survey - 2012

Kaliszewski, N. (2011). Jackson Hold Trails Project Economic Impact Study. University of Wyoming.

Tracy, D – The Orlando Sentinel (2011). Bike trails pump \$42M into Central Florida economy study

Virginia Department of Conservation (2004). Impacts of Trails and Trail Use.

University of Wisconsin Extension (1997). Mountain Biking in the Chequamegon Area of Northern Wisconsin and Implications for Regional Development.

WMTH Corporation (2009). The Economic Impact of Biking.

Lemanski, Ursula (2005). Economic Benefits of bicycle and Pedestrian Facilities. National Park Service Rivers & Trails Program

a. Bikers Per Mile

With the Coldwater Bike Trail analysis based on projected rather than actual data, an analysis of bikers per mile at other locations is a starting point for projecting potential usage. From these projections we calculate a rough average of the number of bikers that will use Coldwater Trail. Table 14 considers the number of stated annual visitors and length in miles of these selected trails: Great Allegheny Passage (PA); Virginia Creeper (VA); Paint Creek Trail (MI); Slick Rock Bike Trail (UT); and Burlington Bike Trail (VT).

~ TABLE 14 ~ Biking Trips Per Trail Mile			
Bike Trail	Annual Visitors	Length of Trail in Miles	Users Per Mile
Great Allegheny Passage	800,000	141	5,674
Virginia Creeper	130,172	34	3,828
Paint Creek	100,000	8.9	11,236
Slick Rock	100,000	12.7	7,874
Burlington	225,000	7.5	30,000
Mohawk-Hudson	458,000	35.2	13,000

Source

Kaliszewski, N. (2011). Jackson Hold Trails Project Economic Impact Study. University of Wyoming.
 Tracy, D – The Orlando Sentinel (2011). Bike trails pump \$42M into Central Florida economy study
 Virginia Department of Conservation (2004). Impacts of Trails and Trail Use.
 University of Wisconsin Extension (1997). Mountain Biking in the Chequamegon Area of Northern Wisconsin and Implications for Regional Development.
 WMTH Corporation (2009). The Economic Impact of Biking.
 Lemanski, Ursula (2005). Economic Benefits of bicycle and Pedestrian Facilities. National Park Service Rivers & Trails Program
 Feeney, S.J. (1998). Analysis of Trail Use, Regional Benefits, and Economic Impact

The wide variance in users per mile suggests that specific type of trail and all related uses are important in such analysis. Many of the trails mentioned have other components, such as walking and / or hiking. Thus, a tally of actual numbers of bike users is problematic. Feeney (1998) found that rails to trails averages are 11,787 visits per mile. While Coldwater is not a conversion of an old railroad track to a bike trail, the statistic offers a starting point for a pro forma analysis of Coldwater usage and form the basis for the range of visitor projections discussed in Part 2B.

b. Direct Economic Impact

We consider direct economic impact along a range of low, normal, and optimistic. This impact is derived by finding the product of anticipated users of the trail and projected spending per day. Total projected spending is derived from local and non-local users based on an anticipated breakdown between each.

We are concerned that Coldwater Bike Trail Survey results, which found per person local expenditures to be \$60.87 per day and lodging expenditures to be \$77.62 per day, may not be realistic since the results are much higher than averages derived from similar trails. We explain this in that the Coldwater Bike Trail Survey responders are individuals very dedicated to the sport of mountain biking and thus may not be representative of all trail users. Expenditures from the other trails shown are based on actual trail user surveys completed at each trail.

Thus, for purposes of expenditures per day we took an average of local and non-local expenditures for each of these selected trails with data available: Jackson Hole, Virginia Creeper, and Allegheny. We did not include the Coldwater Bike Trail

Survey spending results in this average for the reasons stated above, but we recognize that these higher amounts represent upside potential for the trail. The average for local expenditures is \$16.67 per day. In addition to the above data for local spending, data for non-local spending also includes Washington & Old Dominion. The average for non-local expenditures is \$104.25. While these averages are less than reported survey data, we contend that the typical user of the trail will spend in a manner consistent with these findings. The higher survey numbers reported from the survey allows for the possibility of raising these projections, however.

IMBA projects that 95 percent of trail users will be local (i.e. no overnight travel or lodging). Based on Coldwater Bike Trail Survey results we expect that the number of travelers requiring lodging will be higher than 5 percent. Thus, our analysis below uses 90 percent and 10 percent for local users and non-local users, respectively.

