







- 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 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 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.



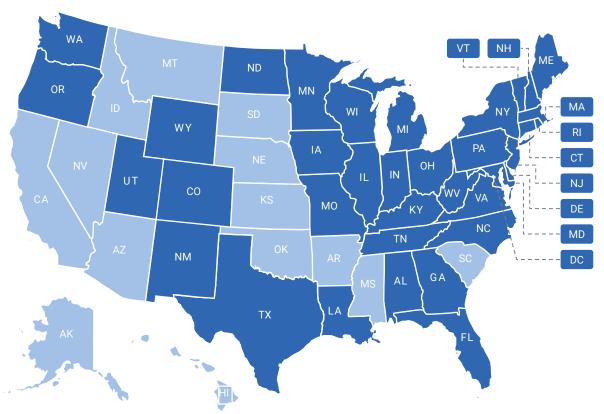


Our Client Locations

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 <u>outdoor economy</u>, 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 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.







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







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







Trails and trail systems can be ...



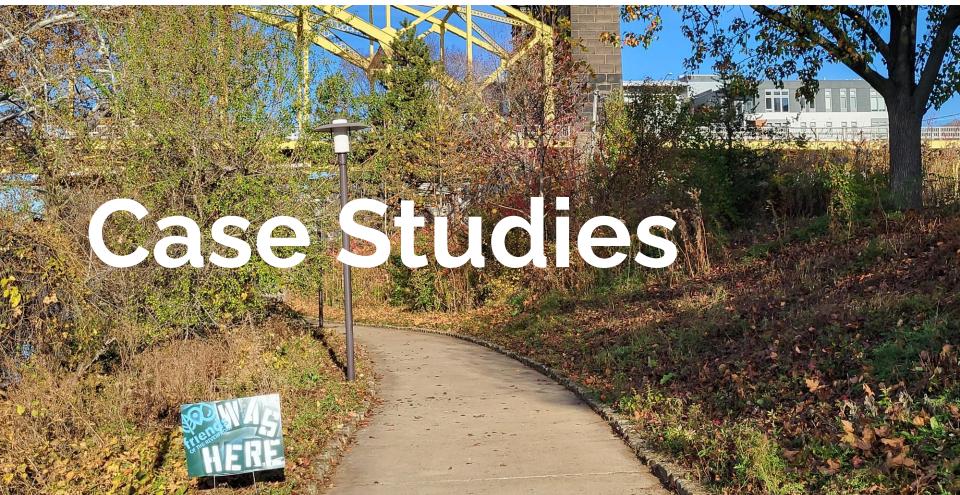
community, county, or region.

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

authenticity, and connectivity across an area.

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







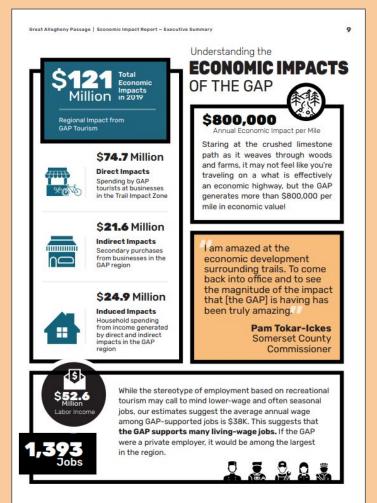
Economic Impact Modeling

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.









Three Rivers Heritage Trail

Enjoy Your Trail Experience!

The Three Rivers Heritage Trail is a nearly 30-mile urbary' suburban riverfront trail system with Trail sections built or in development along both sides of all three rivers in Pittsburgh and throughout Allegheny County. Often used for recreation, exercise and commuting, the Three Rivers Heritage Trail provides access to vibrant urban areas, popular shopping and entertainment districts, and lush green space for residents and visitors to the region.

Visit friendsoftheriverfront.org to use our interactive map and stay up-to-date with Trail Alerts.

Recommended Trail Access and Parking

Ohio River

Westhall St.
On street parking, 10 spaces available,
40,4720,-50,0433

Allegheny River

P River Ave. @ Heinz St. Gravel lot. 8 spaces available. Additional parking available at River Ave. and Veterans Bridge (downriver) and River Ave. and Washington's Landing Bridge (upriver)

40 4536,70 0005 P Washington's Landing under 31st St. Bridge Paved lot. 5O spaces available. 40.4638.79.9780

Milivale Riverfront Park @ River Front Dr.
Paved lot. 80 spaces available. 40.4710 -79.9731

P Lawrenceville Trailhead @ 40th St.
Gravel lot. 10 spaces available.

