

# North Carolina Trails

*A Path Forward for Economic Growth and Job Creation in NC*

**North Carolina Trail Coalition (NCTC)**

**Summer 2014**

# Meeting Purpose / Agenda

Explore how the State of NC and the three largest trail non-profits can partner to make trails an element of the overall strategy to grow the economy and create jobs.

## Agenda:

- Mutual Goals
- Who we are
- Economic Impact of Trails
- Discussion

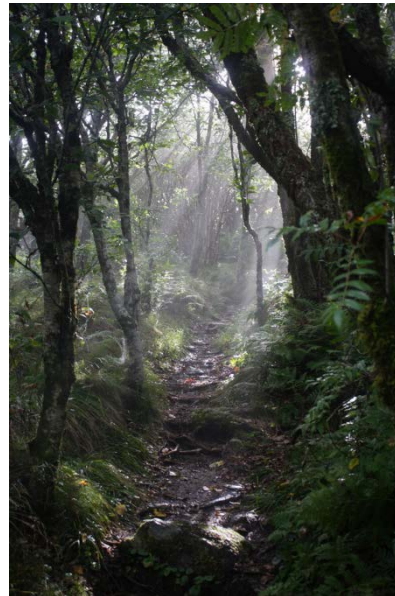
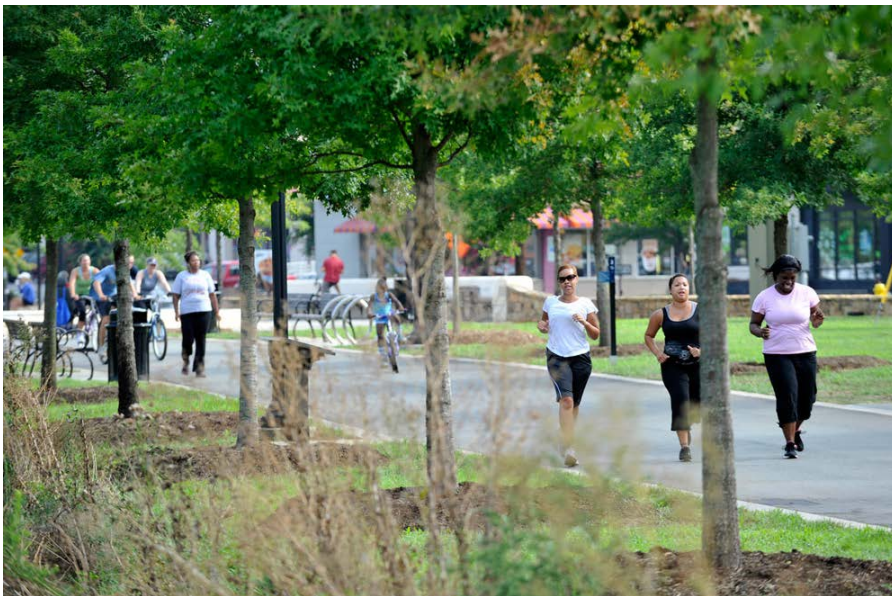
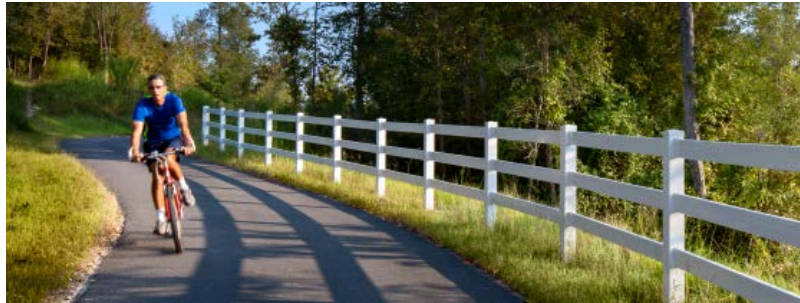


