



Trails for Us

How Trails Benefit Our Local
Communities

21 July 2022



THE HARBINGER CONSULTANCY



Slides will be available
after the webinar.



About Me

I help conservation, heritage and economic development organizations collaborate with small towns and rural communities, and help these communities work together regionally, often using economic analysis to fuel new approaches to sustainable growth.

- Principal, The Harbinger Consultancy — 30+ years working in rural community and economic development
- Develop and conduct online courses for land trusts, trail advocates, outdoor recreation economy builders, community leaders and community & economic development professionals
- Co-chair, National Geotourism Council, an organization dedicated to community-engaged, place-sustaining tourism

Trails for Us

How can we talk about the value of trails in a way that focuses on how trails benefit our communities?

We'll review what studies (and observation) tell us about three different kinds of community benefits and outline some (mostly) simple, practical ways you can demonstrate these for your own trails.



Trails contribute to Quality of Life



Explore Whitefish.com

Research suggests a **predictable relationship** between amenities, quality of life and economic performance in rural areas.

An **amenity** in economist speak = an attribute that enhances a location as a place of residence. Amenities are place-specific & you typically can't restore them (or it's really difficult) once they are destroyed.

Three important baskets of amenities for trail communities

Natural

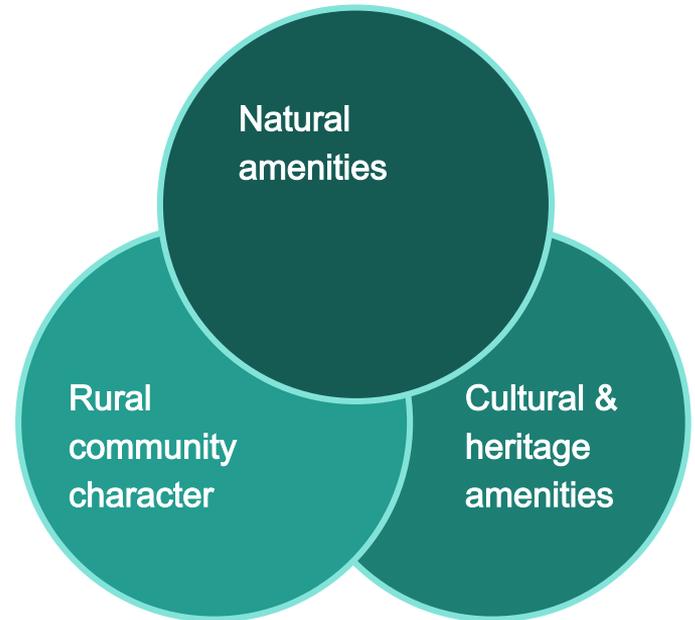
Scenic beauty, public lands & protected areas, trails, waterways, easy access to outdoor recreation, clean air & water, open space, wildlife

Rural character

“Good place to raise a family,” small-town atmosphere, social networks and community feeling (these can apply to urban/suburban neighborhoods, too)

Culture and heritage

Arts & creative sector, unique settlement patterns, social and cultural traditions, historic sites and structures, education & engagement opportunities



Six ways these amenities are important

1) Business attraction

Long-time & new business owners rate quality environment, scenic beauty, recreation opportunities, and community characteristics like small-town atmosphere higher than local tax structure or cost of doing business.

Snepenger, D.J., Johnson, J.D., and Rasker, R. "Travel-stimulated entrepreneurial migration," *Journal of Travel Research*, Summer 1995, pp. 40-44.

Figure 5 Top Five Reasons for Doing Business in the Yellowstone Region

A survey conducted in Madison, Gallatin, and Park counties (Montana) asked business owners to rate the importance of 15 variables on their decision to conduct business in the region. At the top of the list were:

1. Scenic beauty
2. Quality environment
3. Good place to raise a family
4. Desire to live in a rural setting
5. Small-town atmosphere.