We project a likely range of users of the trail between approximately 5,000 and 13,000 per trail mile developed in part from existing trails analyzed in Table 14. Converted into annual users for an 11 mile course, the initial size of the Coldwater Trail, the results are between approximately 50,000 and 150,000 annual users, a projection that may be revised upward with development. The number of individuals accompanying, and the frequency of the number of trips the typical participant makes annually are considered within these projections. This projection considers actual data from the selected bike trails discussed above and averages from extensive rail to trail user data that is available as a basis for the analysis. We find the product of a range of trail users per mile and spending by the typical user to find direct economic impact. See Table 15 for direct economic impact projections at the end of year 1.

~ TABLE 15 ~			
Projected Direct Economic Impact from Expenditures of Coldwater Bike Trail			
Annual Users		Daily spending per typical user	Direct Impact from Spending
Low	50,000	$(0.90)(\$16.67)+(0.10)(\$104.25) = \$25.43$	\$1,271,500
Normal	100,000	$(0.90)(\$16.67)+(0.10)(\$104.25) = \$25.43$	\$2,543,000
Optimistic	150,000	$(0.90)(\$16.67)+(0.10)(\$104.25) = \$25.43$	\$3,814,500

For the study purposes we distinguish a local user as one who spends a portion of a day or a full day on the trails, but who does not obtain lodging. Therefore, all non-local users would be obtaining lodging overnight either at a local hotel, motel, camp ground, RV park, etc.

c. Multiplier Effect

Section B provides the direct impact from visitors to the trail. In Section C we present the multiplier effect of indirect effects and induced effects. Both indirect and induced effects consider the flow of spending and consumption that occurs after initial, direct spending. Indirect and induced effects are frequently measured by a Type II economic multiplier. Based on data from Bowker, Bergstrom, and Gill (2007), our analysis uses a multiplier of 1.44 to capture total impact from indirect and induced effects. To calculate indirect and induced impact from spending, our study used the product of direct impact from spending and the Type II multiplier of 1.44 for each scenario of annual users. Indirect and induced effects are not immediate, but rather are the result of spending and commerce that occurs over time in response to the initial, direct spending. See Table 16 for an illustration of total impact from expenditures.

~ TABLE 16 ~ Expenditures Impact of Coldwater Bike Trail			
Annual Users	Direct Impact from Spending	Type II Multiplier	Total Impact from Spending
Low	\$1,271,500	1.44	\$1,830,960
Normal	\$2,543,000	1.44	\$3,661,920
Optimistic	\$3,814,500	1.44	\$5,492,880

d. Tax Revenue Impact

Economic impact from expenditures from visitors to the trail is not confined only to sales. Tax revenues are generated for retail purchases (sales tax), lodging taxes, and for income taxes from income affected by increases in sales. To find the tax revenue impact we considered both sales taxes and income taxes that are generated from expenditures from visitors. Sales taxes are only generated from retail sales and not service sales. For this analysis we estimate that approximately 85 percent of expenditures will be for retail goods and 15 percent for services. Thus, we found the product of the number of annual users and amount spent per daily user (excluding lodging) of \$16.67 and multiplied that amount by 85 percent. The multiplier of 1.44 was then applied. This is the level of spending on which 10 percent sales taxes are levied.

Lodging taxes vary across the state, but for this part of Alabama they are 11 percent total (Alabama Department of Revenue). For the lodging tax we are only considering those that require lodging.

From the Coldwater Bike Trail Survey, we found that users will spend on average \$77.62 on lodging. This number may be higher than an average of all users, both avid bike riders and novices alike, but we did not think that it is unreasonable. However, we believe that a better, and more conservative, estimate is \$60.00 per night on average for lodging and based our lodging taxes upon that number. This amount takes into account the lower cost of camping as a significant number of survey respondents prefer camping over other lodging. See Figure 11 depicting the preferences of survey respondents for various types of lodging. Our estimate was 10 percent of annual non-local users (based on low, normal, and optimistic range) would spend an average of \$60.00 on lodging on which a lodging tax is assessed.