# Trails Support Goals of all State Departments

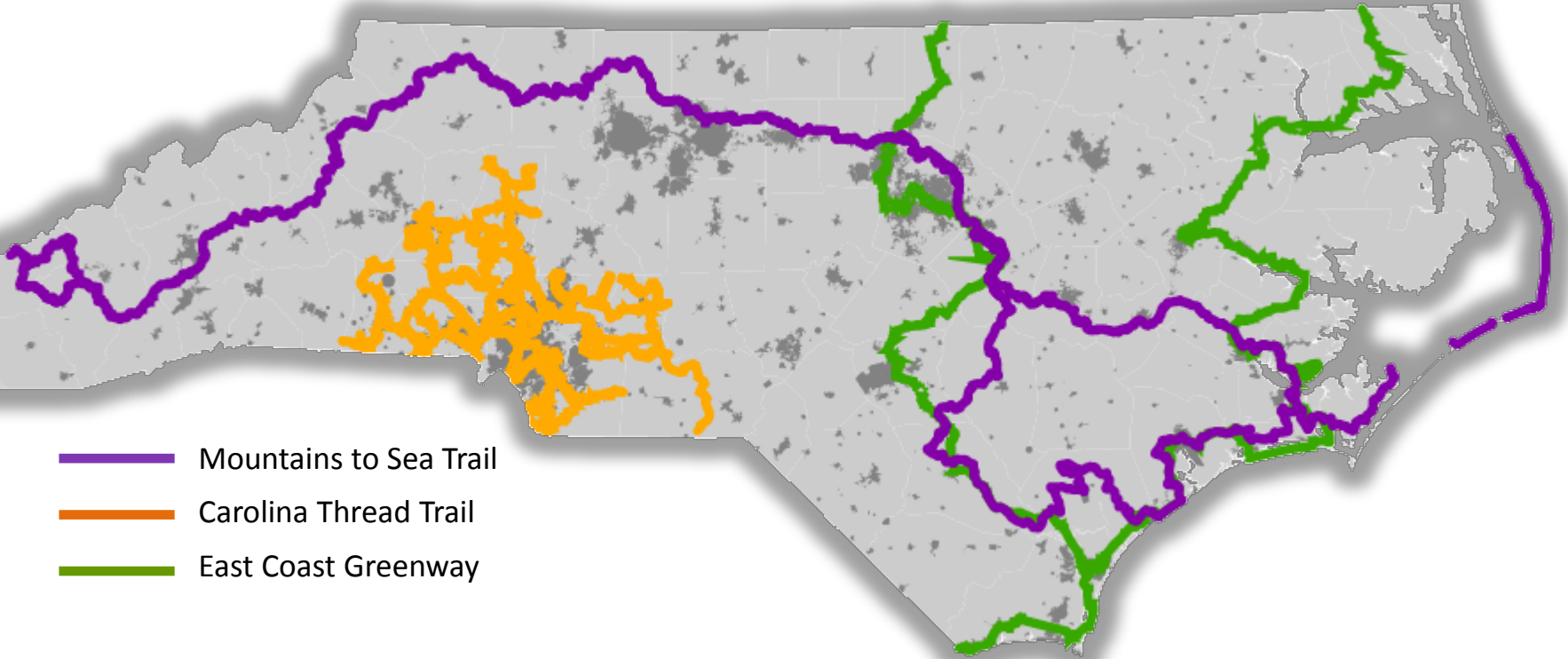





# Our Goal

Make North Carolina the **Great Trails State**



# We Connect North Carolina

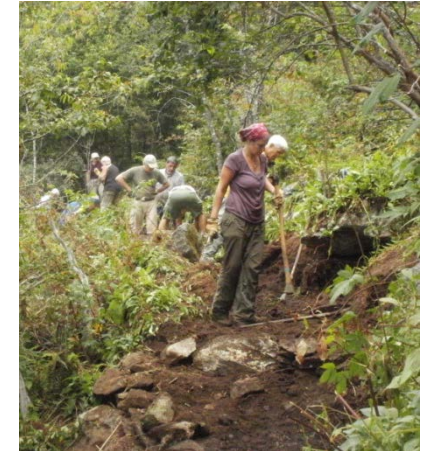


-  Mountains to Sea Trail
-  Carolina Thread Trail
-  East Coast Greenway

Our combined trail networks will connect over **5.4 Million residents**, span more than **2,800 miles** and touch **64 counties**.

# Mountains-to-Sea Trail

North Carolina Mountains-to-Sea Trail - Statewide Status  
Current Trail/Road Route and Future All Trail Route  
March 12, 2014



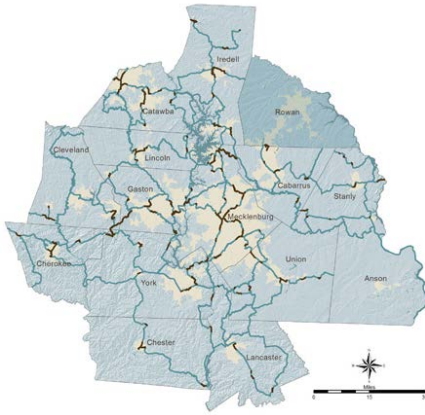
- VISION**
- 1000+ mile walking trail
  - Showcases extraordinary natural and cultural places
  - 37 counties
  - 1.8 million people
  - 501 (c) 3 since 1997
  - MST added to State Park system in 2000
  - **\$1 million** private since 2007

- TRAIL BUILDING**
- 1000 FMST volunteers maintain 530 miles of trail
  - Donate 25,000+ hours per year
  - Save State Parks \$526,000 per year

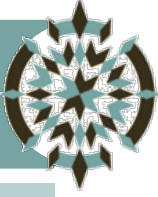
- HELPING PEOPLE HIKE THE TRAIL**
- Printed online and hiking guides and maps
  - Provide back road connecting route so people can hike entire state now
  - Recognize completers and major trail developments

- STATUS**
- 620 miles already complete
  - Launching Trail Town program to help communities benefit economically
  - Raising additional funds