Other important variables included proximity to public lands, recreation opportunities, and a low crime rate. On the whole, these business owners considered these quality-of-life factors to be more important than traditional business climate variables such as tax structure and cost of doing business.¹³

2) Population growth

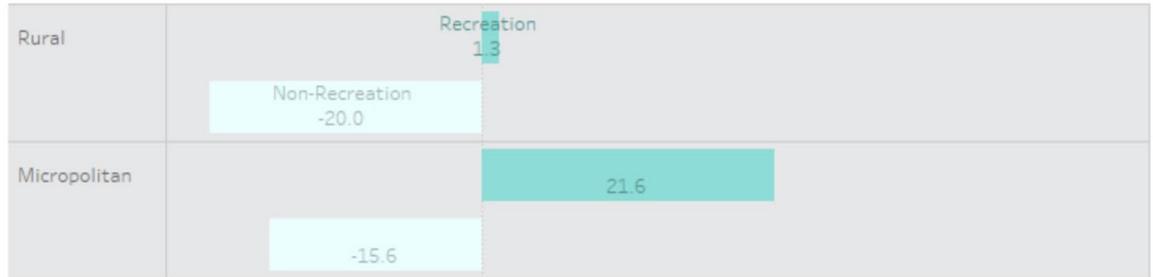
Significant correlation with population in-migration in rural counties, migration more correlated with quality of life than with economic considerations.

[Recreation Counties Attract New Residents and Higher Incomes](#)
[Headwaters Economics 2019.](#)

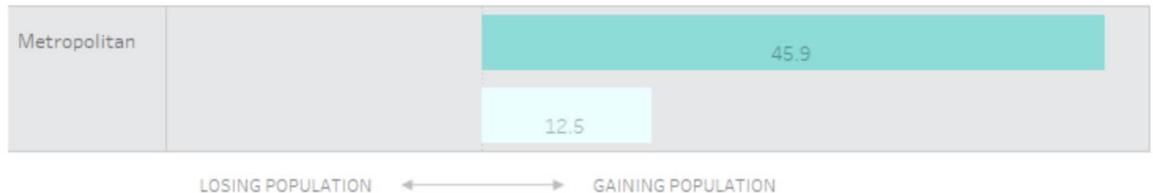
Recreation Counties Have Higher Net Migration Rates Since 2010



In non-metro areas, recreation counties are growing while non-recreation counties are losing residents on average.



In metro areas, recreation counties are gaining residents at a faster pace on average.



3) Loyalty and place attachment

People like living there and care about their place. One study found that attachment was strongest to natural, agricultural and cultural features in that order. Newer residents value natural attributes more highly; long-time residents value historic and cultural attributes more highly. (Lokocy study)

4) Support for land protection

Attachment to place motivates support for land protection and creates common ground among different community “factions” or networks.



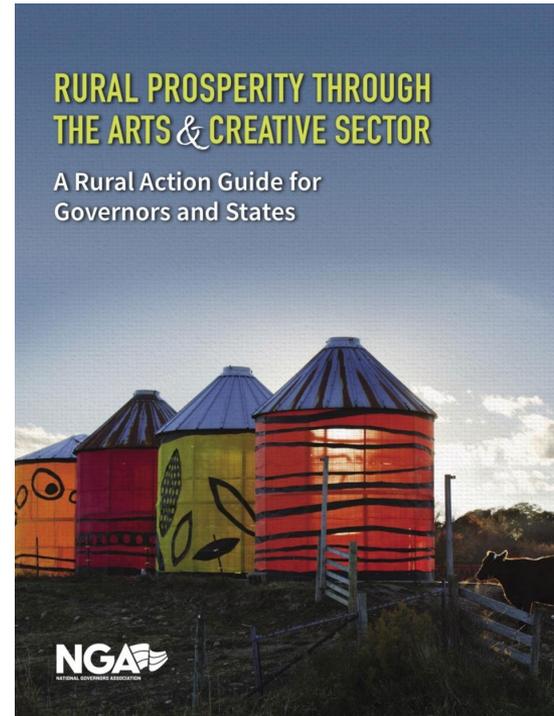
Local food producers, processors and markets are amenities for residents and visitors.

5) Community & economic development

Cultural & heritage amenities, especially, are frequently the basis for development initiatives that spur new economic activity and ultimately economic diversification. The value of the creative economy is well documented. The value of the outdoor recreation economy is becoming better known.

6) Direct economic impact

Festivals & events have clear economic impacts, and so do cultural organizations, business incubators, makers labs, historic preservation investments, and yes, trails.