~ FIGURE 11 ~
Lodging Preferences of Coldwater Bike Trail Survey

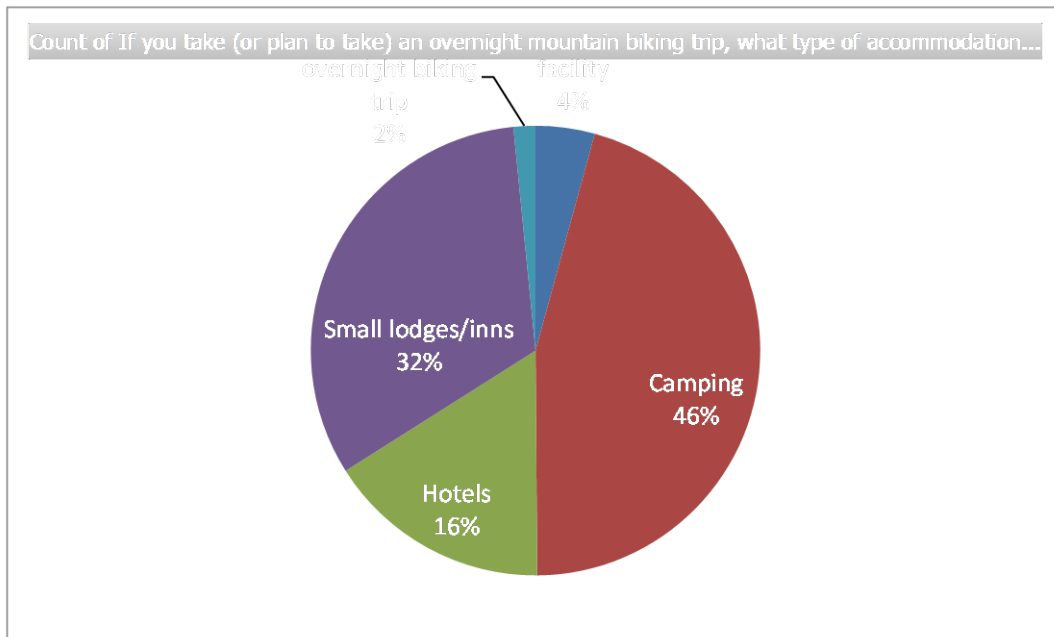


Table 17 depicts tax revenue impact from the Coldwater Bike Trail. Those tax revenue impacts are from sales taxes, income taxes, and lodging taxes. These are revenues generated in addition to the economic impact generated from spending.

~ TABLE 17 ~				
Tax Revenue Impact from Coldwater Bike Trail				
Retail Sales Taxes (assuming 85 percent of total impact from spending is retail related)				
Annual Users	Retail Sales	Sales Tax		Sales Tax Revenue
Low	\$1,020,204	0.10		\$102,020
Normal	\$2,040,408	0.10		\$204,041
Optimistic	\$3,060,612	0.10		\$306,061
Income Taxes				
Annual Users	Total Spending with Multiplier	Taxable Income Ratio¹	AL Income Tax Rate	Income Tax Revenue
Low	\$1,830,960	0.25	0.05	\$22,887
Normal	\$3,661,920	0.25	0.05	\$45,774
Optimistic	\$5,492,880	0.25	0.05	\$68,661
Lodging Taxes				
Annual Users		Lodging Subject to Tax	Lodging Tax	Lodging Tax Revenue
Low	50,000	50,000*0.10*\$60.00 = \$300,000	0.11	\$33,000
Normal	100,000	100,000*0.10*\$60.00 = \$600,000	0.11	\$66,000
Optimistic	150,000	150,000*0.10*\$60.00 = \$900,000	0.11	\$99,000

¹ Taxable Income Ratio is the ratio of taxable income to total income. In a related analysis Chang (2001) used 25 percent, an amount on the lower end of an approximate range for this ratio between 20 percent and 60 percent. We agree with the use of this percentage and also use 25 percent as a conservative estimate to reflect tax deductions and exemptions that reduce the level of income on which income is taxed.

e. Total Economic Impact

To find the total economic impact of the Coldwater Bike Trail we sum the total impact from spending with tax revenue impact from increases in sales, lodging, and income tax base. Each of these estimates is based on a range of annual users from low, normal, and optimistic, or 50,000, 100,000, and 150,000, respectively.

It is important to note that other impacts will likely accrue over time that we do not initially consider. With no employees for the trail and thus no jobs added initially the impact of workers living in a community, with children in school, and resources in local depository institutions, is not immediately evident. Spending will almost always be the majority of the economic impact for most situations; the Coldwater Bike Trail is no exception. Additional tax revenues from sales, income, and lodging are relevant and summed to find total economic impact.

Each of these impacts – spending and taxes – will likely increase if the trail is expanded as planned in the future. Much of this potential rests with the number of visitors accessing the trail and how much they spend while visiting. If non-local visitors increases and thus the need for lodging increases this represents a more positive revenue source as well. Table 18 depicts total economic impact of the Coldwater Bike Trail

~ TABLE 18 ~
Total Economic Impact from Coldwater Bike Trail

		Categories of Economic Impact				
Annual Users		Total Spending	Sales Taxes	Income Taxes	Lodging Taxes	Total Economic Impact
Low	50,000	\$1,830,960	\$102,020	\$22,887	\$33,000	\$1,988,867
Normal	100,000	\$3,661,920	\$204,041	\$45,774	\$66,000	\$3,977,735
Optimistic	150,000	\$5,492,880	\$306,061	\$68,661	\$99,000	\$5,966,602

IV. Conclusion

Based on national, regional, and local industry trends, mountain biking is a growing sport that is becoming increasingly popular with a variety of individuals. Survey results indicate strong support with a core group of individuals with the dedication and economic means to frequently participate. Respondents were excited about the Coldwater Bike Trail and overwhelmingly are interested in the site as a likely destination at some point in the future.

