



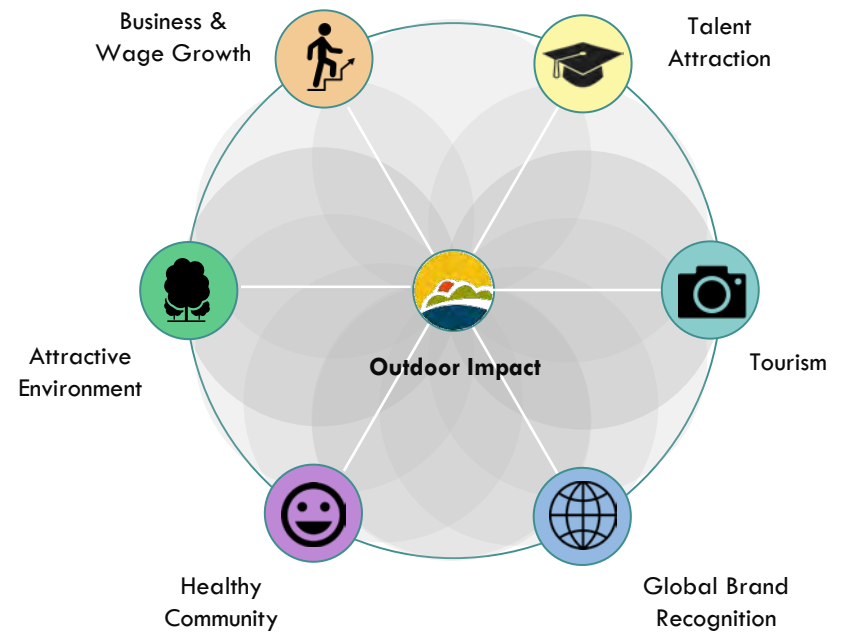
Roanoke Region Outdoor Impact, Infrastructure and Investment

Prepared for the Roanoke Regional Partnership & Roanoke Outside Foundation | August 2018



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About This Report

Avalanche Consulting, a leader in economic development consulting, and GreenPlay, a consortium of experts on parks, recreation, and open spaces, utilized research, local community input, and national studies and trends to create this report for the Roanoke Region of Virginia. Recommendations contained within this report are intended to be a blueprint for both public and private sector investment to support future growth of the region. This report includes the following:

- **The Case** – Background information and context that shows why there is an urgent need for outdoor infrastructure investments in the region and a summary of goals and strategies to take the region's outdoor assets to the next level.
- **Recommendations** – A look at actionable elements and specific goals, strategies, and tactics related to investing in outdoor infrastructure, engaging the community, marketing outdoor assets to business and talent, and attracting and supporting businesses that complement the outdoor economy, ultimately setting the region up for long-term economic prosperity.
- **Funding and Organizational Structure** – Organization and funding options are a key component to optimize a program focused on enhancing, maintaining, and sustaining outdoor infrastructure and the region's competitive advantage.
- **Best Practices** – Examples of organization and funding sources are outlined, including the Anacostia River Clean Up and Protection Fund, Outdoor Knoxville, and Oklahoma City MAPS.
- **Supporting Data** – Data related to the urgent need for outdoor infrastructure investments in the region, a full list of Roanoke Outside Foundation's accomplishments to-date, and an inventory and resources map.
- **Survey Results and National Trends** – Summary of the community survey conducted by GreenPlay and an overview of outdoor recreation influencing trends.

01

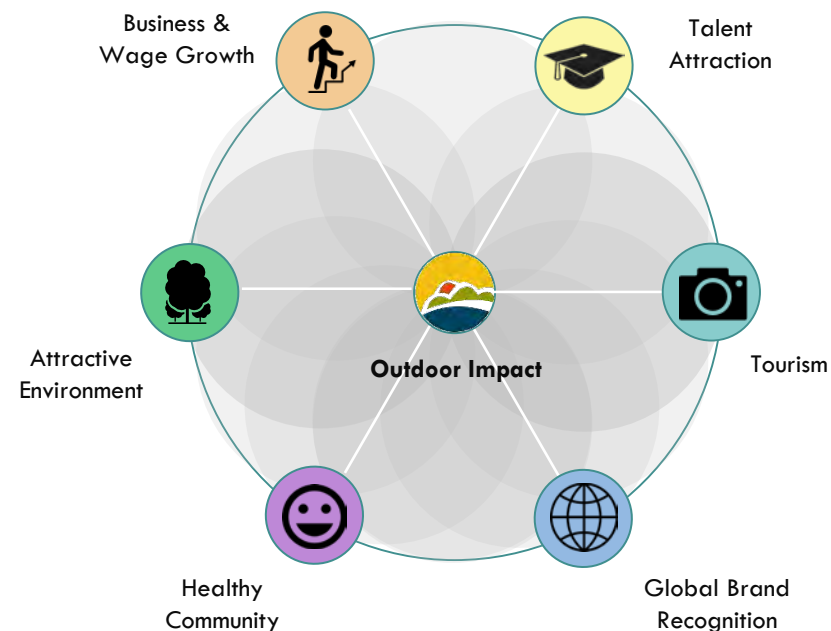
Executive Summary

Executive Summary

The Roanoke Region is recognized for its natural beauty and abundant outdoor assets; a defining characteristic of the region and a key driver in attracting business, entrepreneurs, residents, and visitors. Communities across the country recognize that investing in livability and outdoor infrastructure is integral to attracting business and talent, and therefore key to overall economic success.

The Roanoke Regional Partnership, through its Roanoke Outside Foundation, has successfully changed the community narrative to embrace, showcase, and activate many outdoor assets in the region. However, **continued investment and maintenance of outdoor infrastructure in the region is critical** to strengthen the solid foundation on which the regional economy will grow and thrive. Focused attention and action in the areas of outdoor infrastructure, marketing, and economic development initiatives will stimulate this growth.

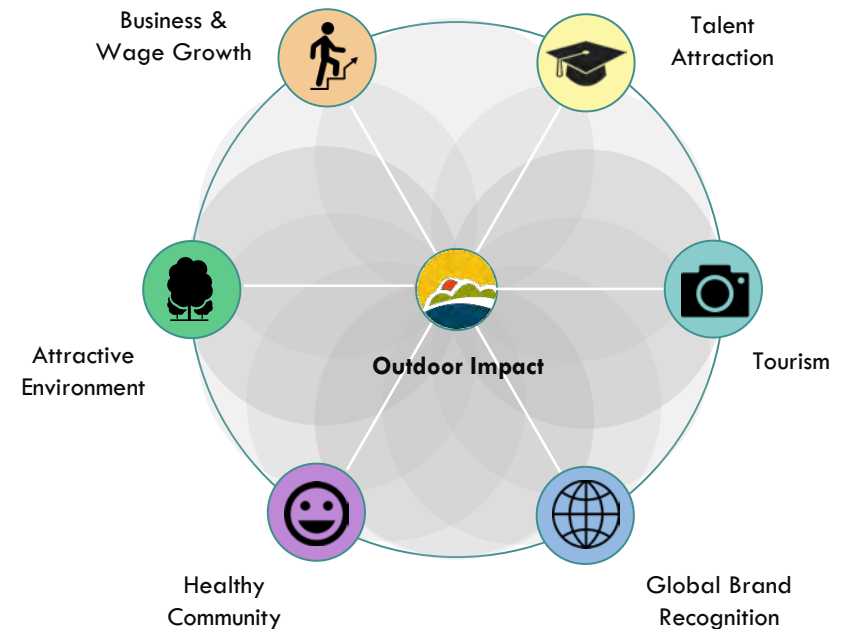
Outdoor infrastructure investment is particularly urgent because **population growth is slowing in the region**. Leveraging the region's outdoor assets can be a powerful tool in talent attraction efforts. Additionally, **a strong labor market will support a diverse industry base to fuel economic growth in the region**. In addition to leveraging outdoor amenities to attract talent, the Roanoke Region can grow and support outdoor-related businesses. Marketing outdoor assets and attracting and supporting businesses that complement the outdoor economy will help the region **reinforce its narrative, supporting both tourism and economic development efforts alike**.



Executive Summary

While the Roanoke Region's attractive outdoor environment is a distinct competitive advantage, it is not enough. Stakeholders identified a **strong need for maintenance funding** of existing assets as well as the need to continually invest in new outdoor assets that enhance user experiences and improve overall quality of life. These investments combined with **dedicated community outreach and education programs** can ensure all community members realize the **health benefits** of the region's outdoor assets.

Outdoor assets are one of the greatest opportunities for creating a future the region envisions. The region must continue to invest in and maintain its valuable outdoor assets in order to attract talent, increase business and wage growth, support tourism, enhance quality of life and overall community health, reinforce its outdoor narrative, and propel the region's economy forward.



02

The Case

The Case

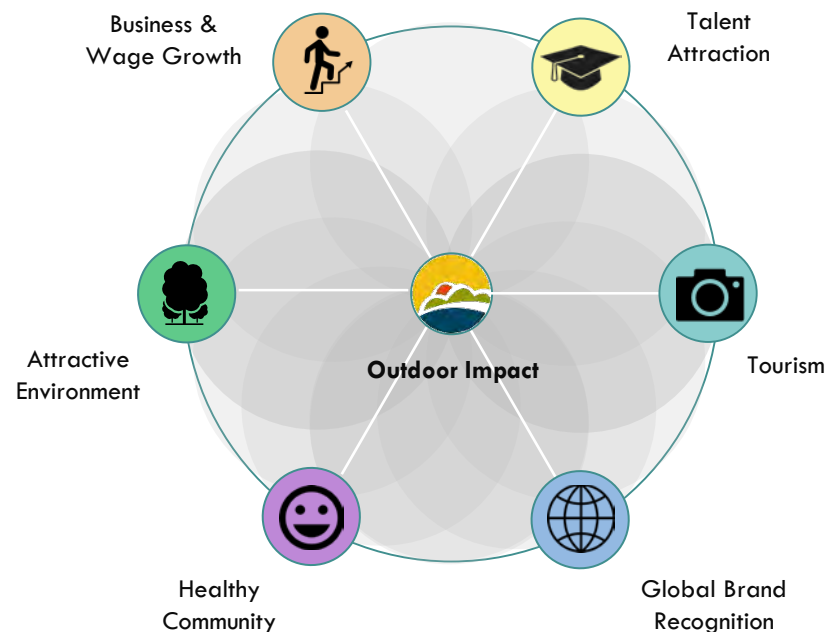
Why invest in outdoor infrastructure?

TALENT ATTRACTION

Population growth is slowing in the region. Businesses invest in growing communities because of the relative ease of recruiting and retaining employees. However, population growth remains at a very low level in the Roanoke Region and net in-migration of talent is declining. Additionally, the region has lost ground over the past five years in growth rate of young adults living in the region. **Talent attraction is a key priority to combat this issue.** The strength of the region's outdoor recreation infrastructure can be a magnet for talent attraction. It is a differentiator that will help the region stand out. **Investing in and promoting outdoor recreation amenities will draw in-demand talent to the region.**

BUSINESS AND WAGE GROWTH

A strong labor market and diverse industry base will fuel economic growth. Businesses seek locations where other companies are growing and the labor force is increasing. New workers are drawn to regions that have abundant employment opportunities. Roanoke had slow employment growth and moderate income growth during the first half of the decade. However, both employment growth and income growth have actually accelerated in recent years – evidence supported in recent investments by Ballast Point, Eldor Corporation, Humm Kombucha, Deschutes Brewery, and expansions such as Power School, Atlantic Credit and Finance, and American Electric Power. In addition to leveraging outdoor infrastructure amenities to attract talent, **the Roanoke Region can grow and support outdoor-related target industries.** The Roanoke Region must continue to foster a positive narrative surrounding the outdoors and the opportunities it provides to both business and talent to fuel economic growth.



