

# The Monon South Trail

## Visitor Use Study



September 2025





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## Summary Report

September 2025





# Introduction

## Monon South Trail

The Monon South Trail is under development as a 57-mile trail between Mitchell and the Clark/Floyd County Border that connects eight local communities in the Lawrence, Orange, Washington and Clark Counties uplands region of southern Indiana. Phase 1A of trail construction was completed in June 2025 with approximately 20 miles of trail and paved sections through all trail communities opened. Website- <https://www.mononsouth.com/>

## Radius Indiana

Radius Indiana is the economic development organization for the eight-county region of Crawford, Daviess, Dubois, Greene, Lawrence, Martin, Orange, and Washington and serves as a catalyst for government, business, and academic collaboration. Radius spearheaded and is managing the construction of the trail. Website- <https://radiusindiana.com/>

## Acknowledgements

### Radius Indiana

Jeff Quyle  
Sadie Miskuff  
Krystal Painter

### Town of Borden, IN

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### Town of Orleans, IN

Robert Henderson

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## Crossroads Development Resource, LLC

Crossroads Development Resource, LLC is an independent consulting firm focusing on planning, research, and training for outdoor recreation to enhance quality of life, economic development, and health in communities of all sizes. Website- <https://crossroadsdr.com/>

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### Recommended Citation:

Elliott, L. (2025). *Monon south visitor use study*. Crossroads Development Resource.





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## Methodology

The Monon South Trail is a multi-faceted, multi-year project to measure and analyze usage patterns and opinions of trail users. In 2025, surveys were collected in the communities of Orleans and Borden since the trailheads in these communities were officially open and sections through other communities were still under construction or not officially open with the exception of Mitchell. Mitchell will be surveyed in a subsequent year and determined by project leadership. Data collection and analysis will take place in different communities in a rotation as determined by the project team in subsequent years.

The following is a summary of the project phase methodologies. The complete methodology can be found in the Appendix.

### Trail User Survey

The Trail Use survey asked trail users about their experience on the trail including their usual activities, frequency of use, exercise habits, opinions of and concerns about trail management and maintenance, trail related economic activity and basic demographics. The 27-question survey was distributed both passively and actively. Passive distribution included trailside 24" X 36" signs with an invitation to take the survey and a QR code to access it, and postcards with the invitation and QR code along with paper copies of the survey including addresses stamped envelopes for return placed in strategic throughout the month of June 2025. Active distribution included stationing project staff and volunteers at trailheads and other strategic locations along the trail during busy periods to engage trail users and give them the invitation postcard. Active distribution of the survey took place between June 10 and June 23, 2025.

### Business Trail Neighbor Survey

The Business Trail Neighbor survey was sent to businesses identified by the project team as near enough to the trail for it to impact their business operations and with a business model that could reasonably be impacted by the presence of trail users. These businesses included mainly retail, food service, and lodging. Excluded were industrial and general office businesses such as insurance agents and attorneys who were unlikely to experience trail users directly. The 26-question survey was distributed by mailing a postcard to each identified business with an invitation to complete the survey and a QR code to access it. The list of invitees was compiled through a list of partners maintained by Radius with additional research on online maps and GIS systems and included 38 businesses in the communities of Orleans and Borden. The initial mailing of postcards took place on June 8, 2025 with a second reminder round of postcards mailed on June 22, 2025.

### Property Value Research

Trail and greenways are known to positively impact property values of trail adjacent properties and the same is anticipated for the Monon South Trail. Both market values and assessed valuation were recorded to track changes over time and determine the impact of the trail on those





property values. Criteria for the properties included in this study are those within the Town boundaries of Orleans and Borden and with any part of the property 150 feet or less from the trail.

Methods used to gather property value information include referencing Zillow for current market values and the respective county GIS systems for assessed valuation. Due to the volatile and highly negotiated nature of the sales of businesses, Zillow generally does not offer market values for business properties so most businesses in this study will have only assessed valuation.

In order to safeguard privacy, the property addresses and names of property owners are not included in this report. Instead, each property is given a unique identifying number. Addresses and names are retained in a non-public database that will be used in the same manner for future property value tracking.

## Analysis

91 surveys in the Trail User survey and 12 in the Trail Neighbor survey were at least partially completed. Not all survey respondents answered every question so the number of responses will vary from question to question.

Certain questions asked survey takers to select all answers that apply, as opposed to a single answer from a multiple-choice list, and responses to those questions will total more than the number of surveys.

Though the survey locations were in Orleans and Borden, all communities and trailheads were included as a response to the first question in the Trail User survey, "Which trailhead are you using today?" and the first question in the Trail Neighbor survey, "Which trailhead or community is closest to your business?" to avoid altering the survey in subsequent years. Some surveys responded with trailheads in communities other than Orleans and Borden and are included in the data, categorized as "Other Trailheads". At the time of the survey period, the trail was not fully constructed and did not connect the trail communities to each other. It is unknown whether these survey takers mis-identified the trailhead where they entered the trail, entered the trail at the trailheads they identified then skipped to a survey location when the trail section they were travelling on ended, or gathered the QR code or web link at a survey location or other source, then used the trail at a different location.

In this report, responses are sorted by trailhead or by primary residence zip code. Data tables include the total of all responses, Orleans responses, Borden responses, and other trailhead responses to measure the differences in usage in the various communities. For some questions it was useful to see the differences between those accessing the trail in Borden versus accessing the trail at the Deam Lake Road trailhead. In the Trail Neighbor survey, two respondents answered New Pekin as their location despite no surveys being mailed to New Pekin businesses and those are preserved in the results in this report. Where "Other" is represented in a table in the Trail User survey, it includes residence zip codes outside the primary trail communities. The purpose of this breakout is to examine data from visitors separately from local residents to calculate the potential impact of trail-related tourism.



# Trail User Survey

## Trailheads Used

40 survey respondents reported accessing the trail at Orleans with 34 accessing the trail at one of the two Borden trailheads. Borden trailheads included the trailhead recently opened in town adjacent to the Town Hall and the Deam Lake Road trailhead approximately three miles to the east. Of the Borden responses, 10 said they used the Deam Lake Road trailhead 13 surveys identified other trailheads as their point of access. Survey invitations and staff were only placed in Orleans and Borden so it is not known if these 13 mis-identified the trailhead they used or obtained the survey invitation from another source.

Orleans	Borden (town)	Borden (Deam Lake Rd.)	Other Trailheads
40	24	10	13

*Table 1: Trailhead used when entering the trail*

## Trail User Primary Residence

Trail users were asked to give the zip code of their primary residence to identify where they lived in order to determine the level of usage from trail users from other locations (visitors) who may contribute economically to the trail communities and to determine the level of usage by the residents of each community.

Orleans	Borden	Other Trailheads	Other
38 (44%)	10 (11%)	15 (18%)	24 (27%)

*Table 2: Primary residence of trail users*

Location	#
New Albany	4
Salem	4
New Pekin	3
Mitchell	3
Campbellsburg	1

*Table 4: Other trailheads*

*Table 3: Primary residences of visitors*

Location	County (IN)	#
Floyds Knobs	Floyd	3
Bedford	Lawrence	2
English	Crawford	2
Memphis	Clark	2
Paoli	Orange	2
Scottsburg	Scott	2
Charlestown	Clark	1
Fisherville, KY		1
Georgetown	Floyd	1

Location	County (IN)	#
Greenville	Floyd	1
Lake Worth, FL		1
Lanesville	Harrison	1
Leavenworth	Crawford	1
Louisville, KY		1
New Albany	Clark	1
Sellersburg	Clark	1
Springville	Lawrence	1



38 respondents identified Orleans as their primary residence, closely matching the number of surveys identifying Orleans as their point of access. Only 10 of the 34 Borden trailhead surveys identified Borden as their primary residence, indicating a lack of use by Borden residents. 15 said they lived in other towns along the trail.

24 (27%) of surveys said they lived in other locations, travelling to use the trail or visiting for some other purpose and using the trail on their visit. Most visitors were from Clark County (home of Borden) or Floyd County with 5 each area. Two visitors were from the Louisville, KY area, one was from Florida and the remainder from different parts of southern Indiana. 27% is a remarkably high number for a trail that is not fully constructed and likely not well known. An average expectation for visitor usage on well-established, long distance trails is around 25%<sup>1</sup>. This bodes well for the popularity of the trail and its potential impact on local economies once construction is complete and promotional efforts take root.

## Usage

### Primary Activity

The primary activity among all survey respondents was walking (55%) followed by biking (32%). When examining usage by community, there is a stark difference. 71% of respondents in Orleans are walking while only 30% of Borden respondents are walking. Only 12% of Orleans respondents report biking as their primary activity while 59% of Borden users, including 71% accessing the trail at Deam Lake Rd and 55% of those accessing the trail in town, report biking as their primary activity and other trailheads users are split at 45% for each activity.

Primary Activity	Total	Orleans (35)	Borden (town) (20)	Borden (Deam Lake Rd.) (7)	Other Trailheads (13)	Other (19)
Walk	55%	71%	30%	29%	45%	26%
Bike	32%	12%	55%	71%	45%	68%
Run/Jog	7%	11%	5%	0%	0%	0%
People Watching	3%	3%	5%	0%	0%	0%
Skate	0%	0%	0%	0%	0%	0%
Skateboarding	0%	0%	0%	0%	0%	0%
Other	4%	3%	5%	0%	9%	5%

*Table 5: Primary activity*

<sup>1</sup> Brethova, K., Anderson, K., Elliott, L., Durkin-Blackburn, C., Edelstein, R., & Wolter, S. (2025). Monon South Trail Economic Impact Projection Report. Eppley Center for Parks and Public Lands at Indiana University Bloomington.



Factors that may account for the difference are that the completed trail section in Orleans is very short and does not extend far beyond the town's borders, limiting the distance bikes can travel. The Borden section is much longer, has an access point near Deam Lake State Recreation area, and has many more visitors using the trail, attracting more bikers.

68% of visitors using the trail report biking as their primary activity while only 26% are walking.

Other activities included 7% saying they run or jog with the activity being slightly more prevalent in Orleans (11%) than Borden (5%). No one using another trailhead or visiting reported running or jogging as an activity. The most common response to "other" activities was "walking the dog(s)".

### Distance of Use

The most common distance that all respondents report using the trail is 1-2 miles (37%), followed by 2-5 miles (26%). Consistent with the reported primary activity (walking vs. biking), respondents in Orleans were much more likely to use the trail for a shorter distance (67% less than 2 miles). A majority of Borden respondents, however, used the trail for more than 5 miles on the day they completed the survey, including those entering the trail at both trailheads with Deam Lake Rd. users slightly higher than town users to travel longer distances. Other trailheads were more varied in usage distance, being evenly split between 1-2 miles and more than 10 miles (31% each).

Distance	Total	Orleans (39)	Borden (town) (22)	Borden (Deam Lake Rd.) (8)	Other Trailheads (13)
1-2 miles	37%	59%	14%	13%	31%
2-5	26%	33%	18%	13%	23%
More than 10	20%	0%	41%	50%	31%
Less than 1	10%	8%	14%	0%	8%
5-10	7%	0%	14%	25%	8%

Table 6: Use distance

### Frequency of Use

43% of trail users report using the trail on a weekly basis, the most common use frequency. The second most common frequency was once or seldom, reflective of the high number of first-time users and visitors. 21% of respondents said they use the trail on a daily basis. Orleans residents were more likely to use the trail weekly (44%) or daily (36%) while Borden users were much more likely to say they used the trail once or seldom (48%), again reflective of the higher number of visitors that

Frequency	Total	Orleans (36)	Borden (29)	Other Trailheads (12)
Weekly	43%	44%	31%	58%
Once (or seldom)	28%	14%	48%	17%
Daily	21%	36%	10%	17%
Monthly	7%	6%	10%	8%

Table 7: Use frequency



access the trail at Borden or Deam Lake Road. 58% of respondents who say they accessed the trail at trailheads other than Orleans or Borden say they use the trail Weekly.

## Use Purpose

Most respondents report exercise as their primary reason for using the trail at a very high rate. 82% of Orleans trail users and 85% who said they used another trailhead gave exercise as their primary reason. 50% of Borden surveys gave recreation as their primary reason. Only 2% of respondents said tourism was their primary motivation, all at Borden. The outlying results at Borden, as with other factors, are likely the result of the high number of non-local, bike riding visitors.