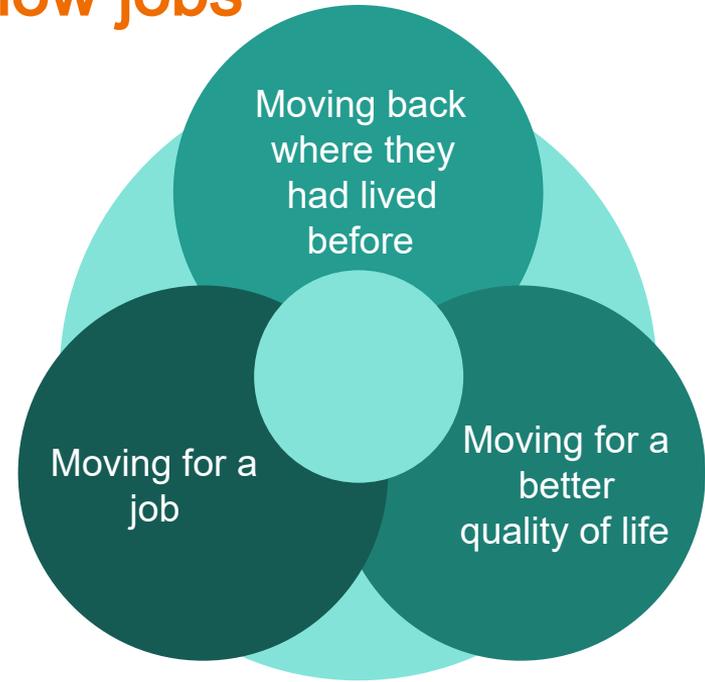
[Rural Prosperity Through the Arts & Creative Sector](#) (National Governors' Association, 2015)

The old adage was, “people follow jobs”

But now, it is equally true that jobs follow people.

In a recent study that looked at who is moving to Montana communities, why they are choosing these places, and how satisfied they are once they move there, there were three roughly equal buckets of movers.

[Montana Movers Study 2021 Report. Tara Mastel et al, Montana State University.](#)



Often fuels
“entrepreneurial
migration” → 0%

Top 5 reasons for moving

in the Montana study

- 1) To find a desirable natural environment (better access to the outdoors)
- 2) To find a less congested place to live
- 3) To take advantage of a slower pace of life
- 4) To live in a smaller community
- 5) To find a safer place to live



Explore this for your own community

Find locally relevant studies — Your state or university recreation or tourism research programs might have studies especially related to arts & culture, community economic development, recreational amenities, and historic preservation. Also, look at local comprehensive & recreation planning documents.

Do a business & resident survey — ask your own questions to explore local value

Interviews & focus groups — learn the value language of locals and explore perceptions

HEADWATERS ECONOMICS

Library of Trails Benefits

Benefit	Use	Year	Region
Select Benefit... Access (7) Business impacts (77) Consumer surplus (15) Property value (14) Public health (31)	Select Use... Cycling (70) Equestrian (14) Hiking (13) Mountain biking (35) Nordic skiing (9)	Select Year... 1985-2000 2001-2009 2010-present	Select Region... Midwest Northeast South West

Apply filter
RESET

Filtered Results (12)

The Economic Impact of Outdoor Recreation and the Whitefish Trail in Whitefish, Montana			
BENEFIT	USE	REGION	YEAR
Business impacts	Equestrian	West	2018

[Headwaters Economics Library of Trail Benefits Studies](https://headwaterseconomics.org/trail/?benefit=business-impacts&use=mountain-biking®ion=west)



The power of asking

Select Research Highlights

- In [Whatcom County, Washington](#), 95 percent of long-time residents—many of whom are mountain bikers, hikers, and trail runners—state that trails are important to their decision to stay in the area.¹
- In [Bloomington, Indiana](#), property owners adjacent to trails most commonly identified convenience and access to recreation, physical fitness, social connection, and connection to the natural environment as benefits of living near trails.²
- In [Jackson, Wyoming](#), nine out of ten respondents use pathways and trails. Residents use area pathways and trails every other day in the summer and every three days in the winter. Ninety-six percent of residents stated that outdoor recreation was an important factor in their decision to move to or stay in the area.³
- In [Missoula, Montana](#), 86 percent of residents had used city parks in the previous 12 months. Seventy-three percent of respondents used hiking trails, 56 percent used paved commuter trails, and 49 percent used natural area/wildlife habitat within the past year.⁴
- In [Methow Valley, Washington](#), one-third of residents ranked recreational opportunities as the top reason why they moved to the area. Ninety-three percent of residents reported that the trail network was either the most important (63%) or an important (30%) factor in their decision to purchase real estate in the valley.⁵

These are the kinds of things you can learn if you ask. Also, these studies can give you models and ideas for asking these questions.

[Measuring Trail Benefits: Quality of Life, Headwaters Economics, 2016](#)



Need help?