26 NEW OUTDOOR
Service Providers
Have Started Since 2010

The Case

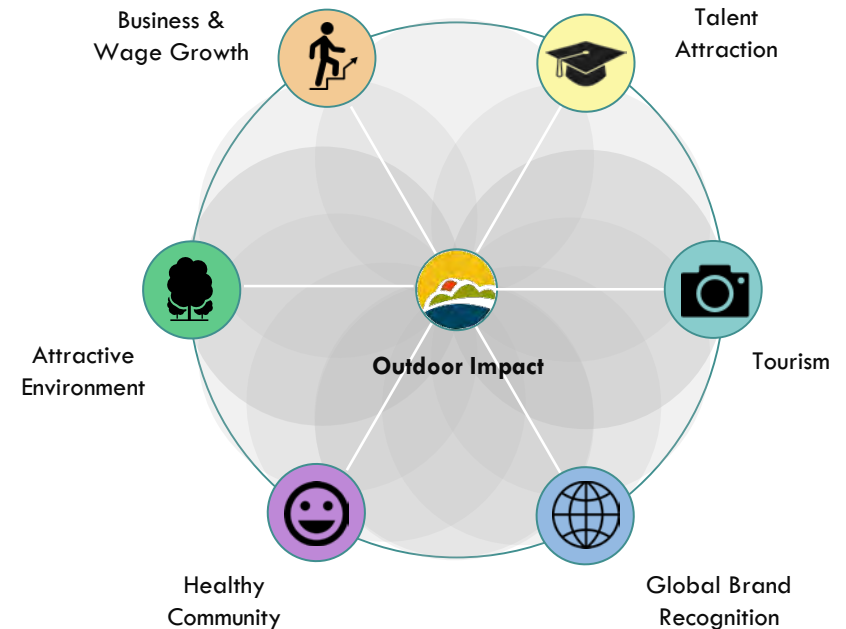
Why invest in outdoor infrastructure?

ATTRACTIVE ENVIRONMENT

While the Roanoke Region is recognized for its attractive outdoor environment, what we have isn't enough. Stakeholders identified a **strong need for maintenance funding** of existing assets as well as the need to **continually invest in new outdoor assets that enhance user experiences and improve overall quality of life**. Funding for maintaining the region's outdoor assets was one of the top needs cited in the community survey conducted by GreenPlay. The assets we have are just the start – it will take dedicated resources to build and maintain outdoor infrastructure while also expanding the region's breadth of outdoor recreation amenities.

HEALTHY COMMUNITY

Outdoor infrastructure contributes to a healthy community. Access to the Roanoke Region's robust natural assets makes it easier for residents to live a healthy lifestyle. Communities with active outdoor recreation offerings such as greenways and trail systems for biking and walking have higher levels of physical activity and lower levels of obesity and illness. Open spaces also contribute to a healthy environment by preserving natural resources, protecting clean water, maintaining clean air, and encouraging community involvement in the outdoors. Increased investments in outdoor infrastructure as well as dedicated community outreach and education programs can ensure all community members realize the health benefits of the region's outdoor assets.



OBESITY & EXERCISE
RATES ARE SITE SELECTION
 FACTORS

The Case

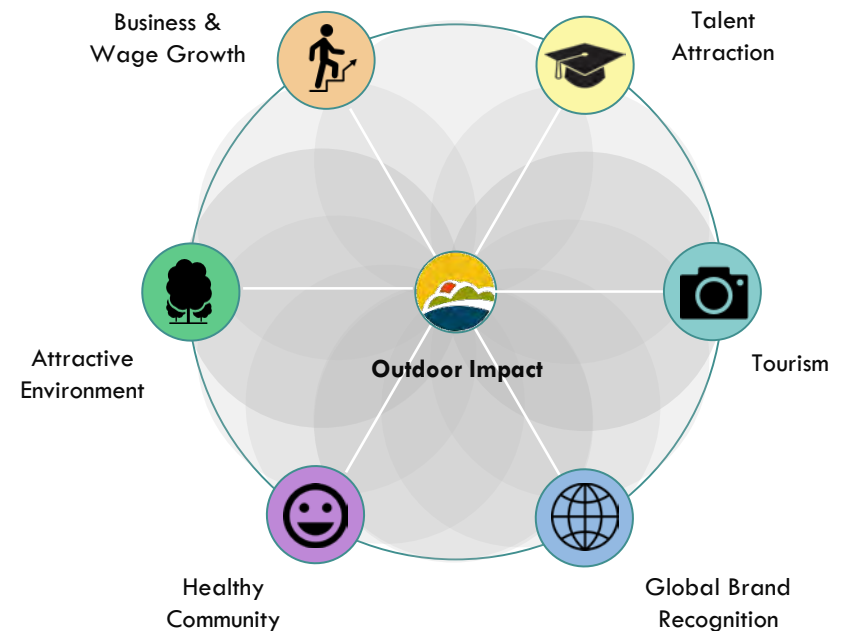
Why invest in outdoor infrastructure?

GLOBAL BRAND RECOGNITION

Outdoor infrastructure investments will reinforce the region's identity as an outdoor destination. Roanoke Outside Foundation, through education and brand building events like the Blue Ridge Marathon and GO Outside Festival, has successfully changed the community narrative to embrace, showcase, and activate the many outdoor assets in the region. Investing in outdoor infrastructure, marketing outdoor assets, and attracting and supporting businesses that complement the outdoor economy will strengthen the region's overall narrative. In doing so, the outdoors becomes a core aspect of the region's brand identity, a differentiator that will help unify and amplify the region's voice. Stronger brand recognition will benefit both tourism and economic development efforts.

TOURISM

Outdoor infrastructure investments support tourism. The Roanoke Region is a sought-after destination for visitors exploring the outdoors. According to the Virginia Tourism Corporation, the region's tourism industry generated a record \$813 million in direct travel expenditures and employed over 7,800 workers in 2017. Additionally, hotel room revenue and demand hit record highs in 2017. Building and maintaining outdoor infrastructure will continue to support the region's thriving tourism industry.



The Case

What has been the Roanoke Outside Foundation's impact to-date?

The Roanoke Outside Foundation has made a large impact on changing the regional narrative to one built upon the outdoors. By educating residents on what is in their own backyard, showing them how to engage with it, and connecting them with programs, classes, and outfitters, Roanoke Outside turned residents into the region's biggest advocates and cheerleaders. It serves as a clearinghouse for information on the region's outdoor assets, offering a full inventory of outdoor assets along with marketing and promotion on www.roanokeoutside.com. Prior to this, information about the region's outdoor assets was nonexistent or difficult to access. When the "old railroad town" story had lost luster and effectiveness, the Foundation created a modern, resonant new narrative.

Since 2009, Roanoke Outside branded events have attracted thousands of people, filled hotel rooms, and built the region's positive image. These events showcase the region's outdoor opportunities and natural beauty. The Blue Ridge Marathon has an international reputation, garnered national media mentions, and made a \$4.5 million economic impact. The Go Outside Festival has grown attendance from 4500 to 40,000 and is considered the premier East Coast outdoor festival. Go Cross is now a two-day UCI sanctioned race attracting professional cyclists from around the U.S. The Foundation has donated \$400,000 to over 60 local nonprofits, events, and clubs that contribute to the development of the region's outdoor brand. **These events, combined with existing events and programs, have helped establish the region as a true outdoor community in the U.S.**

\$400K
IN DONATIONS TO
60 local nonprofits,
events, and clubs

The Case

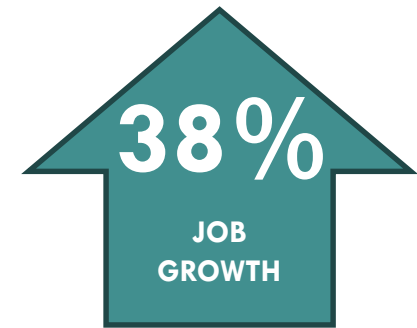
What is the Roanoke Outside Foundation's impact to-date?

Efforts have led to increased participation in outdoor programming (e.g. races and classes) and asset usage (e.g. greenways, State Parks, Appalachian Trail, and regional parks).

Roanoke Outside Foundation has supported outdoor infrastructure investments, such as the creation of a crowdfunding campaign that raised \$80,000 for kayak launches and river access points throughout the region. Roanoke Outside also supported market research and feasibility studies for outdoor investments such as a climbing gym and in-river kayak park.

The Roanoke Region experienced 38% growth in outdoor sector employment since 2010, compared to 3.9% in Virginia and 14.5% in the U.S. More than 26 new outdoor-related businesses have located or expanded in the region since Roanoke Outside's establishment, including Backcountry.com, the nation's second largest e-retailer of outdoor gear. A comprehensive list of Roanoke Outside's accomplishments is included on page 53 of this report.

Roanoke Outside has become self-sustaining. However, the current funding structure, in which money is raised in small amounts, is holding back progress and ignoring infrastructure funding. **Establishing a dedicated funding source is critical to maintaining momentum and building on Roanoke Outside Foundation's success.**



in outdoor
sector since
2010
compared to
3.9% statewide

The Case

How can we take the region's outdoor infrastructure to the next level?

In only 10 years, Roanoke Outside has established itself as the leading evangelist for the outdoor economy, inspired the new community narrative, spearheaded outdoor infrastructure investments, created jobs., and attracted money to the region. Other communities routinely look at the Roanoke Region as a model for how to create an economy propelled by its natural assets. With the right funding tools and partnerships, **Roanoke Outside can ultimately serve as the leader and economic development driver for the outdoors.** While much has already been accomplished, overall slow population growth and moderate employment growth indicate that **the status quo is not enough.** Dedicated outdoor infrastructure investments, marketing, and economic development initiatives will drive the region's growth and create a solid foundation for the regional economy to thrive. **Standing still is not enough.** Goals and strategies to take the region's outdoor assets to the next level include:

GOAL 1: The Roanoke Region secures a dedicated funding source for building and maintaining outdoor infrastructure.

- 1.1: Create a regional fund for outdoor infrastructure maintenance and development.
- 1.2: Create a venture fund to incentivize outdoor businesses.

GOAL 2: The Roanoke Region enhances, develops, and activates its outdoor assets.

- 2.1: Improve user experience and increase camping, hiking, and biking opportunities in the region.
- 2.2: Increase usage, accessibility, and engagement of rivers and lakes in the region.
- 2.3: Continue to identify opportunities and strategies for enhancing outdoor position and competitive advantage.

GOAL 3: The Roanoke Region increases community engagement and support for outdoor-related programs and initiatives.

- 3.1: Continue to increase community engagement and awareness of the region's outdoor assets.
- 3.2: Support initiatives that promote a healthy environment and enhance outdoor culture in the region.

GOAL 4: The Roanoke Region leverages its outdoor assets to attract talent and business.

- 4.1: Promote the region's outdoor assets to attract talent.
- 4.2: Create outdoor events focused on talent attraction and retention.
- 4.3: Recruit businesses to the region that value its outdoor lifestyle.

03

Recommendations

Recommendations



Photo Credit: Sam Dean

GOAL 1:

The Roanoke Region secures a dedicated funding source for building and maintaining outdoor infrastructure.

FUNDING THE OUTDOORS

GOAL 1: The Roanoke Region secures a dedicated funding source for building and maintaining outdoor infrastructure.

While the Roanoke Region is recognized for its attractive outdoor environment, what we have isn't enough. Stakeholders identified a strong need for maintenance funding of existing assets as well as the need to continually invest in new outdoor assets that enhance user experiences and improve overall quality of life. Funding for maintaining the region's outdoor assets was one of the top needs cited in the community survey conducted by GreenPlay. The assets we have are just the start – it will take dedicated resources to build and maintain outdoor infrastructure and provide expanded access to outdoor recreation amenities.

Strategy 1.1: Create a regional fund for outdoor infrastructure maintenance and development.

- A dedicated funding source for outdoor infrastructure will ultimately produce an economic return through population growth, business growth, and revenue generation through taxes such as admission, room, real estate, business license, and personal property.
- Explore funding options on page 30.

Strategy 1.2: Create a venture fund to incentivize outdoor businesses.

- Create a fund that can support outdoor-related business ventures.
- Examine models such as Explore Asheville's Tourism Product Development Fund, which provides financial assistance to local tourism projects and is funded through Buncombe County's occupancy tax.