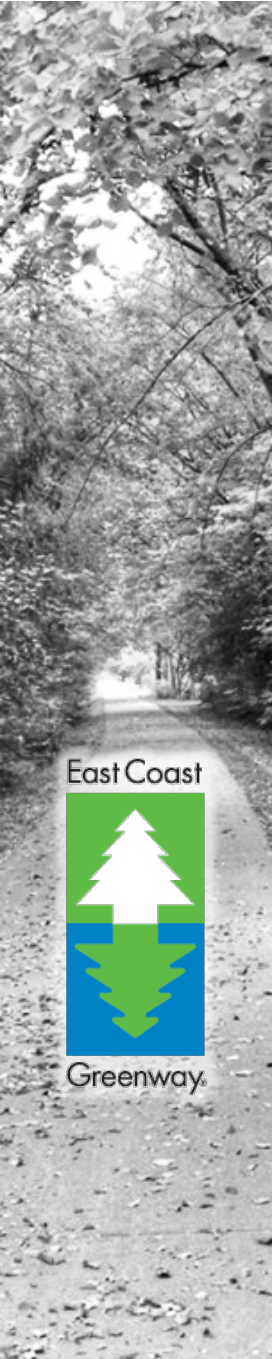
# Carolina Thread Trail



VISION	MASTER PLANNING	TRAIL BUILDING	STATUS
<ul style="list-style-type: none"> <li>• 11 counties in NC</li> <li>• 4 counties in SC</li> <li>• 2.6 million people</li> <li>• 501 (c) 3 Trail Organization since '07</li> <li>• <u>\$16.8 million</u> private</li> </ul>	<ul style="list-style-type: none"> <li>• Year-long process of community self-determination and public workshops</li> <li>• 76 local government have adopted master plans totaling 1,460 miles</li> </ul>	<ul style="list-style-type: none"> <li>• Communities, volunteers, Thread collaborate                             <ul style="list-style-type: none"> <li>• design</li> <li>• build</li> <li>• maintain</li> </ul> </li> <li>• Received <u>\$7.5 million</u> in land donations</li> <li>• <u>\$26.5 million</u> in public funding</li> </ul>	<ul style="list-style-type: none"> <li>• 217 miles complete</li> <li>• Raising additional funds</li> <li>• Future signature 140 mile North-South spine will connect <u>860,000</u> NC citizens and generate 6.6 million in tax revenue</li> </ul>



# East Coast Greenway



## VISION

- Urban Sister to Appalachian Trail
- Linking Communities from Key West to Maine

## TEAM

- 27,000 supporters and followers
- Headquarters Relocated to the Triangle in 2011
- NC State Committee Includes 17 MPOs and RPOs  
Advisory Seats for NCDOT and NC State Parks  
Grassroots Trail advocates

## STATUS

- 10 million visits per year
- 850+ miles of greenway complete
- Triangle over 90% complete for 75 miles
- Growing national press coverage including Wall Street Journal and NY Times





# What Does the **Great Trails State** Look Like?



Thriving Economy



Top Tourist Destination



Healthy Residents



Transportation Alternatives



# Topics Today



**Thriving Economy**



**Top Tourist Destination**



Healthy Residents



Transportation Choices



# Trails Support Stronger Economy

## Jobs Created or Supported

*Fred Smith Company has been honored to provide construction services associated with the expansion of North Carolina's trail systems, which has **stimulated our economy by more than \$23,000,000** and provided work for **hundreds of employees and subcontractors**.*

~Fred Smith, Founder  
The Fred Smith Company



## Reliable Tourist Spending

*Direct spending in Mount Airy by visitors who use the greenways is estimated to be **\$578,585**. The number of visitors along with their spending makes the greenway system an **important part of the overall tourism offerings in Mount Airy**.*

~Erick T Byrd, PhD. , UNCG  
Bryan School of Business and Economics

## Increase Property Values

*Builders say having a project on the Katy Trail has become money in the bank. There is a **25% premium** for having their product back up to the trail.*

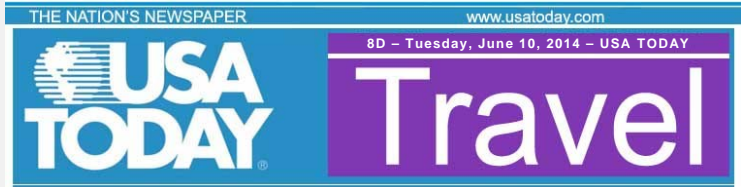
~Dallas Morning News

## Recruit & Keep Businesses

*Building our network of **trails is an essential investment that enables the Research Triangle Park to remain globally competitive** by allowing us to **attract the type of workers that companies want with amenities professional workers demand**.*

