

A cyclist wearing a green shirt and a helmet is riding away from the camera on a dirt trail. The trail leads towards a large, rustic wooden truss bridge that spans a small stream. The bridge is surrounded by dense green trees and foliage. The scene is bright and sunny, with dappled light on the ground. The title text is overlaid on the left side of the image.

Assessing the Economic Impact of Trails and Trail Systems

-
- 1. Introduction to Fourth Economy**
 - 2. Trails and Trail Systems Overview**
 - 3. Case Studies: GAP Trail and Three Rivers Heritage**
 - 4. Assessment: Developing your own set of indicators**

Who Are We?



Maura
Kay

Maura is a consultant specializing in analytics at Fourth Economy. As part of Fourth Economy's Outdoor Economy work, she has completed impact analyses of the Great Allegheny Passage as well as the Three Rivers Heritage Trail in Pittsburgh. Maura's passion for economic development originates from her Mon Valley, Pennsylvania roots. Her previous experience is centered around Main Street management and community wealth building.



Maya
Haptas

Maya is a senior consultant at Fourth Economy who specializes in commercial district revitalization and small business development. Maya holds an M.A. in Historic Preservation Planning from Cornell University's City and Regional Planning Department and a Certificate in Business District Executive Management from Rutgers University. Maya brings a passion for community-based economic development to her work and has developed a nuanced understanding of the built environment.

We help communities and organizations create strategic, equitable, and resilient economies.



Economic Equity

Bold plans that specifically address economic disparities especially focused on communities of color.



Economic Strategy

Implementable plans that help communities create a vision and portfolio of strategies designed for impact.



Economic Resilience

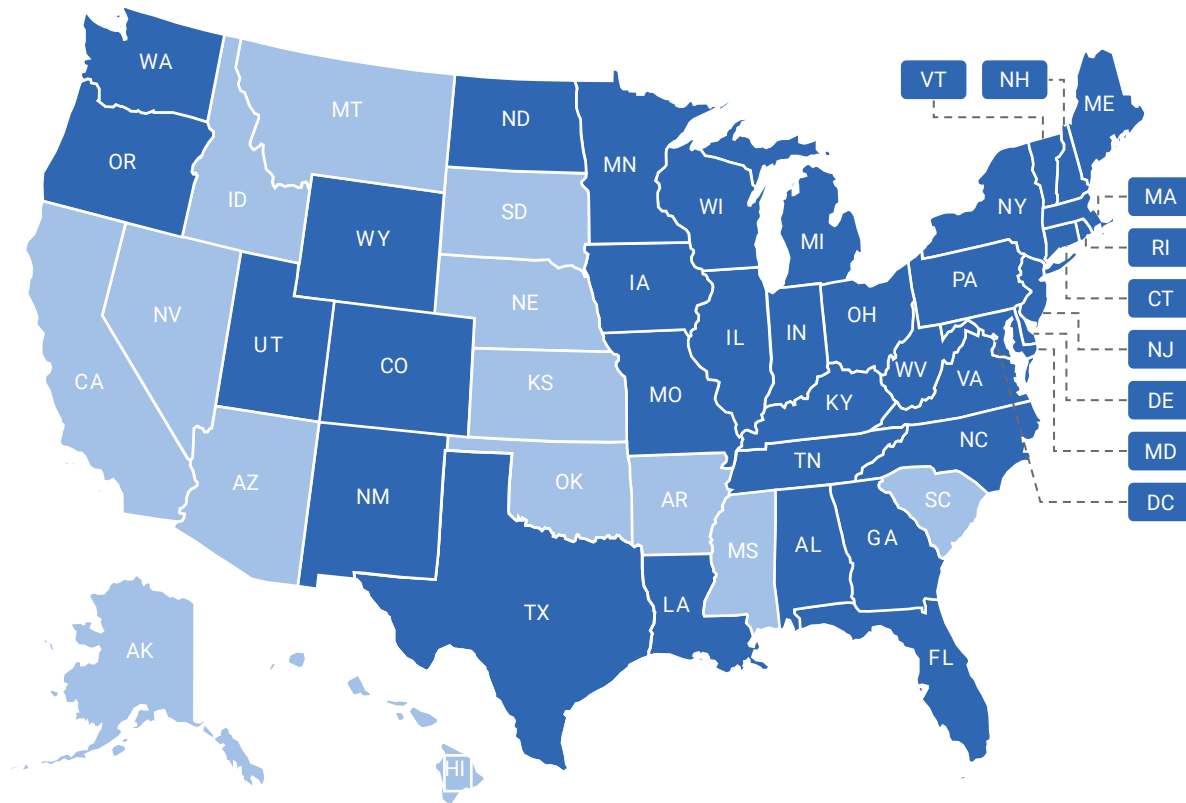
Forward-looking strategies that prepare to be more economically and environmentally resilient for the next crisis.

Our Client Locations

Dark Blue = States/Regions where we have worked

National Clients =

- Economic Development Administration
- Interise
- National Governors Association
- Jobs for the Future Foundation



Outdoor Economy: Parks and Trails

The Fourth Economy team includes a range of experts that demonstrate an excellent understanding of economic impact analysis and the [outdoor economy](#), including parks and trails. Fourth Economy has completed park and trail projects that include economic impact, feasibility studies, market analyses, and real estate analyses for these and other recreation amenities.

Fourth Economy has worked on trail-specific projects, including work with RiverLife in Pittsburgh, the GAP Trail, Three Rivers Heritage Trail, and Pike to Bike, and several park-specific projects, such as South Park in Allegheny County and Allegheny Commons Park in Pittsburgh.