Recommendations



Photo Credit: Sam Dean

GOAL 2: The Roanoke Region enhances, develops, and activates its outdoor assets.

INFRASTRUCTURE INVESTMENTS

GOAL 2: The Roanoke Region enhances, develops, and activates its outdoor assets.

Stakeholders cited increasing opportunities for camping, hiking, and river usage as top priorities to enhance the region's outdoor recreation offerings. Recommendations are a result of community and stakeholder input along with national outdoor recreation trends (see pages 61).

Strategy 2.1: Improve user experience and increase camping, hiking, biking, and climbing opportunities in the region.

- Focus on increasing camping, hiking, biking, and climbing opportunities.
- Enhance existing assets to improve user experiences.
- Expand diversity of users.
- Additional ideas recommended through stakeholder and citizen input include:
 - Accelerate implementation of regional greenway and rails to trails projects, including the Greenway Master Plan, Craig/Botetourt Rail Trail, and Jackson River Scenic Trail.
 - Maintain and expand existing parks and trail.
 - Execute the Explore Park Master Plan.
 - Create or improve camping options at Explore Park, Roanoke Mountain, Lake Moomaw, Philpott Reservoir, and Carvins Cove, as well as camping options close to the urban core. Encourage development of private campgrounds.
 - Develop Mill Mountain incline trail – a destination exercise trail (e.g. Manitou Springs, Colorado).
 - Expand parking at popular trailheads.
 - Create multi-use trail connecting Douthat State Park to Clifton Forge.
 - Connect Tinker Creek Greenway from Roanoke into Botetourt County.
 - Develop amenities at Falling Spring Falls including trail to bottom of falls.
 - Establish climbing routes on bridge buttresses.
 - Establish camping options along Jackson River.

Recommendations



Photo Credit: Roanoke Outside

GOAL 2:
The Roanoke Region
enhances, develops,
and activates its
outdoor assets.

- Additional ideas recommended through stakeholder and citizen input include *(continued)*:
 - Develop camping options in close proximity to mountain bike trails.
 - Improve Morris Hill campground at Lake Moomaw.
 - Build zip line across Roanoke River Gorge.
 - Incorporate outdoor theme into public art.
 - Develop Roanoke Mountain Campground as an urban campground.
 - Establish canoe or hike-in cabins at Philpott Reservoir and Lake Moomaw.
 - Downhill-specific mountain bike trail on Mill Mountain.
 - Develop remote hike, bike-in campsites at Carvins Cove.
 - Build beginner-friendly mountain bike trails to encourage new users.
 - Expand bike share program.
 - Work with Blue Ridge Parkway to allow mountain bike access between Explore Park and Mill Mountain, as well as on Chestnut Ridge Trail.

Strategy 2.2: Increase usage, accessibility, and engagement of rivers and lakes in the region.

- Improve health of rivers.
- Enhance user experience.
- Add access points.
- Additional ideas recommended through stakeholder and citizen input include:
 - Build Virginia's first in-river kayak park on the Roanoke River.
 - Create regional wayfinding for river users.
 - Develop additional river and lake access points.
 - Build a wakeboard cable park at Smith Mountain Lake.
 - Establish river outfitter business on Jackson River.
 - Remove low-water bridges and pipes along Roanoke River.
 - Establish rowing club.
 - Bring more land along rivers and streams into public ownership.

Strategy 2.3: Continue to identify opportunities and strategies for enhancing outdoor position and competitive advantage.

- Maintain awareness of industry trends and applicability to the Roanoke Region.
- Perform annual gap analysis of existing infrastructure and user experiences.

Recommendations



Photo Credit: Roanoke Outside

GOAL 3:
The Roanoke Region
increases community
engagement and support
for outdoor-related
programs and initiatives.

COMMUNITY ENGAGEMENT

GOAL 3: *The Roanoke Region increases community engagement and support for outdoor-related programs and initiatives.*

The Roanoke Outside Foundation has made a large impact on changing the regional narrative to one built upon the outdoors. By educating residents on what is in their own backyard, showing them how to engage with it, and connecting them with programs, classes, and outfitters, Roanoke Outside turned residents into the region's biggest advocates and community cheerleaders. (See a full summary of Roanoke Outside Foundation's accomplishments on page 53.) With the right programs and investments, the region can continue to increase community engagement and support for outdoor-related programs and initiatives.

Strategy 3.1: Continue to increase community engagement and awareness of the region's outdoor assets.

- Continue to function as a clearinghouse specifically for outdoor recreation and events in the region via marketing channels such as the website, social media, and earned media.
- Educate the community about the value of outdoor recreation and the importance of continued investment in outdoor infrastructure. Utilize marketing channels such as the website, social media, and earned media.
- Expand programs that help to connect underserved populations with outdoor recreation activities. For example, build on the successful Outdoor Explorers Mentor Program with Big Brothers Big Sisters. Identify other nonprofits and community organizations that could adapt a similar program. Consider establishing programs that offer free or discounted gear and rentals to underserved populations.
- As trailhead and water access expands over the next few years, educate the community about the growing connectivity and access of the region's outdoor amenities. Develop dedicated internal marketing campaigns and hold public classes to share pertinent information.
- Create dedicated outreach programs to ensure all neighborhoods have access to and are aware of the region's outdoor amenities.

Recommendations



Photo Credit: Brendle Wolfe

GOAL 3:

The Roanoke Region increases community engagement and support for outdoor-related programs and initiatives.

- To aid talent retention efforts, host outdoor recreation activities such as hikes or camping trips with regional college and university students to connect them to the region's outdoor assets.
- Collaborate with local parks and recreation departments and schools to include more outdoor recreation and environmental education during in-school and out-of-school time. Identify successful programs that could be replicated across school districts.

Strategy 3.2: Support initiatives that promote a healthy environment and enhance outdoor culture in the region.

- Leverage Roanoke Outside's leadership role to support programs and initiatives that promote a healthy environment and enhance outdoor culture, such as a plastic bag fee, plastic food ware ban, or increased use of alternative transportation such as the bike share program, to name a few.
- Consider developing an annual State of the Outdoors Report for the region. Use findings from the report to convene partners, take action on top priorities, and support legislation or programs aligned with Roanoke Outside's mission. Promote report findings on Roanoke Outside's marketing channels.

Recommendations



Photo Credit: Big Lick Brewing

GOAL 4:
The Roanoke Region leverages its outdoor assets to attract talent and business.

TALENT & BUSINESS ATTRACTION

GOAL 4: *The Roanoke Region leverages its outdoor assets to attract talent and business, with an emphasis on high demand, highly educated talent.*

The region's outdoor recreation infrastructure can be a powerful tool for talent and business attraction. Outdoor amenities offer social opportunities, pleasant aesthetics, and lead to healthier communities, making locations with access to outdoor recreation opportunities desirable destinations for business and talent. By recognizing the outdoors as an economic asset, the region has successfully moved its story from railroads to "beer, bikes, and brains." This asset can be monetized through new businesses, tourism, and other economic activity generated by new residents attracted by the region's outdoor culture. Companies such as Deschutes Brewery, Backcountry.com, and Humm Kombucha have cited the Roanoke Region's outdoor culture as a reason to locate their companies – and employees – to the region. For companies that value the outdoor lifestyle – such as the outdoor industry or food and beverage – outdoor recreation is a key consideration when deciding where to locate or expand.

Strategy 4.1: Promote the region's outdoor assets to attract talent.

- Create a dedicated talent attraction program that builds upon the outdoor recreation narrative. Invest in original multimedia to communicate with talent in targeted national markets, including website, video, and social media content.
- Major employers in the Roanoke Region confirm that the outdoor narrative and resources provided by Roanoke Outside help them attract talent. Continue providing employers with marketing tools that capture the outdoor narrative to use in their own talent recruitment initiatives.
- Connect regional universities and employer websites with RoanokeOutside.com.

Strategy 4.2: Create outdoor events focused on talent attraction and retention.

- Host outdoor recreation events such as hikes and camping trips with regional college and university students to connect them to the region's outdoor assets.
- Continue to develop and expand existing events such as eXperience and eXpand Outside which introduces young professionals to outdoor activities while building a social network.

Recommendations



Photo Credit: Sam Dean

Strategy 4.3: Recruit businesses to the region that value its outdoor lifestyle.

- As new outdoor infrastructure investments are made, update your marketing toolkit to showcase how the region is dedicated to being a premier outdoor destination.
- Host leads and prospects and gatekeepers through in-bound events and FAM tours to showcase the Roanoke Region's outdoor assets. Continue recruiting events such as corporate meetings, trade shows, and association meetings that could be held in the Roanoke Region.

GOAL 4:

The Roanoke Region leverages its outdoor assets to attract talent and business.

04

Funding Structure

Funding Structure

A dedicated funding source is critical in order to successfully implement the recommendations outlined in this report, and ultimately spur population and business growth in the region. A dedicated funding source for outdoor infrastructure will ultimately produce an economic return through population growth, business growth, and revenue generation through taxes such as admission, room, real estate, business license, and personal property.

Potential funding sources to support operational and outdoor infrastructure investments include:

INFRASTRUCTURE FUNDING OPTIONS

Local Government Operational and Development Options

- There are a variety of mechanisms that local governments can employ to provide services and to make public improvements. Parks and recreation operating and capital development funding typically comes from conventional sources such as sales, use, and property tax referenda voted upon by the community, along with developer exactions. Operating funds are typically capped by legislation; may fluctuate based on the economy, public spending, or assessed valuation; and may not always keep up with inflationary factors. In the case of capital development, “borrowed funds” sunset with the completion of loan repayment and are not available to carry-over or re-invest without voter approval. Explained below are the salient points of traditional funding sources. Many of these strategies may be currently in use to some extent by the agency.

General or Operating Fund

- Some services can be funded by an agency’s General or Operating Fund, which can be comprised of property tax, sales tax, and other compulsory charges levied by a government for the purpose of financing services performed for the common benefit of a community. These funds may also come from resources such as inter-governmental agreements, reimbursements, and interest and may include such revenue sources as franchise taxes, licenses and permits, fees, transfers in, reserves, interest income, and miscellaneous other incomes.

General Obligation Bonds

- Bonded indebtedness issued with the approval of the electorate for capital improvements projects and general public improvements.

Funding Structure

Revenue Bonds

- Bonds can be used for capital projects that will generate revenue for debt service, where fees can be set aside to support repayment of the bond. These are typically issued for water, sewer or drainage charges, and other enterprise type activities. Parks and recreation agencies have used these for Enterprise Fund capital projects.

Inter-local Agreement

- Contractual relationships could be established between two or more local units of government and/or between a local unit of government and a non-profit organization for the joint usage/development of outdoor amenities, programming, regional parks, or other facilities.

Park Development and Trails Construction

- New park construction relies on Acquisition and Improvement Funds (A&I) whenever possible for funding. When A&I funds are not available or when developing parks to increase the level of service, general funds are used. Grants are also sought, such as those from the Land and Water Conservation Funds (LWCF), the Community Development Block Grant (CDBG), and other sources. Whenever possible and in the best interest of the local government, partnerships are also used to help develop new parks and/or specific amenities within them.
- Petition General Assembly to expand House Bill 38 to include funding from the sale of outdoor equipment to include but not be limited to hiking, paddling, and biking. The additional funds generated would be distributed by the Department of Conservation and Recreation and be used for local government as matching grants.

Meals Tax

- An increase in the meals tax, or percentage of existing, that could be approved by the local governing bodies. The funds would go into a regional fund distributed in the form of grants to regional projects, including outdoor-related business startups and expansions.

Regional Asset District Fee

- Petition the General Assembly for increase to go to the Foundation to be distributed as grants.