~Liz Rooks, Vice President  
Research Triangle Park

# We Have Great Trails to Market



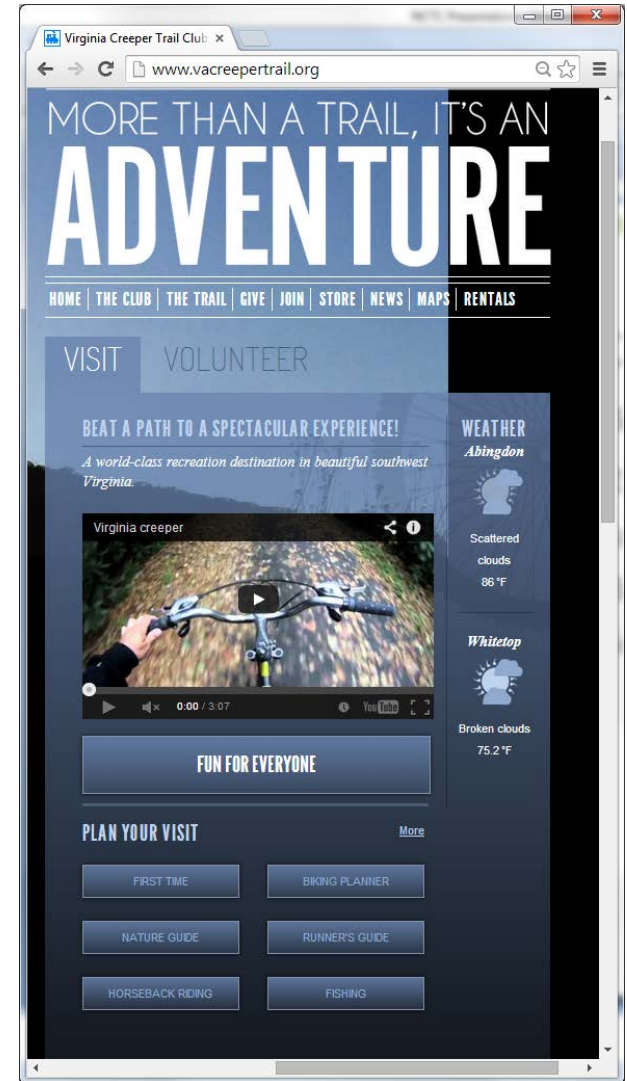
## 15 Fantastic Bike Trails

Trail	Miles	
Paseo del Bosque Trail, NM	35	<b>Neuse River Trail - 34 Miles</b> Wake/Johnston Counties
Mohonk Preserve Trails, NY	30	<b>American Tobacco Trail - 23 Miles</b> Durham/Wake/Johnston Counties
Bear Creek Greenway, OR	26	<b>Gary Shell Trail – 15 Miles</b> Wilmington, NC
Mid-Mountain Trail, UT	26	<b>Bicentennial Greenway - 14.5 miles</b> Greensboro
The Wild Azalea Trail, LA	26	<b>Black Creek/White Oak – 11.8 Miles</b> Cary, NC
Rock Creek Park, DC	25	
Hockhocking Adena Bikeway, OH	20	
Shining Sea Bikeway, MA	11	
Tony Knowles Coastal Trail, AK	11	
Skyline Wilderness Park Trails, CA	10	
Mammoth Cave Railroad Trail, KY	9	
Discovery Trail, WA	8.5	<b>Mallard Creek Trail – 7 Miles</b> Mecklenburg County
Animas River Trail, CO	7	<b>Cape Fear River Trail – 4 Miles</b> Fayetteville, NC
High Bridge Park Trail, NY	3	
Memorial Park Trails, TX	3	

# Virginia Investment in Trail Tourism

## Virginia Creeper Trail

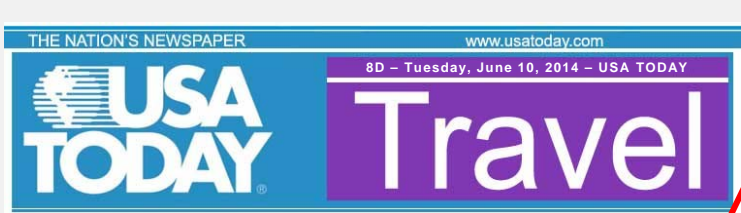
- Damascus, VA – Pop 981
- “Trail Town USA”
- Over 100,000 Visitors per Year  
(American Tobacco Trail is over 200,000)
- 34 Miles long  
(Neuse River Trail is also 34 miles)
- Businesses within 8 Miles
  - 10 Bike Rental / Provision companies
  - 9 B&Bs
  - 5 National Hotel Chains
  - 27 Restaurants



Robust Website and Smart Phone App

# The Bigger Picture

*When we consider all types of trails North Carolina is even better positioned to attract trail tourism.*



## 15 Fantastic Bike Trails

Trail	Mile	
Paseo del Bosque Trail, NM	35	MST Balsam Gap to Stone Mtn – 300 Miles
Mohonk Preserve Trails, NY	30	MST Eno to Clayton – 105 Miles
Bear Creek Greenway, OR	26	Appalachian Trail – 88 Miles
Mid-Mountain Trail, UT	26	MST Pilot Mtn to Hanging Rock – 40 Miles
The Wild Azalea Trail, LA	26	Neuse River Trail - 34 Miles Wake/Johnston Counties
Rock Creek Park, DC	25	American Tobacco Trail - 23 Miles Durham/Wake/Johnston Counties
Hockhocking Adena Bikeway, OH	20	Gary Shell Trail – 15 Miles Wilmington, NC
Shining Sea Bikeway, MA	11	Bicentennial Greenway - 14.5 miles Greensboro
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High Bridge Park Trail, NY	3	Cape Fear River Trail – 4 Miles Fayetteville, NC
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# Economic Impact Metrics \*

Economic Benefit	Metric	Rural/Transitional	Urban/Suburban
<b>Increased Residential Property Values</b>	% Property premium	Trail specific	2% - 32%
<b>Revenue from Local/Regional Events</b>	Events / Year	Not yet available	3 - 173
	Revenue / Event	Not yet available	\$21K - \$306K
<b>Trail User Spending / visit</b>	Local Spending	0 - \$ 68	0 - \$ 50
	Tourist Spending	\$74 - \$138	\$ 50 - \$150
<b>Jobs Created / Supported</b>	Jobs / mile	1 - 2	10 - 25
<b>Tourism / Visitor Counts</b>	Visits / mile / year	3,800 – 15,000	20,000 – 77,000

\* Based on review of over 40 relevant studies on real trails in southeast USA and actual user surveys.