University of Kansas Community Tool Box

3.6 Focus groups — plan, prepare, conduct and use focus group results

3.13 Surveys — creation, distribution, collection and utilization

+ Loads of other ideas like

3.20 Photovoice — participatory research using photos or videos

The screenshot shows the Community Tool Box website interface. At the top, there is a logo with two stylized figures and a sun, followed by the text 'COMMUNITY TOOL BOX'. Below the logo is a search bar with the placeholder 'Enter your search' and a 'Search' button. To the left of the search bar are social media icons for Google+, Facebook, Twitter, YouTube, and a plus sign. To the right is a location indicator showing '620' and a world map with 'English' selected. A 'Donate' button is also present.

The main navigation bar contains five categories: 'LEARN A SKILL' (how-to information), 'HELP TAKING ACTION' (guidance for your work), 'CONNECT' (link with others), 'ABOUT' (the tool box), and 'SERVICES' (supporting collective impact).

The breadcrumb trail reads: Home » Table of Contents » Community Assessment » Chapter 3. Assessing Community Needs and Resources » Section 6. Conducting Focus Groups » Main Section.

The current page is 'Chapter 3', with a 'Table of Contents' link. A horizontal navigation bar shows page numbers 1 through 46, with 42-46 highlighted in a dark green bar.

The main heading is 'Section 6. Conducting Focus Groups'. Below it, there are tabs for 'Main Section' (selected), 'Checklist', and 'Examples'. A 'PowerPoint' link is also visible.

The content area shows 'CHAPTER 3 SECTIONS' with 'Section 1. Developing a Plan for Assessing Local Needs and' partially visible. A text box below states: 'Learn how to plan, prepare, conduct, and use focus group results to receive qualitative data for deeper understanding of community issues.'

Trails contribute to Community Health



Research suggests a predictable relationship between **access to recreation facilities** like trails and **levels of physical activity** .

Also between levels of physical activity and **overall health** and **health care cost reductions** over time.

Promoting activity among people who don't typically exercise



WV Railsto-Trails Council

A study of two trails in and near Morgantown, WV, (pop. ~30,000) found that one-quarter of trail users had not been active before the trail was built, and report large increases in physical activity since they began using the trail.

For most of these newly-active residents, the trail was the only place where they exercised and they report the trail's safety, paved and flat terrain, and convenience as the most important considerations in deciding to use the trail.

[Use of a Community Trail Among New and Habitual Exercisers, Paul Gordon, et al, 2004](#)

Trails = more physical activity = cost savings

In Brownsville, people who live near trails

exercise
22%
more



than those who do not.

Completing 93 miles of proposed multi-use trails would boost physical activity,

saving
\$5.9-\$12.3
million

in health care costs

[A Healthy Advantage: Expected Economic Benefits from Implementing the Lower Rio Grande Valley Active Transportation and Tourism Plan](#) (The Harbinger Consultancy, Sept. 2017)



How did we do it? Three steps.

1. Trail proximity & increased physical activity

Health studies —physical activity can increase 40 or 50 percent with trail access close to one's home. We used physical activity data collected over time in Brownsville geolocated for physical proximity to trail + before/after a local hike/bike trail opening.

FINDING People who live within 1/4 mile of a multi -use trail engage in **22 percent more moderate physical activity** than those who do not.

2. Physical activity = better health = cost savings

Brownsville data showed 50% of adults reported no physical activity in at least a week, and 70% have at least one chronic health condition esp. overweight related.

Published, peer-reviewed studies estimate **per-capita health care costs resulting from physical inactivity at between \$228 and \$476 per year.** We thought of these as potentially avoided costs.