Purpose	Total	Orleans (39)	Borden (30)	Other Trailheads (12)
Exercise	68%	82%	47%	85%
Recreation	29%	18%	50%	15%
Tourism	2%	0%	3%	0%
Transportation	1%	0%	3%	0%

*Table 8: Use purpose*

## Partners

When asked who they use the trail with most often, the most common response overall was with a spouse or partner (34%) followed by alone (29%), with other family members, 14%, and with friends or a social group (10%). 62% of respondents use the trail with other people, proving trail usage to be a very “social” activity.

Borden again differed greatly from other trailheads in terms of usage partners with most using the trail with a spouse or partner compared to 27% in Orleans and 25% at other trailheads. Those who accessed the trail at Deam Lake Rd were even more likely than those who accessed the trail in town to be with a spouse or partner. Borden users were also less likely to use the trail with other family members or as part of a club, adding more definition to the “typical” trail users at Borden as married or partnered couples visiting together to ride bikes on the trail.

Partners	Total	Orleans (33)	Borden (town) (21)	Borden (Deam Lake Rd.) (8)	Other Trailheads
With spouse or partner	34%	27%	52%	62%	25%
Alone	29%	24%	29%	13%	42%
With other family members	14%	12%	5%	13%	17%
With friends or social group	10%	9%	10%	13%	8%
With a club	4%	9%	0%	0%	8%
Other	9%	18%	5%	0%	0%

*Table 9: Use partners*



## Time of Day

The most common time of day to use the trail varied. In Orleans, evening was the most popular time with 56% of respondents using the trail after 5:00 PM. In Borden, mid-day was the most popular time with 43% using the trail between 9:00 AM and 1:00 PM and 27% using it in the evening. Other trailhead users were also more likely to use the trail in the evening with 42% using the trail at that time and 33% using the trail mid-day. Overall, 36% of survey respondents report using the trail in the evening, 30% mid-day, 18% in the afternoon (1:00 PM- 5:00 PM), and 16% in the morning before 9:00 AM.

Time	Total	Orleans (32)	Borden (30)	Other Trailheads
After 5:00 PM	36%	56%	27%	42%
9:00 AM- 1:00 PM	30%	16%	43%	33%
1:00- 5:00 PM	18%	9%	20%	8%
Before 9:00 AM	16%	19%	10%	17%

Table 10: Use time

## Health and Wellness

Trail use is proving to have a positive impact on health, as expected. Exercise regularity, exercise frequency, and overall wellness have increased at every trailhead since the respective trail sections were completed. Much previous research into the use of trails has shown a positive correlation between the presence of a trail and increases in exercise and decreases in the amount spent on health care.

## Exercise Regularity

While a fairly high level of respondents reported regular exercise of at least 3 times per week (67% overall) before they started using the trail, 60% of respondents report increasing their exercise level because of the trail. The most marked increase in exercise comes in Orleans at 69% and other trailheads at 62%, consistent with the high percentage of trail users in those locations who said their primary reason for using the trail is exercise. 48% of Borden surveys said they increased their exercise level, consistent with the high percentage of respondents who said they already exercised 3 times per week.

Exercise Level	Total	Orleans (36)	Borden (29)	Other Trailheads (13)
Increased	60%	69%	48%	62%
Same	39%	31%	52%	31%
Decreased	1%	0%	0%	8%

Table 11: Exercise level

Of those who reported an increase in exercise, 64% reported more than a 25% increase in their exercise level and 32% report increasing exercise by more than 50%. While the different locations vary somewhat, these results are mostly consistent with a low of 58% of respondents at other trailheads reporting at least a 25% increase to a high of 79% increasing exercise by at least 25% at the Borden trailheads.



% Increase	Total	Orleans (24)	Borden (14)	Other Trailheads (7)
1-25%	36%	38%	21%	43%
26-50%	32%	33%	43%	29%
51-75%	26%	21%	29%	29%
More than 75%	6%	8%	7%	0%

Table 12: Exercise increase

## Wellness

When asked to report on their overall well-being with a rating of 1 to 10, respondents reported an overall average of 7.26 before they started using the trail, increasing to 8.03 with consistent trail use. The lowest increase was in Borden from 8.07 before to 8.25 after, aligning with the already higher levels of exercise from Borden trail users. The largest increase came from other trailheads, going from 6.92 to 8.0. Orleans respondents reported an increase from 6.76, the lowest pre-trail use rating, to 7.88.

	Total	Orleans (34)	Borden (28)	Other Trailheads (12)
Before	7.26	6.76	8.07	6.92
After	8.03	7.88	8.25	8

Table 13: Self reported wellness

## Accessing the Trail

### Means

The most common way to access the trail, as expected, was driving. 61% of all respondents said they drove to the trail. At Orleans, only 38% of trail users report driving and 53% walked to the trail. Only 6% biked. The trail in Orleans runs through town with many cross streets and points of sidewalk access, making it easy to walk. Borden, however, was the opposite. Despite the trail running through the middle of the long and narrow town, only 17% of people walked to access the trail. 73% said they drove to the Borden trailheads and 10% rode their bikes. This correlates with other usage

Access Method	Total	Orleans (32)	Borden (30)	Other Trailheads (12)
Drive	61%	38%	73%	75%
Walk	30%	53%	17%	25%
Bike	6%	6%	10%	0%
Ride with family/friends	0%	0%	0%	0%
Other	3%	3%	0%	0%

Table 14: Means of travel to the trail



indicators that most Borden users were visitors who rode their bikes on the trail with many of them accessing it at Deam Lake Road, despite the lack of parking at that location.

### Distance Travelled to Access

Monon South users travel a variety of distances to use the trail. The most common distances traveled are very close- less than ½ mile (26%), or far away- more than 10 miles (26%). The difference between the distances travelled by Orleans and Borden users is striking. 54% of Orleans trail users travelled a mile or less to use the trail while only 27% of Borden users travelled less than a mile. 60% of Borden users travelled more than 5 miles with the vast majority of those travelling more than 10 miles, consistent with the heavy use of the Borden trailheads by out of town visitors. Only 24% of Orleans trail users travelled more than 5 miles to use the trail.

Distance	Total	Orleans (33)	Borden (30)	Borden (Deam Lake Rd.) (8)	Other Trailheads (12)	Other (22)
Less than 1/2 mile	26%	30%	17%	13%	25%	9%
More than 10 miles	26%	9%	53%	62%	25%	68%
1/2 to 1 mile	15%	24%	10%	13%	8%	0%
2 to 5 miles	14%	6%	13%	13%	17%	5%
5 to 10 miles	10%	15%	7%	0%	17%	18%
1 to 2 miles	9%	15%	0%	0%	8%	0%

*Table 15: Distance travelled to access trail*

When considering out of town visitors, almost all of whom access the trail at Borden, 68% travelled more than 10 miles and another 18% travelled between 5 and 10 miles.

### Organized Group Activities

When asked if they would be willing to join organized group activities to use the trail, 29% of overall respondents said they would prefer not to participate in group activities. This preference was much lower in Orleans (15%) and higher in Borden (46% overall) and at other trailheads (67%), likely reflecting the more local usage of the trail in Orleans. Borden visitors, not surprisingly, were much less likely

Activity	Total	Orleans (33)	Borden residents (10)	Borden visitors (18)	Other Trailheads (12)
Would join groups	48%	61%	30%	39%	17%
Not interested	29%	15%	40%	50%	67%
Programs or classes	11%	9%	30%	6%	8%
Social group	7%	6%	0%	6%	0%
Races or contests	5%	9%	0%	0%	8%

*Table 16: Willingness to participate in group activities*





to joins clubs, social groups, or activities than Orleans or Borden residents, though the percentage of Borden residents who said they were not interested in joining groups (40%) was still much higher than in Orleans. Borden residents, however, were much more interested in participating in programs or classes on the trail (30%) than Orleans residents (9%) or those at other trailheads (8%).

48% of overall respondents said they would join activity groups, 11% are willing to join programs or classes on the trail, and 7% would join an informal group of trail users. Only 5% said they would participate in trail related races or contests.

## Concerns

Trail users were asked to rate their level of satisfaction over a variety of issues that the trail communities and trail managers should be aware of. Ratings of concerns are recorded as 1 = not at all satisfied through 5 = very satisfied. The lower the average rating, the more trail managers should be attentive to the issue. Respondents were also asked to provide open ended answers to issues where they rated not at all or only a little satisfied, giving trail managers specific points of concern to be addressed.

Of note, construction of the entirety of the trail and all of its accompanying amenities was not complete at the time of the survey. Where amenities were not yet opened or completed, they were, of course, rated at a low of satisfaction and are omitted from the survey analysis though they were included and are preserved in the survey instrument to maintain the consistency of the question over the multiple years of the study. These amenities include restrooms, lighting, and signage which have not yet been permanently installed.

The highest level of satisfaction is with the (low) level of congestion on the trail with 86% of respondents indicating that they are Quite or Very Satisfied. This may change as the trail is completed and attracts more users. Orleans users were slightly less satisfied with congestion than Borden or other trailheads, likely a result of the shorter paved stretch and higher population density near the trail, though not an issue of concern at this point. Respondents overall are also happy with access for disabled people, lack of presence of wild animals, personal safety, and parking, with all issues averaging over 4 (Quite Satisfied) on the 5 point scale. Satisfaction was slightly lower in Borden for all of these issues, particularly with parking. There is no dedicated parking yet in Borden with shared parking lots to access the trail in town and no parking at the Deam Lake Road trailhead.

Concern	Total	Orleans (32)	Borden (29)	Other Trailheads (11)
Congestion	4.38	4.32	4.36	4.55
Accessibility	4.27	4.47	3.96	4.45
Wild animals	4.17	4.16	4.00	4.09
Personal safety	4.07	4.32	3.79	4.09
Parking	4.06	4.45	3.64	3.73
Unleashed pets	3.99	3.87	3.88	3.82
Trash	3.97	3.8	4.04	4.00
Bikers/skaters too fast	3.97	4.03	3.85	4.00
Trail maintenance	3.81	3.79	3.67	4.18
Motorized vehicles	3.78	3.71	3.79	3.27
Benches	3.62	3.93	3.11	3.82
Police presence	3.36	3.34	3.19	3.27

*Table 17: Concern with potential problems*



The presence of unleashed pets, trash, bikers or skaters going too fast and trail maintenance received moderate ratings of satisfaction with Borden again lower than other trailheads with the exception of trash and cleanliness. Open ended comments indicated litter and a lack of trash cans as problems, though trash cans are an amenity which are not yet installed but will be as trail construction is finished. Other trail maintenance concerns mentioned in comments included lack of mowing along the trail and the gravel surfacing outside of town.

The presence of benches and places to sit were also cited as areas of potential dissatisfaction, though all planned benches are also not yet installed. The presence of motorized vehicles using the trail was a particular area of concern in satisfaction ratings and mentioned several times in comments and anecdotally to the survey team. Clear signage indicating that motorized vehicles were not allowed on the trail was placed along the trail in early June, hopefully reducing the problem.

The lowest rated concern was the presence of police or security personnel on the trail, though personal safety has a fairly high level of satisfaction. With limited police staffing available in smaller communities, it is not likely that police or other security personnel will be able to constantly monitor the trail, though a more obvious presence during times of heavy usage may alleviate trail users' concerns.

## Economic Activity

To understand the current and potential economic impact to the trail on the local communities, trail users were asked to report on what, if anything, they spent money on related to their usage of the Monon South Trail on the day of their surveyed visit and on an annual basis, and how much they spent. This examination of spending by category of expenditure looks at averages of all survey respondents and, separately, those who reported spending on a particular item. Calculating average spending by all users gives an actual measure of the economic impact (\$ spent X # of trail users), while examining the expenditures of those who actually spent money shows the potential impact of enticing trail users to spend. This categorized look at spending by type allows trail and community leaders to identify the types of businesses with the most impact and which may offer the greatest opportunity for potential business owners to open, for existing businesses to expand, and for all to better promote themselves to trail users.

### Spending

The average daily expenditure by *all* trail users, whether they spent money or not, on the day they took the survey was \$15.46. The highest daily total came in Orleans with \$22.08 of spending and the lowest was from those who reported accessing the trail on other trailheads at \$8.23.