Trails and Trail Systems: Understanding the Economic Impact

Trails and the Outdoor Economy

Outdoor Economy Definition

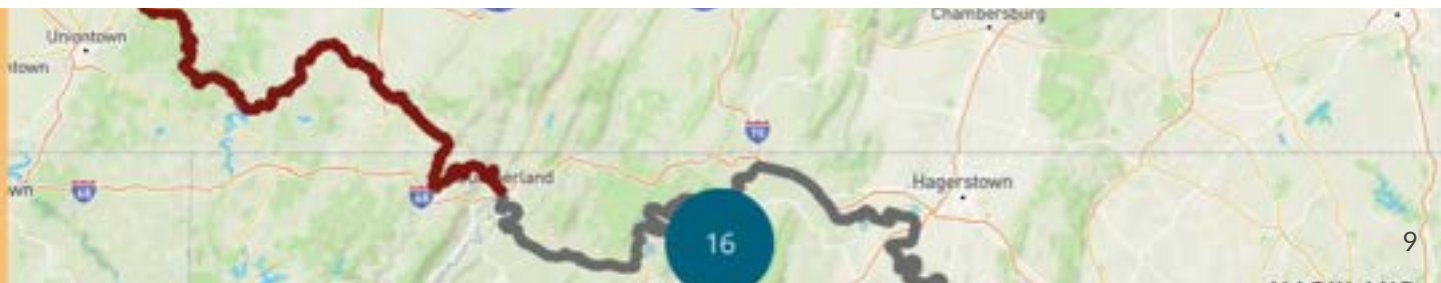
- The Federal Bureau of Labor Statistics (BLS) defines the outdoor recreation economy across sectors, estimating the share of each sector that contributes to the outdoor recreation economy. **This acknowledges that economic impact of outdoor recreation is not limited to just outdoor activity centric industries such as boating, hiking, hunting, and skiing.**

“This approach can apply to communities that have been left behind by other strategies,”

- *Silas Chamberlin, Ph.D., Vice President of Economic and Community Development, York County Economic Alliance.*

Search By Type

65 Results [Select All](#) | [Deselect All](#)



Trails and the Outdoor Economy

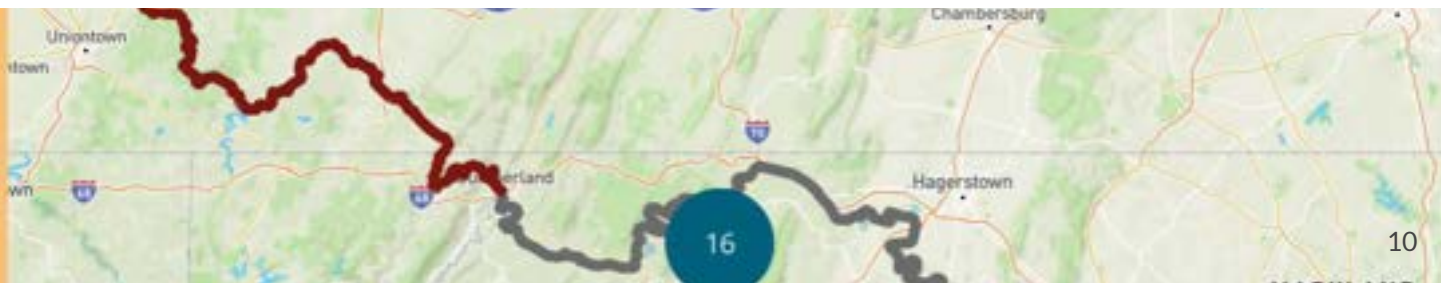
Outdoor Economy Impacts

- \$17 billion to PA GDP (12% Increase from 2021)
- 7% growth in employment (153,00 to 164,000 jobs) from 2021-2022*

**U.S. Bureau of Economic Analysis's Outdoor Recreation Satellite Account*

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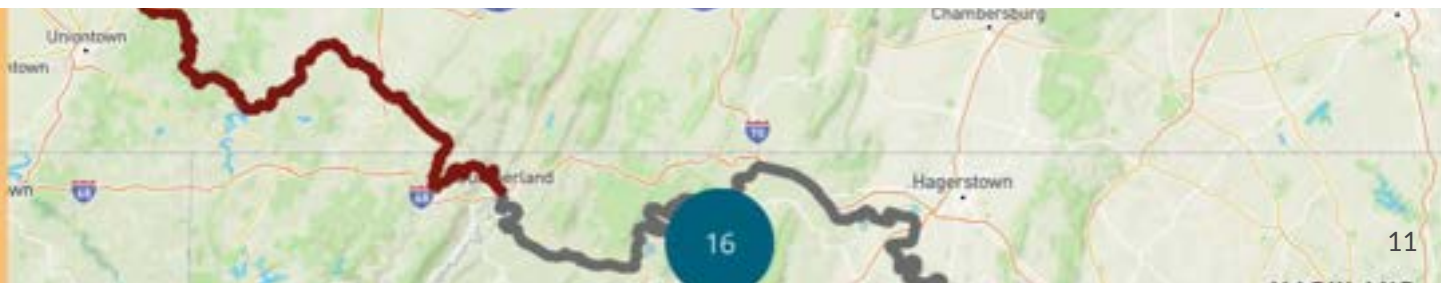


Trail Towns and Trail Systems

- Trail Towns are communities adjacent to public trails that choose to embrace the trail as an opportunity for economic growth and improved quality of life.
- Trails are recognized for their economic impact on adjacent towns through the many National, State, and regional programs that support trail town development.
- There are examples of trail towns or outdoor towns all over Pennsylvania from the Great Allegheny Passage to the Rail Trails in York, PA, and the Jakes Rocks Overlook and Mountain Bike Trail in Warren, PA

Search By Type

65 Results [Select All](#) | [Deselect All](#)



Trails and trail systems can be ...



A critical piece of any prosperous community, county, or region.



An increasingly important determinant for residents and tourists in their respective decision-making.



A powerful tool for driving community-building, authenticity, and connectivity across an area.