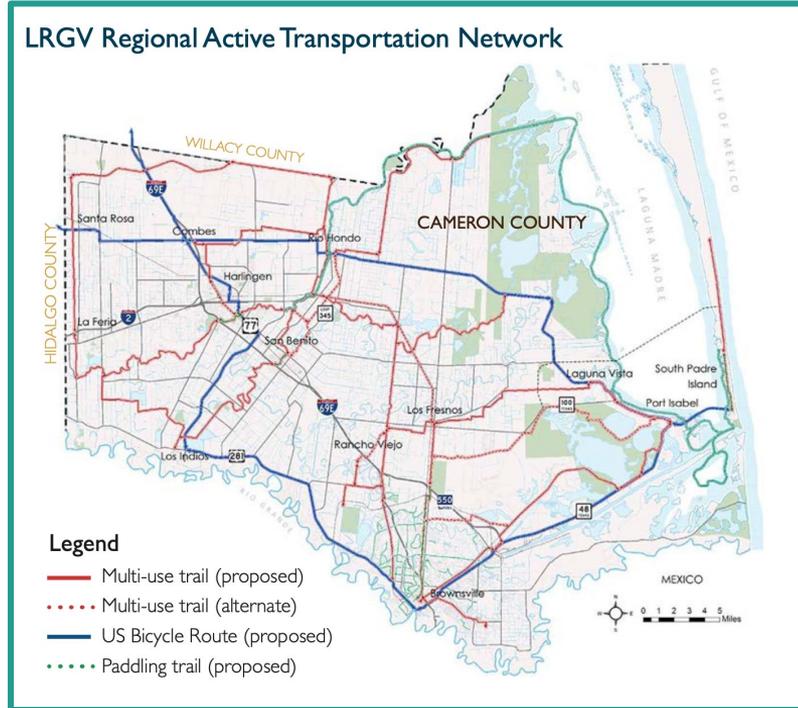


How did we do it? Three steps.

3. Cost savings for proposed multi-use trail network

Projecting the conservative 22% increase in physical activity to Cameron County residents living near the proposed Active Plan multi-use trail network, **annual health care cost savings from avoided costs of physical inactivity** would range from \$5.9 to \$12.3 million.

We used census block data to estimate the population that would live within $\frac{1}{4}$ mile of one of the proposed multiple use trails in the network.





Need help?

Schools of Public Health

Health & physical activity cohort data.
Affiliated faculty, researchers and graduate students.

Local/county health departments

Health & physical activity cohort data.

The screenshot shows a web browser displaying the 'Trails Benefits Library' page on the Headwaters Economics website. The URL is headwaterseconomics.org/trail/?benefit=public-health. The page features a navigation bar with 'Research', 'Tools', and 'About Us' links, and a search icon. Two research entries are visible:

Economic and Health Benefits of Bicycling in Northwest Arkansas

BENEFIT	USE	REGION	YEAR
Business impacts Property value Public health	Cycling Mountain biking	South	

In northwest Arkansas, a substantial investment in paved and unpaved trails has contributed substantially to the region's well-being (measured in improved health) and economic performance (measured in visitor spending and employee retention). Evidenced by residents' interest in living close to trails and willingness to pay more for homes near trails, cycling is an essential part of life in this region.

CITATION
BBC Research and Consulting. 2018. *Economic and Health Benefits of Bicycling in Northwest Arkansas*. Prepared for The Walton Family Foundation and PeopleForBikes. Denver, CO: BBC Research and Consulting.

[Summary & Interpretation](#)

Association between active commuting and incident cardiovascular disease, cancer, and mortality: prospective cohort study

BENEFIT	USE	REGION	YEAR
Public health	Cycling Walking	International	2017

This large study of U.K. residents finds that those who walk or bike to work have significantly lower

[Headwaters Economics Library of Trail Benefits Studies](#)



Need help?

Three rules of thumb for identifying locally relevant studies and data sources if you don't have local data you need.

- 1) Pick studies from **situations that are similar to yours**
- 2) Pick data sources that are **close to home**
- 3) Make sure they have the **data you're missing**

Trails contribute to Local business growth and success



Research and plain old observation suggest that trails can affect business location decisions , business expansion, and new business formation .

This can be seen especially in communities that have decided to leverage their trail proximity —or create it for themselves. Many Trail Town programs are designed to enhance community vitality by making direct trail-to-business connections. Bike Friendly Business programs are similarly focused (though not always just on trails).

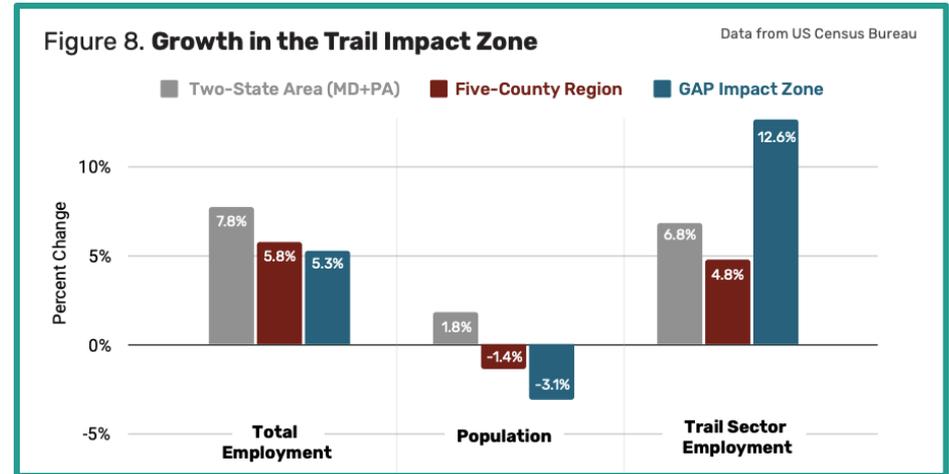
Longdistance trails and trail networks yield the biggest effects they are the most studied)

Great Allegheny Passage (GAP)—150 miles, Pittsburgh PA to Cumberland MD

2007-2015 137 new trail-related businesses opened in GAP Trail Towns. There were 72 business closings during the same period, resulting in a net gain of 65 new businesses. 270+ net new jobs were created

25 businesses expanded operations and 15 changed hands.