Monongahela River

P Station Square Trailhead @ Duquesne Incline
Gravel lot. 20 spaces available.
40.4401-60.0171

P South Side Riverfront Park @ 18th St.
Paved lof: 50 spaces available:
40,4315,79,9727

P Eliza Furnace Trailhead @ Swinburne St. Paved lot. 25 spaces available. 40.4259,-79.9532

P Junction Hollow Trailhead Boundary St. © Four Mile Run Rd. Paved lot. 25 spaces available. **4** 5 1 40,4259,-79,9532

P Hazelwood Ave. @ Gloster St.
On street parking. **Q**

Duck Hollow @ Old Browns Hill Rd.
Paved lot. 30 spaces available. 40 4143 .70 0165

MAP KEY & LEGEND

Trail: Paved Surface

Trail: Crushed Stone Surface

· · · Trail: Walking Trail Access Point

River Mileage from the Point Trail Dead End

Trail Connecto Share the Road

Great Allegheny Passage Overlay Great Allegheny Passage

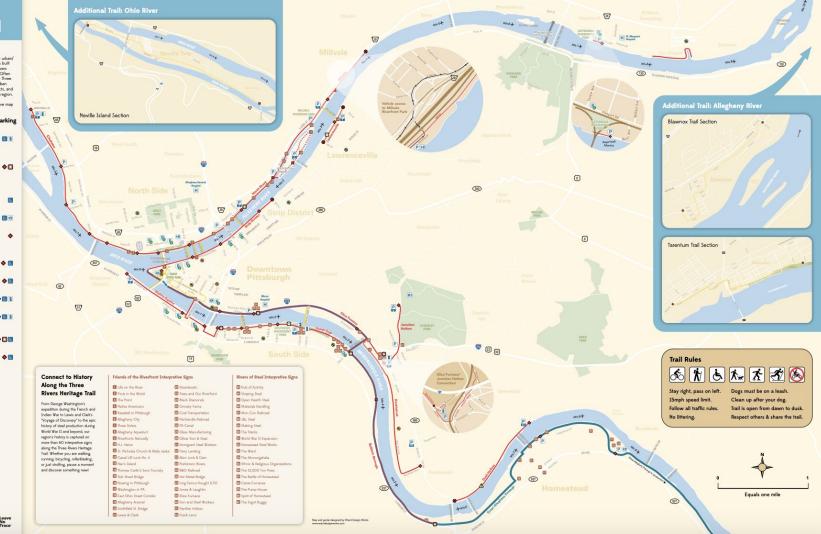
Chemical Toilets

Public Restrooms Trail Parking

Potential Trail Closure. See Website

0 Dog Park Bike Shops Fix-It Station





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 trailrelated spending equals the amount earned by Book Retailers in **Allegheny County.**





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

(9) 72¢ | \$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 gaspowered cars off the road

offsetting the energy use of 132 homes





or **2,422** barrels of oil **not burned**¹³

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



\$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









Thank you.