#### Daily

Not surprisingly, food and beverage was the most common expenditure among those who spent money on their visit. 23% of survey respondents reported spending on food on their visit with an average expenditure of \$17.21. Food expenditures were highest on average in Borden (\$25.00) and lowest among other trailheads (\$4.00). Transportation and parking was the next most common expenditure with 12% of respondents



reporting an average expenditure of \$19.82. Transportation and parking includes all expenses incurred for traveling to the trail including, but not exclusively, fuel, parking fees, highway tolls, vehicle rental costs, and airfare. No trailhead on the MST has a cost for parking or parking meters nearby at the current time. 5% of respondents spent money on off-trail attractions, all in Borden and Orleans, with an average expenditure of \$57.00. 3 respondents spent on clothing, all in Orleans, with an average expenditure of \$123.33, 2 spent on lodging with an average expenditure of \$37.50, one person spent money on gifts and souvenirs (\$10.00) and one person spent on bikes or bike repairs (\$90.00) on the day of their visit.

Out of town visitors spent an average of \$12.76 on the day of their visit. Of those who spent money, food and beverage was the most common expenditure with 38% reporting spending an average of \$21.78 each. 17% of visitors spent on transportation and parking at an average of \$15.74 each. One reported spending on lodging (\$50.00) and one spent on gifts and souvenirs (\$10.00).

Item	Total	Average (all users)	Average (Spending users)	Orleans	Orleans (9 Spending users)	Borden	Borden (5 Spending users)	Other Trailheads	Other Trailhead (Spending user)	Other	Other (9 Spending users)
Food/Beverage	\$360.00	\$3.95	17.14 (21)	\$3.00	\$12.00 (10)	\$6.62	\$25.00	\$4.00	\$10.40	\$7.84	\$21.78 (9)
Lodging	\$75.00	\$0.82	37.50 (2)	\$0.62	\$25.00 (1)	\$1.47	\$50.00 (1)	\$ -	\$ -	\$2.00	\$50.00 (1)
Off-trail attractions	\$285.00	\$3.13	57.00 (5)	\$5.88	\$117.50 (2)	\$1.47	\$16.67 (3)	\$ -	\$ -	\$ -	\$ -
Gifts and souvenirs	\$10.00	\$0.11	10.00 (1)	\$ -	\$ -	\$0.29	\$10.00 (1)	\$ -	\$ -	\$0.40	\$10.00 (1)
Bikes/bike repair	\$90.00	\$0.99	90.00 (1)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Clothing and shoes	\$370.00	\$4.07	\$123.33 (3)	\$9.25	\$123.33 (3)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transportation and parking	\$218.00	\$2.39	\$19.82 (11)	\$3.33	\$27.50 (7)	\$0.73	\$27.50 (2)	\$4.23	\$13.75 (4)	\$2.52	\$15.74 (4)
Total	\$1,408.00	\$15.46	\$354.79	\$22.08	\$305.33	\$10.58	\$129.17	\$8.23	\$24.15	\$12.76	\$97.52

Table 18: Daily spending

### Annual

Annual estimates of spending in the same category are helpful to understand the longer term spending impact and is a more consistent method of measuring spending than daily expenditures which offered a smaller sample size and may spike or may be zero on a given day. It should be noted that at the time of this report, the trail has not been open for a full year, meaning survey respondents are necessarily giving an estimate of their annual spending rather than their actual spending over the prior year.



The average annual spending reported per all survey respondents is \$222.13. The highest annual spending occurs in Orleans at \$351.53 per trail user per year, \$185.14 in Borden, and is lowest among those who report accessing the trail at other trailheads at \$19.24. Food and beverage is the most frequent and largest annual expenditure with those who spend money on food anticipating spending an average of \$515.67. Food and beverage expenditures are much higher in Orleans at \$610.00 per year compared to \$280.83 in Borden.

The next highest annual expenditure is lodging at \$491.67 per respondent. Spending in both Borden and Orleans is \$516.67 per respondent with no lodging expenditures reported by those accessing the trail at other trailheads. There are no hotels in either Orleans or Borden so lodging expenditures are most likely at campgrounds or vacation rentals such as through VRBO or Airbnb. Opportunities to offer lodging will undoubtedly grow as the trail is completed and more heavily used.

Annual expenditure on clothing and shoes is anticipated at \$290.91 per spender. Off-trail attractions are reported at \$261.67 per trail user, transportation and parking is reported at \$188.58, bikes and bike repair at \$165.00, and gifts and souvenirs at \$120.00 per trail user per year.

Out of town visitors spend an average of \$134.70 each on an annual basis among all visitors surveyed. Of those who report an annual estimate of spending, lodging is the highest expenditure at \$525.00 followed by bikes and bike repair and clothing and shoes at \$250 each, transportation and parking at \$204.50, off-trail attractions at \$155.00, food and beverage at \$97, and gifts and souvenirs at \$60.00 per trail user.

Item	Total	Average (all users)	Average (Spending users)	Orleans	Orleans (9 Spending user)	Borden	Borden (6 Spending users)	Other Trailheads	Other Trailhead (1 Spending user)	Other (24 visitors)	Other (5 Spending users)
Food/Beverage	\$7,735.00	\$85.00	\$515.67 (15)	\$152.50	\$610.00 (10)	\$49.56	\$280.83	\$3.85	\$ 50.00	\$18.13	\$97.00 (5)
Lodging	\$2,950.00	\$32.42	\$491.67 (6)	\$45.59	\$516.67 (3)	\$45.59	\$516.67 (3)	\$ -	\$ -	\$43.75	\$525.00 (2)
Off-trail attractions	\$2,355.00	\$25.88	\$261.67 (9)	\$27.35	\$285.50 (5)	\$27.35	\$232.50 (4)	\$ -	\$ -	\$12.92	\$155.00 (2)
Gifts and souvenirs	\$720.00	\$7.91	\$120.00 (6)	\$10.00	\$133.33 (3)	\$9.41	\$106.67 (3)	\$ -	\$ -	\$5.00	\$60.00 (2)
Bikes/bike repair	\$990.00	\$10.88	\$165.00 (6)	\$18.50	\$148.00 (5)	\$7.35	\$250.00 (1)	\$ -	\$ -	\$10.41	\$250.00 (1)
Clothing and shoes	\$3,200.00	\$35.16	\$290.91 (11)	\$62.50	\$312.50 (8)	\$20.59	\$233.33 (3)	\$3.08	\$40.00 (1)	\$10.41	\$250.00 (1)
Transportation and parking	\$2,263.00	\$24.87	\$188.58 (11)	\$35.09	\$200.43 (7)	\$25.29	\$175.00 (5)	\$12.31	\$95.00 (2)	\$34.08	\$204.50 (4)
Total	\$20,213.00	\$222.12	\$2,099.83	\$351.53	\$2,206.43	\$185.14	\$1,795.30	\$19.24	\$185.00	\$134.70	\$1,291.50

Table 19: Anticipated annual spending



## Additional Businesses

When asked which additional businesses they would like to see, food service (snack shops and restaurants) topped the list in the overall results, in Orleans and Borden, and with out of town visitors. 73% of all respondents said they would like to see more snack shops and 60% said they want more restaurants. Both Orleans and Borden were similar to the overall result with Borden trail users indicating food service as a need at a slightly higher rate. Among out of town visitors, these types of business were requested by 80% of respondents but less in demand among users of other trailheads.

Bike shops are in high demand among visitors (53%) and those at other trailheads (57%) but less so in Orleans (29%) and Borden (30%), consistent with the higher level of biking as an activity among visitors. Gift and souvenir shops also have moderate demand overall (27%) but more so in Orleans (29%) and Borden (25%) than near other trailheads (14%) or with visitors (20%). Clothing and lodging are in low demand at this time with only 10% overall asking for clothing shops and 8% asking for additional lodging. Demand for clothing shops is somewhat higher in Orleans (19%) while lodging demand is highest in Borden (20%).

21% of respondents listed other businesses as priorities. Comments mentioned water and beverages several times and campgrounds, coffee shops, pet care stores once each.

Business	Total	Orleans (47)	Borden (48)	Other Trailheads (16)	Other (40)
Snack shops	73%	71%	75%	57%	80%
Restaurants	60%	62%	65%	42%	80%
Bike shops	31%	29%	30%	57%	53%
Gift/souvenir	27%	29%	25%	14%	20%
Clothing	10%	19%	5%	0%	7%
Lodging	8%	0%	20%	14%	13%
Other	21%	14%	20%	43%	13%

*Table 20: Popular businesses among trail users*

## Additional Attractions

Attractions noted by survey respondents as desirable are led by State parks, forests, and nature preserves with 61% overall indicating a need for them, consistent across all trailheads and among out of town visitors. Some significant facilities already exist in close proximity to the trail route including Deam Lake State Recreation Area near Borden and Spring Mill State Park east of Mitchel is a few miles from Orleans. Clark State Forest and Charlestown and Falls of the Ohio State Parks in Clark County (home of Borden) are a bit farther away but reachable on a day trip from the



trail. The desire for these types of outdoor recreation facilities is clear and while they may not be constructed immediately, better routes and directions to access them would likely be welcomed.

Local parks and playgrounds are the next most popular attraction to add with 45% of respondents indicating a desire for them. Congress Square in Orleans and Borden Community Park in Borden are within a hundred yards of the trail. Near other trailheads in communities not yet surveyed, Salem, Campbellsburg, and New Pekin have at least one park or playground within a few blocks of the trail. The addition of directional signage and sidewalk improvements would be very helpful for location of these facilities for trail users.

In addition to State operated outdoor recreation and local parks, additional outdoor recreation sites operated Federally, locally, or by non-profits entities were mentioned as important by 33% of respondents. As with other outdoor recreation facilities, many of these exist near the trail route including the Hoosier National Forest, Twin Creek Valley Nature Preserve, and Salinda Lake but are unknown to trail users and would benefit from better promotion and directional signage.

Historical sites and wineries, breweries, and distilleries were each mentioned by 39% of survey respondents as important to add. Festivals were mentioned by 31%. Festivals have the potential to draw many visitors and tourists for economic impact and several already exist in the trail towns including Orleans' Dogwood Festival, Borden's Star Valley Strawberry Festival, and New Pekin's 4th of July Celebration (the oldest such celebration in the nation). It may be helpful to maintain a coordinated and easily accessed events calendar to help promote these events to visiting trail users.

Among out of town visitors to the trail 69% said they would like to see more State operated outdoor facilities, 50% would like to see more historical sites, and natural areas, and 44% said they want more wineries, breweries, and distilleries to visit on their trip.

Attraction	Total	Orleans (63)	Borden (54)	Other Trailheads (20)	Other (46)
State Park, Forest, Nature Preserve	61%	61%	65%	63%	69%
Local parks	45%	57%	30%	50%	31%
Historical sites	39%	30%	45%	50%	50%
Wineries/Breweries/Distilleries	39%	39%	45%	38%	44%
Festivals	31%	35%	30%	25%	25%
Other natural areas	33%	39%	30%	25%	50%
Museums	10%	9%	15%	0%	6%
Other	10%	4%	10%	13%	13%

*Table 21: Popular attractions among trail users*



## Trail Information

Communication about and promotion of the Monon South Trail, the trail communities, events, activities, amenities, business, and attractions will be critical as the construction of the trail is completed and usage increases. Trail users were asked how they currently receive information about the trail and trail happenings and how they would like to receive information in order to align promotion and information dissemination methods with the preferences of trail users.

### Current

Word of mouth (67%) is the most common method for receiving information about the trail by a wide margin and at every trailhead, even among out of town visitors. Community websites are next with 33%. The trail has a website (<https://www.mononsouth.com/>) but with only 22% of trail users accessing it as a resource, it appears to be underutilized. Trailside signage, as has been noted, is limited until construction of the trail is complete and all amenities are installed. Information sources external to trail managers such as newspaper, radio, television, and travel websites and blogs are barely used as sources of information, not surprising considering the very recent openings of trailheads and limited time to get the word out but presenting an opportunity for communication going forward.

