

CITY OF BELPRE ECONOMIC DEVELOPMENT STRATEGIC PLAN

Prepared for:

Belpre Area Chamber of Commerce and the City of
Belpre, Ohio

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Executive Summary

This report, developed by Ohio University's Voinovich School of Leadership and Public Affairs, investigates strategies to enhance economic development for the City of Belpre, Ohio as requested by the Belpre Area Chamber of Commerce. This "Economic Development Strategic Plan" was funded by the U.S. Economic Development Administration (EDA) and the Appalachian New Economy Partnership, a program of the Ohio Department of Higher Education and the State of Ohio.

The City of Belpre, Ohio has seen decades-long population stagnation and an overall decline in working age adults and school enrollment. Over one-third of Belpre's population is 55 or older. The availability of quality housing is limited, which restricts Belpre's ability to address this population decline and boost school enrollment by attracting middle-class families.

Belpre has key decisions to make to stabilize and ultimately reverse this population decline and ancillary challenges. The City has strong links to key industries in the regional economy, as well as a suite of natural assets that could be enhanced. This plan specifically recommends the implementation of economic development efforts around three focus areas: 1) Community Branding & Placemaking; 2) Industry Cluster Growth; and 3) Restaurants & Retail Development. Concentrated strategic investment and support of these themes may help capitalize on emerging business opportunities, infrastructure improvements, and ways to retain and attract families to the area. Belpre should focus on implementing the priorities put forth in this plan by designating responsibility for each task to small groups of community organizations, volunteers, and/or elected officials.

Community Branding & Placemaking

Key Findings:

- The City of Belpre lacks a distinct "brand" to differentiate itself in the Mid-Ohio Valley region.
- Civitan Park and the Ohio River are underutilized assets in Belpre.
- Belpre in Bloom and other beautification efforts are important to the city. However, the lack of a central "hub" or downtown limits the effectiveness of placemaking or creating public spaces in the community.

Recommendations:

- A "Buy Belpre" campaign to encourage community pride and support for local businesses that can generate excitement for placemaking efforts.
- Belpre should actively recruit or support the entrepreneurial development of river-oriented recreational businesses, such as kayaking, boating, etc.

- Belpre should continue Belpre in Bloom and other beautification efforts, but focus specifically on Civitan Park and the surrounding area to create an identity for the community. This includes continuing to pursue the development of the Athens-Belpre Rail Trail.
- Belpre should hold routine festivals with music, food vendors, and entertainment in the park to attract families, especially during the summer months. For example, First Friday, Last Fridays, or Third Thursdays are common events in many communities.
- Belpre should pursue a tourism effort around the Belpre Historical Society / Farmer's Castle Museum by linking to other efforts by Underground Railroad sites.

Industry Cluster Growth

Key Findings:

- The Belpre Medical Campus location for Marietta Memorial Hospital links Belpre to the broader healthcare cluster. Yet, infrastructure challenges (i.e., gas and water) have limited the full development of the campus.
- The Belpre region and Southeastern Ohio show employment and/or firm concentration in the Plastics and Polymers industry cluster.
- Belpre's strategic location on the Ohio River makes it a prime location for firms in the Plastics and Polymer industry cluster requiring river access, yet the lack of infrastructure and suitable industrial sites may limit location of firms in the supply chain.
- The decline and limited participation of working age adults in Belpre may limit the City's efforts to grow and attract industry.

Recommendations:

- Belpre should develop a list of infrastructure priorities and sites with the first focus on securing gas availability and adequate water pressure for the Belpre Medical Campus.
- Belpre should work with the Buckeye Hills Regional Council and the Ohio University's Voinovich School EDA University Center to seek EDA and/or Appalachian Regional Commission (ARC) grant funding to support this infrastructure development.
- Belpre should connect with and encourage Plastics and Polymers supply chain and other related firms to locate to the Belpre region due to economies of scale and comparative advantages surrounding this industry.

- Belpre should work with companies to help facilitate retention and expansion efforts for those already located in the city.

Restaurants & Retail Development

Key Findings:

- Belpre's retail market is oversaturated given the amount of purchasing power in a five-mile radius.
- Residents desire more retail and sit-down restaurant options. The lack of shopping and dining options were cited by several interviewees as an economic development issue.
- Belpre's alcohol laws limit the attractiveness of the area to chain restaurants that rely on alcohol sales.

Recommendations:

- Belpre should identify local franchise owners of retail stores and restaurants currently not located in the greater Parkersburg market. Available sites, especially with river view or access, may be appealing to these individuals.
- Belpre should hold public hearings to explore allowing liquor by the drink, especially in designated commercial zones which may be attractive to prospective businesses (e.g., on the Ohio River).

Action Steps

1. Distribute Buy Belpre window clings to local businesses and residents to enhance the community branding effort.
2. Develop Civitan Park with beautification efforts and the promotion of community events. Create a comprehensive website with all programs, events, and opportunities, including local tourist attractions for visitors.
3. Work with elected officials, government agencies, local development districts, and others to pursue grant funding to support infrastructure issues associated with the Belpre Medical Campus location for Marietta Memorial Hospital. Meet with hospital executives to determine specific needs for the hospital campus and how to prioritize efforts.
4. Work with the Buckeye Hills Regional Council and the Southeastern Ohio Port Authority to assess the feasibility of economic development related incentive programs. Appropriate legal counsel to explore the viability of tax increment financing (TIF) and special improvement districts (SID).
5. Characterize and communicate with retail stores and restaurants that would provide goods or services currently underserved in Belpre and begin to facilitate visitation and attraction efforts.

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1. Introduction

In the fall of 2016, the Belpre Area Chamber of Commerce asked Ohio University's Voinovich School of Leadership and Public Affairs for assistance in crafting an economic development strategic plan for the City of Belpre, Ohio. A team of researchers met with the Chamber in October, the Voinovich School developed a scope of work in November, and ultimately began work on the plan in January of 2017. The project was funded by the U.S. Economic Development Administration (EDA) program, and the Appalachian New Economy Partnership, a program of the Ohio Department of Higher Education and the state of Ohio.

The Rural Universities Consortium (RUC) University Center, a partnership between Ohio University and Bowling Green State University, is a designated U.S. EDA University Center. Collectively, the RUC serves 59 rural Ohio counties: 32 Appalachian counties and 27 counties in Northwestern Ohio with direct business assistance services, applied research initiatives, and annual State of the Region Conferences.

This student-led, and faculty and staff supported effort proposes several recommendations that were developed through the findings of core research tasks. These tasks included a comprehensive economic scan and workforce inventory, interviews with key community stakeholders, community engagement (e.g., public meetings) intended to identify economic development desires, and an analysis of regional industry clusters. We identified several areas for improvement of Belpre's regional economy, which are noted in the executive summary.

2. Existing Conditions & Community Trends

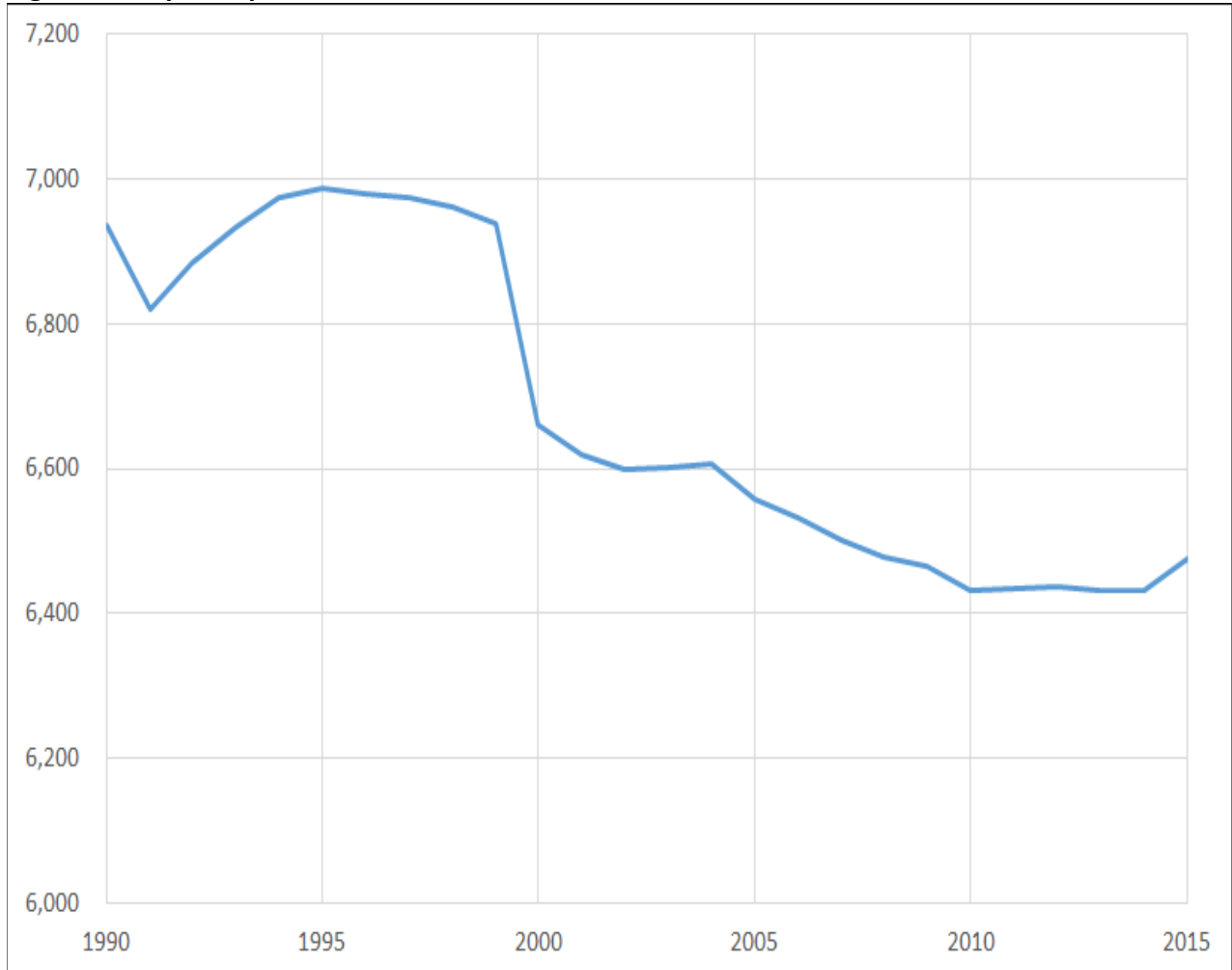
The first task associated with this work involved a demographic and economic scan in order to compile a solid information foundation on key economic and demographic descriptors (e.g., unemployment rates, income, labor markets, etc.) of Belpre, Washington County, and the surrounding region.

