

# Bicycle and Pedestrian Facilities Economic Impact Analysis Scoping Study

Project Report

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Prepared for:



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## Executive Summary

East Central Wisconsin Regional Planning Commission (ECWRPC) led the development of an economic impact analysis (EIA) scoping study from August to December 2019. The scoping study works toward the goal of estimating benefits of the region's walking and bicycling networks. This report presents the scoping study's findings. Participants who contributed to this effort are invited to read the report and consider its recommendations. This report represents the beginning phase of the EIA. A full study is possible through continued coordination, collaboration, and identification of funding sources. The report synthesizes lessons learned from **a stakeholder meeting, two online surveys, two focus groups, and fourteen stakeholder interviews**. Stakeholder coordination was crucial to develop a future study that resonates with decision makers in the planning area (urbanized areas of Calumet, Outagamie, and Winnebago counties).

## A Vision for an Economic Impact Analysis

The following recommendations would help create a report that best showcases the region and leverages existing resources. The ideal study would benchmark existing regional benefits of active transportation. The study would also investigate potential future benefits of expanding walking and bicycling.

## Audiences

The full EIA should be accessible to all residents. Priority audiences are elected officials and members of the local business community (e.g., business owners, developers, and Chambers of Commerce). For example, efforts should focus on quantifying information in terms of monetary values.

## Themes

Stakeholders expressed particular interest in a study that quantifies the following benefits of active transportation.

- Existing and Forecasted Active Transportation Mode Share
- Quality of Life and Workforce Attraction
- Tourism
- Local Real Estate Values
- Safety, Health, and Environmental Benefits

## Timeline

The project start date has not yet been identified and depends in part on identifying potential funding. Project costs were developed based on an estimated **12 to 18 month timeline**.

## Estimated Cost

Producing the EIA using a consultant and a combination of existing and newly created data sources would cost approximately \$85,000 - \$150,000. Although producing an EIA using only existing data sources would cost approximately \$40,000 - \$75,000, this approach would not include a detailed analysis of local and regional case studies or custom data collection and analysis. Leveraging public agency staff time is recommended. Continued public and stakeholder engagement is likely to cost approximately \$5,000 - \$15,000. Project management is estimated as an additional 5% to 10% of project cost.

## Scoping Document Development

This document supports the goal of working toward a future economic impact analysis (EIA) that resonates with the region's context. The scoping study's purpose was to engage the community and

stakeholders in the economics of bicycle and pedestrian infrastructure, gauge expectations for a future economic impact analysis (EIA), and determine what data are available to support the study. The study's stakeholder engagement and data review concentrated on the urbanized areas of Calumet, Outagamie, and Winnebago counties. Discussing the future project with stakeholders and analyzing available data sources, before the full EIA begins, helps position ECWRPC for undertaking an EIA that responds to local interests.

The scoping study's stakeholder engagement encompassed the following:

- One public agency stakeholder meeting
- Two online surveys: one for residents and one for other stakeholders
- Two focus groups: one for trail users and advocates and one for economic and tourism professionals
- Fourteen stakeholder interviews

## Public Agency Stakeholder Meeting

Twenty-one people from municipalities and counties within the ECWRPC planning area attended a public agency stakeholder meeting on September 5, 2019. The meeting was convened to introduce the project and to hear stakeholders' ideas related to the following topics:

- Prior economic impact analyses
- Topics to study in a future economic impact analysis
- Potential stakeholder roles related to a future study
- Data and background information needs

Meeting participants mentioned the ECWRPC's Winnebago County Economic Impact Study—Parks and Trails (2015 and 2017) as an example of reports that studied existing trails' impacts on the region, such as average expenditure of trail users, a trail user survey, and usage statistics. Other planning documents related to biking and walking were also mentioned as important to the region's context. Topics to study within the context of a future economic impact analysis mirrored topics suggested by other stakeholders. The list of proposed topics is found below, in no particular order:

- Increase in property values, due to presence of active transportation facilities (e.g., to counter negative perceptions)
- Attract and retain workforce
- Quality of life
- Redevelopment changes to land use (e.g., Oshkosh Riverwalk)
- Per capita spending along trails and collected from community events
- Return on investment from infrastructure: collaborate with municipalities, include cost of maintenance and operations, think about on v. off road infrastructure
- Safety benefits from separated infrastructure
- Impacts of roundabouts on bicycling / walking comfort

Participants were asked to consider the types of audiences who should receive the report and how to tailor findings toward these audiences. Elected officials and business owners were identified as two crucial audiences. Stakeholders felt that these audiences might resonate more with benchmarking existing benefits of the active transportation network, as opposed to extrapolating long-term impacts from building the proposed active transportation network. Meeting participants emphasized quantifying the benefits of active transportation facilities in monetary terms.

When asked about their agencies' potential roles related to economic development, most stakeholders provided examples of data they could provide for the study. Example data includes parcel data, trail and bike lane usage data, health department survey data, and building and construction permits.

## Online Surveys

Online surveys were used to collect information and ideas from potential interview participants. This approach allowed the team to collect a baseline level of data from stakeholders identified as potential study participants. The survey mirrored questions asked during the project stakeholder kickoff meeting. The survey asked stakeholders about topics of interest that could be evaluated within the future economic impact study. It requested more information about pertinent data that the agency could contribute, previously completed economic impact studies, and their understanding of key economic and tourism assets.

A shorter version of the survey was posted to ECWRPC's Facebook page for residents to respond. Survey questions were the same between both versions. However, the shorter one removed questions that asked respondents about data they could contribute to the future economic impact analysis. Thirty-nine people completed the longer version. Four United Way representatives completed the shorter version of the survey.

## Survey Findings

Survey questions included multiple choice questions and open-ended questions. Major findings are summarized below.

### Topics to Analyze

Livability, business, and mobility were identified as the most important topics to analyze within the context of a future economic impact analysis. Respondents were provided with examples of each answer choice:

- Livability (e.g. quality of life, resident satisfaction)
- Business (e.g., local spending, attract and retain workers)
- Mobility (e.g., access to community services, transport options)
- Environment (e.g., natural resource protection, air quality)
- Public Health (e.g., aging in place, physical activity, absenteeism)
- Fiscal responsibility (e.g., return on investment, cost effectiveness)
- Tourism (e.g., event spending, community branding)
- Safety (e.g., property damage, injuries)