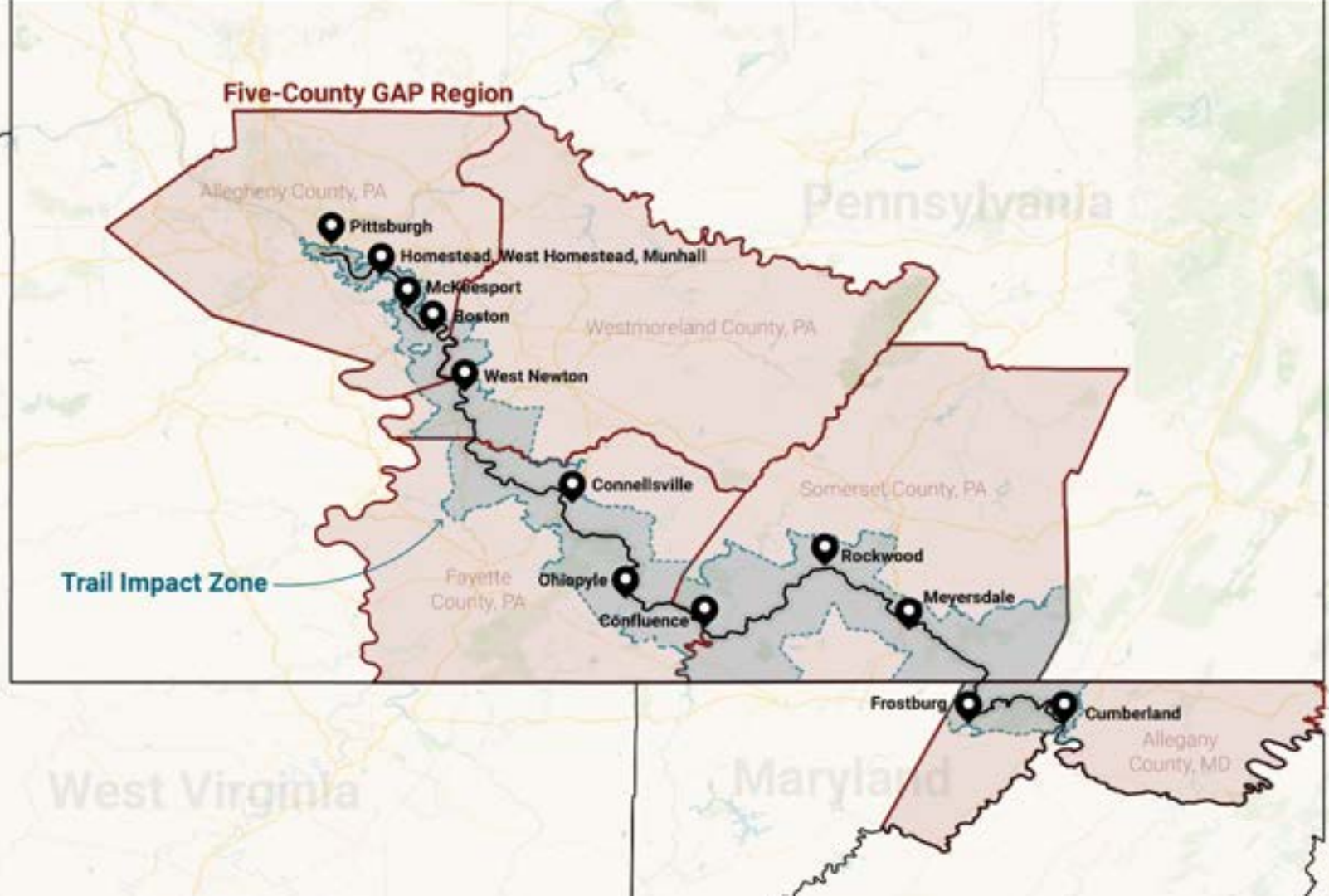


An achievable goal for communities to unite around, and the ability to start with low-investment wins

Case Studies



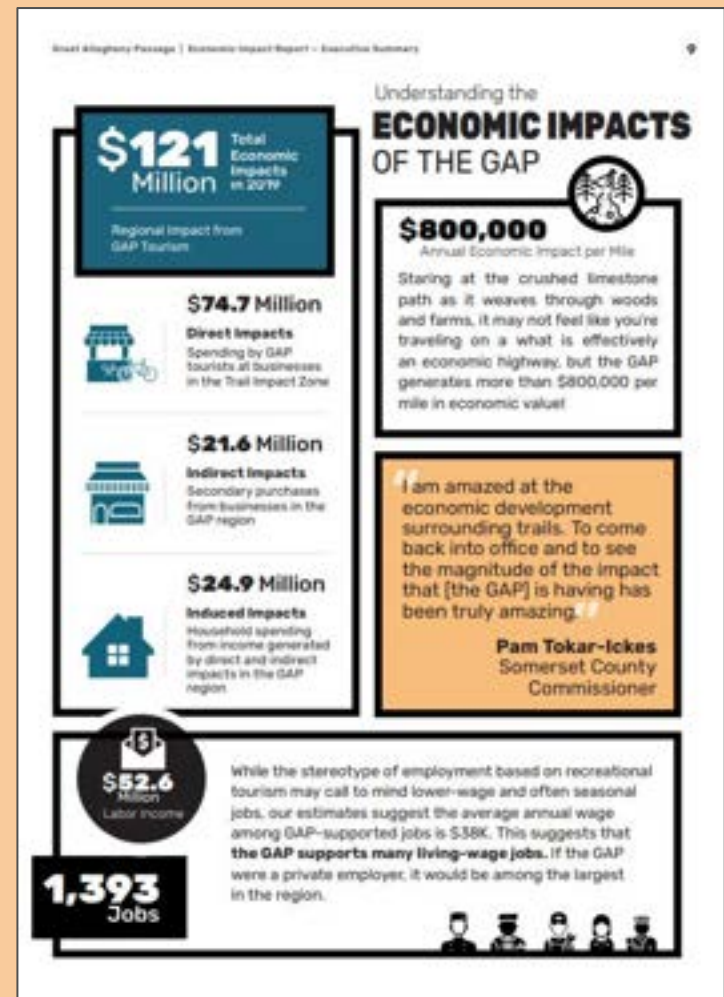
Five-County GAP Region



Economic Impact Modeling

Tourism & Recreation on the GAP Trail

The Great Allegheny Passage (GAP), is a 150-mile multi-use trail that connects Pittsburgh to Cumberland, MD. To understand spending patterns, we analyzed economic data as well as user perceptions through surveys of trail users and business owners.