This section provides the existing population and household trends and characteristics of Belpre city, Washington County, and Ohio, including age, educational attainment, school enrollment, and household incomes.

2.1 Population Growth Trends¹

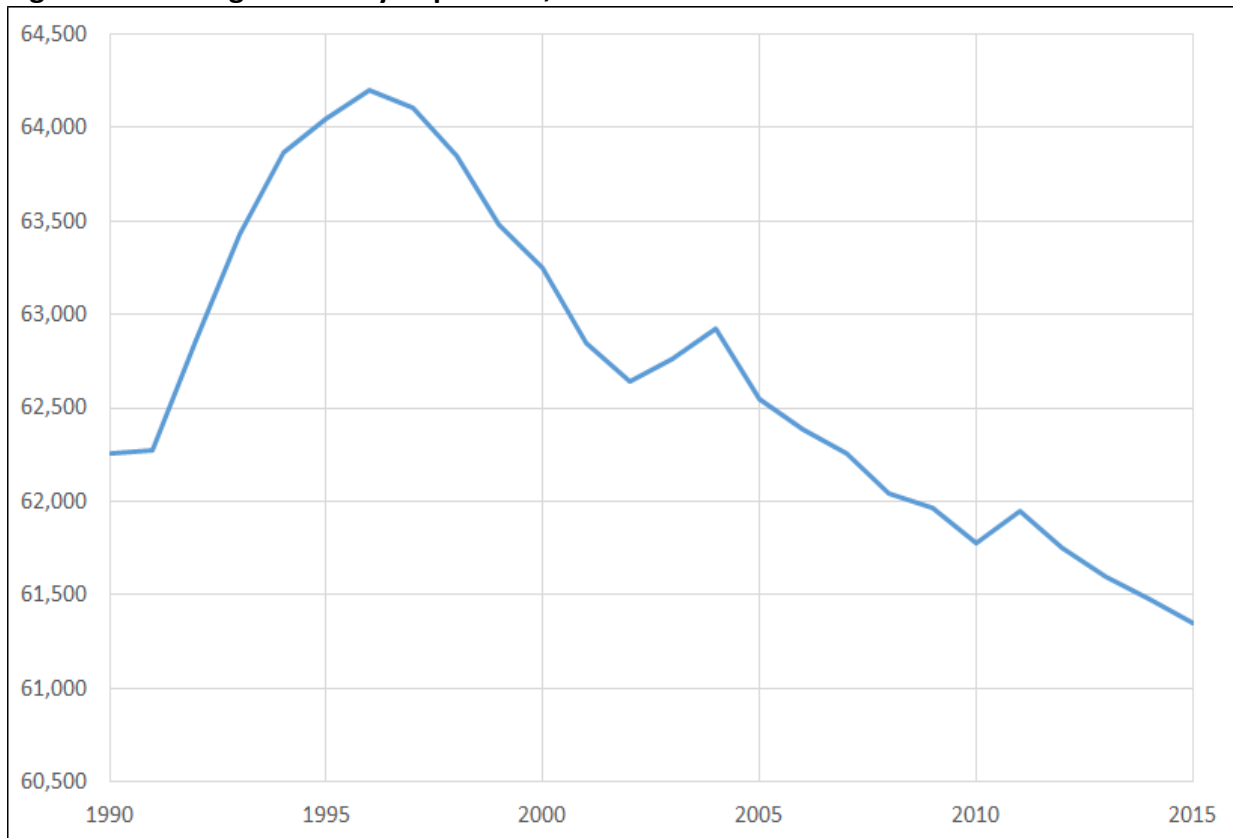
As shown in Figure 1, the population of Belpre experienced a 7% loss from 1990 to 2015, declining from around 6,935 individuals in 1990 to around 6,476 in 2015. In comparison, the overall population of Washington County only had a loss of roughly 1.5%, decreasing from around 62,254 residents in 1990 to 61,351 in 2015.

Figure 1: Belpre Population, 1990-2015



¹ Figures 1 and 2 were developed by authors from U.S. Census Bureau

Figure 2: Washington County Population, 1990-2015



2.2 Age Distribution

As shown in Table 1, 37.2% of the population of Belpre was older than 55 in 2015. This compares to 33.7% and 28.5% in Washington County and Ohio, respectively, signifying a large senior population in Belpre. In contrast, about 14.1% of the Belpre population was younger than 15, compared to 16.4% in Washington County and 18.9% in Ohio. Moreover, Belpre had a median age of 44.5, Washington County had 43.6, and Ohio had 39.2, further suggesting that Belpre has an older population. However, while the median age of Washington County and Ohio increased from 2010 to 2015, the median age of Belpre fell. Finally, the total working age (people of age 15-64) of Belpre in 2010 was 4,366 in 2010, and fell to 4,144 in 2015. This means that Belpre's working age population experienced a loss of more than 5%.

Table 1: Age Distribution: Belpre, Washington County, and Ohio, 2010 and 2015

Age Range	2010		2015		Percent Change
	Number	Percent	Number	Percent	
Belpre					
Under 15	813	12.5%	912	14.1%	12.2%
15-24	1,105	17.0%	845	13.1%	-23.5%
25-34	653	10.1%	813	12.6%	24.5%
35-44	674	10.4%	693	10.7%	2.8%
45-54	1,031	15.9%	790	12.3%	-23.4%
55-64	903	13.9%	1,003	15.6%	11.1%
65 and over	1,306	20.1%	1,392	21.6%	6.6%
Total Population	6,485		6,448		-0.6%
Median Age	45		44.5		-1.1%
Washington County					
Under 15	10,824	17.4%	10,061	16.4%	-7.0%
15-24	8,056	13.0%	7,963	13.0%	-1.2%
25-34	6,656	10.7%	6,615	10.8%	-0.6%
35-44	7,847	12.6%	7,143	11.6%	-9.0%
45-54	9,884	15.9%	8,899	14.5%	-10.0%
55-64	8,423	13.6%	9,178	15.0%	9.0%
65 and over	10,376	16.7%	11,492	18.7%	10.8%
Total Population	62,066		61,351		-1.2%
Median Age	42		43.6		3.8%
Ohio					
Under 15	2,265,348	19.7%	2,187,898	18.9%	-3.4%
15-24	1,591,089	13.8%	1,570,571	13.6%	-1.3%
25-34	1,414,705	12.3%	1,453,253	12.6%	2.7%
35-44	1,546,960	13.4%	1,422,737	12.3%	-8.0%
45-54	1,745,227	15.2%	1,638,580	14.2%	-6.1%
55-64	1,364,403	11.9%	1,555,657	13.4%	14.0%
65 and over	1,584,699	13.8%	1,747,281	15.1%	10.3%
Total Population	11,512,431		11,575,977		0.6%
Median Age	38.3		39.2		2.3%

Source: U.S. Census Bureau, American Community Survey, Age and Sex 2010-2015

2.3 Educational Attainment

Table 2 shows estimations of the educational attainment of residents at the three levels. In 2015, roughly 50% of the population of Belpre reported having some amount of college education, compared to 48% in Washington County and 55% in Ohio. This shows that Belpre is ahead in the county but trails in statewide averages. On the other hand, 15.1% of Belpre's population does not have a high school diploma, compared to 10.4% in Washington County and 10.9% in Ohio, placing it far below the county and state as whole. From 2010 to 2015, the proportion of the population that reported having some college education increased from roughly 42% to 49.80%, however, the proportion that does not have a high school diploma also increased from 12.4% to 15.1%. This shows that while number of residents of Belpre attaining a higher education has increased, the number of residents not graduating from high school has also increased.