There are several economic and demographic trends that represent strengths and weaknesses that this analysis reveals that need further discussion. The major strength is that biking is a healthy activity that has appeal from an inexperienced, occasional rider to an experienced sportsman. The demographic category most likely to ride according to our survey is a higher income male between 30-50 years of age, although with the increasing universal popularity of biking, actual users are likely to fall somewhat outside this specific demographic.

The existence of the Coldwater Trail on virgin woodlands offers numerous opportunities to integrate the trail as a destination in east-central Alabama. In fact, with opening of the Coldwater Mountain Bike Trail System (Phase I) recently, there has been a lot of interest according to local biking officials. As the trail system grows, both in popularity and length, we expect to see more evidence of its economic and social impact throughout the area.

The initial entry point (trailhead) is on the western-most portion of the mountain and does have a number of small retail stores near it as well as a grocery store. Within 6 miles either in the direction of Anniston or Oxford there are numerous retail outlets, restaurants, and hotels/motels which is conducive for the overnight bikers. While this trailhead is more rural than many others planned for Phase II and III, close-by merchants should begin to see a growth in sales as the trail becomes more well-known.

As the other phases are completed and the numerous other trailheads are opened, the West Anniston area merchants should begin to see increased traffic from trail users as several of the trailheads will be in close proximity.

Another major impact would be experienced if the trail system was eventually linked with the Ladiga Trail – a rail trail which winds its way into Georgia. This existing rail trail has a history of hosting thousands of riders.

Weaknesses that we identify are primarily just areas of concern. It is unfortunate that over 81 percent of respondents were not familiar with Forever Wild Trust and a majority unsure of its role of outdoor recreation and wildlife. Establishing a better link between the Trust and active participation in areas such as Coldwater Mountain are important in leveraging resources and marketing not only east-central Alabama but the entire state as well.

Another area of concern is that both the market potential and spending potential index that was accessed for 5, 50, and 100 mile radii of Coldwater Mountain appear to indicate that more riders might be more urban than rural. For example, in the 5, 50, and 100 mile ring study analysis the immediate 5 mile radius (relatively more urban) shows more market potential or demand for biking activity than the 50 mile radius. This might be explained by a relatively more rural area from 5-50 miles in every direction from Coldwater Mountain. The numbers, however, for market and spending potential are very strong out to 100 miles from Coldwater Mountain. The 100 mile radius considers more urban areas such as Atlanta, GA, for example.

Although the survey found a disproportionate number of half day and full day travelers relative to overnight travelers, we are not very concerned with lower market potential numbers within part of the radius covered. From the survey, recommendation from a friend or relative and the reputation of the trail were both major influences on choice of destination of a mountain

biking trip. However, we believe that any current or past weaknesses in the potential of this timely sporting activity are evolving with more interest and thus demand for biking activity.