5

BUSINESS, EMPLOYMENT, AND TAX IMPACTS

BUSINESS IMPACTS

Trail users support arts, culture, and recreation businesses. The direct spending of trail users benefits the following kinds of businesses:

RESTAURANTS

\$6.4 M



LODGING

\$2.4 M



RETAIL

\$12.5 M



ARTS, CULTURE, & ENTERTAINMENT

\$1 M



EMPLOYMENT

Trail use and spending supports

**351
EMPLOYEES**

generating a total

**\$16 M
IN WAGES**

READ ALL ABOUT IT!

The \$16 million in earnings from trail-related spending equals the amount earned by Book Retailers in Allegheny County.



72¢

NEARLY 72 CENTS FROM EVERY DOLLAR
SPENT SUPPORTS WAGES FOR RESIDENTS.

\$23

AVERAGE HOURLY
WAGE OF TRAIL-
SUPPORTED JOBS

TAX IMPACTS

Spending from trail users and income tax from trail jobs results in an estimated

\$5.7 M
IN TAX
IMPACTS



\$1.6 M
IN LOCAL TAXES
nearly \$50K per mile!



\$1.7 M
IN STATE TAXES
\$51K per mile!



\$2.4 M
IN FEDERAL TAXES
nearly \$74K per mile!



taking **233** gas-powered cars off the road

offsetting the energy use of
132 homes



or **2,422** barrels of oil not burned¹

Adding it All Up

If the Three Rivers Heritage Trail were an industry, its Gross Regional Product (GRP) would be nearly **\$26.5 million!**

To put that into context, that is more than the GRP of **surface coal mining** and about equal to the GRP of **commercial bakeries** in Allegheny County.



\$26.4 M
SURFACE COAL MINING



\$26.5 M

THREE RIVERS HERITAGE TRAIL



\$26.7 M
COMMERCIAL BAKERIES

Data Collection Strategies

Data Collection Strategies

- **Trail user profile**
 - ▶ Trail counters
 - ▶ Cell phone capture data
 - ▶ Intercept surveys
 - ▶ User surveys - sourced from partners, allies, or via QR codes on the trail
- **Direct Impacts Analysis**
 - ▶ Economic Impact Analysis
 - ▶ Tourism Spending - direct and indirect
- **Trail Adjacent Impact Analysis, Time Series**
 - ▶ Property Values
 - ▶ Tax Analysis - property, sales, schools
 - ▶ Municipal Impacts
- **Health Related Impacts**
 - ▶ Estimate Health Impacts by bringing in data from National Institutes of Health, research from other trail groups, and other sources



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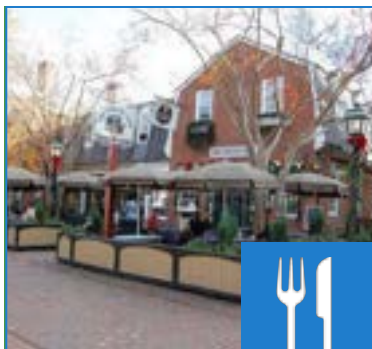


Placemaking in the Southeast



The Battery
Atlanta, GA

Brings residents and tourists to the area for food, drink, sports, and other entertainment in a new development.



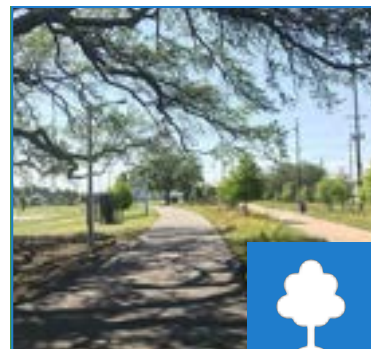
Merchant's Square
Williamsburg, VA

Provides mixed-use activities in a historic setting for residents and tourists alike.



South Slope Murals
Asheville, NC

Combines art-based tourism and exposure to popular restaurants and breweries on a self-guided tour.



Lafitte Greenway
New Orleans, LA

Connects the historic French Quarter to nearby neighborhoods through a multi-use trail.

Why is Placemaking Important?

“Quality of place is a useful and important element in **attracting talent** and **building healthier, happier, and more prosperous communities.**” – Bloomberg

“Transformative placemaking—a new, integrated approach to place-led development—has **helped communities meet the challenges wrought by the pandemic**, and can lead us toward a more equitable recovery.” – The Brookings Institute

“A nearby urban park is associated with the **same mental health benefits as decreasing local unemployment rates by 2 percentage points**” – Journal of Mental Health Policy and Economics

Key Creative and Outdoor Industries that Contribute to Placemaking Include...



Example NAICS Codes:

- 711110 - Theater Companies
- 611610 - Fine Arts Schools
- 713910 - Golf Courses
- 713920 - Skiing Facilities



Outdoor Economy

- Primary Outdoor
- Secondary Outdoor

Placemaking has Numerous Economic Implications

Placemaking is a critical tool to attracting and retaining people to a community, because it amplifies a place's characteristics, promotes an authentic identity, and creates wellbeing for both visitors and residents. It intersects with efforts like:

Tourism, community branding, and promotion

Talent and employer attraction and retention

Small business and Main Street support

Public transit, trails, and walking infrastructure

Diversity, equity, and inclusive planning

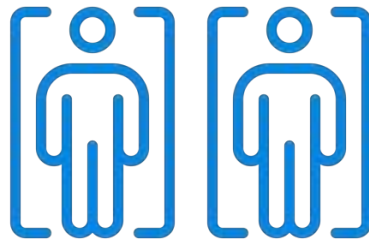


Challenges to Successful Placemaking



Community control and site access

Ownership, bureaucracy, or zoning policy sometimes get in the way of ready access to potential asset improvements.