Funding Structure

OPERATIONAL FUNDING OPTIONS

Plastic Bag Fee / Other Tax Revenue

- This mechanism is done in other communities and could provide a robust funding source.
- Use findings from this report to advocate for a plastic bag fee. Communicate the need for a dedicated funding source and specific programs the plastic bag fee would fund.
- Work with localities to garner broad support for the fee.
- Using the Montgomery County MD model:

The nickel-per-bag plastic bag tax in Montgomery County has had the impact of dampening demand for the plastic bags, though there is still a fair amount of revenue generated. Montgomery County MD is a county of 1,058,810 people as of 2017. Annual retail sales tax collections totaled \$562,756,579 in 2017. At a 6 percent rate of taxation, this translates into taxable retail sales of approximately 9.4 billion (\$9,379,276,317). In 2017, the disposable bag fee collected \$2.61 million from 65.18 million bags, which is approximately 0.69 bags per \$100 in taxable sales (note: this is only a high-level and rough estimate).

The Roanoke MSA saw taxable sales of \$4,141,786,129 in 2017. If the same ratio were to hold true, a rough estimate of 28,782,777 bags might be expected in the Roanoke MSA. Montgomery County MD's 'nickel tax' generates around 4 cents in revenue per bag. That would translate into \$1,152,548 in the Roanoke MSA. In the Roanoke Region (MSA with the addition of Alleghany and exclusion of Craig), the revenue would be an approximate \$1,199,494 per year.

Rough estimates of revenue by County:

- City of Roanoke - \$511,319
- City of Salem - \$164,415
- Roanoke County - \$295,194
- Franklin County – \$118,015
- Botetourt County – \$60,020
- City of Covington – \$30,815
- Alleghany County – \$19,714

Funding Structure

Tiered Donation Program

- Consider establishing a donation program that offers 3-5 donor tiers based on the level of support.
- Outline benefits for each tier, such as listing top donors on website, providing VIP access to events, and offering gear/rental discounts and perks, to name a few.

Business Supported Fundraising

- Consider a 1% for the Region program modeled after 1% for the Planet. Participating businesses donate one percent of their sales to programs and initiatives that benefit the region.

Adventure Center Model

- Consider establishing a consolidated Adventure Center for the Roanoke Region that brings together all outdoor resources in one location. This outpost can become a one-stop shop for outdoor recreation, where individuals can rent equipment, sign up for group outings, and obtain more information about outdoor recreation activities.
- Use this approach to consolidate parks and recreation outdoor divisions across localities in the region. This would help local parks and recreation divisions save money, operate more efficiently, and consistently reinforce the Roanoke Region's outdoor narrative and brand identity.

Funding Structure

Program-Specific Fundraising

- Develop dedicated fundraising and crowdsourcing campaigns for specific outdoor infrastructure investments. Utilize marketing channels such as the website, social media, and earned media to promote each campaign.

Big Fundraisers

- Consider big fundraising events that generate revenue. It is important to consider the cost and time resources needed to execute a large fundraising event to ensure you have a positive return on investment.

Grants

- Identify and apply to grants that support outdoor infrastructure investments.

05

Organizational Structure

Organization

While it is important to explore all potential funding sources, dedicated seed capital managed by the Roanoke Outside Foundation is critical for success. It is recommended that Roanoke Outside Foundation serve as the administrator upon securing a dedicated funding source. Managing outdoor infrastructure investments will also require collaboration across the region. The following section highlights key organizations and their role in supporting outdoor infrastructure investments.

Roanoke Outside Foundation

The Roanoke Outside Foundation was created as a 501(c)3 charitable organization by the Roanoke Regional Partnership to focus on the outdoor economy and facilitate funding for programs. Roanoke Outside has grown to become a **leader, facilitator and convener of the outdoors** by building the outdoor brand, improving outdoor infrastructure, enhancing livability, and ultimately growing the economy. In order to build on this success, **Roanoke Outside can serve as a leader and administrator of a dedicated funding source**. This will allow the organization to lead implementation of select initiatives outlined in the Recommendations section of this report in partnership with regional stakeholders.

Roanoke Regional Partnership

The Roanoke Regional Partnership is the regional economic development organization representing the counties of Alleghany, Botetourt, Franklin and Roanoke; cities of Covington, Roanoke, and Salem; and the town of Vinton. The Partnership is a joint venture between the seven governments and more than 200 private sector businesses that want to help this region grow. Its program of work includes business attraction, retention and expansion, market intelligence, asset development, and image building. The Partnership can support the region's outdoor infrastructure by integrating the **outdoor narrative** into talent attraction and targeted business recruitment efforts; actively recruiting, retaining, and expanding **outdoor-related businesses**; and contributing its **thought leadership and market intelligence** to highlight the economic impact of the outdoors on the Roanoke Region.

Organization

Partner Organizations

The following partner organizations can support outdoor infrastructure investments. It is important to note that this list is not exhaustive and is meant to serve as a guideline when determining key partners for each outdoor initiative.

Local Governments and Organizations: Alleghany, Botetourt, Franklin, and Roanoke counties; cities of Covington, Roanoke, and Salem, and the town of Vinton; Roanoke Valley Alleghany Regional Commission; Alleghany Highlands, and Visit Virginia's Blue Ridge.

Federal and State Organizations: National Park Service, U.S. Forest Service, Virginia Department of Game and Inland Fisheries, Virginia Department of Conservation and Recreation.

Outdoor Businesses: Orvis, Backcountry.com, Roanoke Mountain Adventures, East Coasters, Underdog Bikes, Just The Right Gear, Starlight Bikes, Cardinal Bikes, River Rock Climbing, Walkabout Outfitter, Fleet Feet Sports, Runabout Sports, Mountain Junkies, Gander Outdoors, Sportsman Warehouse, Mountain Laurel Designs, Twin River Outfitters, Starlight Custom Apparel, Mountain Shepherd Wilderness Survival School, Blue Mountain Adventures, Back Country Ski and Sports, and Downshift Bikes & Brews.

Organizations & Clubs: Pathfinders for Greenways, Roanoke IMBA, Appalachian Trail Conservancy, Clean Valley Council, Trout Unlimited, Friends of Blue Ridge Parkway, Blue Ridge Land Conservancy, Blue Ridge Bicycle Club, Star City Youth Cycling, Boy Scouts of America, Girl Scouts of America, Boys and Girls Club, Big Brothers Big Sisters, and YMCA.

Organization

Sample Organizational Chart

Roanoke Outside Foundation would serve as the Outdoor Infrastructure, Impact, and Investment Fund administrator. An advisory board comprised of fund contributor representatives would establish policies and performance benchmarks.



06

Best Practices

Best Practices

Anacostia River Clean Up and Protection Fund

An Anacostia River Clean Up and Protection Fund was established by the Anacostia River Clean Up and Protection Act of 2009. This Act requires all Washington DC businesses that sell food or alcohol to charge a 5-cent fee for each paper or plastic disposable bag distributed with any purchase. Businesses remit 4 cents of the 5-cent fee to the Office of Tax and Revenue on their sales tax return. Businesses that offer a rebate to customers who bring their own reusable bag are only required to remit 3 cents of the 5-cent fee. These fees make up the majority of the Anacostia River Clean Up and Protection Fund. To verify compliance, the Department of Energy & Environment (DOEE) inspects over 550 businesses per year. Businesses in violation receive a warning letter before being fined \$100- \$800, depending on the number of previous violations. Fines are also deposited into the Fund.

The Fund has four revenue sources: disposable bag fees, enforcement revenue, proceeds from commemorative license plates, and voluntary tax contributions from Washington DC residents. Since the Act went into effect, bag fee revenue has increased each year as more businesses have complied with the law and as the number of retail establishments in the area increased. Since 2010, over \$16 million in bag fee revenue has been generated and \$39,700 in fines have been assessed. Since 2011, proceeds from commemorative license plates have generated more than \$130,000 in revenue. Additionally, Washington DC residents have donated over \$520,000 to the Fund through voluntary tax contributions.

The Anacostia River Clean Up and Protection Fund is used to install and incentivize green infrastructure, establish watershed education programs, conduct stream restoration projects, install and maintain trash capture devices in streams, and purchase and distribute reusable bags to low-income and senior populations. In 2017, \$3.46 million was spent on programs such as RiverSmart, which offers financial assistance to homeowners and local schools to invest in infrastructure that limits storm water runoff; watershed education programs, including overnight field trips for local students; trash capture installation along the Anacostia River and its tributaries; a stream restoration project at Alger Park; food service ware outreach; reusable bag distribution; enforcement and fee collection; and administration of the Fund.

Best Practices

Outdoor Knoxville

Outdoor Knoxville is an initiative to make Knoxville's outdoor assets an economic driver for the region. The effort aims to "increase outdoor amenities, create better access to recreational areas, and promote greater participation in outdoor activities." The website www.OutdoorKnoxville.com provides a comprehensive inventory of outdoor activities, venues, organizations, events, and resources in the East Tennessee region. Outdoor Knoxville also created the Get Out and Play! Guide, a comprehensive directory of all parks, trails, and greenways in Knox and surrounding counties. An Outdoor Knoxville Adventure Center has also been established that houses the Legacy Parks Foundation, Billy Lush Board Shop, and Visit Knoxville's Visitor Outpost. Visitors can rent equipment, sign up for group outings, and obtain more information about outdoor recreation activities at the Center.

Outdoor Knoxville is a divisions of Legacy Parks Foundation, a nonprofit organization "working to ensure that our community enjoys exceptional recreational opportunities, natural beauty and open spaces, and that these assets exist for generations to come." Areas of focus include preserving ridges and views, connecting greenways and trails, maintaining health and access of waterways, creating recreational opportunities for the underserved, and exceeding the national average for public parks and green space. Since 2007, the Foundation has raised over \$8 million dollars for parks and open space, conserved 1,000 acres of forest and farmland, and added over 500 acres of parkland in Knox County. Creative fundraising initiatives are utilized – for example, a local brewer and distributor created a beer in support of the Legacy Parks Foundation, donating \$15 for every account that buys a half-barrel and \$2 for every case that is purchased to the Foundation.

Best Practices

Oklahoma City MAPS

A plan to revitalize and re-energize Oklahoma City was created that inspired residents to invest in their struggling community. Business leaders, community stakeholders, and elected officials became advocates for “Believe in Our Future,” a campaign that asked voters to approve a penny sales tax that would improve quality of life through downtown revitalization. The result was MAPS – Metropolitan Area Projects. The initiative called for taxpayers to drive downtown revitalization and included nine major projects in the central business district that would provide new and upgraded cultural, sports, recreation, entertainment, and convention facilities. The plan explicitly detailed what projects would be funded and the government would not go into debt to pay for the projects. In 1993, Oklahoma City voters passed a five-year, one-cent sales tax.

The program was overwhelmingly successful and generated \$350 million in funding. The U.S. Conference of Mayors pointed to the community noting, “Using a pay-as-you-go structure allowed Oklahoma City to build world-class facilities without the burden of debt for future generations and city leaders. Oklahoma City citizens made the historic decision to invest their own money in the city they called home.”

The first nine MAPS projects took ten years to complete and included construction of the Triple-A Bricktown Ballpark, a new downtown arena, the Bricktown Canal, and renovation of the Civic Center Music Hall and Convention Center, to name a few. Projects did not begin until enough taxes had been collected to pay for the project. With its success and a blueprint in hand, leaders sought to address issues in the Oklahoma City Public Schools and launched MAPS for Kids, which passed for \$514 million in 2001. That was coupled with a \$180 million Oklahoma City Public Schools bond issue, and the total funding was used for facility improvements, technology, and transportation projects. In the end, the program will have built or renovated 70 buildings. In late 2009, with the success of two previous efforts, city, business, and community leaders went back to the taxpayers with an aggressive ask - \$777 million for eight new projects. They voted yes. The program includes funding for a new 70-acre downtown park, new convention center, modern transit, and more than 50 miles of biking and walking trails.

The MAPS program makes Oklahoma City an attractive place to live, work, raise a family, and start or grow a business. A study funded by the Greater Oklahoma Chamber of Commerce has shown that over time, the MAPS initiatives brought in more than \$5 billion in private and public investment to the region. Leaders say that MAPS has transformed more than just infrastructure. There is a change in attitude and strong desire to be in Oklahoma City, with graduates seeking jobs in the area and young families planting roots, and corporate location and expansion exploding over the last decade.