Estimated Sales Related to Trail Traffic:
2008: 25%, 2012: 30%, 2013: 34%, 2014: 40%



[Great Allegheny Passage Economic Impact Report. Fourth Economy, 2021](#)

Smaller trails and networks also yield business benefits...you just m dig for them more



Graham Sevier

Owner
7th & Park, Brownsville

“When we decided where to locate our new business, trail access was our top priority. Small businesses such as mine can be in a good position to benefit from expanding the trail network, and from subsequent increases in tourism and active lifestyles.”

7th & Park Cycles and Coffee in Brownsville, TX, is a coffee shop + bike shop that started as a trailhead weekend popup in the park near a trailhead to a <10 -mile multi -use path connecting downtown with Palo Alto National Historical Park.

How do you learn about these stories?
Ask!

“If you build it, they will come” only sort of works

Using data to focus business growth

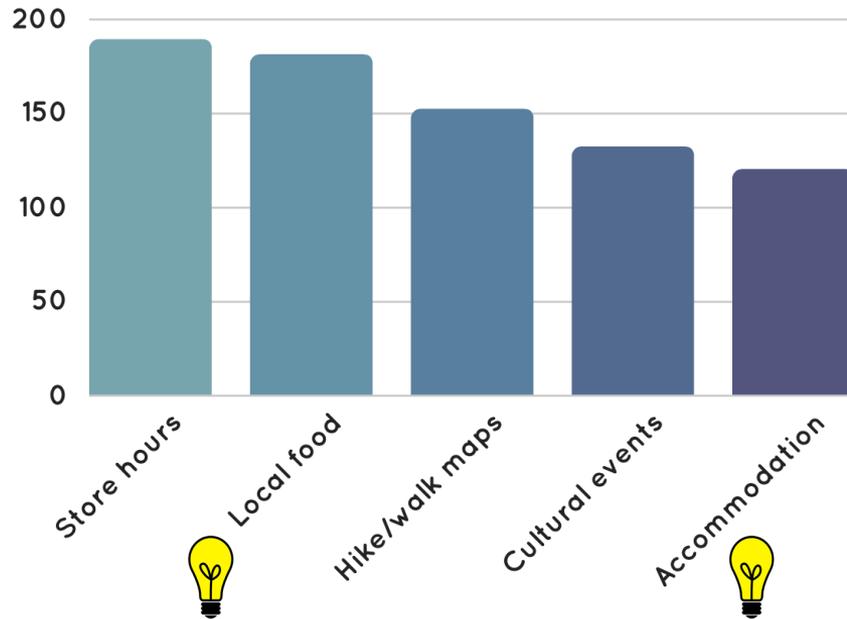


Perry (pop. 3,400) is one of ten participants in the new [Genesee Valley \(NY\) Trail Town initiative](#). It pitches itself as Letchworth State Park’s “Main Street,” but it has taken a lot of focused effort to make that description meet reality.

On the shoulders of a few years of dedicated effort on downtown improvement (including a community investment model they call [Main Street LLC](#)), the community was ready to focus seriously on business growth.

What to focus on?

Top 5 Improvements Needed



[2017 visitor survey](#) conducted in conjunction with two other villages, both of which also neighbor Letchworth State Park.

Perry took the kinds of businesses visitors wanted to heart. (And the other priorities, too.)

New Perry local food & drink, hospitality & retail businesses s



Food with local flair

Brooklyn Pizza
Butter Meat Co.
For the Love of Flour
Ration Wine Bar

Accommodations listings

Dell Collective lux Airbnb

Specialty retail Outdoors

Endlessly

Loch Life – Perry
Pip Pop Perry Pop Up – World’s
Smallest Wool Shop
11 Covington
Books & Fields

How it happened

- Personal relationships
- A welcoming community of entrepreneurs and business owners
- Local government and business leaders paying attention to the look and feel of downtown & creating spaces for businesses
- Matching entrepreneurs to spaces
- Micro-business support and encouragement (including digital)

More ideas See Letchworth Gateway Villages [Digital Main Street](#) project including one-on-one digital coaching, and [Growing Food Tourism](#) project.