Communication method	Total	Orleans (57)	Borden (47)	Other Trailheads (18)	Other (30)
Word of mouth	67%	73%	60%	50%	53%
Community website/tourism bureau	33%	35%	28%	40%	12%
Trail website	22%	23%	28%	0%	35%
Trailside signage	18%	19%	20%	0%	24%
Flyers and posters	13%	23%	8%	0%	6%
Newspaper	10%	15%	0%	0%	0%
Radio	7%	4%	0%	0%	0%
Travel sites/blogs	5%	4%	8%	10%	6%
Television	3%	4%	4%	0%	6%
Other	28%	19%	32%	60%	35%

Table 22: Current information sources

### Preferred

The trail website is the most preferred method to access information but as noted, appears to be underutilized currently. As the trail grows in completion, usage, and familiarity, searches for information on the website will undoubtedly increase. Additional information on the website such as an events calendar and lists of local businesses would be helpful in attracting out of town visitors to the trail.



Additional trailside signage would also be very welcome and can help promote local businesses and attractions. 53% indicated a desire for more signage although, as noted, amenities such as signage have not been completely installed as of yet.

Trail users do appreciate learning about the trail from friends and family with 40% saying word of mouth is a preferred method of communication. Community websites and local tourism bureaus are a preferred method by 34%, and flyers and posters next most popular with 29%. Social media (other) was mentioned several times in open comments as a desired source of information, along with email bulletins and text messages.

Communication method	Total	Orleans (74)	Borden (50)	Other Trailheads (19)	Other (38)
Trail website	55%	50%	67%	44%	80%
Trailside signage	53%	58%	50%	44%	53%
Word of mouth	40%	54%	21%	22%	13%
Community website/tourism bureau	34%	31%	38%	22%	47%
Flyers and posters	29%	35%	17%	11%	13%
Travel sites/blogs	9%	12%	8%	22%	13%
Radio	9%	12%	0%	11%	0%
Newspaper	5%	8%	4%	0%	7%
Television	5%	4%	4%	0%	7%
Other	19%	23%	17%	33%	20%

*Table 23: Preferred information sources*

## Demographics

The following are demographic characteristics of trail users. All demographics align with U.S. Census Bureau measurements. Each question other than the ages of household members of trail users included “prefer not to answer” as an option so response percentages may not add up to 100%. For comparison, the demographic data obtained from the U.S. Census Bureau<sup>2</sup> for Orleans and Borden residents is included, where available.

<sup>2</sup> U.S. Census Bureau, (2023), American Community Survey 2023 ACS 5-year estimate data profiles. Orleans and Borden, Indiana.





## Age

To better determine the ages of all trail users, respondents were asked to provide the ages of people in their household with whom they usually use the trail, as opposed to only the person who completed the survey.

The most common age range of respondents and their family members who use the trail is 46-65 at 53% overall. That jumps to 68% in Orleans and drops to 36% in Borden. 33% of respondent households have trail using family members who are over 65. That age range is lower in Orleans (20%) and higher in Borden (45%).

Meanwhile, 7% of households have trail users under the age of 2, 7% have trail users ages 2-5, 9% have trail users ages 6-10, and 23% have trail users ages 11-17. Orleans has slightly more trail users under the age of 18 than average and Borden has significantly less.

Among out of town visitors, 53% of survey respondent households have trail using family members who are 46-65 and 35% have trail using family members who are over 65 years of age.

Age	Total	Orleans	Borden	Other Trailheads	Other	Orleans (Town)	Borden (Town)
Under 2	7%	8%	5%	0%	6%		
2-5	7%	8%	5%	10%	18%	6%	12%
6-10	9%	12%	0%	0%	6%	3%	11%
11-17	23%	24%	14%	20%	12%	7%	12%
18-25	18%	24%	0%	10%	18%	9%	4%
26-35	14%	16%	18%	10%	6%	12%	15%
36-45	14%	12%	9%	0%	18%	7%	17%
46-65	53%	68%	36%	60%	53%	36%	19%
Over 65	33%	20%	45%	20%	35%	21%	10%

Table 24: Demographics: Age

## Sex/Gender

52% of respondents were female and 46% male. Females were more prevalent in Orleans (57%) and Borden (52%), than on other trailheads (40%). Only 41% of out of town visitors reported as being female.



Age	Total	Orleans (46)	Borden (29)	Other Trailheads (13)	Other (29)	Orleans (Town)	Borden (Town)
Female	52%	57%	52%	40%	41%	48%	49%
Male	46%	43%	43%	60%	59%	52%	51%
Non-Binary	0%	0%	0%	0%	0%		

Table 25: Demographics: Gender

### Race/Ethnicity

All respondents who answered this question indicated they are white. In Orleans, 98% of residents are white while the remaining 2% are Black or African American. In Borden, 98% of residents are white while 1% are Black or African American and 1% are Hispanic.

### Employment Status

The vast majority of respondents are employed or wages (51% overall) or retired (39%) with a higher percentage of trail users in Orleans employed (67%) compared to Borden (42%). Borden respondents were more likely to be retired than employed. Out of town visitors were more evenly split with 53% employed and 47% retired. Very few respondents indicated being a student, not employed, or self-employed.

Census Bureau data does not track employment status in the same manner as asked in the survey so categories will vary.

Item	Total	Orleans (27)	Borden (24)	Other Trailheads (10)	Other (17)	Orleans (Town)	Borden (Town)
Employed	51%	67%	42%	70%	53%	58%	71%
Retired	39%	26%	54%	30%	47%		
Student	3%	0%	0%	0%	0%		
Self-employed	2%	4%	0%	0%	0%		
Not employed	2%	4%	0%	0%	0%		
Homemaker	0%	0%	0%	0%			

Table 26: Demographics: Employment status



## Household Income

The most common income bracket among survey respondents was \$100,000-\$149,000 with 36% overall, and the most common at each trailhead and among out of town visitors (41%). Respondents at other trailheads (56%) were much more likely to be in this income bracket than in either Orleans (33%) or Borden (29%). 21% of overall respondents report household income from \$50,000-\$74,999. 13% report household income of \$75,000-\$99,999. 15% of overall respondents report household income over \$150,000 and few were at the lower end of the income scale with 15% having less than \$50,000 in household income.

Item	Total	Orleans (27)	Borden (21)	Other Trailheads (9)	Other (17)	Orleans (Town)	Borden (Town)
\$100,000-\$149,999	36%	33%	29%	56%	41%	19%	35%
\$50,000-\$74,999	21%	33%	14%	11%	18%	24%	23%
\$75,000-\$99,999	13%	7%	24%	11%	18%	12%	17%
\$150,000-\$199,999	11%	11%	10%	11%	12%	3%	4%
\$15,000-\$24,999	5%	7%	5%	11%	0%	13%	1%
\$25,000-\$34,999	5%	4%	10%	0%	12%	5%	3%
\$35,000-\$49,999	5%	4%	5%	0%	0%	8%	6%
\$200,000 or more	4%	0%	5%	0%	0%	1%	7%
Under \$15,000	0%	0%	0%	0%	0%	14%	4%

*Table 27: Demographics: Household income*



## Summary and Recommendations

When analyzing survey results, it should be noted that trail construction is not complete and all amenities such as restrooms, benches, water stations, and signage have not been installed in all locations where they are planned. As such, any ratings and comments regarding these items, while important to help determine where to focus resources and energy in the near term for the benefit of trail users, are reflective of the current state of the trail and not its final state.

### Orleans profile

Trail users in Orleans, at this point, are much more likely to be Orleans residents who use the trail frequently for short to moderate distances, primarily walking, for exercise, and are as likely to use the trail alone as with family or friends. They are more likely to be female, a mixture of older adults and children with fewer younger adults than other locations, and employed for wages with more moderate incomes.

### Borden profile

Usage in Borden is very different from Orleans. Usage in Borden is dominated by non-residents riding bicycles for much longer distances and for recreation rather than exercise. They are much more likely to be older adults, retired, with moderate incomes, and using the trail with a spouse or partner rather than alone or with friends or other family. It is difficult to determine if this profile will be consistent over the long term since approximately half of the survey responses in Borden were from visitors reporting other zip codes as their primary residence. The Borden trailhead opened formally in May and usage among Borden residents is likely to increase over time, potentially changing the profile.

### Visitor profile

A remarkable 27% of survey responses came from visitors, mostly in Borden. Primary residence zip codes show that most of these visitors came from the metropolitan Louisville, KY area, concentrated in Clark and Floyd counties. For a trail still under construction and with limited time for non-local promotion, this is very encouraging. Concentrated promotion of the trail in the Louisville area is likely to boost visitation.

Visitors are more likely to be retired, with above average income, and using the trail with a spouse or partner. They are much more likely to bike for long distances for recreation. They are more likely to spend money on food and potentially lodging and gifts and spent more on average on the day of their visit than local residents at any location. Visitors have the potential to add substantially to economic activity in trail communities and creating both businesses and attractions and providing signage and other information sources for them should be a very high priority for trail community leaders.

Many of these visitors entered the trail at the Deam Lake Road trailhead and conversations with survey staff revealed that many of them are camping at Deam Lake State Recreation Area and are riding their bikes to and on the trail. This indicates an opportunity to promote the trail to Deam Lake campers. Additional signage at the trailhead and along Deam Lake Road, coupled with promotion of Borden businesses would likely bring even more.



## Usage

Orleans residents' usage patterns of more frequent usage for shorter distances are likely a reflection of the short distance of the trail section that is not connected to other communities at either end at this time and that Orleans is far from any large population center. Most trail users use the trail in the evening, walk to access the trail and travel less than a mile to use it. Orleans residents are somewhat less likely to use the trail alone and a sizable majority of survey respondents said they were open to using the trail with other people in organized settings such as clubs or races and other contests. Indeed, a walking club has been established and, as of the time of this report, meets on Tuesday evenings. While it is encouraging that Orleans residents are enjoying the trail, opportunities will exist once the trail is completed to attract visitors to Orleans for its beautiful Congress Square and to events such as the Dogwood Festival.

A key takeaway from survey responses is that Borden residents themselves were not using the trail during the survey period nearly as frequently as Orleans residents despite the trail being in very close proximity to most residences in town, though usage has picked up considerably since the beginning of the school year in early August with Borden High School students using the trail for athletics practices and travel from the school to athletics facilities near Borden Community Park. Borden users are much more likely to be visitors who ride bikes over longer distances and use trail for recreation and the usage patterns, as with the user profile, reflects this. The primary time they use the trail is mid-day (9:00 AM to 1:00 PM), they are less likely to use the trail on a frequent basis, and much less likely to be willing to join organized activities and groups. It is encouraging that many trail users are coming to Borden to ride on the trail. Borden residents, however, have used the trail at a very low rate to date and opportunities will exist to encourage more local usage, perhaps through organized programs or groups or promotion of the health benefits of trail use.

## Health and Wellness

In its short life, the positive impact of the trail on exercise habits and well-being is clear. Exercise levels have increased at every location with 60% of all survey respondents reporting an increase in exercise since their trail section was built, many by 50% or more. Respondents at every location also report an increase in overall well-being. Trail communities should continue to promote the health benefits of trail use to encourage better exercise habits and lower health care costs.

## Concerns

Trail users have low levels of concern for most issues including safety and comfort on the trail. The highest areas of concern are related to the ongoing construction of the trail (restrooms, benches, signage, etc.) and will be remedied in the near future. Trail maintenance concerns revolve around mowing and trail surfacing, also construction related issues that will resolve over time. The use of motorized vehicles on the trail is an area of concern to be addressed. Signs have been posted that inform trail users that motorized vehicles are not allowed on the trail, which will hopefully lower their impact.



## Economic impact

Even with limited time and data, the potential economic impact of the trail is becoming clear. An economic impact projection by the Eppley Center for Parks and Public Lands indicated that out of town visitors should be anticipated to spend between \$42 and \$103 per day of their visit resulting in an economic impact of up to \$6.9 million per year<sup>3</sup>. Visitors in this survey spent an average of \$97 on the day of their visit, though in only a few spending categories. This is encouraging considering the ongoing construction and lack of directions signage to orient visitors to local businesses.

Among both visitors and local trail users, additional restaurants, snack shops, and bike and bike repair shops are in high demand and represent business growth opportunities. It should be noted that no hotels or inns exist in either Orleans or Borden, leaving lodging as a major area of opportunity, particularly for vacation rentals and boutique hotels that may be added to the lodging inventory very quickly.

Additional attractions desired by trail users include state recreation facilities such as state parks, forests, and nature preserves, local parks and other outdoor recreation sites, historical sites, wineries, breweries, and distilleries, and festivals. The good news is that many of these attractions already exist in or near Monon South Trail communities. Trail users should be targeted for promotional efforts to bring them and their economic impact to the region.