# One Example: North-South “Spine” in Charlotte region

## North Carolina Segment

- 89 miles in length
- 25 miles complete
- ~ \$25 MM invested

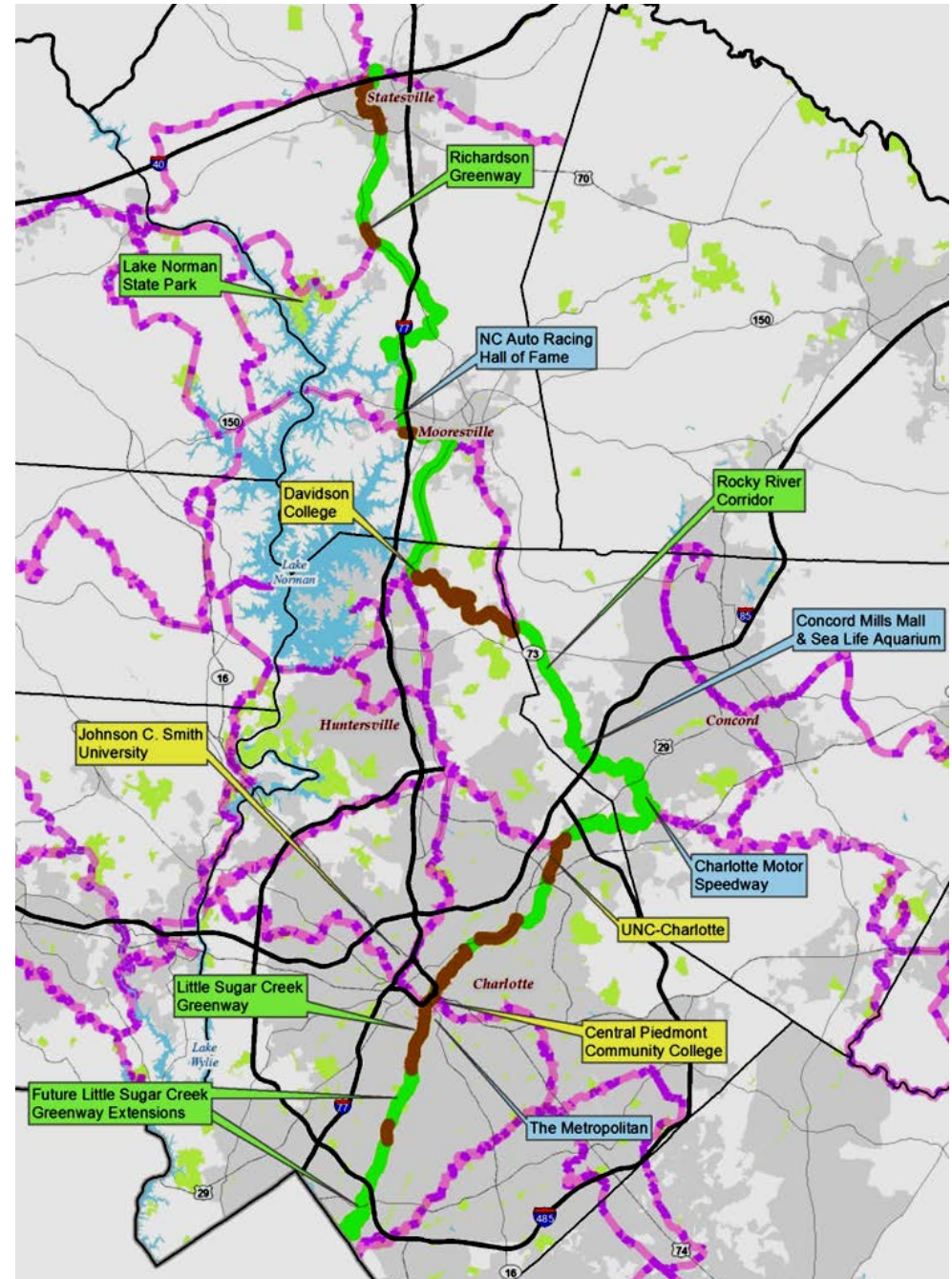
## Needed for completion

- \$60 million
- \$11MM already committed
- ~ \$49 MM needs to be raised
- 10 year timeframe