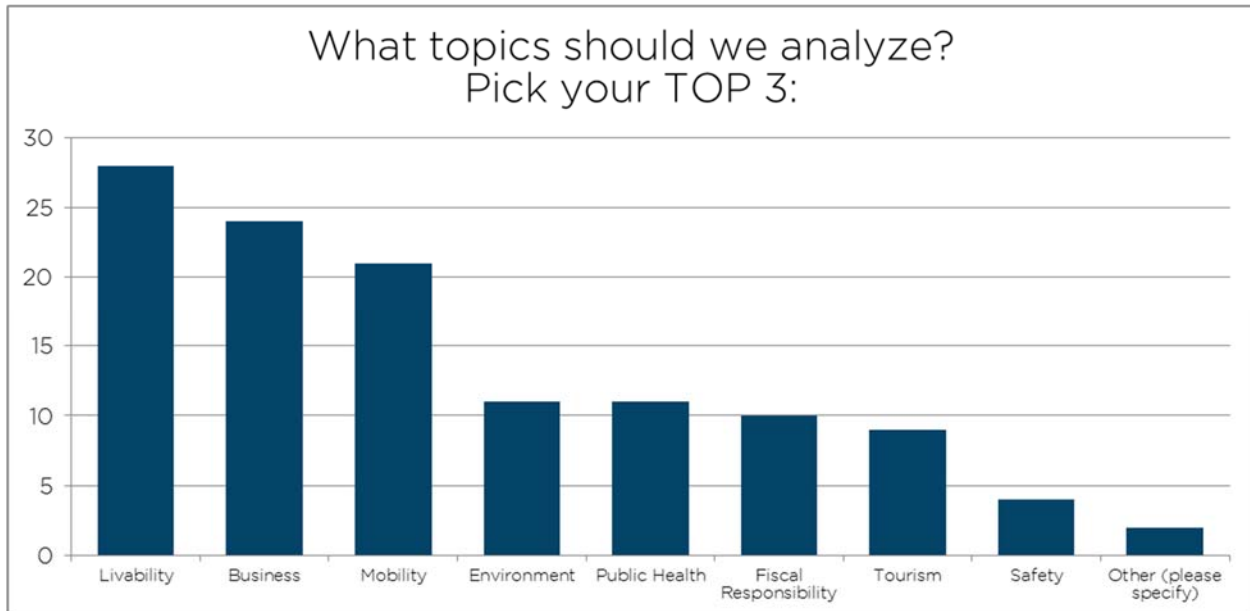


Figure 1. Online survey question regarding topics to analyze within the future EIA.

### Report Audiences

Respondents were asked about top audiences to read the report. Elected officials, business owners / Chambers of Commerce representatives, and developers were the most frequently cited potential audiences.

### Study Timeline

Survey respondents were asked whether the analysis should focus on the benefits of existing rates of active transportation or to instead focus on future rates, based on future network development. More than three quarters of respondents (82%) indicated greater interest in future network development and future rates of active transportation.

### Organization Roles and Data

One of the survey goals was to understand respondents' potential roles vis a vis the future study. Although responses are not binding agreements, they indicate potential capacity throughout the region to work toward the study. Respondents were asked to pick as many answer choices as are applicable. Nearly three quarters of responses, 74%, indicated an interest in providing guidance or review of the future study.

Responses indicating an interest in providing or collecting data received the second and third highest number of responses, respectively. Participants also indicated a wide variety of existing data points available to contribute to the study. Of participants who indicated data available for the future study, over half (52%) said they have access to data that maps existing or proposed active transportation networks. Bike or pedestrian counts, bike or pedestrian surveys, and crash data are other commonly available data sources.

## Focus Groups

The Center for Customized Research and Services at UW Oshkosh (CCRS) contributed to the research component of this project by conducting a series of focus groups and in-person interviews in October and November, 2019. These exercises proved especially valuable as the collection of feedback through multiple channels is commonly viewed as a best practice in market research. These also enabled the project team to gain deeper insights from several key stakeholders. Participants ranged from commercial real estate developers to community foundation staff. The insights shared closely mirror the survey findings and provide additional context that will prove useful in designing the scope of the forthcoming economic impact analysis. The full Focus Group Report by UW Oshkosh is available as a separate document.

### Focus Group Composition

The decision to include focus groups as a feedback collection mechanism was based both on the volume and type of information requested as well as the diversity of stakeholders identified by the project team. A focus group is especially well-suited for encouraging open discussion among those interested in and impacted by a given topic. This is especially true of bicycle and pedestrian facilities as the impact of existing improvements differs across municipalities and stakeholder groups.

Several possible focus group cohorts were initially identified for recruitment. This included economic development professionals, elected officials, real estate developers, tourism officials, and trail enthusiasts. Two focus groups were ultimately selected, composed of economic development and tourism professionals in the first, and advocates and community stakeholders in the second.

### Focus Group Themes

The focus group discussions were formatted to follow the same order of topics as the survey. Topics were timed both for priority and total session length so that all feedback was collected in a timely manner, while allowing for open discussion. The topics discussed include:

1. Individual/Organization Role
2. Facilities and Stakeholder Interaction/Usage
3. System Quality Assessment
4. Role of System in Promotion of Region
5. Organization Data Needs and Haves
6. Organization Data Wants
7. Destinations Best Served and Needs for Improvement

Not surprisingly, much of the discussion in both of the focus groups centered on the topic of system quality as each conversation included several passionate system users and others that hope to encourage more utilization. Conversely, relatively little time was devoted to questions regarding data availability as few organizations appear to possess data that would be specifically relevant to the proposed economic impact analysis. Stakeholder interviews, conversely, identified available and missing data.