## Communications

Currently word of mouth is the most common way respondents learn about the trail and trail happenings. The trail website, social media, and local directional signage are preferred methods of receiving communication but are currently underutilized by trail users (in the case of the website and social media) or have not yet been placed (in the case of signage). Adding directional signage should be a priority and adding event calendars and rosters of local businesses would be of benefit on the website.

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<sup>3</sup> Brethova, K., Anderson, K., Elliott, L., Durkin-Blackburn, C., Edelstein, R., & Wolter, S. (2025). Monon South Trail Economic Impact Projection Report. Eppley Center for Parks and Public Lands at Indiana University Bloomington.



## Business Trail Neighbor Survey

### Proximity

#### Location

6 survey respondents are located in Borden, 4 in Orleans and 2 reported another location. Two also answered New Pekin, though surveys were only mailed to businesses in Orleans and Borden. It is not known whether these businesses are not aware that the Borden trailhead is open, mistakenly selected New Pekin, or are actually in New Pekin and accessed the survey without the invitation but they will be identified as New Pekin businesses in this report.

Orleans	Borden	New Pekin
4	6	2

Table 28: Business location

#### Proximity to Trail

Businesses were asked the proximity of their business to the Monon South Trail. Four businesses report being on the trail. Three of those businesses are in Borden and one in New Pekin. Seven businesses said they were near the trail including all four Orleans businesses, three Borden businesses, and one New Pekin business.

Proximity	Total	Orleans	Borden	New Pekin
Adjacent	4	0	3	1
Near	7	4	3	0
Not Near	1	0	0	1
Don't know	0	0	0	0

Table 29: Proximity to trail

### Impact on Business

#### Type of Business

Four respondents identified their business as a retail business, two of those in Orleans and two in Borden. Eight said they operate a business not identified in another category. Of these eight, one said they are a hardwood flooring distributor and one said they operate a childcare business. There were no known hardwood flooring or childcare businesses in proximity to the trail in Orleans or Borden so these businesses may have received the survey QR code or link without the post card invitation being sent to them. The other six did not provide a specific type of business.

Type	Total	Orleans	Borden	New Pekin
Restaurant	0	0	0	0
Coffee shop/café	0	0	0	0
Grocery	0	0	0	0
Retail	4	2	2	0
Lodging	0	0	0	0
Other	8	2	4	2

Table 30: Type of business



## Increase in Sales

The businesses were asked if the trail has made an impact on their sales since the nearby trailhead was opened. Two businesses said they have increased sales, three said they have seen a sales decrease, and seven said they are not sure. Four businesses, however, report an increase in sales between one and 25% since the opening of their community's trailhead including one in Orleans and three in Borden.

% increase	Total	Orleans	Borden	New Pekin
1-25%	4	1	3	0
26-50%	0	0	0	0
51-75%	0	0	0	0
76-100%	0	0	0	0
More than 100%	0	0	0	0

Table 32: % increase in sales

## Targeting Trail Users

When the businesses were asked if they target trail users as customers, six said they do not and two said they do a little, both in Borden. None reported significantly targeting trail users as a primary source of customers.

They were also asked to estimate the percentage of trail users they see as customers. Seven said 25% or less and only one business in Borden reported between 26% and 50% of their customers are trail users.

% of trail users	Total	Orleans	Borden	New Pekin
0-25%	7	2	4	1
26-50%	0	0	1	0
51-75%	0	0	0	0
More than 75%	0	0	0	0

Table 34: % of trail users as customers

Impact	Total	Orleans	Borden	New Pekin
Increase	2	1	1	0
Decrease	3	1	2	0
No impact	0	0	0	0
Not sure	7	2	3	2

Table 31: Increase in sales

Target?	Total	Orleans	Borden	New Pekin
Not at all	6	3	2	1
A little	2	0	2	0
Somewhat	0	0	0	0
Very much	0	0	0	0

Table 33: Targeting trail users





## Support and Satisfaction

### Initial Support

All businesses indicated that they initially supported the trail's construction with five of eight respondents to this question saying they were very supportive.

How supportive	Total	Orleans	Borden	New Pekin
Not at all	0	0	0	0
A little	1	0	1	0
Somewhat	1	0	1	0
Mostly	1	0	1	0
Very	5	3	1	1

Table 35: Support for trail

### Satisfaction

Businesses were asked about their level of satisfaction about a number of characteristics of the trail. None indicated they were dissatisfied with any of these issues. The highest level of satisfaction was with the trail's accessibility for people with disabilities with five businesses indicating they are quite or extremely satisfied. Five also indicate they were quite or extremely satisfied with the aesthetics of the trail, access points, and trail maintenance.

Issue	Total			Orleans			Borden			New Pekin		
	Neither satisfied nor dissatisfied	Quite	Extremely	Neither satisfied nor dissatisfied	Quite	Extremely	Neither satisfied nor dissatisfied	Quite	Extremely	Neither satisfied nor dissatisfied	Quite	Extremely
Safety/Police	6	1	1	2	1		3		1	1		
Response to problems	6	1	1	2	1		3		1	1		
Accessibility	3	1	4			3	3		1		1	
Aesthetics	3	3	2		2	1	3		1			1
Maintenance	3	4	1		3		3		1			1
Parking and traffic	4	4	0		3		4				1	
Access	3	3	2		1	2	3	1			1	

Table 36: Satisfaction with trail characteristics



## Visibility

When asked how well known they thought their business is to trail users, two said they felt their businesses is quite well known, one indicated somewhat well known, and two said it was slightly well known. Three businesses said they felt that their business was not at all known to trail users and none said it was extremely well known. It appears that opportunities exist to better promote businesses near the trail which may attract trail users.

How well known?	Total	Orleans	Borden	New Pekin
Not at all	3	1	2	0
Slightly	2	1	1	0
Somewhat	1	1	0	0
Quite well	2	0	1	1
Extremely	0	0	0	0

Table 37: Visibility to trail users

## Information and Promotion

### Trail Information Sources

When asked how they find out information about the trail and trail related events, six respondents said social media with three in Orleans and three in Borden. Two said the Monon South Trail website and word of mouth. One each said newspaper, television, and from their customers. None said radio or from elected officials.

Issue	Total	Orleans	Borden	New Pekin
Social media	6	3	3	0
MST website	2	0	1	1
Newspaper	1	0	1	0
Radio	0	0	0	0
Television	1	0	1	0
Elected officials	0	0	0	0
Customers	1	0	1	0
Other word of mouth	2	0	2	0

Table 38: Sources of information

### Social Media

When asked how much they use social media to find out information about the trail, two said a little, two said a moderate amount and two said a lot.

Issue	Total	Orleans	Borden	New Pekin
A little	2	0	2	0
Moderate amount	2	1	1	0
A lot	1	1	0	0

Table 39: Use of social media



## Business Promotion

Respondents were asked about how well they think trail managers and community leaders are promoting their business to trail users. None said that their business was promoted extremely well. One said somewhat and six said not at all. At the current time, efforts are being directed toward completion of the trail's construction but once that is accomplished, opportunities clearly exist for trail and community managers to draft a coordinated and intentional effort to better promote businesses in the trail communities.

Issue	Total	Orleans	Borden	New Pekin
Not at all	6	2	3	1
A little	0	0	0	0
Somewhat	1	0	1	0
Extremely well	0	0	0	0

Table 40: Local promotion of businesses

Businesses were asked about the importance of promoting their business to trail users via a variety of methods and to various audiences. When asked about the importance of these promotion methods to *local residents*, trailside signage, other directional signage in town, and local and regional tourism bureaus rated as most important with all respondents saying these methods would be at least somewhat effective, with social media, the Monon South Trail website, and the local community's website receiving one response each of just "a little" effective though there was little doubt about the effectiveness of any of these methods with only one business indicating any methods would not be at all effective, that being non-local traditional media.

Media	Total					Orleans				Borden				New Pekin				
	Not at all	A little	Somewhat	Quite	Very	A little	Somewhat	Quite	Very	A little	Somewhat	Quite	Very	Not at all	A little	Somewhat	Quite	Very
Trail website		1	4		1		1			1	2		1			1		
Town or City website		1	4		1		1			1	2		1			1		
Local tourism bureau			4	1	1		1				2	1	1			1		
Regional or national tourism promotion			5		1		1				3		1			1		
Social media		1	3	1	1			1		1	2		1			1		



Trailside signage			4	1	1		1				3		1				1	
Other community directional signage			4	1	1		1				3		1				1	
Local traditional media			4		1		1				3		1				1	
Non-local traditional media	1		4		1		1				3		1	1				
Other			2								2							

Table 41: Promotion methods: local trail users

Respondents were more positive about the importance and impact of promotional methods to *out of town visitors*. None indicated that any of the methods would not be at all effective. The most effective anticipated methods are community directional signage and non-local traditional media with six of nine responses saying they were quite or very important and non-local tourism promotion with four responses of quite or very important.

Media	Total				Orleans				Borden				New Pekin			
	A little	Somewhat	Quite	Very	A little	Somewhat	Quite	Very	A little	Somewhat	Quite	Very	A little	Somewhat	Quite	Very
Trail website	2	4				1				3		1		1		
Town or City website	2	4				1				3		1		1		
Local tourism bureau		6				1				3		1			1	
Regional or national tourism promotion		4	2	2		1				3		1	1			
Social media		5	1	1			1			3		1			1	
Trailside signage		5	1	1		1				3		1			1	
Other community directional signage		3	3	3		1				3		1			1	
Local traditional media		5	1	1		1				3		1	1			



Non-local traditional media		3	3	3		1				3		1				1	
Other		5	1	1						2							

Table 42: Promotion methods: visiting trail users

### Concerns

#### Issues

The survey asked about issues that may concern business owners about the trail and trail management and their level of concern from “not at all” concerned to “very” concerned. Any of these issues that receive a high level of concern should be noted by trail managers and community leaders and addressed.

Any issue that received a response of “very” concerned or “quite” concerned, received that response only once and all of them from a single respondent in Borden. Overall, there is a low level of concern at this time about safety, property damage, or other issues that may negatively impact a business near the trail.

Concern	Total					Orleans					Borden					New Pekin				
	Not at all	A little	Somewhat	Quite	Very	Not at all	A little	Somewhat	Quite	Very	Not at all	A little	Somewhat	Quite	Very	Not at all	A little	Somewhat	Quite	Very
Vandalism	3		2		1	1					1		2		1	1				
Trespassing	3	1	1		1	1					2		1		1		1			
Noise	4		2			1					2					1				
Personal safety	4		1		1	1					2		1		1	1				
Robbery	4		1		1	1					2		1		1	1				
Lighting	3	1	1	1			1				2		1	1		1				
Traffic	4		1		1	1					2		1		1	1				
Illegal parking	4		1		1	1					2		1		1	1				
Loitering	4		1		1	1					2		1		1	1				
Litter	1	2	1		1		1				1		1		1		1			
Restroom use	4	1	1			1					2	1	1			1				
Animals	3	1	1		1	1					2		1		1		1			

Table 43: Concern with potential problems



## Neighborhood Impact

When asked about the impact of the trail on their neighborhood, all respondents said they felt there was no impact at all.

Issue	Total	Orleans	Borden	New Pekin
Much worse	0	0	0	0
Somewhat worse	0	0	0	0
No impact	6	1	4	1
Somewhat better	0	0	0	0
Much better	0	0	0	0

Table 44: Impact on neighborhood

## Benefits

Businesses were asked about the level of importance of potential benefits of the trail for the community. Almost all agreed that each of these benefits were at least somewhat important. None said that any of the benefits were not at all important, though none also said any of these benefits are very important. Curiously, two responses each to “increased activity for businesses” and “increased opportunity for new businesses” were “a little” (2 on a scale of 1 to 5) potentially indicating a slight degree of hesitation about the positive impact of the trail on business activity.

Issue	Total			Orleans			Borden			New Pekin		
	A little	Somewhat	Quite	A little	Somewhat	Quite	A little	Somewhat	Quite	A little	Somewhat	Quite
Increased activity for businesses	2	4		1				4		1		
Increased opportunity for new businesses	2	4		1				4		1		
Tourism		6			1			4			1	
Recreation		4	2			1		4				1
Social connections		5	1		1			4				1
Health		4	2			1		3	1		1	
Community pride		5	1		1			3	1		1	
Access to nature		3	3			1		3	1			1

Table 45: Benefits of trail for community



## Improvements

The survey asked for feedback on improvements that could be made to the trail or trail management in an open ended question that received no answers.