## When completed, “Spine” will

- serve 860,000 NC residents
- generate estimated \$6 MM annually in tax revenue

**Payback : less than 10 years**

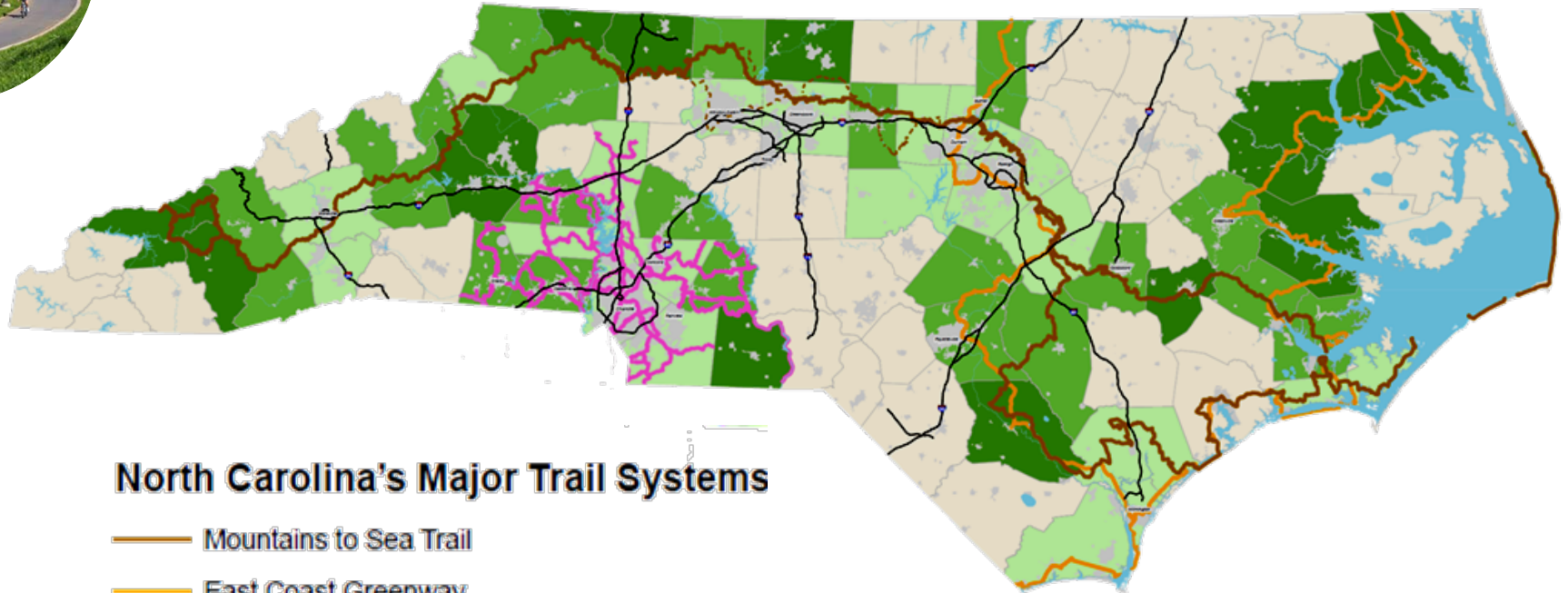


**CAROLINA  
THREAD  
TRAIL**



# Benefits Both Urban and Rural Economies

- Three Trail Systems Connect 64 Counties
- Diverse Economic Challenges
- Long Distance Trails **Amplify** Economic Impact



## North Carolina's Major Trail Systems

— Mountains to Sea Trail

— East Coast Greenway

— Carolina Thread Trail

■ Tier 1 County (19)

■ Tier 2 County (26)

■ Tier 3 County (23)



# NC Trail Funding Overview

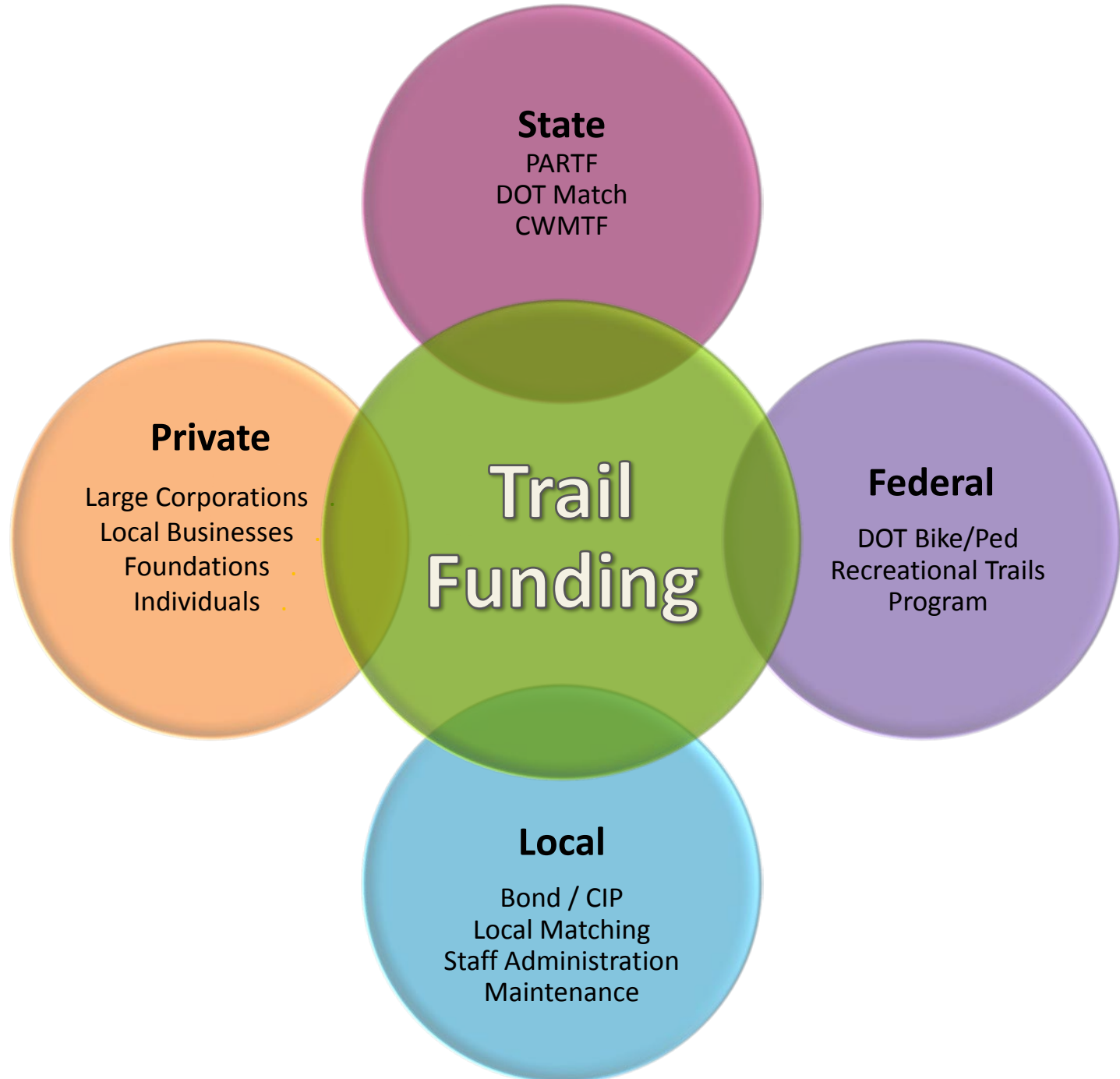
- North Carolina about equal to neighboring states; significantly less than Florida
- Approximately 45% state funding reduction last year (from about \$6.6MM to about \$3.6MM)
- 20% State match for federal dollars defunded in 2013
- Historically state funding an important incentive for local and private investment
- Some local governments using innovative sources