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VI. Appendices

Appendix A



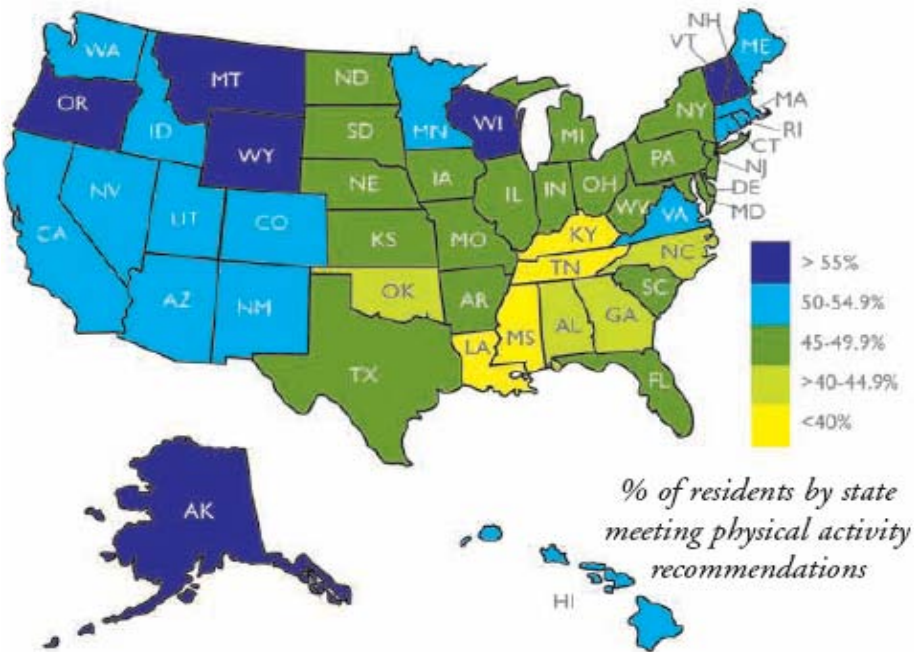
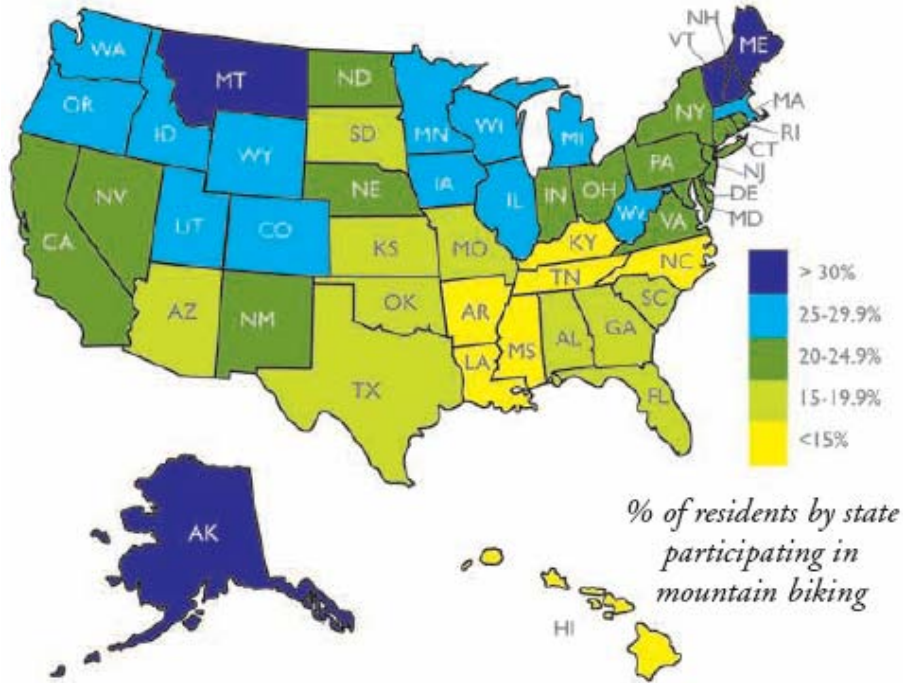
Coldwater Mountain Forever Wild Mountain Bike Trail Project

Coldwater Mountain is a 4000 acre tract of land owned by the State of Alabama's Forever Wild organization and managed by the State Lands Division of the state's Department of Conservation and Natural Resources. Forever Wild was created in 1992 by a statewide vote that garnered 83% "yes votes" from Alabamians and has been very successful in the years since. It is a program dedicated to preserving Alabama's most beautiful land, while expanding the recreational opportunities available to the public. The Coldwater tract was purchased by Forever Wild in the late 90's and is presently being developed into a world class destination trail system for mountain bikers, trail runners, and hikers. Sixty miles of trail have been designed by IMBA's Trail Solutions team and construction will be performed in phases over a 3 to 5 year period. To date, it is funded primarily through a Recreational Trails Program (RTP) grant with the help of the Alabama Department of Economic and Community Affairs (ADECA). The Southern Off-Road Bicycle Association (SORBA) is the SE Regional Division of IMBA and is the grantee coordinating the funding with ADECA. Our club, the NEABA, coordinates all local efforts with civic leaders, politicians, local citizens and the media.

Source: <http://www.neabc.org/coldwater-mountain-bike-trail-project.htm>

Appendix B

State Level Participation Levels for Mountain Bikers: Who Meets Physical Activity Recommendations?