## Other Comments

The survey asked for any other comments respondents may have about the trail in an open ended question that received no answers.

# Summary and Recommendations

## Impact on business

Of the 12 responses, 4 indicated they were retail businesses, and none said they were restaurants, coffee shops, or lodging. Seven said they were “other” types of businesses though the two that reported their specific type of business are not businesses that would typically see activity from trail users. Most businesses reported not targeting trail users as customers, though most also reported that they receive business from trail users. There did not appear to be a significant impact on sales from trail users among the group, though with no restaurants or coffee shops answering the survey, the data may not be complete. Time may also make a difference with more business activity occurring with greater trail use.

## Support

Respondents were quite supportive of the trail’s construction with most of those who answered this question saying they were “very” supportive. There is no apparent dissatisfaction with the trail’s management including safety, aesthetics, access, and maintenance. Most who answered said their business is at least somewhat visible and known to trail users, though none said they were “extremely” well known, indicating a likely benefit to adding directional signage and promoting businesses to trail users.

## Promotions

Social media is a primary way these businesses learn about the trail and trail happenings, though that source is not heavily used. All agreed that their business is not well promoted to trail users by community leaders, which may be a product of the trail’s recent opening at these locations but should be a concerted effort going forward to maximize exposure and drive trail users to these local businesses. Opinions were mixed with regard to methods of promoting local businesses to local trail users but found more agreement that directional signage, social media, and the use of non-local media to promote businesses to visitors. Curiously, there was a slight degree of hesitation about the impact on businesses as a benefit of the



trail, indicating an opportunity for outreach efforts to rally support and gain feedback on promotional efforts that maximize the impact of the trail to the local business community.

### Concerns

There is a very low level of worry among business owners about any negative impacts on the trail. The most common level of concerns about every issue presented was “not at all”. Only one survey indicated they are “very” concerned about any issue, meaning that business owner may have had a bad experience that could be smoothed over with an outreach effort. It should also be noted that, even though concern about vandalism, trespassing, loitering, and safety is low at this time, the trail is not heavily used and these issues may increase over time.





# Property Values

In order to assess the impact of the trail on adjacent and nearby property values, both market value and assessed valuation of all properties within 150 feet of the Monon South Trail and within town boundaries are recorded and will be reviewed periodically over subsequent years to track their changes. It is expected that the trail will positively impact property values over time, as has been shown on many other trails.

Market values were collected through the real estate website Zillow on May 1, 2025. Assessed valuation was collected from property tax records publicly available on through the Orange County GIS system (Orleans) and the Clark County Assessor (Borden). Borden’s 2025 assessments were available at the time this data was collected. Assessed valuation for Orleans is form 2024.

Data notes:

- Tax-exempt properties such as government-owned properties, schools, and churches are not included.
- To ensure the privacy of property owners, no identifying information such as the address or owner’s name is included. Instead, each property is given a unique identifying number. Addresses and names are retained in a non-public database that will be used in the same manner for future property value tracking.
- Due to the volatile and highly negotiated nature of the sales of businesses, Zillow generally does not offer market values for business properties so most businesses in this study will have only assessed valuation.
- On rare occasions, an assessed valuation was not available for a property.
- The property type is categorized here consistent with the type in the tax records.

## Orleans

The following table shows market property values, acreage, assessed valuation, and the type of property for all properties within 150 feet of the trail in Orleans.

Table 46: Orleans Property value data

ID#	5/1 Market Value (Zillow)	Calculated Acreage	2024 Total Assessed Value	Property Type
101	\$117,000	0.26	\$93,000	Residential
102	\$142,000	0.33	\$92,500	Residential
103	\$70,000	0.14	\$69,700	Residential



104	\$145,000	0.37	\$95,000	Residential
105	\$179,000	4.36	\$162,600	Residential
106	\$138,000	0.48	\$115,500	Residential
107		38.02	\$96,300	Farm/Vacant
108	\$234,000	7.36	\$253,700	Residential
109		0.66	\$21,100	Commercial
110		1.98	\$46,600	Industrial
111	\$40,000	0.33	\$40,200	Residential
112	\$84,000	0.26	\$84,000	Residential
113	\$124,000	0.28	\$104,300	Residential
114	\$47,000	0.28	\$47,200	Residential
115		0.32	\$45,300	Commercial
116	\$22,000	0.17	\$22,200	Residential
117	\$99,000	0.27	\$98,700	Residential
118	\$97,000	0.47	\$85,700	Residential
119	\$32,000	0.2	\$32,400	Residential
120	\$3,400	0.32	\$13,700	Residential
121	\$88,000	0.29	\$79,300	Residential
122		0.02	\$66,200	Commercial
123	\$25,000	0.51	\$10,300	Residential
124		0.07	\$21,000	Commercial



125	\$50,000	0.14	\$49,800	Residential
126		0.24	\$18,600	Commercial
127	\$29,000	0.28	\$29,000	Residential
128	\$145,000	0.43	\$145,000	Residential
129	\$50,000	0.21	\$49,900	Residential
130	\$93,000	0.09	\$84,500	Residential
131		3.91	\$22,000	Farm/Vacant
132		0.22	\$3,000	Residential
133		1.39	\$128,000	Industrial
134	\$216,000	0.22	\$155,000	Residential
135	\$70,000	0.22	\$69,900	Residential
136		0.14	\$44,400	Commercial
137	\$228,000	0.3	\$182,400	Residential
138		0.15	\$40,600	Industrial
139	\$136,000	0.07	\$104,800	Residential
140		1	\$278,400	Industrial
141	\$243,000	1.75	\$241,400	Residential
142		0.4	\$10,200	Industrial
143		0.91	\$123,600	Commercial
144	\$44,000	0.37	\$43,600	Residential
145	\$82,000	0.29	\$79,500	Residential



146		0.21	\$21,600	Residential
147	\$33,000	0.12	\$33,100	Residential
148	\$7,400	0.16	\$14,500	Residential
149		18	\$33,800	Farm/Vacant
150	\$3,200	0.88	\$8,200	Residential
151		28.11	\$578,700	Industrial
152	\$85,000	0.26	\$85,200	Residential
153	\$126,000	0.29	\$76,100	Residential
154	\$7,500	0.26	\$7,500	Residential
155		0.34	\$11,600	Residential
156	\$168,000	0.19	\$104,600	Residential
157	\$24,000	0.23	\$23,800	Residential
158		0.79	\$52,400	Industrial
159		1.64	\$380,700	Industrial
160	\$86,000	0.09	\$52,700	Residential
161		0.21	\$76,800	Commercial
162	\$76,000	0.28	\$76,200	Residential
163		0.43	\$79,200	Commercial
164	\$130,000	0.29	\$94,000	Residential
165	\$63,000	0.09	\$63,000	Residential
166	\$275,000	5.01	\$269,900	Residential



167		0.22	\$11,300	Residential
168	\$8,900	0.18	\$8,900	Residential

## Borden

The following table shows market property values, acreage, assessed valuation, and the type of property for all properties within 150 feet of the trail in Borden.

*Table 47: Borden property value data*

ID#	5/1 Market Value	Calculated Acreage	2025 Total Assessed Value	Property Type
101	\$75,000.00	0.27	\$36,100.00	Residential
102	\$62,000.00	0.32	\$31,100.00	Residential
103	\$123,000.00	0.64	\$103,700.00	Residential
104	\$69,000.00	0.23	\$22,700.00	Residential
105	\$172,000.00	0.37	\$139,100.00	Residential
106	\$157,000.00	0.10	\$122,000.00	Residential
107	\$231,000.00	0.70	\$169,300.00	Residential
108	\$153,000.00	2.20	\$124,800.00	Residential
109		2.62	\$109,300.00	Residential
110		2.81	\$102,600.00	Residential
111		56.99	\$258,300.00	Farm
112		1.97	\$130,000.00	Residential
113		2.00	\$158,900.00	Residential



114	\$148,000.00			Residential
115	\$177,000.00	0.78	\$216,800.00	Residential
116		3.00	\$214,600.00	Residential
117	\$323,000.00	3.67	\$184,600.00	Residential
118		9.23	\$231,000.00	Residential
119		12.00	\$203,000.00	Farm
120		1.33	\$158,600.00	Residential
121		1.50	\$176,900.00	Residential
122	\$213,000.00	5.12	\$171,900.00	Farm
123		21.17	\$119,500.00	Farm
124	\$177,000.00	0.26	\$105,600.00	Residential
125	\$167,000.00	1.34	\$125,800.00	Residential
126		1.57	\$144,300.00	Residential
127		1.25	\$152,600.00	Residential
128		1.36	\$130,500.00	Residential
129	\$42,000.00	3.20	\$51,700.00	Residential
130		4.12	\$210,000.00	Residential
131	\$144,000.00	1.30	\$96,600.00	Residential
132	\$187,000.00	0.49	\$112,800.00	Residential
133		6.08	\$260,500.00	Farm
134	\$94,000.00	0.24	\$47,100.00	Residential



135	\$193,000.00	0.45	\$128,800.00	Residential
136		0.56	\$66,500.00	Residential
137	\$96,000.00	0.21	\$57,300.00	Residential
138	\$211,000.00	0.35	\$209,000.00	Residential
139	\$95,000.00	0.19	\$56,300.00	Residential
140		0.68		
141		61.12	\$185,500.00	Farm
142		3.11	\$180,700.00	Residential
143		8.93	\$415,100.00	Residential
144	\$216,000.00	0.47	\$240,300.00	Residential
145		3.83	\$50,700.00	Residential
146	\$197,800.00	0.55	\$178,400.00	Residential
147		2.86	\$176,300.00	Residential
148		1.89	\$222,100.00	Residential
149	\$197,000.00	8.95	\$221,200.00	Residential
150	\$178,000.00	0.86	\$221,300.00	Residential
151		2.17	\$161,800.00	Residential
152	\$325,000.00	3.50	\$309,100.00	Farm
153	\$153,000.00	0.56	\$114,600.00	Residential
154	\$136,000.00	0.16	\$84,100.00	Residential
155	\$74,000.00	0.19	\$43,900.00	Residential



156		2.00	\$107,700.00	Residential
157	\$188,000.00	0.31	\$180,700.00	Residential
158	\$277,000.00	3.52	\$228,000.00	Farm
159	\$108,000.00	0.32	\$50,300.00	Residential
160	\$179,000.00	0.44	\$164,900.00	Residential
161	\$150,000.00	0.38	\$115,600.00	Residential
162	\$132,000.00	0.18	\$60,500.00	Residential
163	\$97,000.00	0.17	\$86,000.00	Residential
164	\$122,000.00	0.33	\$31,000.00	Residential
165		0.44	\$85,700.00	Residential
166	\$184,000.00	0.83	\$184,500.00	Residential
167		1.25	\$126,400.00	Residential
168	\$223,000.00	0.36	\$222,400.00	Residential
169	\$84,000.00	0.17	\$29,400.00	Residential
170	\$209,000.00	0.17	\$189,000.00	Residential
171	\$210,000.00	0.48	\$221,500.00	Residential
172	\$118,000.00	0.17	\$85,700.00	Residential
173	\$185,000.00	0.40	\$214,700.00	Residential
174	\$204,000.00	0.44	\$139,600.00	Residential
175	\$268,000.00	0.66	\$272,500.00	Residential
176	\$158,000.00	1.13	\$160,800.00	Residential





177	\$206,000.00	0.33	\$199,900.00	Residential
178	\$93,000.00	0.33	\$56,500.00	Residential
179	\$149,000.00	0.24	\$148,600.00	Residential
180	\$201,000.00	0.18	\$169,600.00	Residential
181	\$182,000.00	0.60	\$192,700.00	Residential
182	\$141,000.00	0.21	\$105,600.00	Residential
183	\$198,000.00	0.25	\$138,500.00	Residential
184	\$141,000.00	0.19	\$11,800.00	Residential
185	\$200,000.00	1.01	\$220,900.00	Residential
186	\$238,000.00	0.46	\$197,900.00	Residential
187	\$206,000.00	0.43	\$198,800.00	Residential
188	\$128,000.00	0.20	\$94,800.00	Residential
189	\$176,000.00	0.23	\$170,200.00	Residential
190	\$246,100.00	5.72	\$193,600.00	Residential
191	\$95,000.00	0.20	\$102,900.00	Residential
192	\$204,000.00	0.42	\$186,700.00	Residential
193		0.40	\$88,800.00	Commercial
194	\$124,000.00	0.29	\$25,100.00	Residential
195	\$221,000.00	1.04	\$189,000.00	Residential
196	\$117,000.00	0.29	\$88,200.00	Residential
197	\$80,000.00	0.81	\$35,500.00	Residential