Butter Meat Company

Business benefits can also sneak up on you

(John Coen, Ottawa, KS, Chamber President) "Our thoughts and ideas for the trails have evolved over the years as we have seen advantages created. We certainly didn't have all that vision going into it...though I would like to take credit for that."

What's next?

We still don't know what we don't know, but are willing to look at all possibilities.

Hmm...how can we get a piece of the action?

How can we use trails to connect our community?

New businesses

We didn't expect 14 B&Bs & Airbnbs

In-town trails

How can we get people in Ottawa outside and exercising more?

Linking to linear trails

Pocket parks

How can we get families to spend more time on local trails?

What about older kids who don't like hanging out with parents?

Teen park

Or recruit business owners as your eyes and ears

Bonus — this approach can help develop allies within the business community. Get together quarterly for an informal conversation about what you're learning.

- 1) Where are you traveling from, and how long are you planning to be in this area?
- 2) Is this your first time here, or are you a repeat visitor?
- 3) Why are you here? Are you visiting X trails (or event)? What kinds of outdoor recreation are you doing while you're here?
- 4) What has been your favorite part of our trip so far? Is there anything that would have made your stay more enjoyable?
- 5) How did you learn about this area? My business?
- 6) Have you seen our trail (or visitor or history or ???) website?



Explore this for your own community

Track downtown/business district changes — Vacant and abandoned/blighted buildings, net business growth, net job growth, properties brought into code compliance. Trends can be compelling: The storefront occupancy rate in downtown Dunedin, FL, increased from 30 percent to 95 percent following the establishment of the nearby Fred Marquis Pinellas Trail (50 miles).

Track municipal health — value of capital assets, total property valuation, dollars in grant funding, local tax rate, fiscal stress

Do a downtown market/business district analysis — demonstrate value, explore new business opportunities, help businesses capture more sales



University of Wisconsin Extension DIY tool.

https://economicdevelopment.extension.wisc.edu/programs/downtown-market-analysis/?ss_redir=1



Need help?

Municipal officials, Main Street groups, Chambers

Data, connections to business community, observations of downtown changes.

Kansas Community Toolbox

Guidance for surveys and focus groups.

The screenshot shows a web browser window with the URL headwaterseconomics.org/trail/?benefit=business-impacts. The page features the Headwaters Economics logo and navigation links for Research, Tools, and About Us. Two case study entries are displayed:

Trail Usage and Value: A Helena, MT Case Study

BENEFIT	USE	REGION	YEAR
Business impacts Trail use estimates User attitudes	Hiking Mountain biking	West	2018

In Helena, Montana, an 80-mile hiking and mountain biking trail system attracts more than 63,000 trail users during the summer. Seven in 10 users are residents, but visitors who use the trail system account for \$4 million in spending, support 60 jobs, and generate \$185,000 in state and local taxes.

CITATION
Sage, J.L. and Nickerson, N.P. 2018. Trail Usage and Value-A Helena, MT Case Study. Missoula, MT: Institute for Tourism and Recreation Research, College of Forestry and Conservation, University of Montana.

Summary & Interpretation

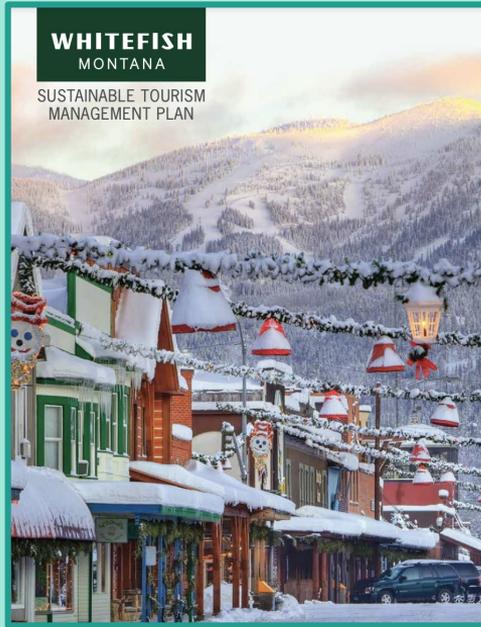
Silver Comet Trail Economic Impact Analysis and Planning Study

BENEFIT	USE	REGION	YEAR
Business impacts Trail use estimates	Cycling Walking	South	2013

West of Atlanta, Georgia, the Silver Comet Trail plans to double its 61 miles. This is expected to bring more than 500,000 new tourist visits and \$30 million in new spending to the area, while also generating substantial new tax revenues for the state through taxes on sales, income, and newly developed residential

Bonus

About those visitors...