Table 2: Educational Attainment: Belpre, Washington County, Ohio, 2010 and 2015

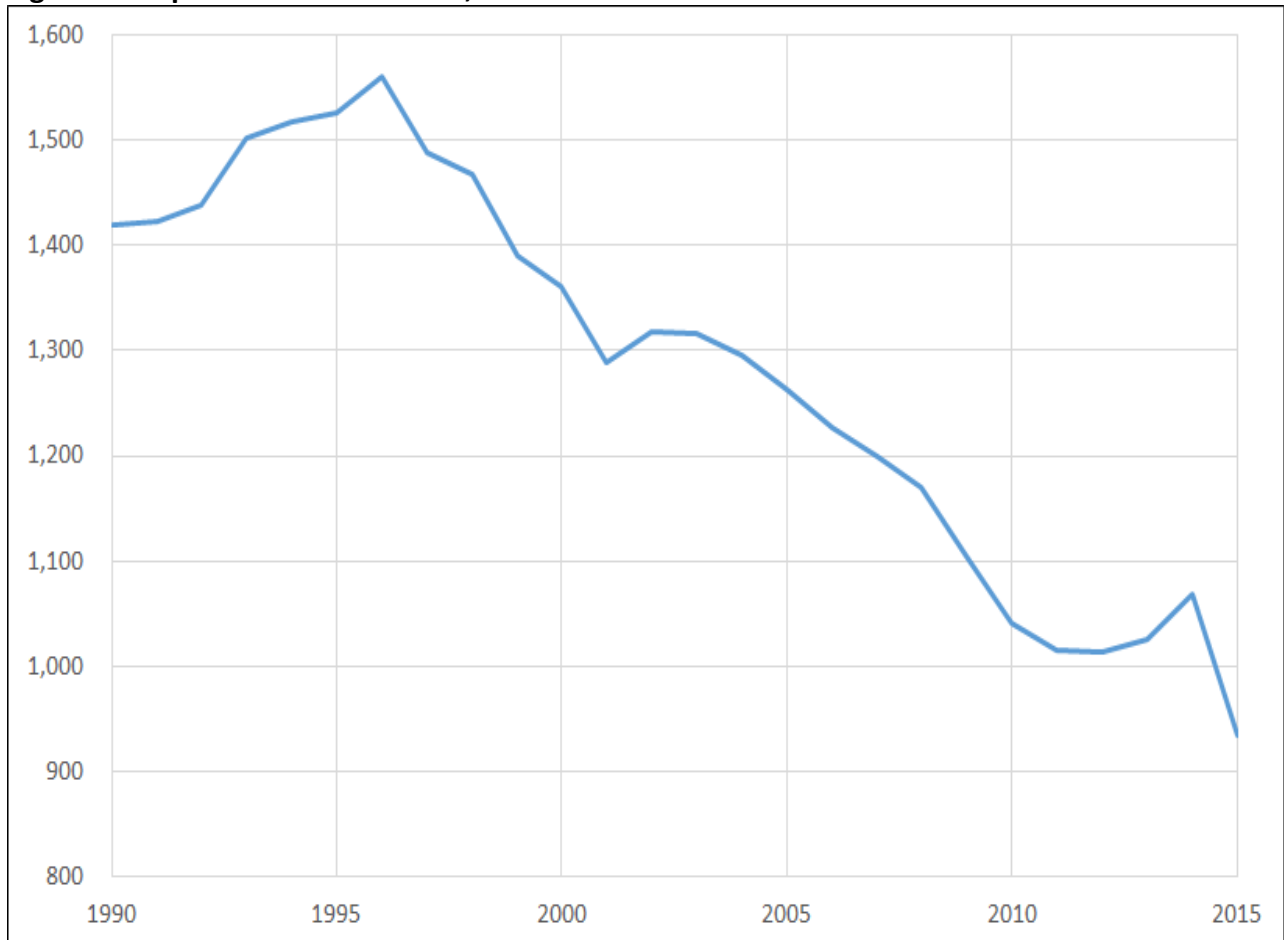
	2010		2015		Percent Change
	Number	Percent	Number	Percent	
Belpre					
Some high school or less	566	12.4%	708	15.1%	25.1%
High school Diploma	2,092	45.8%	1,648	35.1%	-21.2%
Some college, no degree	1,005	22.0%	1,003	21.4%	-0.2%
Associate's degree	374	8.2%	698	14.9%	86.6%
Bachelor's degree	370	8.1%	471	10.0%	27.3%
Graduate or professional degree	160	3.5%	163	3.5%	1.9%
Population 25 years and over	4,923		4,691		-4.7%
Washington County					
Some high school or less	5,182	12.0%	4,511	10.4%	-12.9%
High school Diploma	19,175	44.4%	17,966	41.5%	-6.3%
Some college, no degree	8,637	20.0%	8,452	19.5%	-2.1%
Associate's degree	3,325	7.7%	4,796	11.1%	44.2%
Bachelor's degree	4,578	10.6%	5,113	11.8%	11.7%
Graduate or professional degree	2,289	5.3%	2,489	5.7%	8.7%
Population 25 years and over	43,186		43,327		0.3%
Ohio					
Some high school or less	964,655	12.6%	849,597	10.9%	-11.9%
High school Diploma	2,740,846	35.8%	2,669,316	34.1%	-2.6%
Some college, no degree	1,538,855	20.1%	1,615,405	20.7%	5.0%
Associate's degree	558,888	7.3%	643,162	8.2%	15.1%
Bachelor's degree	1,171,367	15.3%	1,278,763	16.4%	9.2%
Graduate or professional degree	673,727	8.8%	761,265	9.7%	13.0%
Population 25 years and over	7,648,338		7,817,508		2.2%

Source: U.S. Census Bureau, American Community Survey, Educational Attainment, 2010-2015

2.4 School Enrollment Trends²

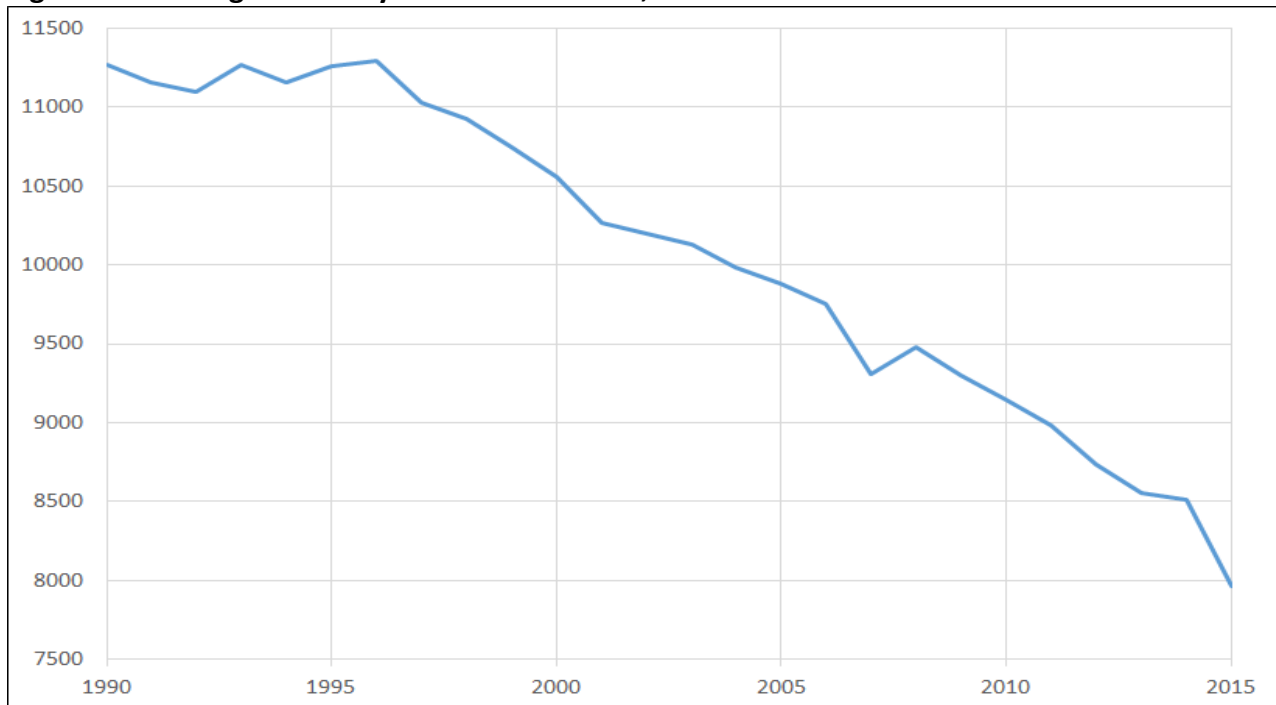
Figure 3 visualizes the number of students enrolled at Belpre City Schools from 1990 to 2015. Enrollment declined consistently from 1996 until 2015, decreasing from 1,560 students to 934, an overall loss of roughly 40%. To show how this compares to the overall county, Figure 4 shows the total enrollment of all schools in Washington County. The enrollment for the county also peaked in 1996 with a total enrollment of 11,293 students. This declined to 7,962 in 2015, an almost 29.5% decrease. This means that while the county's school enrollment has decreased over the last two decades, Belpre schools have been hit especially hard.

Figure 3: Belpre School Enrollment, 1990-2015



² Figures 1-3 were developed by authors from the Ohio Department of Education.

Figure 4: Washington County School Enrollment, 1990-2015³



2.5 Household Income Distribution

Table 3 describes the number and annual income distributions of households in Belpre, Washington County, and Ohio for the years 2010 and 2015. By the Census Bureau definition, household income is the sum of annual earnings for all residents of a household, related or unrelated to the homeowner, who are at least 15 years old.

In 2015, Belpre lagged behind both Washington County and Ohio with a median household income of \$33,248, compared to \$43,509 for Washington County and \$49,429 for Ohio. Belpre's income distribution was also skewed toward lower ranges: most Belpre households fell into the \$15,000 to \$24,999 income range, while the largest portion of both Washington County and Ohio households fell into the \$50,000 to \$74,999 range. Furthermore, 40.3% of Belpre's households earned less than \$25,000 in 2015, compared to 29.3% for Washington County and 25.2% for Ohio.

Belpre's median income grew by 1.8% from 2010 to 2015, a slower growth than Washington County's 4.3% and Ohio's 4.2%. The number of households in Belpre also declined by 6.8% during this timeframe.