198	\$122,000.00	0.49	\$60,900.00	Residential
199	\$140,600.00	0.27	\$87,100.00	Residential
200	\$126,000.00	0.17	\$76,300.00	Residential
201	\$118,000.00	0.29	\$91,400.00	Residential
202	\$101,000.00	0.54	\$55,900.00	Residential
203	\$128,500.00	0.47	\$100,100.00	Residential
204	\$194,000.00	0.63	\$180,700.00	Residential
205	\$91,000.00	0.08	\$41,600.00	Residential
206	\$130,000.00	0.22	\$150,700.00	Residential
207	\$88,000.00	0.09	\$49,400.00	Residential
208		0.26	\$33,900.00	Residential
209	\$121,000.00	0.08	\$91,900.00	Residential
210	\$101,000.00	0.17	\$71,700.00	Residential
211	\$172,000.00	0.42	\$169,800.00	Residential
212		0.39	\$50,700.00	Commercial
213	\$130,800.00	0.36	\$81,900.00	Residential
214		0.08	\$77,700.00	Commercial
215	\$150,000.00	0.50	\$719,300.00	Commercial
216	\$307,000.00	0.10	\$46,700.00	Commercial
217	\$189,000.00	0.12	\$155,300.00	Residential
218	\$77,000.00	0.15	\$33,500.00	Residential



219		0.36	\$29,500.00	Residential
220	\$101,000.00	0.12	\$78,500.00	Residential
221		0.12	\$46,500.00	Commercial
222	\$169,000.00	0.36	\$143,200.00	Residential
223	\$142,000.00	0.24	\$133,300.00	Commercial
224	\$165,000.00	0.24	\$155,000.00	Residential
225	\$211,000.00	0.43	\$216,400.00	Residential
226		0.24	\$138,600.00	Residential
227	\$145,000.00	0.17	\$117,000.00	Residential
228	\$187,000.00	0.24	\$118,700.00	Residential
229	\$186,000.00	0.23	\$175,100.00	Residential
230	\$127,000.00	0.24	\$70,600.00	Residential
231	\$143,000.00	0.19	\$132,400.00	Residential
232		0.24	\$65,400.00	Residential
233	\$190,000.00	0.27	\$143,700.00	Residential
234	\$198,000.00	0.27	\$142,000.00	Residential
235	\$190,000.00	0.27	\$143,600.00	Residential
236	\$187,000.00	0.27	\$141,300.00	Residential
237	\$226,000.00	0.27	\$181,500.00	Residential
238	\$220,000.00	0.26	\$182,600.00	Residential
239	\$257,000.00	0.40	\$183,800.00	Residential



240	\$230,000.00	0.46	\$192,800.00	Residential
241	\$11,000.00	0.22	\$10,700.00	Vacant
242	\$168,000.00	0.17	\$155,500.00	Residential
243	\$187,000.00	0.17	\$204,400.00	Residential
244		0.13	\$36,300.00	Vacant
245	\$77,000.00	0.25	\$70,100.00	Residential
246	\$81,000.00	0.14	\$28,200.00	Industrial
247	\$225,000.00	0.12	\$239,100.00	Residential
248	\$89,000.00	0.29	\$57,900.00	Residential
249		0.55	\$126,900.00	Commercial
250	\$117,000.00	0.22	\$50,000.00	Residential
251	\$113,000.00	0.21	\$89,200.00	Residential
252		0.95	\$26,200.00	Vacant
253	\$138,400.00	0.24	\$116,000.00	Residential
254		1.45	\$1,102,200.00	Residential
255		5.76	\$1,168,200.00	Commercial
256		1.65	\$723,000.00	Commercial
257		5.00	\$314,800.00	Farm
258		0.24	\$263,000.00	Commercial
259		133.52	\$183,800.00	Farm





# Appendix

## Methodology

The Monon South Trail Visitor Use Study is conducted via a partnership between Radius Indiana and Crossroads Development Resource, LLC (researcher). The study is designed to be a multi-faceted, multi-year project with several methods of collecting valuable data on trail users and trail adjacent properties and businesses through surveys and other research in order to measure and illustrate the impacts of the trail on the trail communities and the region.

### 2025 Study Locations

The Monon South Trail is still under construction at the time of the first survey period. As such, surveys and property value research were conducted at the Borden and Orleans trailheads during the month of June 2025. Borden has two trailheads, one in town, and one at Deam Lake Road where the Monon South Trail terminates and were analyzed together as Borden. As additional trailheads are opened, they will be added as study locations in subsequent years.

### Study Methods

#### *Visitor Use Survey*

The survey was drafted by the research team with multiple rounds of review and edit to arrive at the final survey instrument. The survey consists mainly of multiple choice and ranking responses (i.e. "not at all satisfied" = 1 through "very satisfied" = 5). Some multiple choice questions have an "other" option with a text response when the choices offered do not apply. Some ranked questions offer a follow up open ended response question to offer further context to negative ("not at all satisfied") responses, highlighting potential problem areas for trail managers to address. The remainder of the questions are demographics questions.

The survey was primarily conducted using an online survey with paper surveys available upon request. If a paper survey is requested, a postage paid envelope addressed to CDR was included. Upon receiving a paper survey, CDR staff entered the survey into the online instrument.

During the entire month of June, project staff took a passive approach to data collection by placing trailside signs with the survey web link and QR code and postcards with an invitation to take the survey and the survey web link and QR code at trailheads and at willing nearby businesses.

During the period of June 10-24 an active approach was taken with CDR staff and Radius staff and volunteers posted at the trailhead locations and inviting trail users to take the survey and giving them an invitation postcard or paper survey. In the event no paper surveys were on hand,



the postcard contained instructions for requesting one. A staffing schedule was created to ensure in-person survey recruitment included all days of the week and all daily time segments. Time segments include:

- Early morning: Before 9:00 AM
- Mid-day: 9:00 AM-1:00 PM
- Afternoon: 1:00-5:00 PM
- Evening: 5:00 PM till dusk

90 surveys were completed online and one was completed on paper for a total of 91 surveys. Not all survey respondents answered every question so the number of responses will vary from question to question.

#### *Trail Neighbor Survey*

The Trail Neighbor survey was conducted of businesses located adjacent to the trail. Trail neighbor businesses were mailed a postcard with an invitation to take an online or paper survey to reflect on management issues, their experiences with the trails in their area, and the trail's perceived effects on property values and/or any business activity.

The survey was drafted by the research team with multiple rounds of review and edit to arrive at the final survey instrument. The survey mainly consists of multiple choice questions. Some multiple choice questions have an "other" option with a text response when the choices offered do not apply. Other questions are ranking questions (i.e. "not at all concerned" = 1 through "very concerned" = 5). Some ranked questions offer a follow up open ended response question to offer further context to negative (very concerned) responses, highlighting potential problem areas for trail managers to address. The remainder of the questions are open ended to collect richer data from opinions.

In the first year of the study, Radius wished to focus on business and business activity and residential properties were not surveyed but may be in subsequent years. Radius provided a preliminary list of businesses and CDR used maps to research additional businesses to develop the mailing list of 38 businesses. The businesses included were determined by location and business activity. Business activity included food service, lodging, and other retail locations that may be patronized by trail users. Excluded were manufacturing, industrial, and office businesses unlikely to see activity from trail users. All suitable businesses in and near Borden from the west town boundary to the Deam Lake trailhead and all suitable businesses in Orleans near the trail and surrounding Congress Square were included.

The survey invitations were sent using a modified Dillman technique in which letters with the survey invitation were sent to the selected business addresses on the final mailings list on June 8 with a follow-up postcard mailed on June 22.

Twelve surveys were completed online. Not all survey respondents answered every question so the number of responses will vary from question to question. Recommendations were made, where applicable, to highlight any opportunities to grow trail usage or concerns that require attention from trail managers and community leaders.



### *Property Value Research*

The researcher reviewed Orange (Orleans) and Clark (Borden) GIS systems for publicly available assessed property valuation along with sales and projected market value data available on the real estate sales website such as Zillow to gather 2025 baseline data on property values of adjacent properties as determined by the research team. This research will be done on a periodic basis, aligning with the communities surveyed each year, to track changes in the values of adjacent properties over time with increases anticipated to be documented.

Properties included in the research included those with any proportion of the property within 150 feet of the trail. 68 properties were included in Orleans and 155 in Borden. In the reporting, properties were given a unique identifying number with identifying information including property address and owner's name redacted for privacy. This identifying information is held in a non-public database as a key for the identifying numbers and for future follow up tracking.

### **Data Analysis**

At the conclusion of the data collection period (June 1-31). All quantitative survey data was tabulated into tables by question. Quantitative data is derived from survey questions with closed response options such as "yes" or "no", ratings from 1 to 5, or selections from a list. Open-ended answers, including responses from questions that offered "Other" as an answer option and questions that required text answers will be coded, themed, and analyzed for patterns. Coding is the process of systematically analyzing qualitative, or open-ended data and feedback, for key words or phrases that can then be grouped to determine repetitive themes, transforming qualitative data into more categorizable and measurable data.

Once qualitative and quantitative data were compiled, descriptive analysis was done to interpret survey responses and help understand the opinions, needs, and desires of all survey respondents. Cross-tabbing was used to segment the data by trailhead and by local residents vs. visitors to gain better understanding of the responses in those locations and by actual and potential tourists. This descriptive analysis lead to a summary analysis that compiled patterns, themes, and key findings of interest followed by recommendations that can be offered to trail managers and community leaders for trail improvements such as increases in amenities or safety concerns; new business and economic development opportunities to serve trail users and community members; and marketing and promotions of the trail, trail related activities, and community events and amenities that may draw trail users and tourists to the community.





## Visitor Use Survey Instrument

### Monon South Trail Visitor Use Survey

Thank you for participating in the Monon South Trail Visitor Use Study! The survey should take 10-15 minutes to complete. Your participation in this study is voluntary and anonymous. By continuing with this survey, you are indicating that you have read and understand the above information and are at least 18 years of age.

Q1 What trailhead(s) are you using today? (Check each box that applies)

Entering the Trail	Exiting the Trail
Mitchell	Mitchell
Orleans	Orleans
Campbellsburg	Campbellsburg
Salem	Salem
New Pekin	New Pekin
Borden (town)	Borden (town)
Borden (Deam Lake Rd.)	Borden (Deam Lake Rd.)
New Albany	New Albany

Q2 What is the zip code of your primary residence?

47446  
47452  
47108  
47167  
47390



47165

47106

47150

47151

Other (Please write here) \_\_\_\_\_

Q3 What type of activity do you *mostly* do on the trail?

Walk

Bike

Run/Jog

Skate

Skateboard

Bird Watching

People Watching

Other (Please write here) \_\_\_\_\_

Q4 How far, in miles, are you using the trail on this visit?

Less than 1 mile

1-2 miles

More than 2 but less than 5 miles

More than 5 but less than 10 miles

More than 10

Q5 How often do you use this trail?

Once (or seldom)

Monthly

Weekly

Daily

Q6 What is your primary purpose for using the trail?



- Recreation
- Tourism
- Exercise
- Transportation

Q7 Did you exercise regularly (three or more times per week for 20 minutes per session) before using this trail?

- Yes
- No

Q8 The amount you exercise increased since you started using this trail?

- Increased
- Decreased
- Stayed the same

Q9a If your exercise has increased, by how much

- 1-25%
- 26-50%
- 51-75%
- More than 75%

Q9b If your exercise has decreased, by how much

- 1-25%
- 26-50%
- 51-75%
- More than 75%

Q10 Rate your overall feeling of wellness since you started using this trail. (Circle your answers)

Before using this trail	1	2	3	4	5	6	7	8	9	10
-------------------------	---	---	---	---	---	---	---	---	---	----



Now	1	2	3	4	5	6	7	8	9	10
-----	---	---	---	---	---	---	---	---	---	----

Q11 How do you usually get to the trail?