## Stakeholder Interviews

A total of 13 stakeholder interviews were conducted by phone and in person. Interviews were used to collect specific information from key stakeholders. Interview participants represented a wide range of public agencies and organizations. Each was a free-flowing conversation regarding the state of bicycle and pedestrian infrastructure in the region, each individual's connection to these networks, and topics, data, audiences, and participant roles related to studying how bicycle and pedestrian activity benefits the region. The following entities participated in the interviews:

- City of Neenah
- City of Oshkosh
- City of Appleton
- Community Foundation of the Fox Valley
- Fox Cities Chamber of Commerce
- Fox Cities Convention and Visitors Bureau
- Heart of the Valley Chamber of Commerce
- Miravida Living/Cycling Without Age
- Oshkosh Area Community Foundation
- Oshkosh Chamber of Commerce
- Outagamie County
- Village of Little Chute
- Weight of the Fox Valley

## Interview Themes

Although each interview was unique, several key themes emerged:

- **Monetary values:** Interview participants emphasized a need to quantify the value of walking and bicycling in the region by using monetary values. Illustrating the network's return on investment was perceived as critical to demonstrate support for its expansion.
- **Benefit to businesses:** Workforce development, attraction, and retention were viewed as crucial for the region's success. Demonstrating how improved transportation systems can address these challenges is important to fostering buy-in for their continued development. Interview participants also provided examples of businesses that have supported the development of segments of the region's active transportation network.
- **Benefits to residential areas:** Multiple participants were interested in further study related to home prices near trails or other bicycle and pedestrian infrastructure. Interview participants provided examples of case studies where residents either supported or disapproved of walking and bicycling projects based on perceived impacts to home values.
- **Quality of life:** Similarly, interview participants noted how new and potential residents equate walking and bicycling with the ability to provide people with livable communities. Most of the focus was placed on developing livable communities for working age people. However, some participants also noted the need for building an equitable system that supports people of all ages, abilities, and backgrounds.
- **Elected officials:** Elected officials, business owners, and residents were most often cited as people for whom the future study should be tailored. Participants noted that the region's political climate could mean that elected officials would likely respond well to a study that demonstrates infrastructure's return on investment, fiscal responsibility, ability to drive investment, and increase the tax base.



- **Timing:** Interview participants were asked whether a study should evaluate benefits of the existing active transportation system or if they should focus on potential benefits from building out a connected regional network. Interview participants expressed differing opinions about this focus. However, most saw value in a study that benchmarks current conditions and looks toward future development scenarios.

Interview participants were generally very interested in participating in the broader analysis. There was little discussion of funding for the broader study, though multiple participants felt hopeful that funding could be organized. The following section builds upon lessons learned during the study's stakeholder engagement. It presents a recommended approach to creating a future economic impact analysis.

## Recommended Project Approach

A regional economic impact analysis would quantify the benefits and costs of existing and future active transportation infrastructure and usage. This section presents the following recommendations to define the project's scope:

- Report audiences and key research topics
- Data and sources
- Cost estimates and timeline
- Publicizing project findings

## Recommended Audiences and Key Research Topics

The economic impact study should be an accessible document that uses plain language. It is recommended that the report content focus on reaching elected officials and members of the local business community (e.g., business owners, developers, and Chambers of Commerce). Topics to research within the future economic impact analysis were selected for their ability to resonate with these audiences and illustrate the active transportation system's long-term return on investment:

## Existing and Forecasted Active Transportation Mode Share

Many economic impact analyses begin by measuring existing and projected active transportation usage. Projections are typically based on the most recent five-year estimates from the American Community Survey (ACS). These values are then extrapolated to represent future mode share, based on research from national studies and comparison with peer communities. These forecasts lay the foundation for economic analyses that quantify active transportation based on monetary value.