³ Figure 4 includes the following Washington County schools: Belpre City, Fort Fyre Local, Frontier Local, Marietta City, Warren Local, and Wolf Creek Local

Table 3: Household Income Distribution: Belpre, Washington County, and Ohio, 2010 and 2015

Household Income	2010		2015		Percent Change
	Number	Percent	Number	Percent	
Belpre					
Less than \$10,000	450	14.2%	330	11.1%	-26.6%
\$10,000 to \$14,999	209	6.6%	268	9.0%	28.1%
\$15,000 to \$24,999	598	18.9%	601	20.2%	0.4%
\$25,000 to \$34,999	440	13.9%	386	13.0%	-12.2%
\$35,000 to \$49,999	545	17.2%	351	11.8%	-35.6%
\$50,000 to \$74,999	560	17.7%	452	15.2%	-19.4%
\$75,000 to \$99,999	187	5.9%	276	9.3%	48.0%
\$100,000 to \$149,999	149	4.7%	265	8.9%	77.8%
\$150,000 to \$199,999	22	0.7%	18	0.6%	-19.5%
\$200,000 or more	9	0.3%	21	0.7%	119.1%
Total Households	3,169		2,967		-6.4%
Median income	\$32,664.00		\$33,248.00		1.8%
Mean income	\$40,121.00		\$45,602.00		13.7%
Washington County					
Less than \$10,000	2,258	8.9%	2,206	8.8%	-2.3%
\$10,000 to \$14,999	1,624	6.4%	1,554	6.2%	-4.3%
\$15,000 to \$24,999	3,425	13.5%	3,584	14.3%	4.6%
\$25,000 to \$34,999	3,375	13.3%	2,983	11.9%	-11.6%
\$35,000 to \$49,999	3,907	15.4%	3,709	14.8%	-5.1%
\$50,000 to \$74,999	5,125	20.2%	4,461	17.8%	-13.0%
\$75,000 to \$99,999	2,766	10.9%	2,907	11.6%	5.1%
\$100,000 to \$149,999	1,979	7.8%	2,531	10.1%	27.9%
\$150,000 to \$199,999	482	1.9%	652	2.6%	35.2%
\$200,000 or more	431	1.7%	501	2.0%	16.2%
Total Households	25,373		25,089		-1.1%
Median income	\$41,654.00		\$43,509.00		4.5%
Mean income	\$54,633.00		\$57,249.00		4.8%
Ohio					
Less than \$10,000	373,286	8.2%	371,392	8.1%	-0.5%
\$10,000 to \$14,999	268,584	5.9%	256,765	5.6%	-4.4%
\$15,000 to \$24,999	532,616	11.7%	527,285	11.5%	-1.0%
\$25,000 to \$34,999	518,959	11.4%	499,774	10.9%	-3.7%
\$35,000 to \$49,999	691,945	15.2%	655,667	14.3%	-5.2%
\$50,000 to \$74,999	874,036	19.2%	848,241	18.5%	-3.0%
\$75,000 to \$99,999	546,272	12.0%	550,210	12.0%	0.7%
\$100,000 to \$149,999	482,541	10.6%	536,455	11.7%	11.2%
\$150,000 to \$199,999	145,673	3.2%	178,818	3.9%	22.8%
\$200,000 or more	118,359	2.6%	155,893	3.4%	31.7%
Total Households	4,552,270		4,580,499		0.6%
Median income	\$47,358.00		\$49,429.00		4.4%
Mean income	\$62,205.00		\$66,409.00		6.8%

Source: U.S. Census Bureau, American Community Survey, Income in the Past 12 Months, 2010-2015

2.6 Year Housing Structure Built

Table 4 shows the distribution of when housing structures were built in Belpre, Washington County, and Ohio. It shows that only 21.5% of housing structures in Belpre were constructed since 1980. This is much lower than that of Washington County and Ohio, which had 31.9% and 31.8%, respectively. This shows that Belpre has had very little recent construction, especially when considering that 11.1% of that construction happened between 1980 and 1989. Furthermore, 46.9% of housing units in Belpre were constructed before 1970, while 27.4% and 33.2% were respectively constructed in Washington County and Ohio. This shows that not only has Belpre constructed a lot less new housing units, but also has a disproportionate amount of much older housing units.

Table 4: Year Structure Built, Belpre, Washington County, and Ohio, 2015

YEAR BUILT	Belpre		Washington County		Ohio	
	Number	Percent	Number	Percent	Number	Percent
Built 1940 to 1949	150	4.7%	1,288	4.6%	330,406	6.4%
Built 1950 to 1959	690	21.6%	3,102	11.0%	738,799	14.4%
Built 1960 to 1969	659	20.6%	3,322	11.8%	637,730	12.4%
Built 1970 to 1979	557	17.4%	5,062	18.0%	731,422	14.2%
Built 1980 to 1989	356	11.1%	3,124	11.1%	465,073	9.0%
Built 1990 to 1999	179	5.6%	3,289	11.7%	606,139	11.8%
Built 2000 to 2009	145	4.5%	2,243	8.0%	513,529	10.0%
Built 2010 to 2013	9	0.3%	290	1.0%	45,414	0.9%
Built 2014 or later	0	0.0%	22	0.1%	3,451	0.1%
Total Housing Units	3,195		28,124		5,140,902	

Source: U.S. Census Bureau, American Community Survey, Selected Household Characteristics, 2015

2.7 Housing Property Value

Table 5 below displays the current property value distribution of housing structures in Belpre, Washington County, and Ohio. This data shows that the property values are much lower than that of the surrounding area, with a median value of \$96,800, \$13,900 lower than the rest of Washington County, and \$33,100 lower than the rest of Ohio. This is further supported by the fact that 53.4% of Belpre's housing units are valued at less than \$100,000, while 44.4% and 35% of Washington County and Ohio's are worth less than \$100,000.

Table 5: Property Values, Belpre, Washington County, and Ohio, 2015

VALUE	Belpre		Washington County		Ohio	
	Number	Percent	Number	Percent	Number	Percent
Less than \$50,000	193	10.0%	2,713	14.4%	303,057	10.0%
\$50,000 to \$99,999	835	43.4%	5,632	29.9%	760,641	25.0%
\$100,000 to \$149,999	548	28.5%	4,340	23.0%	715,135	23.5%
\$150,000 to \$199,999	171	8.9%	3,079	16.3%	526,169	17.3%
\$200,000 to \$299,999	155	8.1%	1,860	9.9%	444,515	14.6%
\$300,000 to \$499,999	13	0.7%	945	5.0%	215,313	7.1%
\$500,000 to \$999,999	0	0.0%	211	1.1%	61,838	2.0%
\$1,000,000 or more	8	0.4%	57	0.3%	13,776	0.5%
Median (dollars)	\$96,800.00		\$110,700.00		\$129,900.00	

Source: U.S. Census Bureau, American Community Survey, Selected Household Characteristics, 2015

2.8 Rent Distribution

Table 6 presents the rent payment distribution of Belpre, Washington County, and Ohio in 2015. The highest rent range that Belpre has is \$1,000 to \$1,499, which also only accounts for 0.9% of the units, which shows that Belpre lacks higher end rental units. Collectively, Tables 4 and 6 show that 30.2% of Belpre's households live in rent paying units, which is much higher than the rest of Washington County at 20.1% and a little higher than the rest of Ohio at 28.4%. This shows that an above average amount of Belpre's population does not have a permanent residence.

Table 6: Units Paying Rent, Belpre, Washington County, and Ohio, 2015

GROSS RENT	Belpre		Washington County		Ohio	
	Number	Percent	Number	Percent	Number	Percent
Less than \$500	256	26.6%	1,945	34.5%	264,653	18.1%
\$500 to \$999	699	72.5%	3,380	59.9%	907,125	62.0%
\$1,000 to \$1,499	9	0.9%	284	5.0%	233,924	16.0%
\$1,500 to \$1,999	0	0.0%	24	0.4%	36,515	2.5%
\$2,000 to \$2,499	0	0.0%	8	0.1%	11,579	0.8%
\$2,500 to \$2,999	0	0.0%	0	0.0%	3,667	0.3%
\$3,000 or more	0	0.0%	0	0.0%	4,899	0.3%
Total Units	964		5,641		1,462,362	
Median (dollars)	613		600		730	
No rent paid	86		586		82,278	

Source: U.S. Census Bureau, American Community Survey, Selected Household Characteristics, 2015

3. Economic Scan and Workforce Inventory

This section provides a report of the current and historic industry and occupational employment trends for Belpre, Washington County, and Ohio, as well as an analysis of regional employed resident commuter behavior.

3.1 Employment by Industry

Table 4 breaks down industry-specific employment data for Belpre, Washington County, and Ohio in 2010 and 2015. The education, health care, and social services industry is Belpre's most significant employer with 26.7% of the city's working population. This industry is also the most significant employer for Washington County and Ohio.

Belpre had 5 industries with employment growth from 2010 to 2015, compared to 8 with employment decline. Of the growth industries, 2 had a growth rate of over 25%, including 63% growth in wholesale trade. On the other hand, 6 of the 8 loss industries experienced employment declines of greater than 25%, including losses of over 50% in finance and arts & entertainment. In particular, Belpre experienced a 78.7% employment decline in arts & entertainment despite a growth in this industry of 4.5% for Washington County.

3.2 Labor Force Overview⁴

Figure 5 reports figures for the labor force eligibility, employment, and unemployment for Belpre from 2010 to 2015. This data reveals to what degree Belpre recovered from the 2008 financial crisis. In 2010, the Belpre labor force included more than 3,200 individuals, of whom around 2,900 were employed and 300 were unemployed. This corresponds to a 9.3% unemployment rate for the year. Figure 6 shows how this compares with Washington County and Ohio as a whole. In it, Belpre is within 1% of both in 2010. In 2015, unemployment fell to 4.2%, a decrease of more than 5%, placing it more than 2.5% below the county rate and 4% below the national rate. However, while unemployment dropped to 100 individuals, the labor force dropped down to 2,600, a loss of more than 600 workers. To represent this change, Figure 7 shows the participation rate of Belpre, Washington County, and Ohio. In this graph Belpre is shown to have dropped from a participation rate of 57.2% in 2010 to a rate of 47.5% in 2015, a loss of almost 10%. For context, this places Belpre 9% below Washington County and almost 16% below Ohio in 2015.