# Private Sector Engaged

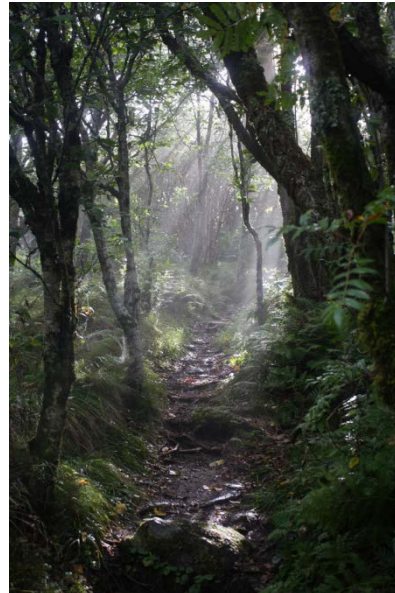
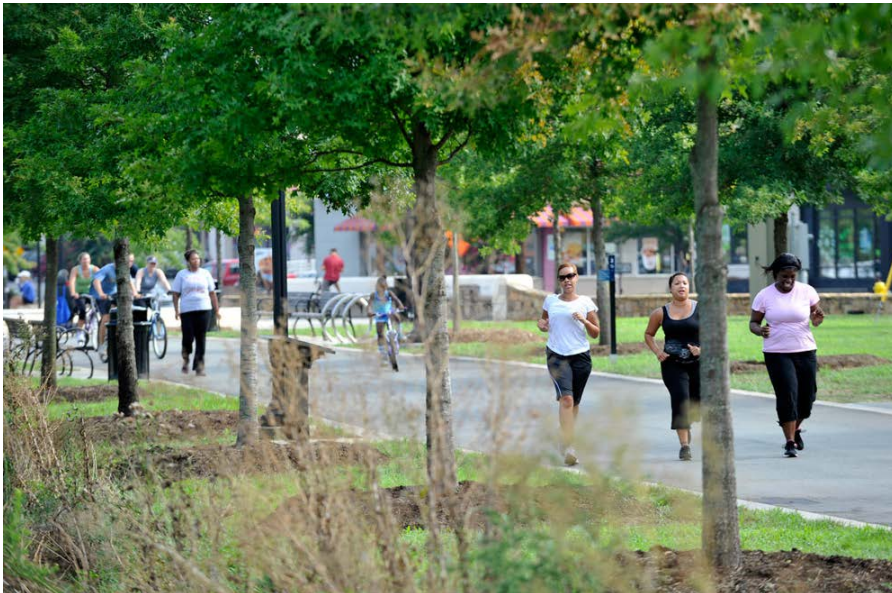


# Trail Funding Strategy



# Our Goal

Make North Carolina the **Great Trails State**



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Make North Carolina the **Great Trails State**