Professional silos

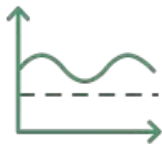
Creative workers, outdoor recreation advocates, and economic developers do not always naturally interact, which means planning and investment happens in an uncoordinated way.



Lack of investment

There is often a reluctance for decision makers to recognize the value of placemaking efforts, which results in unwillingness to support it financially.

Our Process



ESTABLISHING A BASELINE

- Analyze & interpret data
- Engage community leaders
- Review prior plans



ASSESS OPPORTUNITY

- Identify a site
- Evaluate funding sources
- Include community partners



DESIGN FOR RESILIENCY

- Plan for economic shifts
- Address environmental sustainability
- Define multiple uses and target audiences



MOVING TO ACTION

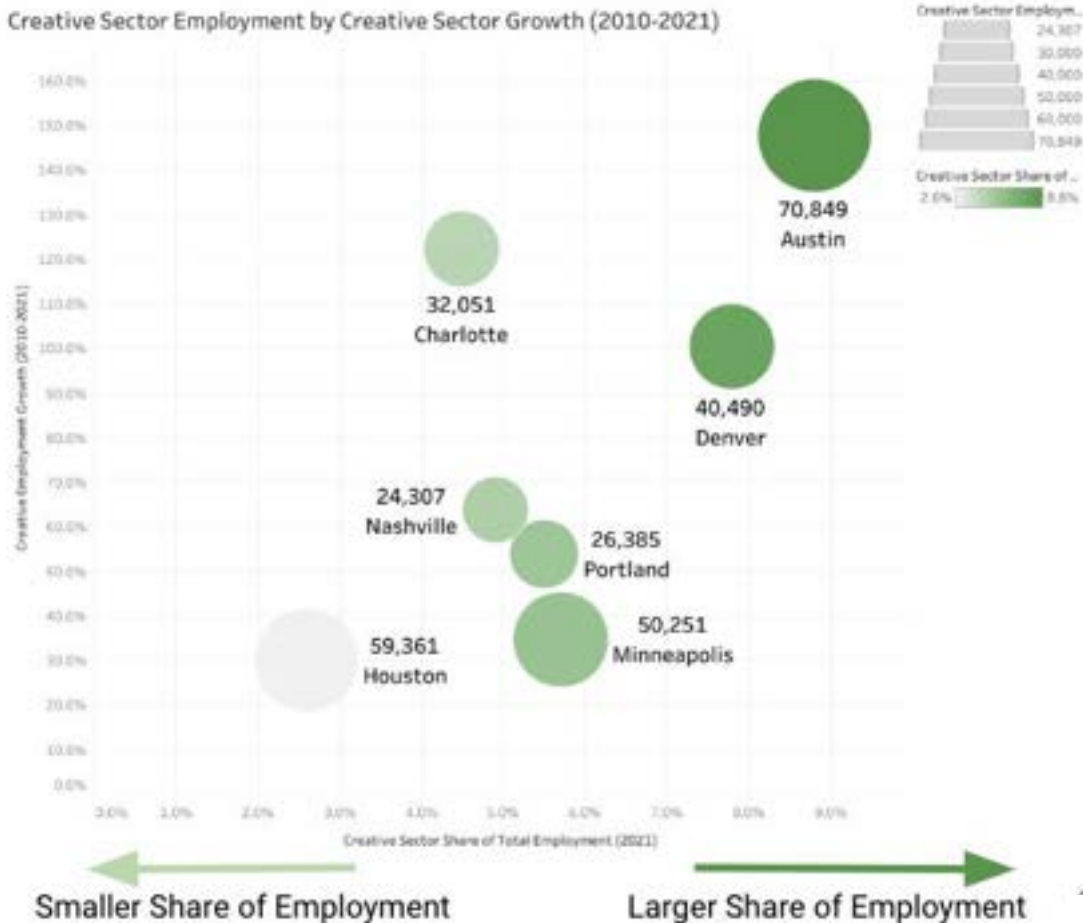
- Implementation
- Evaluation
- Measuring impact
- Continued community engagement

The Importance of Data

Data is a crucial piece of defining the 'State of Place' for any project. Data can shed insights on:

1. Total creative employment
2. The GDP of the creative economy
3. Creative employment wages
4. The availability of creative space

This chart exhibits the total volume of creative sector employment and growth over 10 years.



Public Engagement is Critical

No planning effort is complete without engaging key stakeholders, users, and civic influencers. Relevant to placemaking, key engagement partners may include:

1. Existing and potential tourists
2. Local residents
3. Government officials
4. Nonprofit and business leaders
5. Individual artists and creatives
6. Advocacy groups



What Does Success Look Like on Different Scales?

A Buzzing Urban Center

Client: City of Charlotte, NC

Area Population: 880k

Project Goal: Creation of a cultural plan that will develop stability in the arts and cultural sector, incentivize opportunities for sustainable growth of local artists and arts and culture organizations, grow the industry ecosystem, and respond to community needs.



4E examples

Promenade Park, Ft Wayne

Howard Park, South Bend

Elkhart aquatics center -

<https://www.southbendtribune.com/story/news/2019/07/14/massive-aquatics-center-in-elkhart-aims-to-become-a-regional-draw/46360979/>

White River, Regional Opportunity Initiative

<https://www.discoverwhiteriver.com/vision-progress/readi/>

Project Outcomes

TBD

Client Implications:

TBD



TBD



TBD



TBD

A Diversifying Suburban County

Client: ArtWorks! Gwinnett – Gwinnett County, GA

Area Population: 965k

Project Goal: Creation of a cultural plan that will:

1. Provide a roadmap for job creation, talent development, and creative enterprise inventory;
2. Enhance public infrastructure and placemaking;
3. Lay the foundation for developing funding policies and future priorities.