⁴ Note: Figures 5-7 were developed by authors from the U.S. Census Bureau, American Community Survey, Selected Economic Characteristics, 2010-2015

Table 7: Employment by Industry: Belpre, Washington County, and Ohio, 2010 and 2015

Industry	2010		2015		Percent Change
	Estimate	Percent	Estimate	Percent	
Belpre					
Agriculture, forestry, fishing and hunting, and mining	7	0.2%	8	0.3%	14.3%
Construction	56	1.9%	100	4.0%	78.6%
Manufacturing	353	12.1%	317	12.7%	-10.2%
Wholesale trade	34	1.2%	92	3.7%	170.6%
Retail trade	426	14.6%	514	20.6%	20.7%
Transportation and warehousing, and utilities	134	4.6%	117	4.7%	-12.7%
Information	116	4.0%	78	3.1%	-32.8%
Finance and insurance, and real estate and rental and leasing	246	8.5%	153	6.1%	-37.8%
Professional, scientific, and management, and administrative and waste management services	137	4.7%	92	3.7%	-32.8%
Educational services, and health care and social assistance	776	26.7%	575	23.1%	-25.9%
Arts, entertainment, and recreation, and accommodation and food services	386	13.3%	216	8.7%	-44.0%
Other services, except public administration	79	2.7%	54	2.2%	-31.6%
Public administration	160	5.5%	178	7.1%	11.3%
Civilian employed population 16 years and over	2,910		2,494		-14.3%
Washington County					
Agriculture, forestry, fishing and hunting, and mining	742	2.7%	576	2.2%	-22.4%
Construction	1,816	6.7%	1,708	6.5%	-5.9%
Manufacturing	4,402	16.1%	3,910	15.0%	-11.2%
Wholesale trade	652	2.4%	628	2.4%	-3.7%
Retail trade	3,176	11.6%	3,226	12.4%	1.6%
Transportation and warehousing, and utilities	1,385	5.1%	1,440	5.5%	4.0%
Information	419	1.5%	551	2.1%	31.5%
Finance and insurance, and real estate and rental and leasing	1,536	5.6%	1,264	4.8%	-17.7%
Professional, scientific, and management, and administrative and waste management services	1,767	6.5%	1,655	6.3%	-6.3%
Educational services, and health care and social assistance	6,357	23.3%	6,254	24.0%	-1.6%
Arts, entertainment, and recreation, and accommodation and food services	2,111	7.7%	2,210	8.5%	4.7%
Other services, except public administration	1,286	4.7%	1,124	4.3%	-12.6%
Public administration	1,623	6.0%	1,536	5.9%	-5.4%
Civilian employed population 16 years and over	27,272		26,082		-4.4%
Ohio					
Agriculture, forestry, fishing and hunting, and mining	54,903	1.0%	57,831	1.1%	5.3%
Construction	301,725	5.6%	275,483	5.1%	-8.7%
Manufacturing	859,548	16.0%	831,030	15.5%	-3.3%
Wholesale trade	163,458	3.0%	147,353	2.7%	-9.9%
Retail trade	626,512	11.7%	625,036	11.6%	-0.2%
Transportation and warehousing, and utilities	266,567	5.0%	256,609	4.8%	-3.7%
Information	105,502	2.0%	93,119	1.7%	-11.7%
Finance and insurance, and real estate and rental and leasing	353,630	6.6%	344,096	6.4%	-2.7%
Professional, scientific, and management, and administrative and waste management services	478,692	8.9%	500,289	9.3%	4.5%
Educational services, and health care and social assistance	1,254,969	23.4%	1,300,399	24.2%	3.6%
Arts, entertainment, and recreation, and accommodation and food services	454,730	8.5%	488,167	9.1%	7.4%
Other services, except public administration	239,248	4.5%	239,722	4.5%	0.2%
Public administration	210,373	3.9%	207,539	3.9%	-1.3%
Civilian employed population 16 years and over	5,369,857		5,366,673		-0.1%

Source: U.S. Census Bureau, American Community Survey, Income in the Past 12 Months, 2010-2015