Source: International Mountain Biking Association (IMBA)

Appendix C

Outdoor Recreation Needs by Region

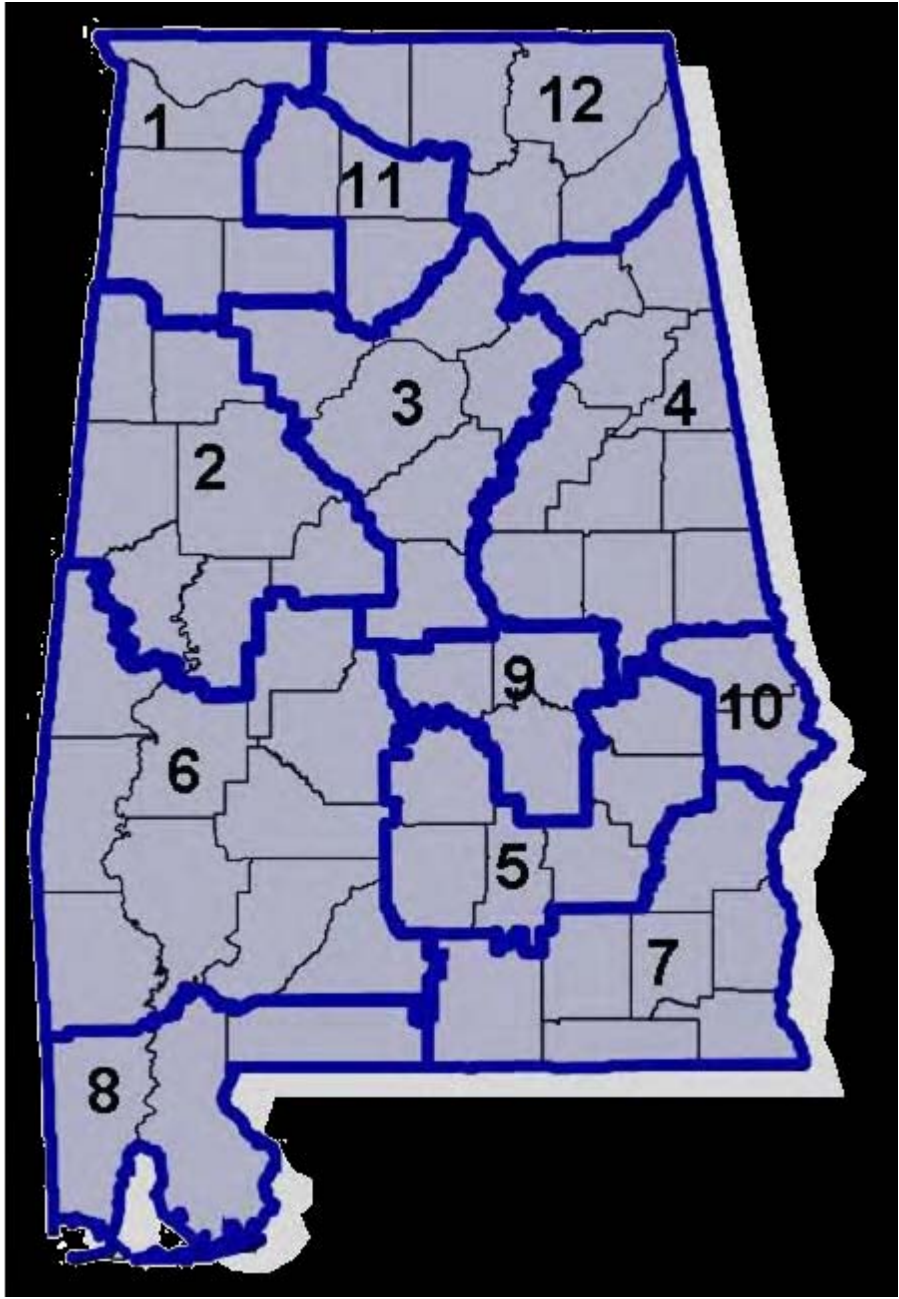
#1 Stated Outdoor Recreation Needs By Region, Sorted By State													
ACTIVITY	STATE RANK	REGION RANK											
		1	2	3	4	5	6	7	8	9	10	11	12
Parks	1	2	4	1	1	1	1	3	2	1	1	5	3
Swimming pools	2	5	1	4	6	4	2	5	1	3	5	1	5
Walking/jogging trails	3	3	2	2	7	7	5	1	6	2	2	4	2
Playgrounds	4	1	3	3	3	2	3	4	4	4	3	3	1
Hunting & hunting land	5	4	8	11	19	19	8	6	5	16	19	2	17
Bicycle trails	6	15	16	8	12	12	19	8	3	6	18	9	4
Hiking trails	7	19	17	5	17	18	7	9	11	12	12	7	6
Fishing access/water	8	13	5	19	15	15	6	7	13		8		18
Baseball fields	9	12		6	10		4	2		13	9		
Golf / golf courses	10	11	7	10	16	17	13		17	10	4	17	7
Basketball courts	11		18	20	11	11	12		7	8	14		
Camping sites	12	7	9	17	14	14	18	10	9	11	15	11	
Softball fields	13	18		7	5	3	9	13		5	7	15	16
Soccer fields	14	20		13	4		11	14	15	9	6	19	8
Trails (unspecified)	15					6	14	11			20	10	10
Tennis courts	16	16				5			14	17		6	12
Skate/skateboard areas	17	8						12	10	18	20	13	
Ball fields	18		12		9	10					16	12	
ATV trails	19	6		12	8	9						8	14
Horse riding trails	20			16	18		20	16			17		
Beach Access									19	19			
Bicycling Signs													19
Boating		17			13								
Boat Ramps			19			13	17		12	14			20
Dog Parks and Trails											11		
Football						16			18				9
Lakes / Rivers Access				14		8							
Mountain Climbing					20								
Nature Trails, Preserves		9	14	9								20	13
Off Road Trails			10										
Organized Sports			13				16						
Park Maintenance			15							15			
Picnic Areas / Tables		10		15	2		10		20	20		14	15
Running Tracks		14											
Running Trails								15					
Security Improved			6										
Shooting Ranges									16				
Sidewalks												16	
Undeveloped Land											13		
Volleyball Courts							15						
Walking Trail Safety													
Water Parks			20									18	11
Wetlands				18									