Project Outcomes

TBD

Client Implications:

TBD



TBD



TBD



TBD

A Historic Rural Attraction

Client: Blue Ridge Music Center

Area Population: 6.6k

Project Goal: Lead a comprehensive effort to expand the impacts of the Center, including:

1. Engaging larger and more diverse audiences;
2. Increasing the variety and volume of the Center's financial resources;
3. Increasing tourism spending in the surrounding communities.



Project Outcomes

TBD

Client Implications:

TBD



TBD



TBD



TBD

Conclusion



Our Team



Rich
Overmoyer

Principal in Charge



Nicole
Muise-Kielkucki

Project Manager



Chris
Worley

Research & Analysis



Ross
Berlin

Research & Engagement

Our Team



Sally
Guzik

Project Manager



Maya Haptas

Senior Consultant,
Main Streets



Carly
Horne

Engagement Lead



Maura
Kay

Research & Analysis



Andrea
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Our Team



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Analysis Lead



Deminique
Heiks

Research & Analysis



Evan
Wise

Research & Analysis



Anne
Jensen

Research & Analysis



Abigail
Brady

Marketing &
Communications Support



Eve
Critton

Senior Consultant

Capabilities

Fourth Economy takes a unique approach to working with our clients as partners. We effectively blend both quantitative and qualitative inputs at every point in the process. Most importantly, our focus is on developing realistic recommendations that can be easily understood and readily implemented.

Economic Strategy

- Community Vision Development
- Economic Impact Analysis
- Comprehensive and Neighborhood Plans
- Strategic Planning
- Feasibility Studies

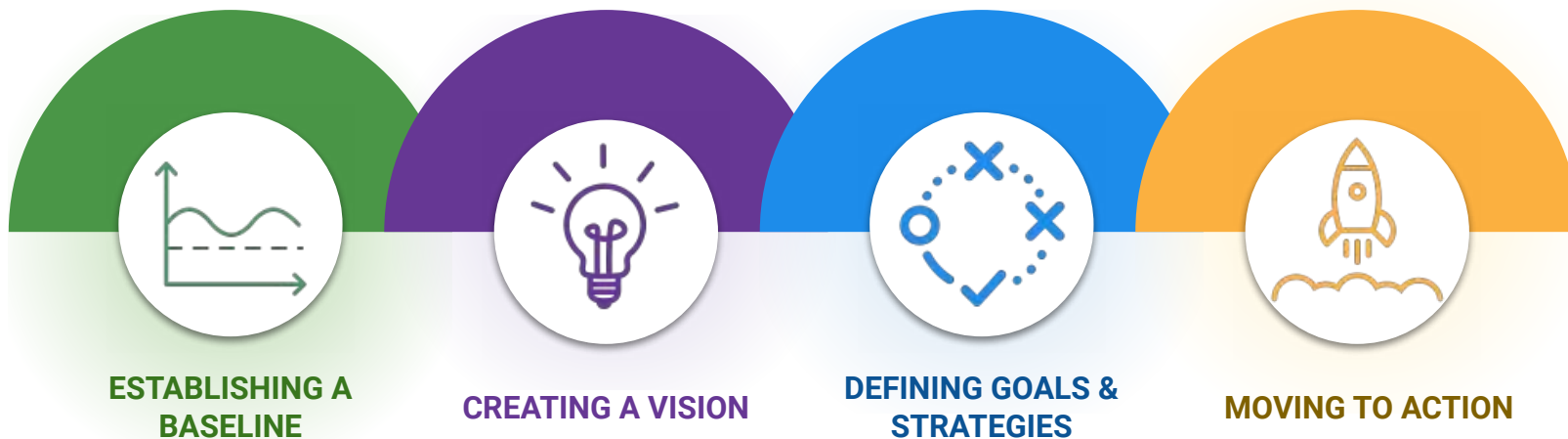
Equitable Development

- Inclusive recovery efforts
- Focus on underrepresented communities
- Economic disparity mitigation
- Barrier elimination

Resilient Economies

- Human-centered climate impact mitigation
- Environmental-related economy impacts
- Industry impact analysis and program development
- Shock and stress scenario exploration

Our Process



- Analyze & interpret data
- Engage community leaders
- Review prior plans

- Develop communications strategy
- Gather & evaluate community input
- Analyze SWOT

- Facilitate Build Sessions
- Engage strategy champions
- Create strategic recommendations

- Create investable stories
- Develop & design final plans
- Define metrics & impact

Our Approach



Baseline Analysis

**Engagement &
Ideation**

**Analysis &
Evaluation**

Feasibility Study

**Report with
Implementation
Plan**

Description

Description

Description

Description

Description

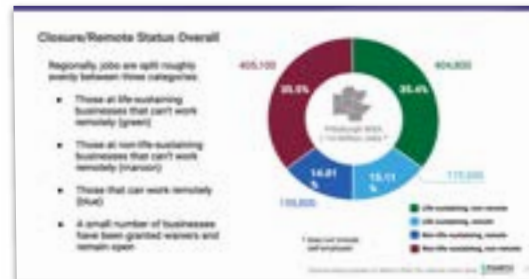
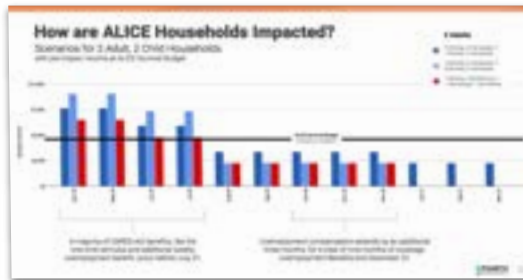
Interpreting the Data

DATA ANALYSIS

We execute heavy analysis of new and existing data sets to develop insights about your community.

DATA VISUALIZATION

We design easily understandable slides, charts, and graphics to increase understanding and create a compelling and investable story.



Example Projects

City of Chester



Economic Competitiveness
Strategy

Rhode Island Research Foundation



Blue Economy Technology
Cluster

Massachusetts HED



Small Business Survey

National Governors Assoc.