Figure 5: Belpre Labor Force, Employment, and Unemployment, 2010-2015

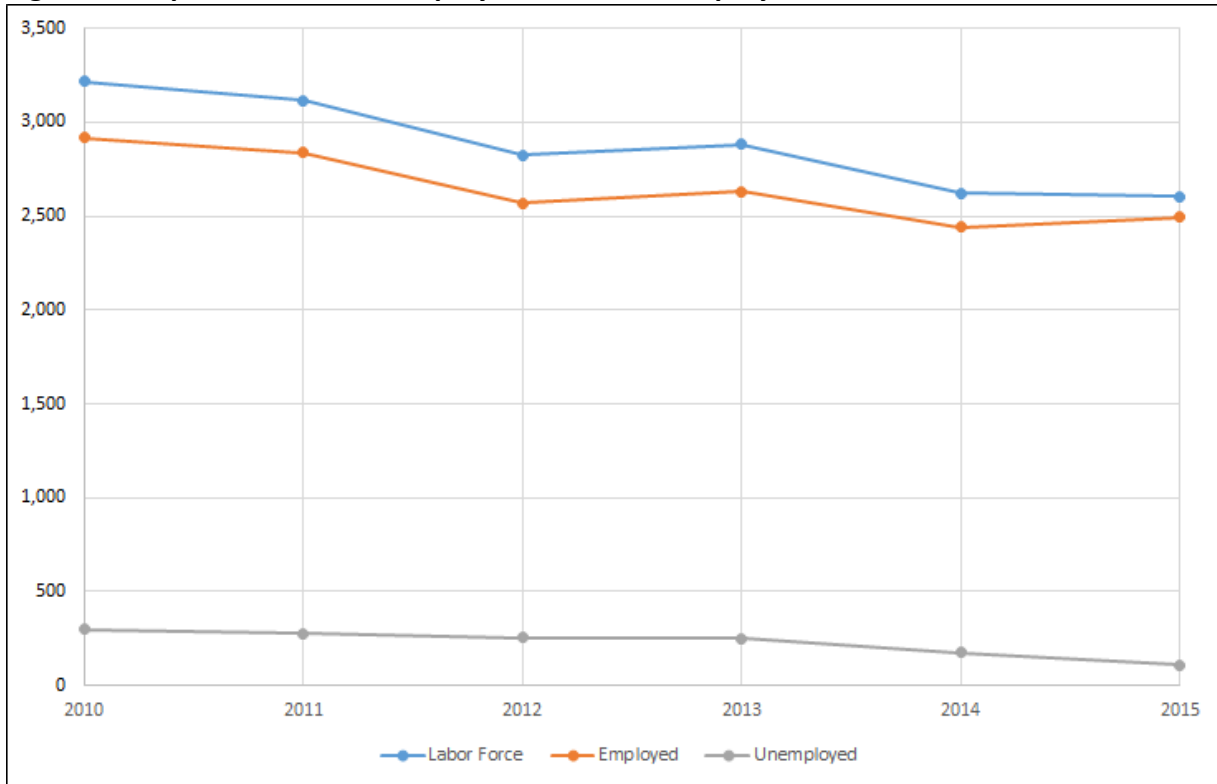


Figure 6: Unemployment Rate: Belpre, Washington County, and Ohio, 2010-2015

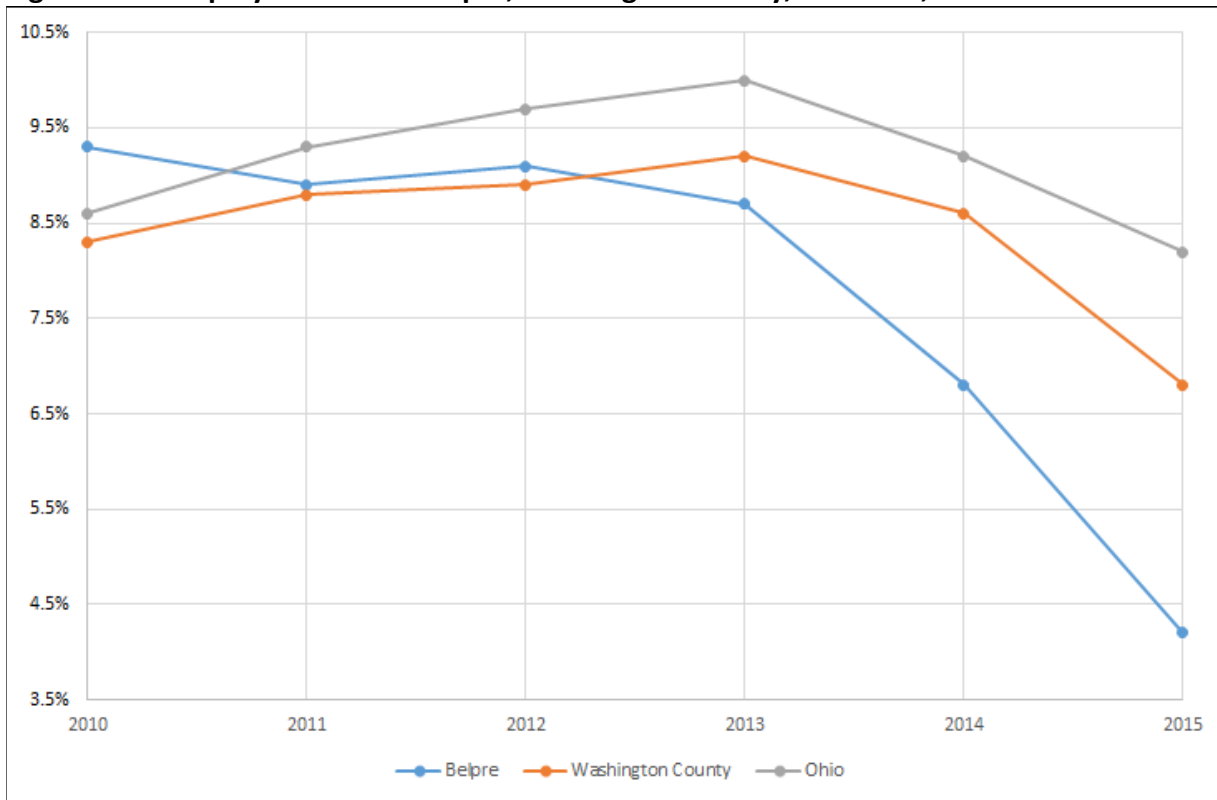
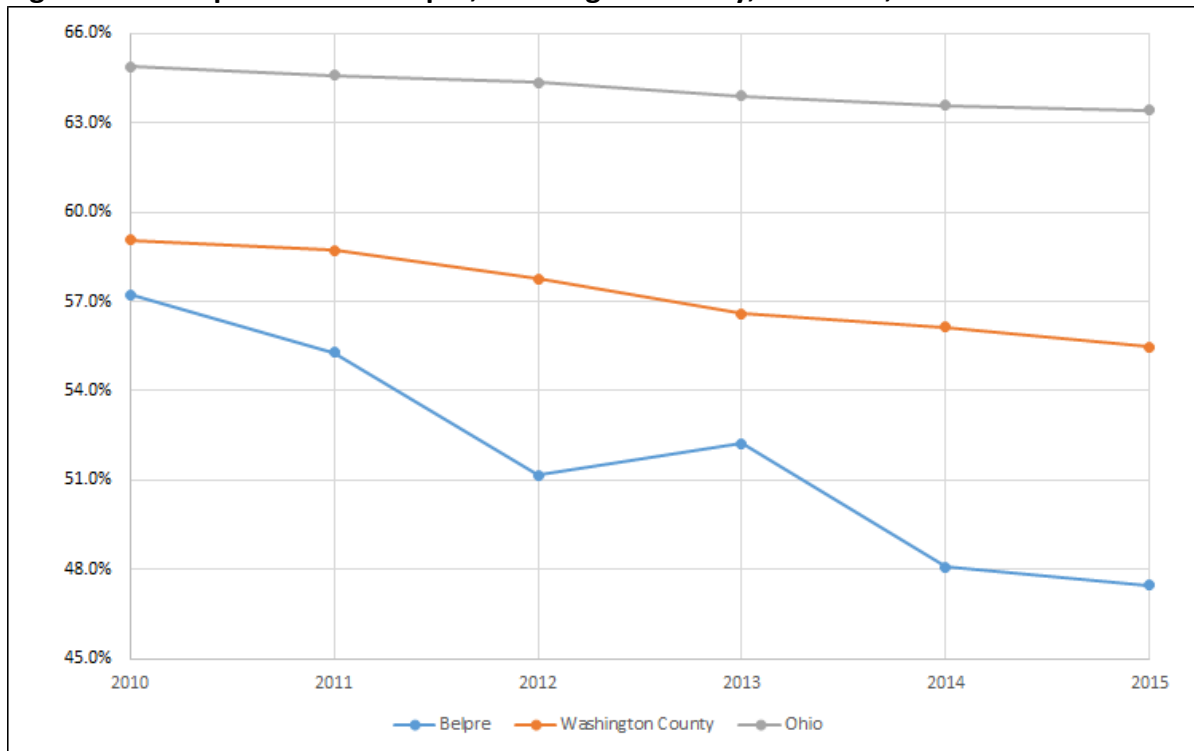


Figure 7: Participation Rate: Belpre, Washington County, and Ohio, 2010-2015



3.3 Employed Resident Commute Shed

Table 5 below details the commuting habits of residents in Washington County and nearby counties in 2013. Each cell in the upper-left matrix describes the proportion and number of people who lived in the column-label county and worked in the row-label county. The rows and columns are extended by auxiliary matrices with summary figures for places of work (extended rows) and places of residence (extended columns).

69% of Washington County residents stayed in-county to work. Of the 31% who left the county, 20% commute to Wood County, WV. Overall, 25% of Washington county residents left the state in their commutes, with 1.3% commuting to Pleasants County, 0.4% commuting to Wetzel County, and 2.9% commuting to other out-of-state locations. Washington County had 25,050 working residents, ranking the county 3rd behind Athens County with 25,956 and Wood County with 36,175.

Washington County hosted 24,154 workers, 28.4% of which commuted from other counties. Wood County and Noble County each contributed roughly 10% to this total. Washington County ranked 3rd among the counties of interest in terms of workers hosted, behind Athens County with 26,567 and Wood County with 39,151.

Table 8: Commuter Inflow/Outflow by County, 2013

		Place of Residence							Other, In State	Other, Out of State	All, In-Commuting	Total Workers	
Place of Work		Athens	Guernsey	Monroe	Noble	Pleasants (WV)	Washington	Wetzel (WV)	Wood (WV)				
	Athens		81.8%	0.1%	0.0%	0.0%	0.0%	1.5%	0.0%	0.4%	17.3%	0.8%	20.1%
		21,229	11	0	0	0	379	0	152	4,584	221	5,347	26,567
Guernsey		0.0%	70.5%	1.1%	19.9%	0.0%	0.5%	0.2%	0.0%	17.9%	1.4%	26.0%	100.0%
		4	11,255	60	793	0	131	10	18	2,717	215	3,948	15,203
Monroe		0.0%	0.2%	55.7%	0.8%	0.0%	0.6%	3.8%	0.1%	20.1%	7.7%	57.0%	100.0%
		0	29	3,094	32	0	138	210	21	978	373	2,781	4,875
Noble		0.0%	2.0%	1.3%	49.1%	0.0%	1.0%	0.0%	0.3%	10.6%	0.7%	36.1%	100.0%
		0	323	73	1,951	0	252	0	107	323	22	1,100	3,051
Pleasants (WV)		0.3%	0.0%	0.3%	0.0%	52.3%	1.3%	1.0%	1.8%	15.9%	1.2%	52.2%	100.0%
		65	5	14	0	1,466	319	57	668	496	39	1,633	3,129
Washington		1.6%	0.5%	6.8%	10.4%	8.5%	69.1%	0.5%	9.5%	5.8%	2.0%	28.4%	100.0%
		407	77	379	414	239	17,298	29	3,437	1,402	472	6,856	24,154
Wetzel (WV)		0.0%	0.0%	7.2%	0.1%	3.3%	0.4%	66.0%	0.1%	20.7%	8.2%	39.8%	100.0%
		0	0	400	2	93	104	3,601	53	1,237	493	2,382	5,983
Wood (WV)		2.1%	0.1%	1.3%	3.5%	20.3%	20.4%	0.3%	81.1%	7.4%	1.2%	25.1%	100.0%
		534	11	71	141	570	5,099	18	29,325	2,902	480	9,826	39,151
Other, In State		12.9%	24.4%	11.6%	12.7%	13.0%	2.4%	22.4%	4.9%				
		3,341	3,898	644	504	365	599	1,221	1,766				
Other, Out of State		1.4%	2.2%	14.8%	3.5%	2.5%	2.9%	5.7%	1.7%				
		376	347	822	139	71	731	311	628				
All, Out-Commuting		18.2%	29.5%	44.3%	50.9%	47.7%	30.9%	34.0%	18.9%				
		4,727	4,701	2,463	2,025	1,338	7,740	1,856	6,850				
Total Workers		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%				
		25,956	15,956	5,557	3,976	2,804	25,050	5,457	36,175				

Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey Commuting Flows

4. Industry Cluster Analysis

Our research team also investigated the prominent industry clusters in the region for local targeting. Industry clusters are “geographic concentrations of interconnected companies and institutions in a particular field” (Porter, 1998, 78) that are “linked by similar needs such as production inputs, specialized labor, and technology” (Hagadone & Grala, 2012, 16). In other words, these clusters are geographically concentrated and include interrelated businesses, vendors, and other organizations within a certain industry.

Using both quantitative measures and anecdotal case studies, we analyzed several industry clusters in the Belpre region. Figure 8 displays the three selected for this analysis: plastics, hospitals, and wood, including a zoom-in on the City of Belpre. The wood and plastics firms are displayed for Washington and its adjacent counties (i.e., Athens, Monroe, Morgan, and Noble), as well as Wood County, West Virginia. The hospitals in the region are only displayed for the City of Belpre, Marietta, and Parkersburg, West Virginia. Hospitals were selected in a purposive manner based off of the discussion and desire to assess the healthcare market in the region, particularly considering the new Marietta Memorial Hospital - Belpre Medical Campus that opened in 2014.

The wood and plastics industries were selected and organized through a more structured method. We utilized the LexisNexis Academic company dossier database and searched for firms in these industries using relevant North American Industry Classification System (NAICS) codes to determine company name and contact information. Focused on the six-county region, we used 17 NAICS codes for plastics and 26 for wood, resulting in 10 plastics firms in the region and 63 for wood (all of which had at least one employee). We employed this method since the region is so rural and data suppression issues hindered the optimal use of the U.S. Cluster Mapping Project or other similar resources. Using the resulting street address information, we used ArcGIS to provide a spatial representation of where each firm was located.