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



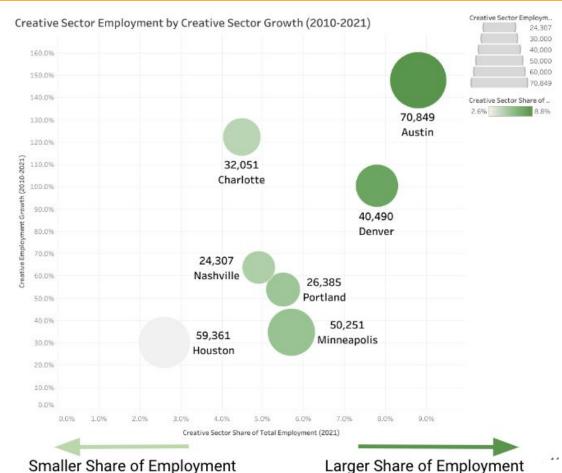


The Importance of Data

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







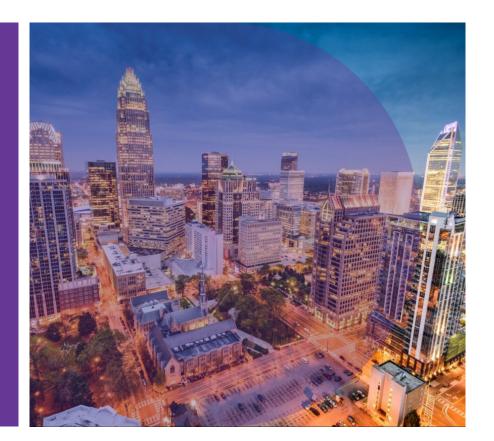


A Buzzing Urban Center

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/



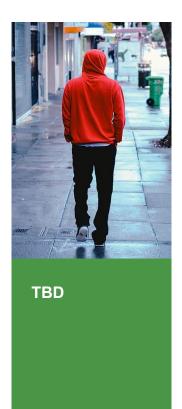


Project Outcomes

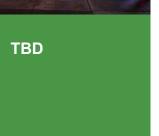
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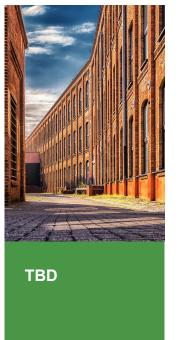
Client Implications:

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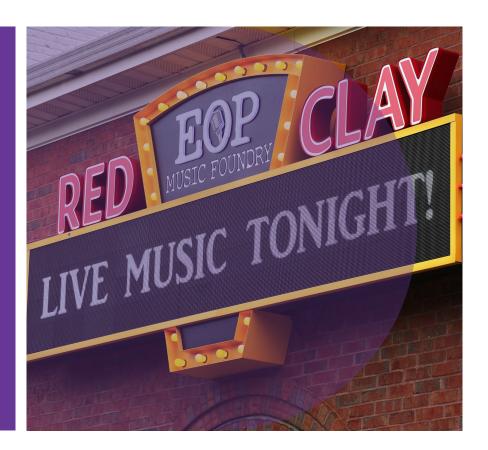
A Diversifying Suburban County

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.





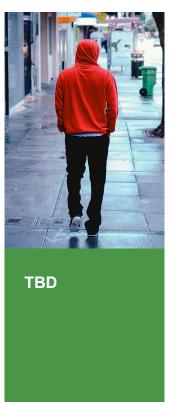


Project Outcomes

TBD

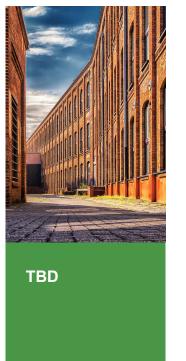
Client Implications:

TBD













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.





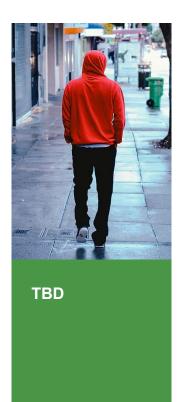


Project Outcomes

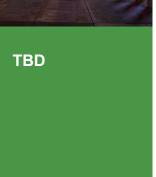
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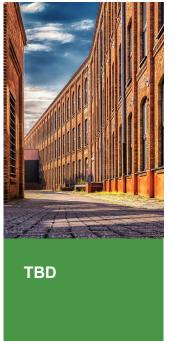
Client Implications:

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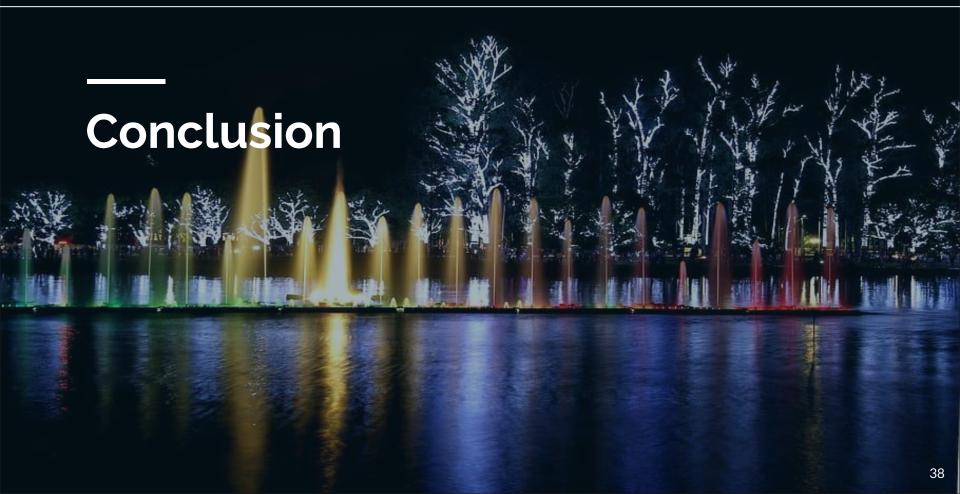
















Our Team



Rich Overmoyer

Principal in Charge

Name

Role



Nicole Muise-Kielkucki

Project Manager



Chris Worley

Research & Analysis



Berlin

Research & Engagement





Our Team



Sally Guzik

Project Manager



Maya Haptas

Senior Consultant, Main Streets



Carly Horne

Engagement Lead



Maura Kay

Research & Analysis



Andrea Negrín

Research & Engagement





Our Team



Jerry Paytas, Ph.D.