Economic Mobility Policy
Report

City of Scranton



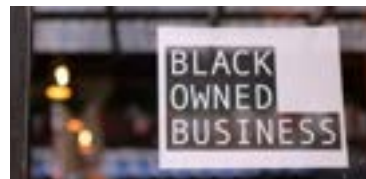
Strategic Economic
Development Plan

YCA/YCEA



Economic Impact
Assessment

Prosper Birmingham



Black-Owned Business
Support Ecosystem

New Growth Innovation Network



Inclusive Recovery Network

Example Projects



**Ramsey County
Community &
Economic
Development**

Economic
Competitiveness and
Inclusion Plan



City of Laramie, WY

Thrive Laramie
Strategic Plan



City of Scranton, PA

Strategic Economic
Development Plan



**Community
Foundation of Central
Georgia**

One Macon!
Community and
Economic
Development Plan

Additional Layouts and Design Ideas

Problems to solve

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Project Objectives

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Use photos for impact

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Market trends

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Client Implications:

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QUICK TIP

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QUICK TIP

Try right clicking on a photo and using "Replace Image" to show your own photo.



QUICK TIP

Try right clicking on a photo and using "Replace Image" to show your own photo.

Quality of Life

Housing Impacts

Overview

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Housing: Key Findings

Owner-Occupied vs. Rental

less than half of Scranton houses are owner-occupied, compared to 69% in Pennsylvania and 64% nationally. Homeowner vacancy is greater than PA and the US overall, while rental vacancy is below average

Cost of Living

Rents and prices for goods and services, are high considering incomes. While Scranton's Median Household Income is more than \$12,000 lower than PA's, median rent is just \$10 less a month - more cost-burdened renters than owners.

**Many stones form an arch,
many drops turn a mill - singly,
none.**

—

Transportation

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Small Business as Economic Driver

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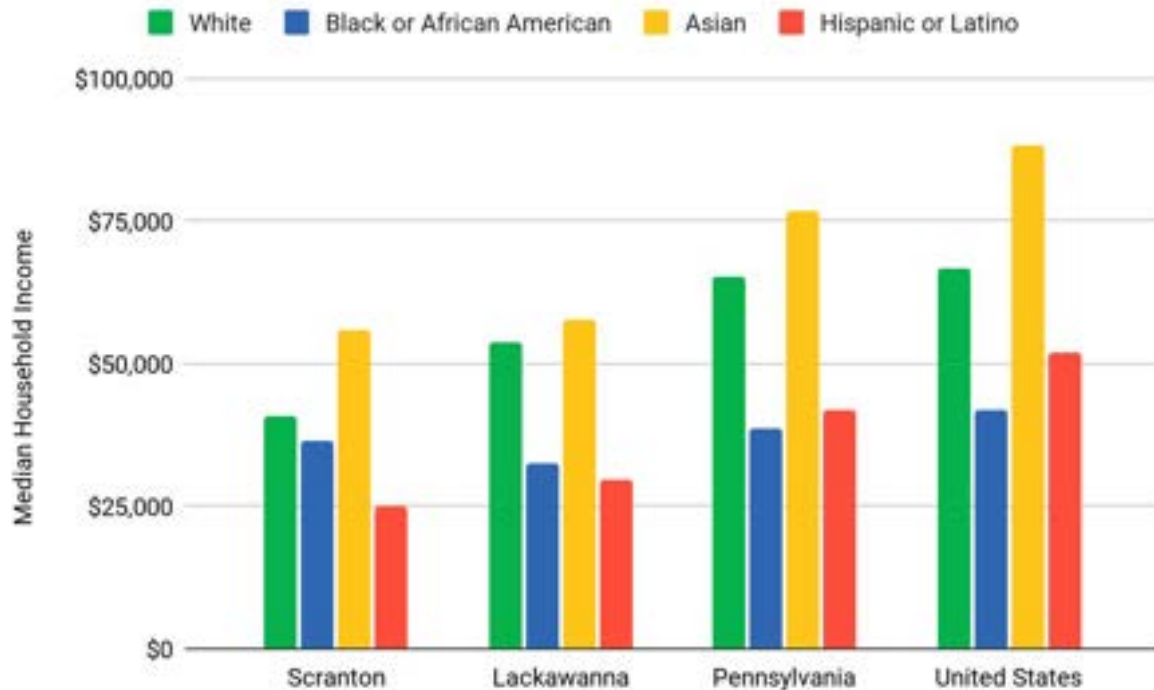