## **Quality of Life and Workforce Attraction**

Case studies would illustrate employers' and municipalities' efforts to recruit and retain people to work and live in the region based on active transportation improvements. Stakeholders identified workforce attraction as a key challenge for the region's businesses. Additional findings could be researched based on existing or future surveys to residents.

## **Tourism**

Regional tourism and spending activity would help contextualize the importance of high profile active transportation improvements in the region. The economic impact study could estimate the number of residents and visitors who use existing and future trails per year. Multiplying this estimate by an assumption of visitor spending would result in an estimate of annual tourist spending.

## **Local Real Estate Values**

National research points to the impact of trails and other active transportation facilities on real estate values of properties adjacent to these facilities. Studying comparable facilities and property values in the study's planning area would illustrate past, present, and future values correlated with active transportation infrastructure.

## **Safety, Health, and Environmental Benefits**

This category of benefit analysis was less frequently mentioned during the stakeholder engagement phase. Nonetheless, there are opportunities to estimate the monetary value of active transportation based on health and environmental benefits. For example, increased physical activity would save money on regional healthcare expenses, while reducing missed time away from work, education, or other activities due to sickness. Reduced CO<sub>2</sub> and other reduced vehicle emissions per year can also be expressed in monetary terms, according to decreased rates of motor vehicle travel due to increased rates of active transportation.

## **Data and Sources**

The following data sources would assist ECWRPC to create an economic impact analysis focused on the topics detailed above. National data sources represent opportunities to create a cost-effective study by leveraging existing resources. Local and regional level data sources could require additional time to analyze and/or collect the data, but would offer the study increased customization. Data from all sources, local, regional, and national, are recommended within the economic impact analysis.

### **National Data Sources**

Alta Planning + Design assisted ECWRPC to develop a list of recommended national data sources. These data are available from agencies including FHWA, US Census Bureau, and US Department of Transportation. ECWRPC amended a separate list of proposed data resources and agencies, dated December 3, 2019. These data should be gathered at the start of the economic impact analysis process.

## Local and Regional Data Sources

Table 1, below, identifies opportunities for utilizing existing local and regional data.

*Table 1. Existing Local and Regional Data*

Name	Source	EIA Topic	Notes
Count data	ECWRPC	Usage	n/a
Poll Pro Survey	City of Oshkosh	Quality of life	Survey questions would need to be created and added to the existing survey.
Home / property values	Assessor's Office	Economic development	n/a
Tax Data (e.g., property taxes, room taxes)	Assessor's Office	Economic development	n/a
Quality of life survey	UWO	Quality of life / workforce attraction	Survey questions would need to be created.
Health / demographic data	City of Appleton, Imagine Fox Cities	Health	Stakeholders cited the Tri-County Core Data, City of Appleton Community Health Needs Assessment and Improvement Plan, City of Appleton Health in all Policies One Year Assessment, Fox Cities LIFE Study, Imagine Fox Cities Community 2019 and 2020 resources, and Weight of the Fox Valley healthcare professional-provided weight data.
Livability Index	Oshkosh Chamber of Commerce	Quality of life	n/a

Table 2 identifies recommended missing data that could be created or compiled from multiple sources during the study.

*Table 2. Missing Data to Create*

Name	Source	EIA Topic	Estimated Level of Effort to Create	Priority Level	Notes
Bike event participation and spending data	The Recyclist and other bike shops / organizations	Tourism	Low	Low	n/a
Walking and bicycling demand mapping	ECW	Usage	Low	High, to coincide with upcoming regional bicycle and pedestrian plan	Opportunity to include in next bike plan
Visitor spending	Chambers, ECW, Fox Cities Visitor and Convention Center. Oshkosh Convention and Visitors Bureau	Tourism	Low to mid	Mid	Results not aggregated
Project case studies	Chambers, ECW	Tourism, Economic development	Low to mid	High	Examples were suggested during interviews. The goal would be to quantify workforce attraction/retention