Analysis Lead



Deminique Heiks

Research & Analysis



Evan Wise

Research & Analysis



Anne Jensen

Research & Analysis



Abigail Brady Marketing &

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



- ESTABLISHING A
 BASELINE
- Analyze & interpret data
- Engage community leaders
- Review prior plans

CREATING A VISION

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

Facilitate Build Sessions

STRATEGIES

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

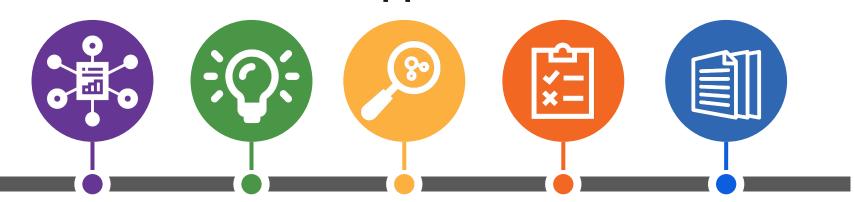
MOVING TO ACTION

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





Our Approach



Baseline Analysis

Description

Engagement & Ideation

Description

Analysis & Evaluation

Description

Feasibility Study

Description

Report with Implementation Plan

Description





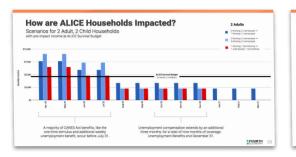
Interpreting the Data

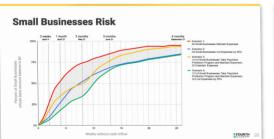
DATA ANALYSIS

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.



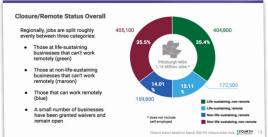






We don't know exactly how many vulnerable households will be impacted by lost wages related to COVID-19. We assume, conservatively, that it's at least 100,000 households and 220,000 people in the region.

FOURTH









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



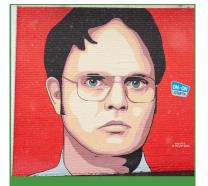
Ramsey County Community & Economic Development

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

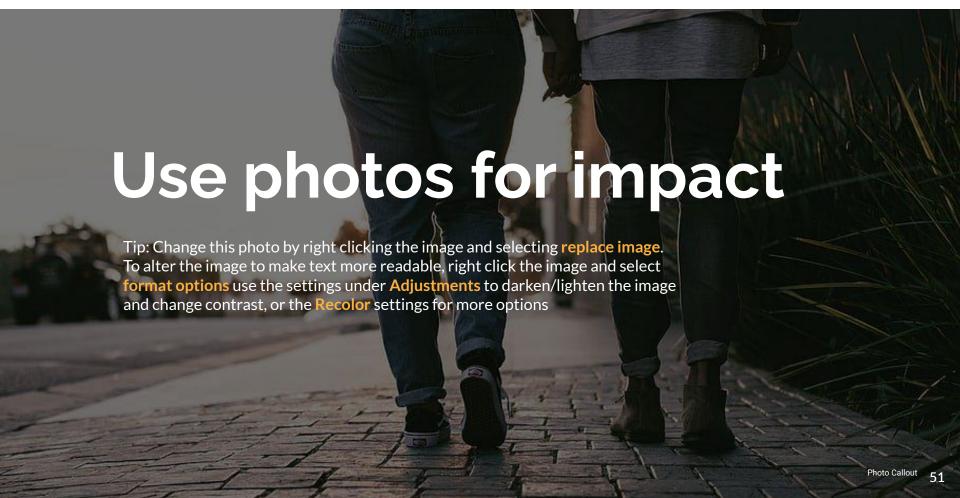
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Market trends

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Client Implications:

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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 Incomes 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

Donec venenatis mauris elit, vel tempus odio laoreet et. Maecenas iaculis luctus ipsum, non sagittis arcu auctor eu. Aliquam tincidunt turpis malesuada augue consectetur, eu vestibulum orci convallis. Suspendisse malesuada risus sed ornare feugiat. Donec nec orci vitae metus posuere mollis. Praesent cursus tellus odio, ut finibus diam finibus aliquet. Suspendisse interdum mauris ut arcu ultricies venenatis. Aliquam erat volutpat.