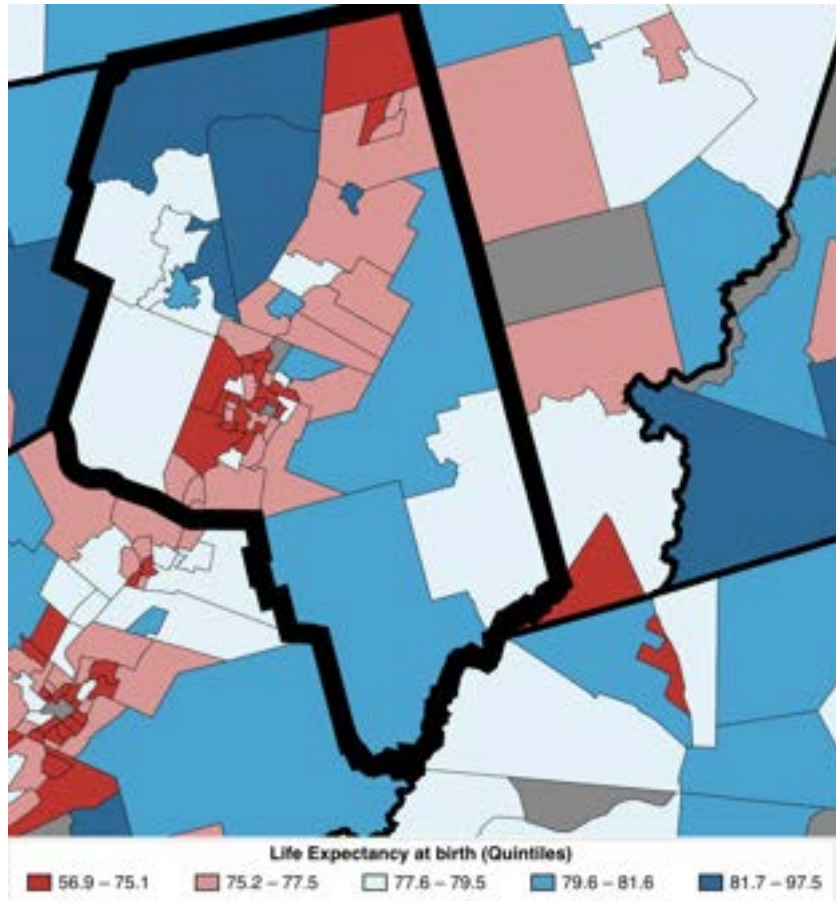
Data Presentation

Median Household Income by Race/Ethnicity

Median Household Incomes in Scranton are lower for every racial/ethnic group.

For Black residents, unemployment is **37%** of the U.S. rate, but the median household income for Black households is **87%** of the U.S. median for Black households





Life Expectancy

Average life expectancy in the City of Scranton is less than 75 years old, three years below the Lackawanna County and US averages of 78 (as of 2017).

3 Scranton census tracts have life expectancies of only 70 years. Within these census tracts, the population is 20% non-white, non-Hispanic and 60% of households have median incomes below \$35,000.

Big Numbers

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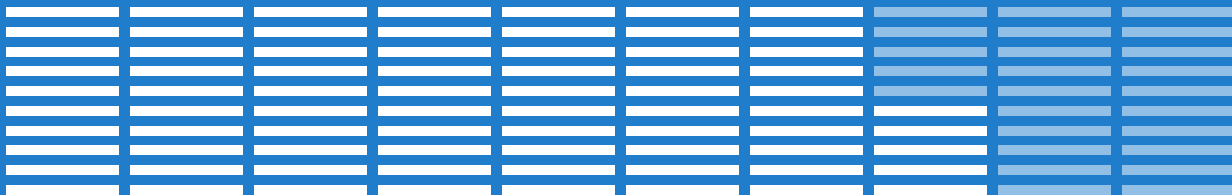
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Data Visualization

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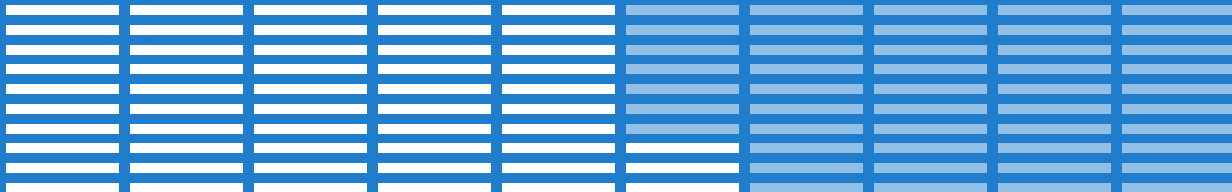
Trend 01



75%

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Trend 02



53%

Tempor incididunt labore et dolore sed do eiusmod.

75yrs

Average life expectancy in the City of Scranton, 3 years less than the National average

1939

Approximately half of all homes (55%) in Scranton were built before 1939

1.9k

Is a number that does not have any relevance to any datapoint

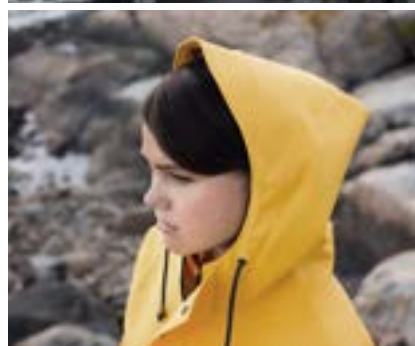
Placemaking

We are being called to explore
placemaking as an interface between
rejuvenation and interconnectedness.

People

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Process



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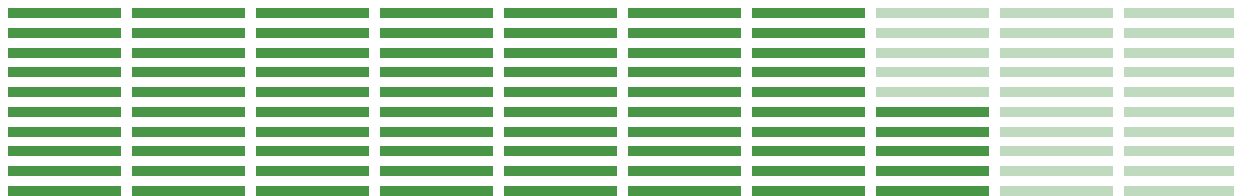
Get Creative

Here the photo callout layout was used with a low opacity shaped added over top. The image was recolored to black and white using the recolor settings.

Additional Data

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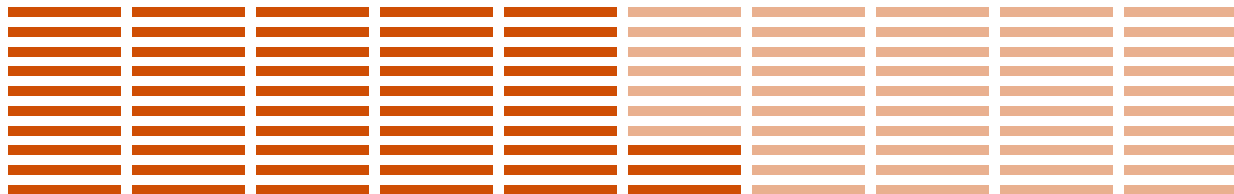
Trend 01



75%

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Trend 02



53%

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Approach

Reimagining Spaces & Places

Timeline

Week 1

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Weeks 3-5

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Week 2

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Week 6-8

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Timeline

Weeks 9 & 10

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Project Completion

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Weeks 11 & 12

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Final Deliverables

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Thank you.