07

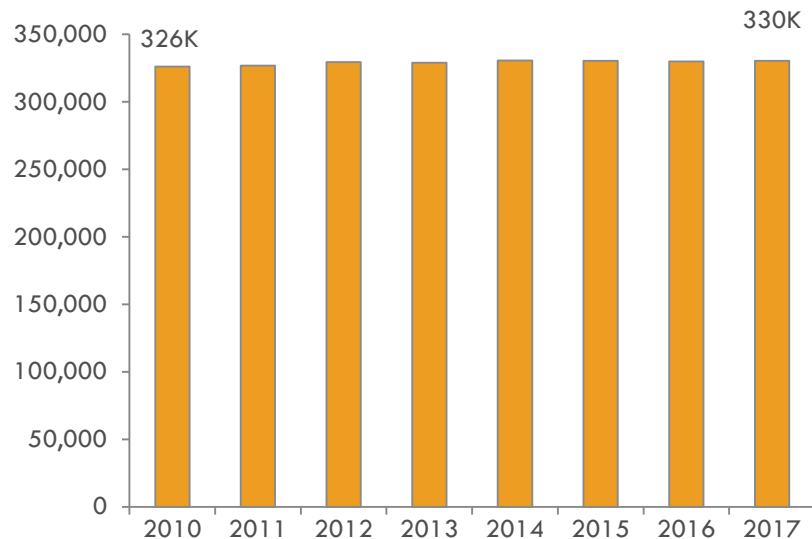
Supporting Data

Supporting Data

Population growth remains at an extremely slow pace.

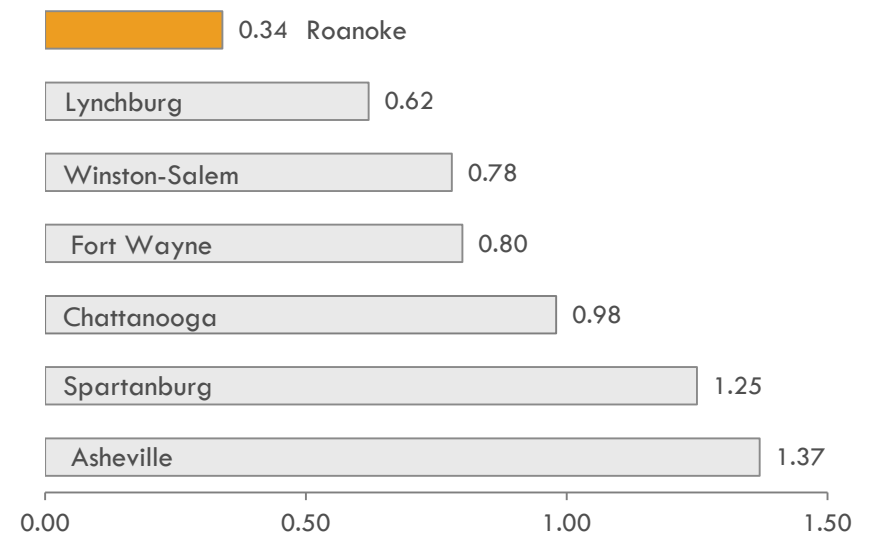
Population growth can be an important indication of a region's recent success and potential for further growth. Businesses are attracted to growing communities because of the relative ease of recruiting and retaining employees. However, population growth remains at a very low level in the Roanoke Region. Additionally, Roanoke's overall population growth both short-term and long-term is extremely slow by comparison with peer communities and the nation overall.

ROANOKE REGION TOTAL POPULATION ESTIMATES
2010-2017



SOURCE: WELDON COOPER CENTER / RRP

POPULATION GROWTH INDEX
2015-2017



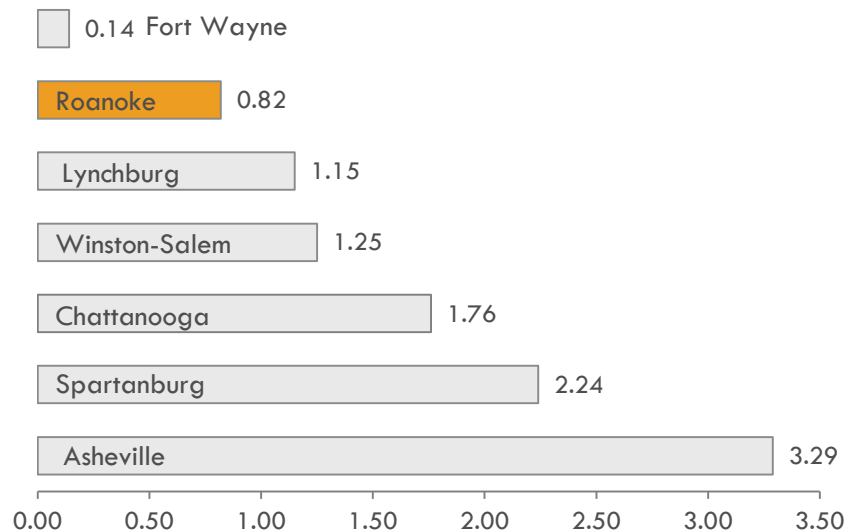
SOURCE: US CENSUS BUREAU / RRP

Supporting Data

The region's rate of in-migration is at a low level comparatively.

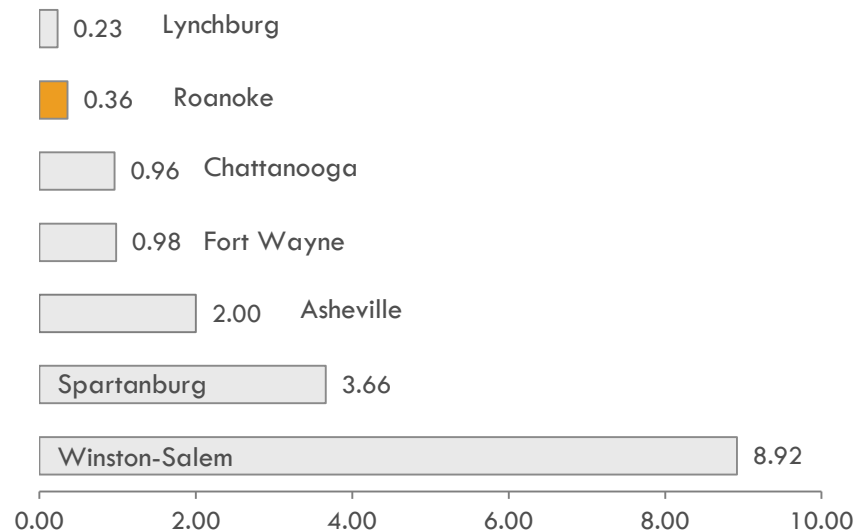
In terms of the rate of in-migration, Roanoke is second lowest among peer communities and at 82% of the national rate. Slower in-migration and almost nonexistent natural increase combine to reduce Roanoke's rate of overall population growth. The region also features a very slow rate of growth of young adults living in the region.

NET MIGRATION PER 1,000 RESIDENTS INDEX
2010-2017



SOURCE: US CENSUS BUREAU/ RRP

YOUNG ADULTS (25 to 44) GROWTH INDEX
2010-2016



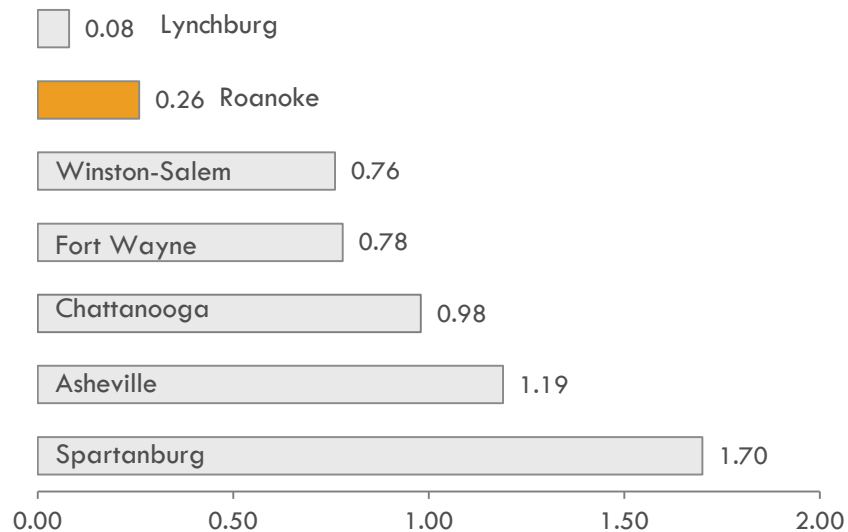
SOURCE: US CENSUS BUREAU/ RRP

Supporting Data

The region must address labor market availability to fuel continued economic growth.

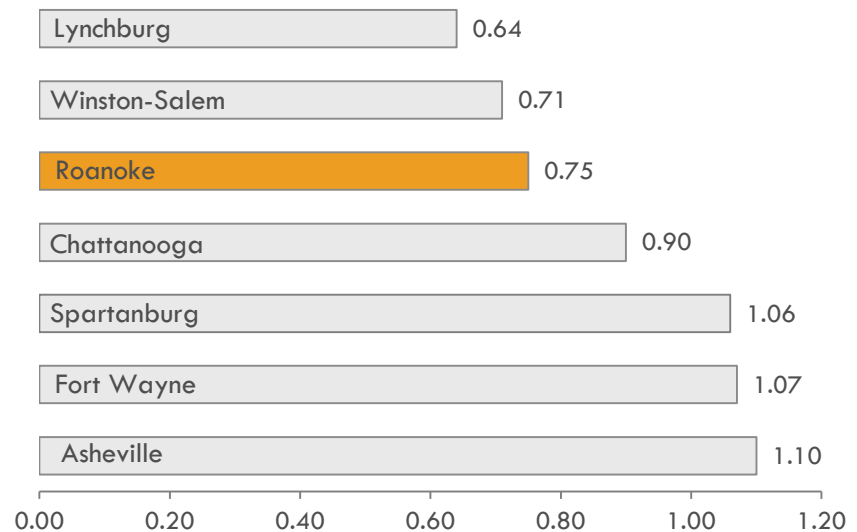
Employment growth is a primary indicator of overall economic health. Higher job growth translates into greater prosperity for a community. New workers are drawn to regions that have abundant employment opportunities. Businesses seek locations where other companies are growing and the labor force is increasing. Roanoke has experienced slow employment and moderate income growth since 2010. There is strong demand among employers to hire workers and a number of recent investments by Ballast Point, Eldor Corporation, Deschutes Brewery, and other expansions further intensifies hiring demand; however, demographic trends (an aging workforce) and a workforce constrained by low levels of population growth are dampening employment growth.