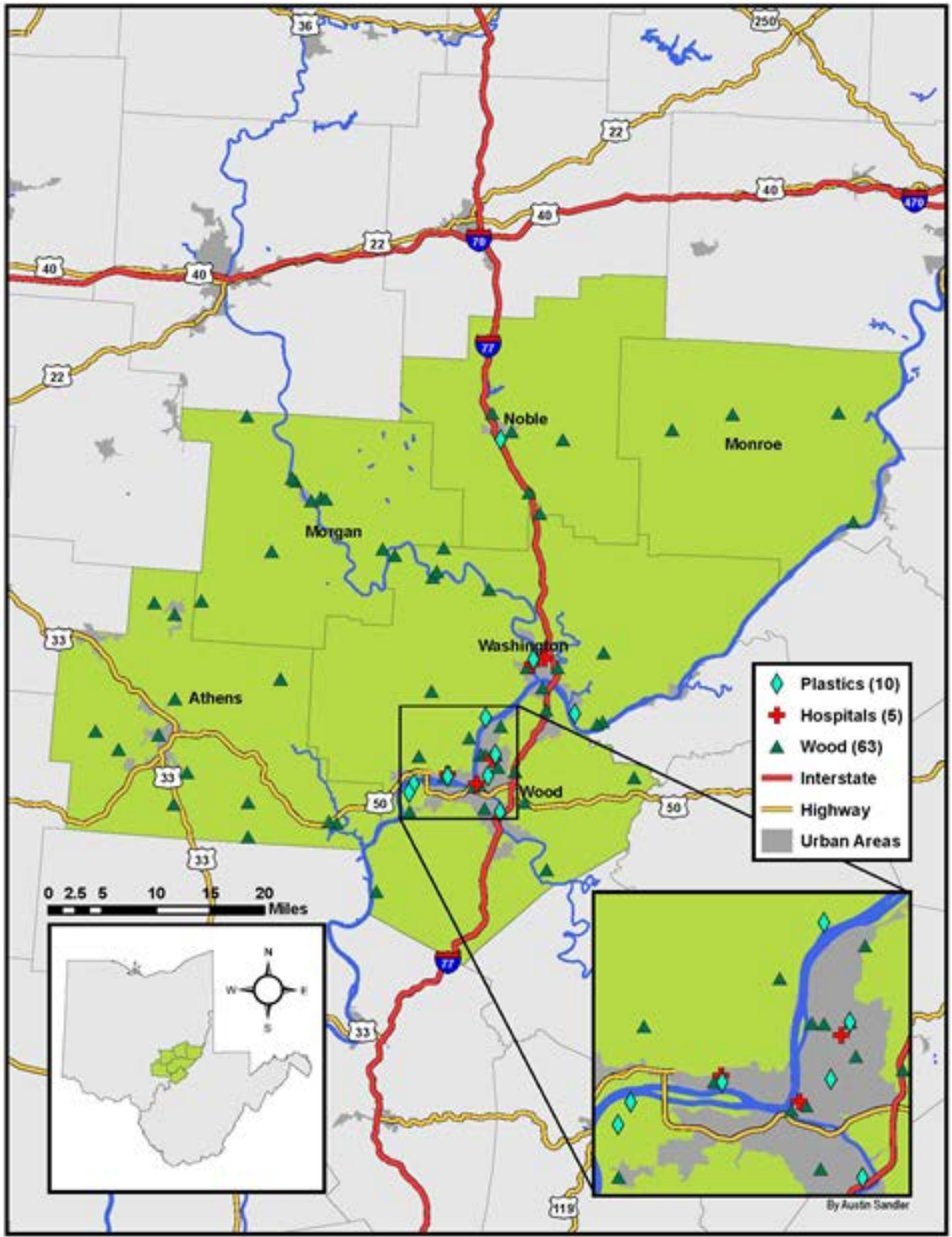
This resulting map suggests that the plastics and wood industries are prominent in the region, and further networking among these respective clusters may breed job creation, entrepreneurial development, and other economic development related activities. The plastics and polymers industry seems to be centered around the Ohio River, which offers distribution and transportation advantages. The region also offers a complete supply chain for the plastics industry, especially considering the shale oil and gas extraction activity in the region. Plastics are a key component of a wide variety of products, ranging from packaging and household products, to electronics, transportation, and construction, among others. Belpre should continue to support its large and unique regional plastics cluster, including key firms such as Kraton and Solvay, to enhance this hub that contributes greatly to the regional economy.

The wood industry analysis displayed a much larger number of firms, representing a historically large, but still growing industry cluster. The Belpre region, and Southeast Ohio as a whole, has a specific competitive advantage in high quality hardwoods, which are often harvested and

shipped elsewhere in the state for higher value-added activities such as wood furniture manufacturing. Nevertheless, the region still has noteworthy potential in sectors such as sawmills and pulp and paper. The region also has an advantage in finely-crafted Amish wood manufacturing to the north. We believe that with workforce training, as well as the pursuit of supply chain assistance, the Belpre area may be able to help improve investment and value-added industry opportunities in this regional industry cluster by attracting more household and wood products manufacturing firms.

Finally, the healthcare industry serves an important role in the three cities, as exemplified by the five large full-service hospitals that exist within the 15–20 mile area. This represents a high concentration of healthcare services in the region, which even extend further beyond hospitals to indirectly include and support ambulatory care industries, residential care facilities, and others. With the suite of universities in the region providing healthcare worker training, as well as the aging population and growing demand for health and hospital services, Belpre should continue to support the expansion of the Marietta Memorial Campus and pursue other opportunities that help serve the needs of the patient population in the community and region. Taken as a whole, understanding, supporting, and enhancing these three key regional clusters will help strengthen the City of Belpre’s economic, labor force, and overall development opportunities.

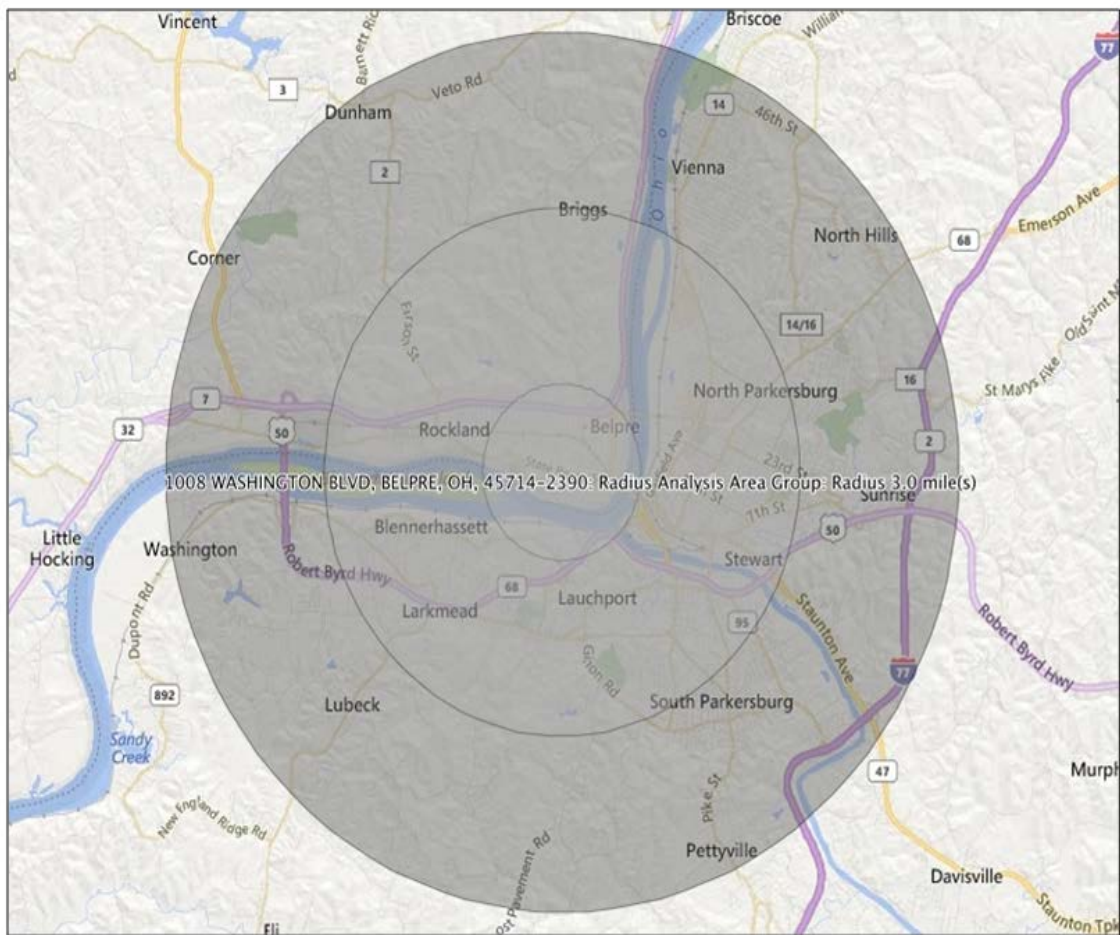
Figure 8: Select Industry Clusters: Plastics, Hospitals, & Wood



5. Retail Market Analysis & Development Impacts

Our team also completed a retail market analysis to help support our economic development scan data and identification of economic development priorities. We specifically utilized data from Claritas, LLC and Environics Analytics Group, Ltd. to determine the gaps and surpluses in retail buying power in Belpre on a 1, 3, and 5-mile radius, as displayed in Figure 9. The retail market power data is gathered from the U.S. Bureau of Labor Statistics' Consumer Expenditure Survey and the U.S. Census Bureau's Census Retail Trade. Overall, the difference between demand and supply signifies the opportunity gaps or surpluses for the types of retail stores in the Belpre region.