[Whitefish Sustainable Tourism Management Plan](#)

On many trails, local users (often 75 -90%) outnumber visitors by a long shot, but that 10% can make a big difference for local businesses, and also for the kinds of services that are available to residents.

On the Whitefish Trail, 22,000 annual uses by visitors (30% of total use) generates \$3.6 million in spending and supports 68 jobs.

[The Economic Impact of Outdoor Recreation and the Whitefish Trail in Whitefish, Montana. Headwaters Economics, 2018.](#)

Locals spend money, too

Economic Impact Analysis

Economic **impact**

How many dollars do you attract from outside your area & how much does that “new money” benefit your place?

Economic **significance**

How many dollars are spent by all visitors & how much total economic activity does it support?



Explore this for your own community

Ask business owners — How much of your revenue comes from trail users? How important were the trails to your decision to open or expand? Are you expanding to better serve trail users?

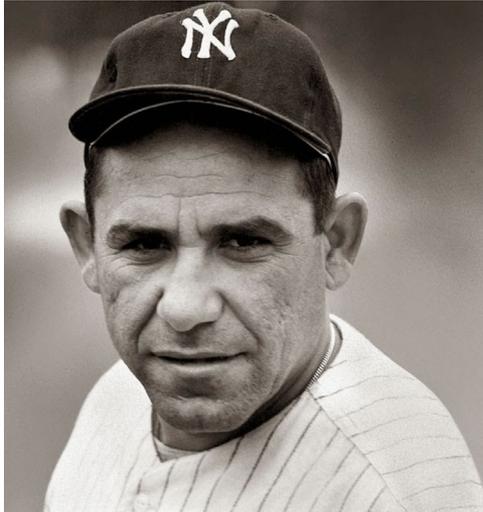
Get ideas about what to ask from the [GAP Economic Impact Study](#).



Amy Camp photo

A side note

Open your mind



You can observe a lot by just watching.- Yogi Berra

- **Keep an open mind.** You may have a great sense of what you're going to learn. You might even be right. But don't build your research to confirm that.
- **Build your message on the facts** , not on what you want the facts to be.
- **Study to learn, not just to advocate.** What you learn might help you fine-tune programs, identify issues and solutions, ask new questions.

What else can you explore and explain?

Some other benefits of trails for local communities

- 1) Transportation — integration with safe routes to school, connecting community resources
- 2) Appearance and safety — Northern Central Rail Trail "Before it was redeveloped as a greenway, the rail corridor was a "magnet" for illegal dumping, vandalism, and illicit uses by adolescents and others. Now, as a prized local resource, the NCRT is "policed" by residents and problems along the corridor have decreased dramatically."
- 3) Festivals and events
- 4) Community engagement (usually there are lots of trail user groups)
- 5) Green space and connectivity
- 6) Cultural and historic preservation

Online Courses for Trail Advocates & Community Builders

Full slate of Fall 2022 courses: <https://www.harbingerconsult.com/online-courses>



Outdoor Recreation Roadmap: A Community-Led Approach to Leveraging Your Natural Assets for Economic Success and Local Renewal

Six 1-hour sessions, Thursdays, Sept. 22 - Oct. 27, 2022. Learn how to make the outdoor recreation economy work for your community to generate more awareness and buy-in, make quick progress that can be sustained over time, and create meaningful changes that make a difference for your community's business and economic vitality, physical health and confidence. Learn a step-by-step process that you can adapt to use "nature-based placemaking" to transform how your community sees, talks about and invests in itself to make it a more attractive place to live, visit and do business.



Tell the Economic Story of Your Conserved Lands and Trails Without Hiring an Economist

Tuesdays, Oct. 25-Nov. 22, 2022. Five 1-hour sessions. Great for building support and funding for private land conservation and trail projects. Learn to research, analyze and communicate a range of economic and community benefits associated with your programs, trails and conserved lands.



Do-It-Yourself Trail Research You Can Start Right Away

Inquire about dates or offering this course to your group. Three 1-hour sessions.

In this course, you will learn how to pull together—and pull off—a meaningful trail study that you can afford. You'll emerge with a plan for a trail study that you can implement right away, whether you have money or not, using targeted volunteer effort, free or low-cost tools, and an approach focused on what you most want or need to learn. You will also learn how to analyze your results, present findings, and use your study to catalyze action.

15% discount on all courses for webinar participants
Use discount code AmericanTrails

Thanks!!

Keep in touch. Really.

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