EMPLOYMENT GROWTH INDEX
2010-2017



SOURCE: BUREAU OF LABOR STATISTICS / RRP

PER CAPITA INCOME GROWTH INDEX
2010-2016



SOURCE: BUREAU OF ECONOMIC ANALYSIS / RRP

Roanoke Outside Foundation: A Good Start

The Roanoke Outside Foundation has made a large impact on changing the regional narrative to one built upon the outdoors. By educating residents on what is in their own backyard, showing them how to engage with it, and connecting them with programs, classes, and outfitters, Roanoke Outside turned residents into the region's biggest advocates and community cheerleaders. Accomplishments to date include:

- **Driving the outdoor community narrative via marketing and community events**

- Serves as a clearinghouse for information on the region's outdoor assets, offering a full inventory of outdoor assets along with marketing and promotion on www.roanokeoutside.com; prior to this, most information about the region's outdoor assets wasn't available online
- Donated \$400,000 to over 60 local nonprofits, events, and clubs that contribute to the development of the region's outdoor brand
- Created brand-building events with significant economic and tourism impact, including the Blue Ridge Marathon, GO Outside Festival, Banff Mountain Film Festival and Expo, and Go Cross
- Created weekly newsletter on outdoor culture with distribution of 15,000
- Identified opportunity and publisher for Life Outside, a regional outdoor lifestyle magazine
- Generated national media mentions in Outside Magazine, Runner's World, Canoe & Kayak, Backpacker, Men's Journal, Delta Sky, Politico, Washington Post, Forbes, Expedia, Single Tracks, Trip Advisor, Weather Channel, ESPN, and Conde Naste Traveler
- Helped create a local chapter of the International Mountain Bicycling Association (IMBA)
- Participated in process for region to receive Silver-Level Ride Center designation from International Mountain Bicycling Association
- Achieved designation for Roanoke as Top Outdoor Town by Blue Ridge Outdoors Magazine (2013-2016)
- Attracted national conferences including Trout Unlimited, Outdoor Bloggers Summit, and Association of Outdoor Recreation Educators
- Created Outdoor Explorers Mentor Program with Big Brothers Big Sisters to connect underserved populations with the outdoors

(continued)

Roanoke Outside Foundation: A Good Start

- **Supporting talent and business attraction efforts**

- Shared outdoor narrative with employers, which is now used by HR departments in their employee recruitment strategy
- Experienced 38% growth in outdoor sector employment since 2010
- Supported over 26 new outdoor-related businesses that have located or expanded in the region since the Foundation's establishment

- **Spearheading outdoor infrastructure investments**

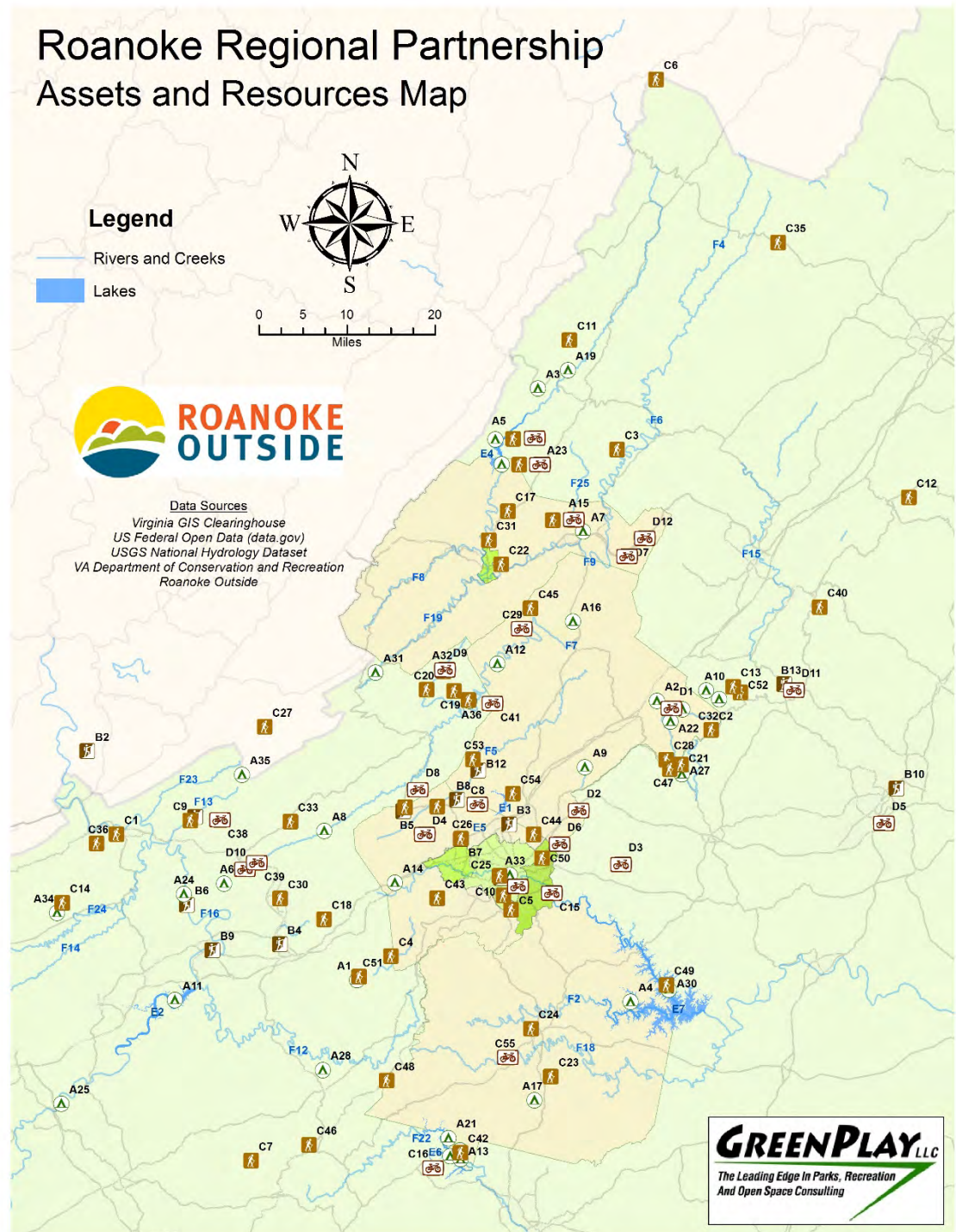
- Identified need for a climbing gym, conducted market research to demonstrate demand, and engaged local developer to create River Rock Climbing as part of mix-used development
- Created crowdfunding campaign that raised \$80K for kayak launches/river access in City of Roanoke, Franklin County, Alleghany County, and Botetourt County
- Led advocacy for public access to rivers previously closed due to landowner Kings Grant rights dispute
- Participated in master planning for Roanoke County's master plan for the 1,100 acre Explore Park
- Funded in-river kayak park feasibility study that identified three locations, one of which is part of the Explore Park master plan
- Stimulated creation of three disc golf courses and one dog park
- Created demand for outdoor recreation positions: Franklin County created an outdoor recreation manager position, City of Roanoke created a Trails Specialists position, and Alleghany Highlands created a Blueway Coordinator position
- Stimulated development of City of Roanoke's Roanoke River Blueway
- Led advocacy for opening Carvins Cove to stand up paddle boarding
- Led advocacy for change in payment for trail access fee at Carvins Cove
- Partnered on city-wide bike share program

- **Supporting Tourism**

- Assisted with startup outdoor service provider businesses such as Roanoke Mountain Adventures, Underdog Bikes, Twin River Outfitters, and River Rock Climbing, all of which provide tourism services.
- Blue Ridge Marathon has had a direct economic impact of \$4.5 million on the local economy.
- GO Outside Festival and GO Cross bring visitors to the region while contributing to region's reputation as an outdoor recreation destination.

Inventory & Resources Map

GreenPlay gathered GIS materials from Roanoke Outside to create a region-wide resource map of relevant assets, access points, trails, and amenities.



Inventory & Resources Map

GreenPlay gathered GIS materials from Roanoke Outside to create a region-wide resource map of relevant assets, access points, trails, and amenities.

Roanoke Regional Partnership

Assets and Resources

Inventory

Camping Areas

A1 - Alta Mons
A2 - Arcadia
A3 - Blowing Springs
A4 - Blue Ridge
A5 - Bolar Mountain
A6 - Boley Fields Group
A7 - Buckhorne Family
A8 - Caldwell Fields
A9 - Camp Bethel
A10 - Cave Mountain Lake
A11 - Claytor Lake State Park
A12 - Craig Creek Recreation Area
A13 - Deer Island
A14 - Dixie Caverns
A15 - Douthat State Park
A16 - Gala
A17 - Goose Dam
A18 - Goose Point Park
A19 - Hidden Valley
A20 - Hopper Creek
A21 - Horseshoe Point Park
A22 - Middle Creek
A23 - Morris Hill
A24 - New River Junction
A25 - New River Trail - Foster Falls
A26 - North Creek Mountain
A27 - Peaks of Otter
A28 - Rocky Knob
A29 - Salthouse Branch Park
A30 - Smith Mountain Lake State Park
A31 - Steel Bridge
A32 - The Pines
A33 - Urban Camping Roanoke
A34 - White Cedar Horse
A35 - White Rocks
A36 - Wilderness Adventure at Eagle Landing

Climbing Areas

B1 - Barney's Wall
B2 - Bozoo

B3 - Charlotte Fox Climbing Wall at Hollins University
B4 - Crimper's Climbing Gym
B5 - Dragon's Tooth
B6 - Fool's Face
B7 - Hanging Rock
B8 - McAfee Knob
B9 - Radford Climbing Wall
B10 - Rise Up Climbing
B11 - The River Rock
B12 - Tinker Cliffs
B13 - Tunstall's Tooth

Hiking

C1 - Angel's Rest
C2 - Apple Orchard Falls
C3 - Beards Mountain
C4 - Bottom Creek Gorge
C5 - Buck Mountain C6 - Buck Run & Locust Spring Run
C7 - Buffalo Mountain Natural Area Preserve
C8 - Carvins Cove Natural Reserve
C9 - Cascade Falls
C10 - Chestnut Ridge C11 - Cobbler Mountain
C12 - Crabtree Falls
C13 - Devil's Marblyard
C14 - Dismal Falls
A15 - Douthat State Park
B5 - Dragon's Tooth
C15 - Explore Park
C16 - Fairy Stone State Park
C17 - Falling Spring
C18 - Falls Ridge Natural Preserve
C19 - Fenwick Mines
C20 - Ferrier Trail & Lick Branch Loop
C21 - Flat Top
C22 - Fore Mountain
C23 - Franklin County Recreation Park
C24 - Grassy Hill Natural Area Preserve
C25 - Greenways
C26 - Hanging Rock Battlefield
C27 - Hanging Rock Raptor Observatory
C28 - Harkening Hill
C29 - Hoop Hole
C30 - Huckleberry

C31 - Jackson River Scenic
C32 - James River Wilderness
C33 - Kelly Knob
C34 - Lipes Branch
B8 - McAfee Knob
C35 - McDowell Battlefield
C36 - Mill Creek Falls
C37 - Mill Mountain Park
C38 - Mountain Lake Conservancy
C39 - Pandapas Pond & Poverty Creek
C40 - Panther Falls
C41 - Patterson Creek
C42 - Philpott's Dogwood Glen
C43 - Poor Mountain Natural Area Preserve
C44 - Read Mountain
C45 - Roaring Run
C46 - Rock Castle Gorge
C47 - Sharp Top
C48 - Smart View
C49 - Smith Mountain Lake Community Park
C50 - Stewarts Knob
C51 - Stiles Falls
C52 - Sulphur Springs Ridge & Price Mountain
C53 - Tinker Cliffs (Andy Layne Trail)
C54 - Tinker Ridge/Hay Rock Overlook
C55 - Waid Recreation Park
A36 - Wilderness Adventure at Eagle Landing

Mountain Biking

D1 - Arcadia Up and Over
C8 - Carvins Cove Natural Reserve
D2 - Dody Ridge
A15 - Douthat State Park
C15 - Explore Park
C16 - Fairy Stone State Park
D3 - Falling Creek Park
D4 - Fort Lewis Mountain (Havens WMA)
C29 - Hoop Hole
D5 - Liberty Mountain Trail System
C37 - Mill Mountain Park
D6 - Montvale Park
C38 - Mountain Lake Conservancy

D7 - North Mountain Trail at Longdale Furance
D8 - North Mountain Trail: Dragon's Back
C39 - Pandapas Pond & Poverty Creek
C41 - Patterson Creek
D9 - Potts Mountain Jeep Road
D10 - Poverty Creek
D11 - South Pedlar ATV Trail System
C55 - Waid Recreation Park
D12 - Whiterock Tower Trail

Lakes

E1 - Carvin Cove Reservoir
E2 - Claytor Lake
E3 - Douthat Lake
E4 - Lake Moomaw
E5 - Lock Haven Lake
E6 - Philpott Lake
E7 - Smith Mountain lake

Rivers and Creeks

F1 - Barbours Creek
F2 - Blackwater River
F3 - Bottom Creek
F4 - Bullpasture River
F5 - Catawba Creek
F6 - Cowpasture River
F7 - Craig Creek
F8 - Dunlap Creek
F9 - Jackson River
F10 - James Creek
F11 - Jennings Creek
F12 - Little River
F13 - Little Stony Creek
F14 - Little Walker Creek
F15 - Maury River
F16 - New River
F17 - North Creek
F18 - Pigg River
F19 - Potts Creek
F20 - Roanoke River
F21 - Roaring Creek
F22 - Smith River
F23 - Stony Creek
F24 - Walker Creek
F25 - Wilson Creek

08

**Survey Results
and National
Trends**

Community Survey Summary

A survey research effort and subsequent analysis were designed and conducted to reach out further to the public regarding existing and potential future facilities and services. The survey was conducted using SurveyMonkey and was open from October 9, 2018 through November 10, 2018. The survey was distributed using an intercept post card distributed during GO Fest and using the Roanoke Outside social media outlets. A total of 457 completed responses from 54 different zip codes were received, with the largest responses identifying as residents living in 24015 and followed by 24014.