Small Business as Economic Driver

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Data Presentation

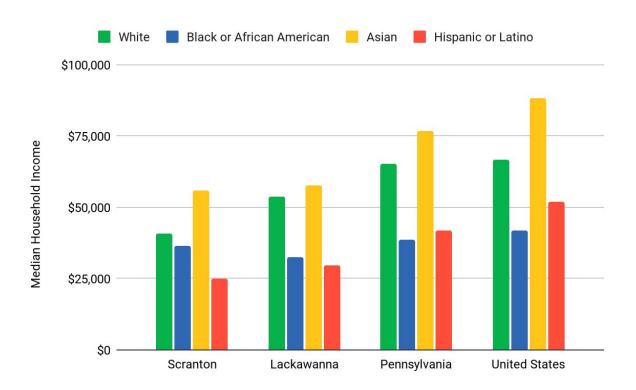




Median Household Income by Race/Ethnicity

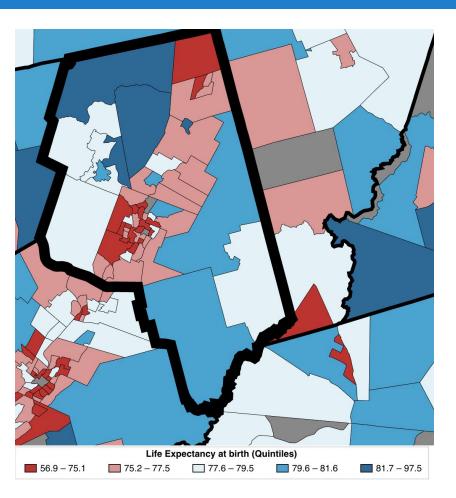
Median Household Incomes in Scranton are lower for every racial/ethnic group.

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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Data Visualization

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15yrs

years less than the

National average

Average life expectancy in the City of Scranton, 3 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





Placemakin

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





People

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Process



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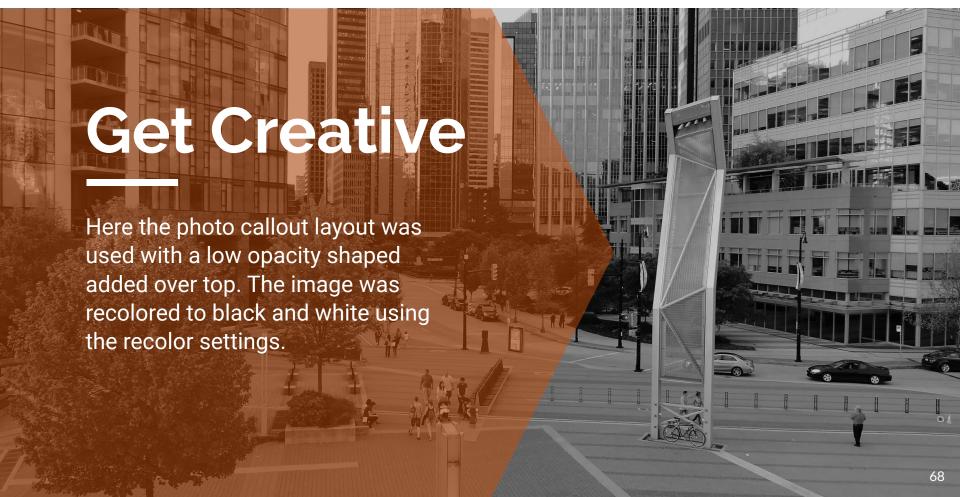


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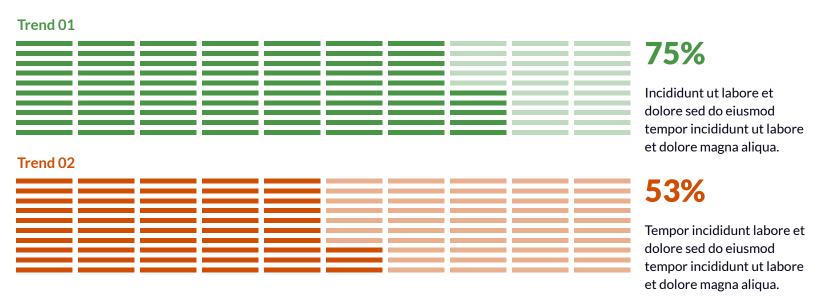






Additional Data

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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.