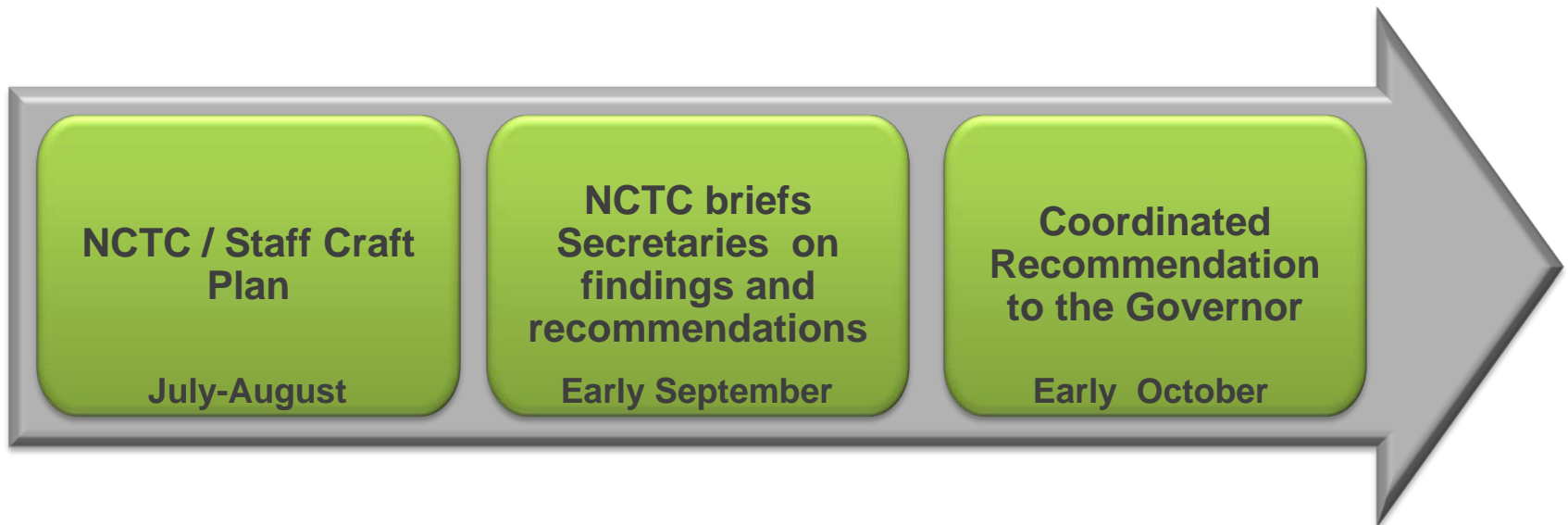
- **Leverages** trail investments
- **Promotes** NC as tourist and retirement destination
- **Connects** to North Carolina scenic beauty
- **Engages** established non-profit trail organizations
- **Provides** highest requested recreational amenity
- **Touches** broad community needs: vital economy, healthy lifestyles, water and air quality, transportation



# Request

*Work with us to craft a plan that makes trails an integral part of North Carolina's economic and job creation strategy.*

- Market North Carolina's Trails
- Optimize existing trail programs
  - Streamline current programs
  - Preserve funding levels
  - Prioritize trails in existing programs
- Increase state funding in 2015 for long distance trails



# Outcome

*Secretaries directed further coordination with their staffs through the Healthy Environments Collaborative to craft a plan that makes trails an integral part of North Carolina's economic and job creation strategy.*



July 17, 2014

Back Row - Deputy Secretary Karin Cochran – Cultural Resources, Assistant Secretary Brad Ives - Natural Resources, Ann Hayes-Browning - Carolina Thread Trail, Niles Barnes - East Coast Greenway, Jerry Barker - Friends of Mountains-to-Sea Trail, Tony Almeida - Duke Energy, Karl Froelich - Carolina Thread Trail, Lauren Blackburn, AICP - NCDOT Bicycle and Pedestrian Director

Front Row – Cakey Worthington - Carolina Thread Trail, Secretary Sharon Decker – Commerce, Iona Thomas, AICP - East Coast Greenway/Stewart, Secretary Aldona Wos - DHHS, Secretary Tony Tata – NCDOT, Secretary Susan Klutz – Cultural Resources, Dennis Markatos-Soriano - East Coast Greenway, Kate Dixon – Friends of Mountains-to-Sea Trail



# Questions?





# BACKUP SLIDES

# Snapshot of Long Distance NC Trails

## Trail

## Type

## Miles

Mountains-to-Sea Trail (MST)	Hiking and Back Roads	1000
East Coast Greenway	Greenways and Back Roads	808
MST Balasm Gap to Stone Mountain	Hiking	300
MST Eno to Clayton	Hiking and Greenways	105
Appalachian Trail	Hiking	88
MST Ocracoke to Jockey's Ridge	Hiking	80
MST Pilot to Hanging Rock	Hiking	40
Neuse River Trail	Greenway	34
American Tobacco Trail	Greenway	23
Gary Shell Trail	Greenway	15
Bicentennial Greenway	Greenway	14.5
Black Creek / White Oak Creek	Greenway	11.8
Mallard Creek	Greenway	7
Cape Fear Trail	Greenway	4

Photo

**MST Thru Hiker**

Photo

**ECG Thru Rides**



# Healthy Residents

Every \$1 spent building biking trails and walking paths can **save about \$3 in medical expenses**. Through GO NC!, BCBSNC hopes to improve health and reduce obesity-related medical costs in North Carolina.

*~ Brad Wilson, BCBSNC president and CEO*

Every \$1 investment in trails for physical activity led to \$2.94 in direct medical benefit. The sensitivity analyses indicated the ratios ranged from 1.65 to 13.40. Therefore, **building trails is cost beneficial** from a public health perspective.

*~Cost-Benefit Analysis of Physical Activity Using Bike/Pedestrian Trails*



## Governor's Cabinet



**BILL DAUGHTRIDGE**  
Secretary of  
Administration



**SHARON DECKER**  
Secretary of Commerce



**LYONS GRAY**  
Secretary of Revenue



**SUSAN KLUTTZ**  
Secretary of Cultural  
Resources



**FRANK PERRY**  
Secretary of Public Safety



**JOHN SKVARLA**  
Secretary of  
Environmental and  
Natural Resources



**TONY TATA**  
Secretary of  
Transportation



**ALDONA WOS**  
Secretary of Health and  
Human Services