- **The top business/service provider/outfitter desired in the regional is campgrounds.** Forty-six percent (46%) of respondents rated campgrounds as the most desired, followed by cabin rentals (38%), aerial zip line course (35%) and destination retail (34%)
- **The most frequently visited outdoor attraction in the regions is the Blue Ridge Parkway and urban trails like the Greenway.** When asked about regional attractions visited, respondents indicated that the Blue Ridge Parkway was the top (65%) followed by urban trails like the Greenway (59%), walking/hiking trails (52%) and the Appalachian Trail (45%) .
- **Structured outdoor education programs were identified as the best way to serve children living in the region.** Respondents were asked about activities and amenities that would help serve the children in region, and structured outdoor education programs (58%) was the top choice followed by beginner mountain bike trails (40%) and a bike park/pump track (38%).
- **Mountain biking should be the most prioritized activity over the next five years.** Twenty-two percent (22%) of respondents rated mountain biking as the top activity the region should prioritize over the next five years. This was followed very closely by hiking/walking (19%), a skate park (17%), and paddle sports and tent camping at (13%).
- **The majority of respondents would definitely support the creation of a dedicated fund for outdoor infrastructure improvements and maintenance.** Sixty-one percent (61%) of respondents stated they would definitely support the creation of a dedicated fund for outdoor infrastructure improvements and maintenance. Another twenty-nine percent (29%) indicated that they would probably support a dedicated fund.

Outdoor Recreation Influencing Trends

The provision of parks, trails and outdoor recreation services can be influenced by a wide variety of trends, including the desires of different age groups within the population, community values, and popularity of a variety of recreational activities and amenities. Within this section, a number of national trends are reviewed that should be considered by the Roanoke Region when determining where to allocate resources toward the provision of parks, trails, outdoor recreational facilities, and outdoor recreational programming to its residents and visitors.

Generational Participation

Millennials often look for local and relatively inexpensive ways to experience the outdoors close to home; on trails, bike paths, and in community parks. They, along with the baby boomer generation, highly value walkability, and in a 2014 study by the American Planning Association, two-thirds noted that improving walkability in a community is directly related to strengthening the local economy. The study also noted that forty-six percent of Millennials, and Baby Boomers, place a high priority on having sidewalks, hiking trails, bike paths and fitness choices available to them in their community. In fact, these community features were viewed by study respondents to be of higher preference than a great school system, vibrant centers of entertainment and culture, and affordable and convenient transportation choices.

Cultural Participation

Cultural and ethnic diversity adds unique character to communities expressed through distinct neighborhoods, multicultural learning environments, and restaurants, places of worship, museums, and nightlife. More than ever, recreation providers will be expected to work with, and have significant knowledge and understanding of individuals from many cultural, racial, and ethnic backgrounds.

- Outdoor recreation participation varies by race: Participation in outdoor activities is generally higher among Caucasians than any other race and lowest among African Americans in nearly all age groups.
- Lack of interest is a major reason for lack of participation in recreational activities: When asked why they did not participate in outdoor activities more often, the number one reason given by people of all ethnicities and races was because they were not interested.
- Most popular outdoor activities: Walking, biking, running, fishing, and camping were the most popular outdoor activities for all Americans, with each ethnic/racial group participating to varying degrees.

Outdoor Recreation Influencing Trends

Active Transportation – Bicycling and Walking

In many surveys and studies on participation in recreational activities, walking, running, jogging and cycling are nearly universally rated as the most popular activities among youths and adults. Walking, jogging and running are often the most highly participated in recreational activity and cycling often ranks as the second or third most popular activity.

Walking, running, jogging and cycling are attractive as they require little equipment, or financial investment, to get started, and are open to participation to nearly all segments of the population. For these reasons, participation in these activities are often promoted as a means of spurring physical activity, and increasing public health. The design of a community's infrastructure is directly linked to physical activity – where environments are built with bicyclists and pedestrians in mind, more people bike and walk. Higher levels of bicycling and walking also coincide with increased bicycle and pedestrian safety and higher levels of physical activity. Increasing bicycling and walking in a community can have a major impact on improving public health and life expectancy. The following trends as well as health and economic indicators are pulled from the Alliance for Biking and Walking's 2012 and 2014 Benchmarking Reports:

Public health trends related to bicycling and walking include:

- Quantified health benefits of active transportation can outweigh any risks associated with the activities by as much as 77 to 1, and add more years to our lives than are lost from inhaled air pollution and traffic injuries.
- Between 1966 and 2009, the number of children who bicycled or walked to school fell 75 percent, while the percentage of obese children rose 276 percent.
- Bicycling to work significantly reduces absenteeism due to illness. Regular bicyclists took 7.4 sick days per year, while non-bicyclists took 8.7 sick days per year.

Economic benefits of bicycling and walking include:

- Bicycling and walking projects create 8 to 12 jobs per \$1 million spent, compared to just 7 jobs created per \$1 million spent on highway projects.
- Cost benefit analyses show that up to \$11.80 in benefits can be gained for every \$1 invested in bicycling and walking.

Outdoor Recreation Influencing Trends

National bicycling trends:

- There has been a gradual trend of increasing bicycling and walking to work since 2005.
- Infrastructure to support biking communities is becoming more commonly funded in communities.
- Bike share systems, making bicycles available to the public for low-cost, short-term use, have been sweeping the nation since 2010. Twenty of the most populous U.S. cities have a functional bike share system.

Bike Friendly Communities

Bicycle-friendly communities have been emerging over the last 10 years. In addition to being a popular recreational activity, cycling has become a desirable, regular mode of transportation as people consider the costs and challenges of commuting by car or public transportation, their desire for better health, and concern for the environment.

The Institute for Transportation & Development Policy published an updated Standard for Transportation Oriented Design (TOD) in March 2014, with accessible performance objectives and metrics, to help municipalities, developers and local residents design land use and built environment “to support, facilitate and prioritize not only the use of public transport, but the most basic modes of transport, walking and cycling.” The TOD Standard, along with its performance objectives and scoring metrics, can be found at <https://www.itdp.org/tod-standard/>.

Trails and Health

Trails can provide a wide variety of opportunities for being physically active, such as walking/running/hiking, rollerblading, wheelchair recreation, bicycling, cross-country skiing and snowshoeing, fishing, hunting, and horseback riding.

Trails and community pathways are a significant recreational and alternative transportation infrastructure, but are most effective in increasing public health when they are part of a system. In fact, the Centers for Disease Control and Prevention’s Trails for Health Initiative concluded that a connected system of trails increases the level of physical activity in a community. Several groups, including American Trails have created resources explaining the many benefits of trails: <http://www.americantrails.org/resources/benefits>.

Outdoor Recreation Influencing Trends

The health benefits are equally as high for trails in urban neighborhoods as for those in state or national parks. A trail in the neighborhood, creating a 'linear park', makes it easier for people to incorporate exercise into their daily routines, whether for recreation or non-motorized transportation. Urban trails need to connect people to places they want to go, such as schools, transit centers, businesses, and neighborhoods. Centers for Disease Control and Prevention, "Guide to Community Preventive Services," <http://www.thecommunityguide.org/index.html>

Natural Environments and Open Space Conservation

Parks and public lands are critical to the quality of life for all Americans, and that quality of life, for everyone, in any community, is improved by clean, green, and accessible parks and open space.

Parks and open spaces serve an essential role in preserving natural resources and wildlife habitat, protecting clean water and clean air, and providing open space for current and future generations. Parks also provide an essential connection for Americans of all ages and abilities to the life-enhancing benefits of nature and the outdoors.

- In addition to providing access to parks and public land, outdoor recreation also contributes to the economy of a community: Outdoor recreation was estimated to have generated \$646 billion in consumer spending in 2012, according to the Outdoor Industry Association, and in 2016 the American Recreation Coalition estimated outdoor recreation will generate more than \$650 billion in consumer spending.
- The return on investment from protecting open space for public benefit from ecosystem services of water filtration, climate change protection, and other aspects of conserving public open space is estimated to be 100 to 1, according to a study by the Gund Institute for Ecological Economies at the University of Vermont.
- Public support for land conservation and open space protection ballot measures has remained above 70 percent passage over the past decade, even during times of economic downturns and recessions.

Riparian and Watershed Best Practices

As managers of large areas of public open space, and large areas of impervious surfaces, parking lots and rooftops at facilities, parks and recreation providers have been tasked with playing a larger role in the stewardship of water resources.

Outdoor Recreation Influencing Trends

Storm water management, floodplain conservation, coastal/shoreline management and wetlands conservation are typical arenas in which parks and recreation providers find themselves working, and agencies should be familiar with the various roles they will need to play in curbing water pollution and preserving natural systems that filter water. For example, several major metropolitan areas, including Houston, Texas, are investing in (often long neglected) riverfront parks, focusing on improving the functionality of floodplains, outdoor recreation opportunities, and natural systems enhancements.

Parks and recreation agencies can also play a key role in creating and implementing watershed management plans. Agencies can also supplement local and regional monitoring efforts of watersheds and riparian areas, assisting planners in their evaluation of the effectiveness of management plans and water quality improvement strategies. Regular monitoring can help identify changes in resource conditions, such as water levels, flow rates, pollution levels, and the effectiveness of pollution abatement measures and water resource improvement efforts.

Nationwide recreation trends in state parks

The table below represents state trends for specific recreation activities at state parks nationwide, as reflected in the 2008 survey. The activities with the most significant increases in popularity are hiking, camping and water-based recreation other than fishing. Those with the most significant declining popularity are hunting and outdoor recreation among youth.

Recreational Trends at State Parks Nationwide

Trends in State Parks	Declining Significantly	Declining Moderately	About Constant	Increasing Moderately	Increasing Significantly
Camping	0	1	21	23	2
Hiking	0	1	14	21	10
Water-based recreation, other than Fishing	0	6	21	14	6
Fishing	0	9	27	9	1
Hunting	1	21	16	5	0
Sightseeing by Car	3	10	22	6	3
Wildlife Viewing, Overall	0	0	19	24	4
Bird watching	0	0	16	26	5
Outdoor recreation, overall	0	3	14	21	4
Outdoor recreation among youth	2	19	15	7	2

Outdoor Recreation Influencing Trends

Outdoor Recreation

The Outdoor Foundation releases a *Participation in Outdoor Recreation Report* annually. According to the 2016 Topline Report, nearly half (48.4%) of Americans participated in outdoor recreation activities in 2015.

Increased participation in outdoor recreation activities were strong in paddle sports, with stand-up paddle boarding remaining the top outdoor activity for growth, with participation growing by 26 percent from 2014 to 2015.