Name	Source	EIA Topic	Estimated Level of Effort to Create	Priority Level	Notes
UWO and Lawrence graduate survey	UWO	Quality of life / workforce attraction	Mid	Mid	Opportunity to survey students about where they live after graduation and why.
Cycling without Age program usage and other statistics	Cycling without Age	Quality of life	Mid	Mid	n/a; cost invested into the trishaws
Municipal crime rates on and off trails	Municipalities	Quality of life	Mid	High	Results not aggregated
Receipt/sales data for businesses adjacent to infrastructure	Chambers, ECW	Economic development	High	High	n/a

### Other Project Development Needs

In addition to collecting and analyzing data, the following are necessary to develop the economic impact analysis.

- Technical Memorandum Development:** Findings from the data analysis portion of the study should be compiled within a technical memorandum before a more graphics-focused report is created. This step allows the project team to review draft findings before the design phase begins.
- Graphic Design and Report Production:** The final report should be a concise (e.g., 15-20 pages), user-friendly promotional document that uses custom graphics and maps to identify economic benefits. As discussed within this scoping study, stakeholders emphasized tailoring information to elected officials and business owners. The document should also be available to and relevant for members of the public, advocates, and potential funders.
- Publicizing Project Findings:** The report should be distributed to key public agency and local organization staff, at least in a digital format. Printed copies are useful for bringing to public meetings and events. One stakeholder interview participant suggested distributing major findings via short videos posted to social media. Graphics and videos could also be distributed to stakeholders for cross-promotion through their communication channels.

## Cost Estimates

Project cost estimates will help ECWRPC and other potential funders understand resources needed to complete the economic impact analysis. The project cost is based on an estimated 12 to 18-month timeline, depending on the amount of data to produce, collect, and analyze, as well as any additional public and stakeholder coordination. Table 3. The estimated cost is shown in terms of the estimated consultant fee. ECWRPC staff time could be used instead of an external consultant or in addition to external consultants. Additional resources needed for the project include continued collaboration with outside agencies and stakeholders, as well as staff time to publicize the report after its finalization. Table 3 displays a menu of options to assist ECWRPC staff with funding allocation and next steps. The estimated quantities included in the table (e.g., up to five (5) meeting boards) is intended to open a discussion about the project development process. ECWRPC may decide to procure more or less of these items, as needed. Cost estimates were developed as of December 2019 and may fluctuate over time. Expenses are not included in the estimates. Projected costs are intended as a menu of potential options. ECWRPC may choose to pursue one of the project descriptions presented below, or a combination thereof.

*Table 3. Menu of Project Cost Estimates*

Project Description	Components	Estimated Cost
EIA developed using existing data sources	<ul style="list-style-type: none"> <li>• Tech Memo</li> <li>• Draft and Final Report</li> <li>• Report Presentation</li> </ul>	\$40,000 - \$75,000
EIA developed using a combination of existing and newly created data sources	<ul style="list-style-type: none"> <li>• Tech Memo</li> <li>• Draft and Final Report</li> <li>• Report Presentation</li> <li>• Assume collection and analysis of up to three (3) new data points with varied complexity.</li> </ul>	\$85,000 - \$150,000
Continued public and stakeholder engagement	<ul style="list-style-type: none"> <li>• Up to two (2) Presentations to local organization or public agency (e.g., beginning, end of the study)</li> <li>• Up to five (5) meeting boards</li> <li>• Assistance with social and print media coordination</li> </ul>	\$5,000 - \$15,000
Project management	Continued project management throughout the project timeline	5% to 10% of project cost

## Conclusion

ECWRPC is well positioned to take the next steps toward a full-scale economic impact analysis. By investing in this scoping study, ECWRPC gained knowledge of the crucial themes that stakeholders identify with existing and future benefits of walking and bicycling. An economic impact analysis that considers the regional context is a valuable tool for showcasing the region's strengths and commitment to providing services for residents and businesses alike.