Source: Troy University Center for Business and Economic Services, 2008 SCORP Survey.

Appendix C (continued)

Listing of Regional Planning Commission Districts that Pertain to Twelve Regions Identified by County

- 1. Northwest Alabama Council of Local Governments - Colbert, Franklin, Lauderdale, Marion, and Winston Counties**
- 2. West Alabama Regional Commission - Bibb, Fayette, Greene, Hale, Lamar, Pickens, and Tuscaloosa Counties**
- 3. Regional Planning Commission of Greater Birmingham - Blount, Chilton, Jefferson, Shelby, St. Clair, and Walker Counties**
- 4. East Alabama Regional Planning and Development Commission - Calhoun, Chambers, Cherokee, Clay, Cleburne, Coosa, Etowah, Randolph, Talladega, and Tallapoosa Counties**
- 5. South Central Alabama Development Commission - Bullock, Butler, Crenshaw, Lowndes, Macon and Pike Counties**
- 6. Alabama-Tombigbee Regional Commission - Choctaw, Clarke, Conecuh, Dallas, Marengo, Monroe, Perry, Sumter, Washington, and Wilcox Counties**
- 7. Southeast Alabama Regional Planning and Development Commission - Barbour, Coffee, Covington, Dale, Geneva, Henry and Houston Counties**
- 8. South Alabama Regional Planning Commission - Baldwin, Escambia and Mobile Counties**
- 9. Central Alabama Regional Planning and Development Commission - Autauga, Elmore and Montgomery Counties**
- 10. Lee-Russell Council of Governments - Lee and Russell Counties**
- 11. North-central Alabama Regional Council of Governments - Cullman, Lawrence and Morgan Counties**
- 12. Top of Alabama Regional Council of Governments - DeKalb, Jackson, Limestone, Madison, and Marshall Counties**



Appendix D

Survey Questionnaire for

Coldwater Mountain Bike Trail System in Calhoun County, Alabama

The Calhoun County Community Development Corporation has contracted with the Center for Economic Development at Jacksonville State University to prepare an Economic and Usage Analysis of the new Coldwater Mountain Bike Trail System in the Anniston/Oxford, Alabama area. In that regard, the Center is requesting you to complete the following questionnaire. **ALL RESPONSES ARE ANONYMOUS AND CONFIDENTIAL!** The surveying system **WILL NOT** capture any information from survey respondents' computers. It will only record your responses.

The survey consists of 18 questions and takes approximately 5 minutes to complete.

Thank you, in advance, for your participation.

1. Would you be interested in mountain biking on the Coldwater Mountain Biking Trail System? (select one)
 - a. Yes
 - b. No
 - c. Uncertain

2. How often did you go mountain biking during 2011? (select one)
 - a. None or fewer than 10 times
 - b. 10 – 19 times
 - c. 20 – 29 times
 - d. 30 – 39 times
 - e. More than 40 times

3. How would you classify your mountain biking ability? (select one)
 - a. Beginner
 - b. Intermediate
 - c. Advanced Intermediate
 - d. Expert

4. What type of mountain biking did you participate in **more** during 2011? (select one)
 - a. Dirt trail or rail trail mountain biking
 - b. Cross-country
 - c. Downhill
 - d. Free riding
 - e. Did not participate in mountain biking

5. What do you enjoy about mountain biking? (Complete all that apply)
- Challenge
 - Being outdoors/scenery
 - Exercise
 - Social aspect/camaraderie
6. How important are the following factors that influence your choice of a destination for a mountain biking trip? Please complete each answer.