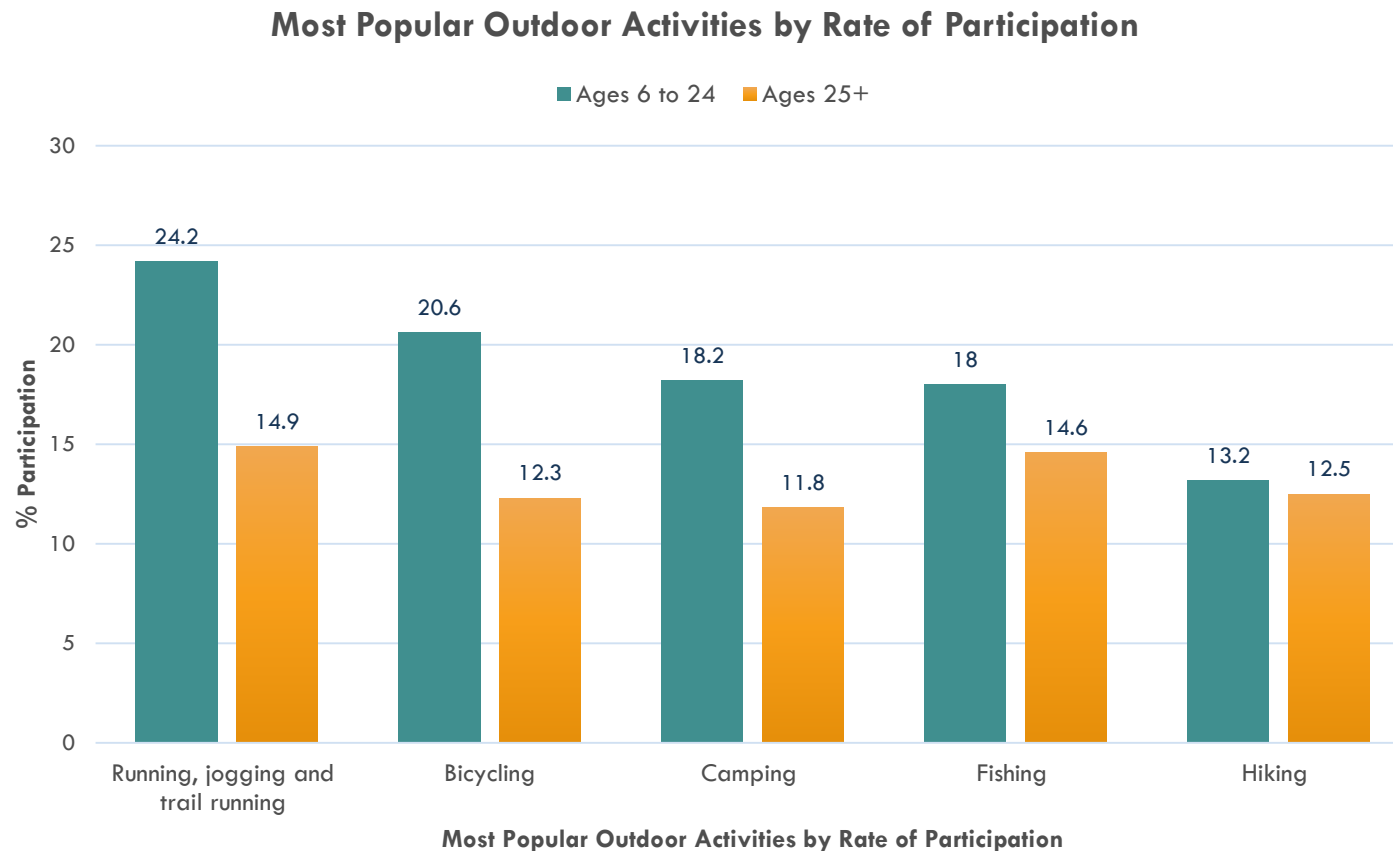
Additional key findings from the Outdoor Foundation's 2016 *Outdoor Recreation Participation Topline Report* include:

Participation in Outdoor Recreation

- In 2015, 48.4% of Americans ages 6 and older participated in at least one outdoor activity. This equated to 142.4 million Americans who went on a collective 11.7 billion outdoor recreation outings.
- Top five participation percentage increase in outdoor activities in the past three years were in stand-up paddling, triathlon (traditional/road), kayak fishing, triathlon (non-traditional/off-road), and trail running.
- Participation among youths ages 6 to 12 was at 63 percent, ages 13 to 17 was at 59 percent, and ages 18 to 24 was at 57 percent.
- Participation among adults ages 25 to 44 was at 56 percent, and 37 percent among adults ages 45 and older.

Outdoor Recreation Influencing Trends

The 2016 *Outdoor Recreation Participation Report* also lists the most popular (by participation rate) and favorite (by frequency of participation) outdoor activities for youth and young adults ages 6 to 24, and adults over the age of 25 nationwide:

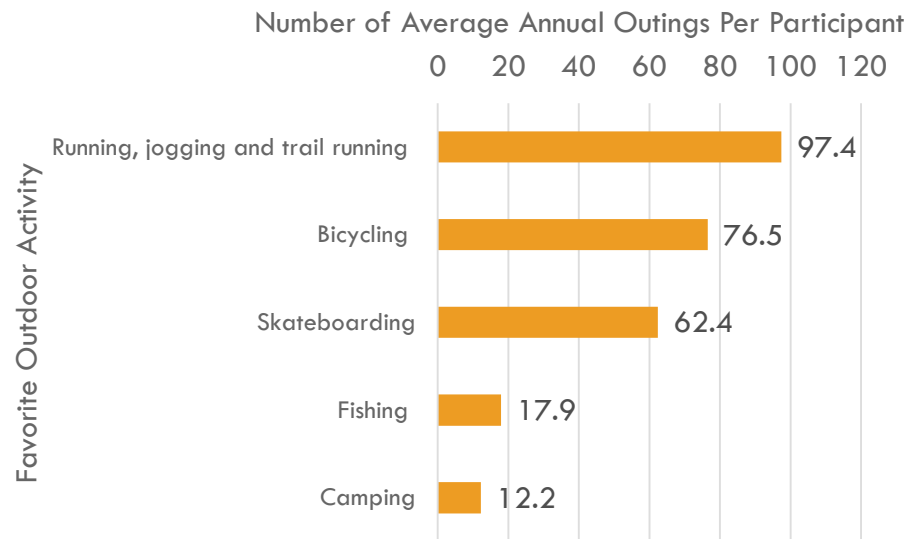


Source: 2016 *Outdoor Recreation Participation Topline Report*

Outdoor Recreation Influencing Trends

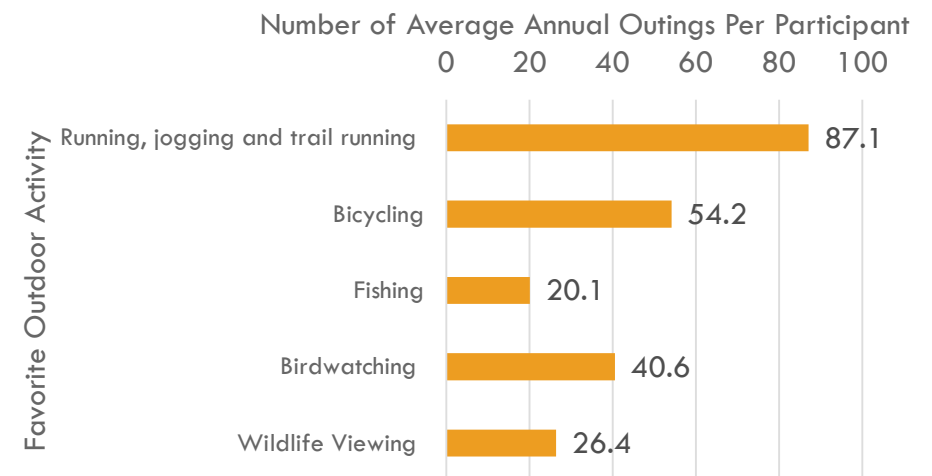
The 2016 *Outdoor Recreation Participation Report* also lists the most popular (by participation rate) and favorite (by frequency of participation) outdoor activities for youth and young adults ages 6 to 24, and adults over the age of 25 nationwide:

Favorite Outdoor Activities by Frequency of Participation among Youths and Young Adults (Ages 6 to 24):



Source: 2016 *Outdoor Recreation Participation Topline Report*

Favorite Outdoor Activities by Frequency of Participation among Adults (Age 25+)



Source: 2016 *Outdoor Recreation Participation Topline Report*

Outdoor Recreation Influencing Trends

Trail Recreation and Cycling Trends

For trail-related recreation activities such as hiking, bicycling, and running, the *2016 Outdoor Recreation Topline Report* indicates a positive three-year trend for trail running, running/jogging, hiking, mountain biking and BMX biking, as shown in the table below. Additionally, participation in trail running and BMX biking is up significantly over the recent three-year period.

Cycling and Trail Recreation Participation by Activity (Ages 6+)

	2010	2011	2012	2013	2014	2015	3 Year Average Change
BMX Bicycling	2,369	1,547	2,175	2,168	2,350	2,690	7.5%
Bicycling (Mountain/Non-Paved Surface)	7,161	6,816	7,714	8,542	8,044	8,316	2.8%
Bicycling (Road/Paved Surface)	39,320	40,349	39,232	40,888	39,725	38,280	-0.8%
Hiking (Day)	32,496	34,491	34,545	34,378	36,222	37,232	2.6%
Running/Jogging	50,713	52,187	54,188	51,127	49,408	48,496	-2.3%
Trail Running	5,136	5,610	6,003	6,792	7,531	8,139	10.7%

Source: 2016 Outdoor Recreation Participation Topline Report

Outdoor Recreation Influencing Trends

Other Cycling Trends

- Bicycle touring is becoming a fast-growing trend around the world, including the United States and Canada. “Travelers are seeking out bike tours to stay active, minimize environmental impact, and experience diverse landscapes and cityscapes at a closer level.”
- Urban bike tours, popular in cycle-friendly cities in Europe, are taking hold in the United States as well.
- One of the newest trends in adventure cycling is “fat bike,” multiple speed bikes that are made to ride where other bikes can’t be ridden, with tires that are up to 5 inches wide run at low pressure for extra traction. Most fat bikes are used to ride on snow, but they are also very effective for riding on any loose surface like sand or mud. They also work well on most rough terrain or just riding through the woods. This bike offers unique opportunities to experience nature in ways that wouldn’t be possible otherwise.

Water Recreation Trends

The Outdoor Foundation’s *2016 Outdoor Recreation Participation Topline Report* provided nationwide trends for various outdoor activities, including a number of water-based recreational activities noted in the table.

Among water recreation activities, stand-up paddling had the largest increase in participation (25.7%), followed by several varieties of the kayaking experience: kayak fishing (17.4% increase), and whitewater kayaking (10.3% increase). Fly fishing participation went up while other fishing activities went down in the same time period. Participation in surfing declined slightly in 2015, down by 2.2 percent overall. Sailing participation increased somewhat, while rafting and wakeboarding participation went down.

Water Recreation Participation by Activity (in thousands) (age 6 years or older)

	2011	2012	2013	2014	2015	3 Year Average Change
Boardsailing/windsurfing	1,151	1,593	1,324	1,562	1,766	4.7%
Canoeing	9,787	9,839	10,153	10,044	10,236	1.3%
Fishing (fly)	5,683	6,012	5,878	5,842	6,089	0.5%
Fishing (freshwater/ other)	38,868	39,135	37,796	37,821	37,682	-1.2%
Fishing (Saltwater)	11,983	12,017	11,790	11,817	11,975	-0.1%
Kayak fishing	1,201	1,409	1,798	2,074	2,265	17.4%
Kayaking (recreational)	8,229	8,144	8,716	8,855	9,499	5.3%
Kayaking (sea touring)	2,029	2,499	2,694	2,912	3,079	8.0%
Kayaking (white water)	1,546	1,878	2,146	2,351	2,518	10.3%
Rafting	3,821	3,690	3,836	3,781	3,883	1.7%
Sailing	3,725	3,958	3,915	3,924	4,099	1.2%
Stand up paddling	1,242	1,542	1,993	2,751	3,020	25.7%
Surfing	2,195	2,895	2,658	2,721	2,701	-2.2%
Wakeboarding	3,389	3,348	3,316	3,125	3,226	-1.2%

Source: 2016 Outdoor Recreation Participation Topline Report



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