- Walk
- Bike
- Drive
- Ride with family/friends
- Other (Please write here) \_\_\_\_\_

Q12 How far did you travel to use this trail today?

- Less than 1/2 mile
- 1/2 to 1 mile
- More than 1 but less than 2 miles
- More than 2 but less than 5 miles
- More than 5 but less than 10 miles
- More than 10 miles

Q13 I usually use the trail:

- Alone
- With my spouse or partner
- With other family members
- With friends or a social group
- With exercise partners
- With a walking, running, or biking club
- Other (Please write here) \_\_\_\_\_

Q14 What time of day do you usually use the trail?

- Early morning 5-8:00 AM



Morning 8-11:00 AM

Midday 11:00 AM - 2:00 PM

Afternoon 2-6:00 PM

Evening After 6:00 PM

Q15 Would you participate in organized group activities on the trail. If yes, which types of activities?

I prefer not to participate in organized group activities

I would join walking, running, biking, or exercise groups or clubs

I would join social groups or clubs with no specific planned activity

I would participate in races or contests

I would participate in programs or classes that took place on the trail or related to trail activities

Q16 Please rate the following concerns you might have about the trail and how satisfied you are with each: (Circle your answers)

	Not at all satisfied	A little satisfied	Somewhat satisfied	Quite satisfied	Very satisfied
Personal safety	1	2	3	4	5
Lighting	1	2	3	4	5
Bikers/Skaters going	1	2	3	4	5
Police presence	1	2	3	4	5
Unleashed pets	1	2	3	4	5
Wild animals	1	2	3	4	5
Motorized vehicles on	1	2	3	4	5



Parking	1	2	3	4	5
Accessibility of the trail	1	2	3	4	5
Restrooms	1	2	3	4	5
Benches/Rest areas	1	2	3	4	5
Trash/cleanliness	1	2	3	4	5
Congestion on the trail	1	2	3	4	5
Trail signage	1	2	3	4	5
Trail maintenance	1	2	3	4	5

Q17 If you answered “Not At All” or “A Little” Satisfied to any of the items in the last question, please explain your concerns.

\_\_\_\_\_

Q18 To better understand the economic impact of the trail, we are interested in finding out the approximate amount of money you spend and what you spend it on related to your Monon South Trail usage. For the items listed below, please indicate your amount spent *on the last day you used the trail* and your estimated annual spending.

Item	Daily Spending \$	Annual Spending \$
Food/Beverage		



Lodging		
Off trail attractions		
Gifts and souvenirs		
Bikes/bike repair		
Clothing and shoes		
Transportation and parking		

Q19 What additional types of nearby businesses would enhance your experience on the trail? (Check all that apply)

- Restaurants
- Snack shops
- Lodging
- Bike/bike repair shops
- Gift/souvenir shops
- Clothing stores

Other (text box) \_\_\_\_\_

Q20 What additional types of nearby attractions would enhance your experience on the trail? (Check all that apply)

- Festivals
- Museums
- Local parks and playgrounds
- State Parks, Forests, Nature Preserves, Fish and Wildlife Areas
- Other natural areas (Federal or private)
- Historical sites



Wineries/Breweries/Distilleries

Other (text box) \_\_\_\_\_

Q21 How do you usually get information about businesses and attractions near the trail? (Check top four)

Trail website

Community website/tourism bureau

Travel sites/blogs

Trailside signs

Flyers and posters

Television

Radio

Newspaper

Word of mouth

Other (text box) \_\_\_\_\_

Q22 How would you prefer to get information about businesses and attractions near the trail? (Check top four)

Trail website

Community website/tourism bureau

Travel sites/blogs

Trailside signs

Flyers and posters

Television

Radio

Newspaper

Word of mouth

Other (text box) \_\_\_\_\_

Q23 How many people in your household with whom you usually use the trail are the following ages?





Under 2	2-5	6-10	10-17	18-25	26-35	36-45	46-65	Over 65

Q24 What is your sex/gender?

- Female
- Male
- Non-binary
- Prefer not to answer

Q25 What is your race/ethnic origin?

- White
- African American
- American Indian or Alaska Native
- Asian
- Native Hawaiian or Pacific Islander
- Hispanic or Latino
- Decline to answer

Q26 What is your employment status?

- Employed for wages
- Self-employed
- Student
- Homemaker
- Retired
- Not employed
- Decline to answer



Q27 What is your household income?

- Under \$10,000
- \$10,000- \$14,999
- \$15,000- \$24,999
- \$25,000- \$34,999
- \$35,000- \$49,999
- \$50,000- \$74,999
- \$75,000- \$99,999
- \$100,000- \$149,999
- \$150,000- \$199,999
- \$200,000 or more

## Business Trail Neighbor Survey Instrument

### Monon South Trail Visitor Use Study Trail Neighbor Survey (Business)

Dear Trail Neighbor,

Thank you for participating in the Monon South Visitor Use Study's Trail Neighbor Survey.

You have been asked to complete this survey because of your business' proximity to the Monon South Trail. Your opinions of the trail's impact on your property or business operations will be of great value to trail and community managers and planners.

This survey will take around 10-15 minutes and will help us gather information about the trail's impact on your business. Specifically, we are asking for your opinions and observations about:

- Your business and its relationship to the trail
- The impact of the trail on your business
- Your general opinions of the trail
- Any problems you experience being a trail neighbor
- Potential public benefits of the trail

Your participation in the survey is completely voluntary and all of your responses will be kept confidential. Your name will not be attached to any answers and will not be shared with anyone outside the study for any reason.



Q1 Which trailhead or community is closest to your business?

- Mitchell
- Orleans
- Campbellsburg
- Salem
- New Pekin
- Borden

Q2 Where is the trail in relation to your business?

- The trail runs adjacent to my property
- The trail runs near my business but not touching it
- The trail is not near my business
- Don't know

Q3 What type of business do you own?

- Restaurant
- Coffee shop/café
- Grocery
- Retail
- Lodging
- Other (text box) \_\_\_\_\_

Q6 Has your business seen an increase in sales since the trail was opened?

- Sales have increased
- Sales have decreased
- Sales have stayed the same
- Not sure/not applicable

If Q6 = increased

Q7 By how much have your sales increased?

- 0-25%



- 26-50%
- 51-75%
- 76-100%
- More than 100%

If Q6 = decreased

Q8 By how much have your sales decreased?

- 0-25%
- 26-50%
- 51-75%
- 76-100%

Q9 Do you target trail users as a primary source of your customers?

- Not at all
- A little
- Somewhat
- Very much

Q10 Please estimate the percentage of your customers that are using the trail when they visit your business.

- 0-25%
- 26-50%
- 51-75%
- 76-100%

Q11 If you were to sell your business, would proximity to the trail make it harder or easier to sell?

- Much easier
- Somewhat easier
- No impact
- Somewhat harder
- Much harder
- Don't Know



Q12 How supportive of the trail were you when you found out the trail would be routed near your property?

- Not supportive at all
- A little supportive
- Somewhat supportive
- Mostly supportive
- Very Supportive

Q13 How supportive of the trail are you now?

- Not supportive at all
- A little supportive
- Somewhat supportive
- Mostly supportive
- Very Supportive

Q14 How satisfied are you with the following regarding the Monon South Trail?

	Not at all satisfied	A little satisfied	Somewhat satisfied	Quite satisfied	Very satisfied
Safety/Police patrols					
Response to reported problems					
Accessibility of the trail for people with disabilities or mobility issues					
Aesthetics of the trail (landscaping, cleanliness, etc.)					
Maintenance of the trail					
Parking and traffic					



Access to your business from the trail (sidewalks, streets, etc.)					
---	--	--	--	--	--

Q14 For any item in the question above where you answered "Not" or "A little" satisfied, please explain. (text box)

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Q15 How well known do you think your business is to trail users?

- Not at all
- A little
- Somewhat
- Quite well

Q16 Are you familiar with the Indiana Main Street program?

- Yes
- No

Q17 To learn more about Indiana Main Street, see <https://www.in.gov/ocra/mainstreet>. Are you interested in participating in helping your community become a Main Street Community?

- Yes
- No
- Not sure/need more information

Q18 How do you usually find out information about the trail (construction, events, programs, etc.)?

- Social media
- Monon South Trail website ([www.mononsouth.com](http://www.mononsouth.com))
- Newspaper
- Radio
- Television
- Elected officials
- My customers



- Other word of mouth

Q19 Do you use social media to learn information about the trail?

- No
- A little
- Some
- A lot

Q20 How well are trail managers and community leaders promoting your business to trail users?

- Not at all
- A little
- Somewhat
- Quite well

Q21 How important are trail managers and community leaders using the following methods of promoting local businesses and activities to local trail users?

	Not at all important	A little important	Somewhat important	Quite important	Very important
Trail website					
City or Town website					
Local tourism bureau					
Regional or national tourism promotion (Travel magazines, Trip Advisor, etc.)					
Social media					
Trailside directional signage					
Other community					



directional signage					
Local traditional media (newspaper, radio, television, etc.)					
Non-local traditional media					
Other					

Q22 How important are trail managers and community leaders using these methods of promoting the trail and community to potential trail tourists?

	Not at all important	A little important	Somewhat important	Quite important	Very important
Trail website					
City or Town website					
Local tourism bureau					
Regional or national tourism promotion (Travel magazines, Trip Advisor, etc.)					
Social media					
Trailside directional signage					
Other community directional signage					





Local traditional media (newspaper, radio, television, etc.)					
Non-local traditional media					
Other					

Q23 Please indicate your level of concern about the following issues as they relate to the Monon South Trail and its users:

	Not at all concerned	A little concerned	Somewhat concerned	Quite concerned	Very concerned
Vandalism or damage to my property					
Trespassing on my property					
Noise or other disturbances from the trail					
Personal safety of myself or my employees when entering or leaving					
Potential for robbery or burglary					
Lighting on or near the trail					
Increased or excessive traffic near my property					



Illegal parking on my property					
Loitering on or around my property					
Litter on or around my property					
Trail users ask to use the restroom without making a purchase					
Unleashed or roaming animals					

Q24 For any item in the question above where you answered “Quite” or “Very” concerned, please explain. (text box) \_\_\_\_\_

Q25 What impact has the trail had on your neighborhood/area surrounding your business?

- It is much worse than before the trail
- It is somewhat worse than before the trail
- The trail has had no impact on my neighborhood
- It is somewhat better than before the trail
- It is much better than before the trail

Q26 How important are these potential benefits of the Monon South Trail for your community?

	Not at all important	A little important	Somewhat important	Quite important	Very important
Increased economic activity for existing					



community businesses					
Increased opportunities for new businesses					
Drawing tourists to the community					
Improving the community's recreation opportunities					
Improving the community's overall health					
Increasing social interaction					
Improving the community's transportation network					
Community pride					
Increasing access to nature					

Q27 Do you have any suggestions for improving management of the Monon South Trail? \_\_\_\_\_

Q28 Is there anything else you would like to tell us about the impact of the Monon South Trail on your property or business?

\_\_\_\_\_



## Postcards and signage

### Visitor Use Postcard



The Monon South Trail is seeking the opinions of trail users. Your feedback will help trail managers and your community create and maintain the best experiences for all users and visitors.

**Please take our survey with the QR code here or at [www.bit.ly/MononSurvey](http://www.bit.ly/MononSurvey).**

Paper copies are available upon request. For a paper copy with a postage paid envelope or for any questions about the survey, contact Project Manager Layne Elliott at [resource@crossroadsdr.com](mailto:resource@crossroadsdr.com)



### Visitor Use Trailside Sign



### Visitor Use Volunteer Badge





## Business Trail Neighbor Postcard



The Monon South Trail is seeking the opinions of trail users. Your feedback will help trail managers and your community create and maintain the best experiences for all users and visitors.

**Please take our survey with the QR code here or at [www.bit.ly/MononSurvey](http://www.bit.ly/MononSurvey).**

Paper copies are available upon request. For a paper copy with a postage paid envelope or for any questions about the survey, contact Project Manager Layne Elliott at [resource@crossroadsdr.com](mailto:resource@crossroadsdr.com)