(With 1 being NOT IMPORTANT and 5 being VERY IMPORTANT)

a. Reputation of destination	1	2	3	4	5	N/A
b. Recommend from friend/relative	1	2	3	4	5	N/A
c. Internet research	1	2	3	4	5	N/A
d. Article in mountain biking magazine	1	2	3	4	5	N/A
e. Article in general outdoor magazine	1	2	3	4	5	N/A
f. Brochure	1	2	3	4	5	N/A
g. Guidebook	1	2	3	4	5	N/A
h. Bike Club	1	2	3	4	5	N/A
i. Travel Agent	1	2	3	4	5	N/A
j. Mountain bike race or event	1	2	3	4	5	N/A

7. How important are the following features in making a destination appealing for a multi-day biking trip? Please complete each answer.

(With 1 being NOT IMPORTANT and 5 being VERY IMPORTANT)

a. Number of trails	1	2	3	4	5	N/A
b. Variety/difficulty of terrain	1	2	3	4	5	N/A
c. Reputation as a mountain biking destination	1	2	3	4	5	N/A
d. Scenery	1	2	3	4	5	N/A
e. Strong mountain biking community/culture	1	2	3	4	5	N/A
f. Other facilities (restaurants, accommodations, bike shops)	1	2	3	4	5	N/A
g. Ease of getting to destination	1	2	3	4	5	N/A
h. Weather	1	2	3	4	5	N/A
i. Cost of trip	1	2	3	4	5	N/A
j. Distance to Destination	1	2	3	4	5	N/A

8. If you take (or plan to take) an overnight mountain biking trip, what type of accommodations do you prefer? (select one)

- a. Hotels
- b. Small lodges/inns/motels
- c. Bed & breakfast facility
- d. Camping
- e. Will not take overnight biking trip

9. When you go mountain biking, what is the typical duration of your trip? Please complete each answer.

(With 1 being NOT LIKELY and 5 being VERY LIKELY)

- | | | | | | | |
|--|---|---|---|---|---|-----|
| a. Half day or less | 1 | 2 | 3 | 4 | 5 | N/A |
| b. One Full day | 1 | 2 | 3 | 4 | 5 | N/A |
| c. 2 days (includes overnight) | 1 | 2 | 3 | 4 | 5 | N/A |
| d. 3 days or more (includes overnight) | 1 | 2 | 3 | 4 | 5 | N/A |

10. How much do you spend per day when you go mountain biking? (please complete both parts if applicable)

- a. \$_____ food, clothing, other expenditures (**excluding lodging**)
- b. \$_____ only for lodging

11. How many people typically accompany you on mountain biking trips? (select one)

- a. 0
- b. 1
- c. 2
- d. 3 or more

12. How far in miles are you willing to travel to a mountain biking destination? Please complete each answer.

(With 1 being NOT LIKELY and 5 being VERY LIKELY)

- | | | | | | | |
|-----------------------|---|---|---|---|---|-----|
| a. Less than 50 miles | 1 | 2 | 3 | 4 | 5 | N/A |
| b. 51 to 150 miles | 1 | 2 | 3 | 4 | 5 | N/A |
| c. 151 to 300 miles | 1 | 2 | 3 | 4 | 5 | N/A |
| d. Over 300 miles | 1 | 2 | 3 | 4 | 5 | N/A |

13. What is your age? (select one)

- a. 18 – 29 years
- b. 30 – 39 years
- c. 40 – 49 years
- d. 50 – 59 years
- e. 60 years or older

14. What is your gender? (select one)

- a. Male
- b. Female

15. In which zip code do you reside? _____

16. Which of the following best describes your household income in 2011? (select one)

- a. Under \$25,000
- b. \$25,000 - \$49,999
- c. \$50,000 - \$74,999
- d. \$75,000 - \$99,999
- e. Over \$100,000

17. Have you ever heard of the Forever Wild Trust – the organization that manages the Coldwater Mountain property where the Trails are located?

- a. Yes
- b. No

18. Please characterize your understanding of what the Forever Wild Trust is:

- a. A private non-governmental organization whose mission is to secure and manage land for conservation related outdoor recreation and wildlife habitats
- b. A federal program whose mission is to secure and manage land for conservation related outdoor recreation and wildlife habitats
- c. A state program whose mission is to secure and manage land for conservation related outdoor recreation and wildlife habitats
- d. None of the above

Again, thank you for your participation! The information from responses will be very helpful to the continued development of the Coldwater Mountain Biking Trail System.