Figure 9: Retail Market Power Radius Map



Retail Market Power

Retail Market Power 2017

Report Generated: February 1, 2017 1:19:13 PM EST

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5.1 Retail Market Gaps

Table 9 summarizes the demand (i.e., consumer expenditures) and the supply (i.e., consumer sales) of various retail store types within a 1- and 3-mile radius of the Kroger grocery store in Belpre. We excluded the 5-mile radius data since much of that circle is outside of the true Belpre market. The table focuses on industries where an opportunity gap exists - that is, where consumer demand is not met by supply.

One classification of opportunity gaps are those that exist merely due to a lack of supply. In the 3-mile radius, Other Gasoline Stations have \$0 supply, while Special Foodservices, Specialty Food Stores, and Cafeterias, Grill Buffets, & Buffets have a supply of less than \$500,000.

Another classification are retailers with particularly high demands. Specifically, General Merchandise Stores have both a high gross demand (\$62,568,837 in the 3-mile radius) and a significant opportunity gap (\$11,819,110 in the same radius). Grocery Stores also possess a high gross demand, but offer a relatively weak opportunity gap due to the presence of a large grocery store (i.e., Kroger) in the analysis region. In general, these data suggest that Belpre has demand for Non-Store Retailers, General Merchandise Stores, and Clothing & Clothing Accessory Stores.

Table 9: Retail Market Power: Opportunity Gaps

Retail Stores	1008 WASHINGTON BLVD, BELPRE, OH, 45714-2390: Radius Analysis Area Group: Radius 1.0 mile(s)			1008 WASHINGTON BLVD, BELPRE, OH, 45714-2390: Radius Analysis Area Group: Radius 3.0 mile(s)		
	2017 Demand (Consumer Expenditures)	2017 Supply (Retail Sales)	Opportunity Gap/Surplus	2017 Demand (Consumer Expenditures)	2017 Supply (Retail Sales)	Opportunity Gap/Surplus
Other Gasoline Stations-44719	\$2,498,304	\$0	\$2,498,304	\$16,142,897	\$0	\$16,142,897
Other General Merchandise Stores-4529	\$4,649,882	\$1,570,095	\$3,079,788	\$29,957,028	\$17,097,887	\$12,859,141
General Merchandise Stores-452	\$9,645,858	\$1,570,095	\$8,075,763	\$62,568,837	\$50,749,727	\$11,819,110
Limited-Service Eating Places-722513	\$2,842,382	\$0	\$2,842,382	\$18,741,730	\$9,319,246	\$9,422,484
Clothing & Clothing Accessories Stores-448	\$3,082,558	\$182,102	\$2,900,456	\$20,624,512	\$14,317,116	\$6,307,396
Clothing Stores-4481	\$2,354,593	\$180,640	\$2,173,953	\$15,797,880	\$10,961,064	\$4,836,817
Special Foodservices-7223	\$619,181	\$5,710	\$613,471	\$4,078,141	\$185,395	\$3,892,746
Beer, Wine & Liquor Stores-4453	\$552,140	\$296,828	\$255,312	\$3,623,374	\$861,625	\$2,761,749
Specialty Food Stores-4452	\$368,129	\$75	\$368,054	\$2,346,155	\$228,273	\$2,117,882
Shoe Stores-4482	\$459,911	\$1,462	\$458,448	\$3,115,930	\$1,052,332	\$2,063,598
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$471,704	\$0	\$471,704	\$3,032,267	\$977,738	\$2,054,528
Grocery Stores-4451	\$10,096,417	\$18,413,791	(\$8,317,374)	\$64,754,785	\$63,174,451	\$1,580,333
Cafeterias, Grill Buffets, and Buffets-722514	\$74,885	\$0	\$74,885	\$493,769	\$64,176	\$429,593

5.2 Retail Market Surpluses

Table 10 is similar to Table 9, yet focuses on opportunity surpluses, or areas in which retail supply exceeds consumer demand. In essence, a high opportunity surplus indicates that the retail market is oversaturated in that sector.

This table suggests that the Belpre region is oversaturated with motor vehicle and parts retailers, as can be seen from the Automotive Dealers row and the Automotive Parts/Accessories row. Moreover, the surpluses in Furniture & Home Furniture Stores and Sporting Goods, Hobby, Book, & Music Stores suggest a general oversaturation in GAFO retailers. However, not all GAFO markets are oversaturated, as shown by the opportunity gaps in General Merchandise Stores and Clothing & Clothing Accessories Stores seen in Table 9.

Table 10: Retail Market Power: Opportunity Surpluses

Retail Stores	1008 WASHINGTON BLVD, BELPRE, OH, 45714-2390: Radius Analysis Area Group: Radius 1.0 mile(s)			1008 WASHINGTON BLVD, BELPRE, OH, 45714-2390: Radius Analysis Area Group: Radius 3.0 mile(s)		
	2017 Demand (Consumer Expenditures)	2017 Supply (Retail Sales)	Opportunity Gap/Surplus	2017 Demand (Consumer Expenditures)	2017 Supply (Retail Sales)	Opportunity Gap/Surplus
Automotive Dealers-4411	\$13,415,654	\$9,462,923	\$3,952,731	\$86,858,550	\$243,790,219	(\$156,931,668)
Gasoline Stations with Convenience Stores-44711	\$2,536,391	\$0	\$2,536,391	\$16,419,476	\$54,246,017	(\$37,826,541)
Automotive Parts/Accessories, Tire Stores-4413	\$1,434,262	\$869,814	\$564,449	\$9,346,008	\$31,340,555	(\$21,994,547)
Furniture & Home Furnishings Stores-442	\$1,546,660	\$3,603,632	(\$2,056,972)	\$10,047,877	\$27,809,515	(\$17,761,639)
Sporting Goods, Hobby, Book, Music Stores-451	\$1,396,465	\$1,708,476	(\$312,011)	\$9,328,349	\$26,326,558	(\$16,998,209)
Building Material & Supply Dealers-4441	\$8,173,535	\$6,684,045	\$1,489,490	\$51,817,380	\$68,765,584	(\$16,948,204)
Sporting Goods, Hobby, Musical Instrument Stores-4511	\$1,217,013	\$1,350,797	(\$133,783)	\$8,100,376	\$24,671,311	(\$16,570,936)
Other Miscellaneous Store Retailers-4539	\$1,339,830	\$3,247,928	(\$1,908,098)	\$8,898,520	\$21,417,311	(\$12,518,791)
Furniture Stores-4421	\$825,086	\$395,477	\$429,609	\$5,372,270	\$17,323,081	(\$11,950,811)
Full-Service Restaurants-722511	\$3,898,136	\$61,652	\$3,836,484	\$25,775,822	\$37,612,480	(\$11,836,658)
Office Supplies, Stationery, Gift Stores-4532	\$773,745	\$629,890	\$143,855	\$5,080,637	\$16,156,711	(\$11,076,074)
Electronics & Appliance Stores-44314	\$1,197,375	\$4,853,653	(\$3,656,278)	\$8,020,814	\$17,400,872	(\$9,380,058)
Lawn/Garden Equipment/Supplies Stores-4442	\$711,162	\$438,372	\$272,791	\$4,525,839	\$12,263,208	(\$7,737,369)
Other Motor Vehicle Dealers-4412	\$1,018,274	\$3,399,196	(\$2,380,922)	\$6,316,594	\$13,590,721	(\$7,274,127)
Home Furnishing Stores-4422	\$721,574	\$3,208,155	(\$2,486,581)	\$4,675,607	\$10,486,434	(\$5,810,827)
Used Merchandise Stores-4533	\$246,396	\$1,740,896	(\$1,494,500)	\$1,649,781	\$5,932,299	(\$4,282,518)
Other Health & Personal Care Stores-44619	\$343,964	\$0	\$343,964	\$2,209,163	\$5,112,886	(\$2,903,723)
Florists-4531	\$107,504	\$1,349,903	(\$1,242,399)	\$672,482	\$3,573,837	(\$2,901,355)
Pharmacies & Drug Stores-44611	\$4,639,094	\$6,891,013	(\$2,251,918)	\$29,848,518	\$32,531,410	(\$2,682,892)
Snack and Nonalcoholic Beverage Bars-722515	\$394,829	\$11,772	\$383,057	\$2,603,371	\$5,250,033	(\$2,646,662)
Drinking Places -Alcoholic Beverages-7224	\$227,528	\$2,497	\$225,031	\$1,516,704	\$3,721,359	(\$2,204,654)
Optical Goods Stores-44613	\$186,706	\$269,229	(\$82,523)	\$976,291	\$2,289,831	(\$1,313,539)
Department Stores, Excluding Leased Departments-4521	\$4,995,975	\$0	\$4,995,975	\$32,611,810	\$33,651,840	(\$1,040,030)
Jewelry, Luggage, Leather Goods Stores-4483	\$268,054	\$0	\$268,054	\$1,710,702	\$2,303,721	(\$593,019)
Book, Periodical & Music Stores-4512	\$179,452	\$357,680	(\$178,228)	\$1,227,974	\$1,655,247	(\$427,273)

Overall, Belpre should use this analysis to think about what types of retail business it may want to attract to the community as part of its ongoing economic development efforts. Belpre is certainly meeting its consumer demand in the motor vehicle and parts sectors, but may want to consider retail options such as merchandise and clothing stores in the future.

6. Community Engagement

Our research team completed two distinct tasks to support task two: Community Engagement in Economic Development Priorities. First, we conducted 13 semi-structured, in-person interviews with local business owners, government officials, and community members, among others. This list was gathered from an informed source that was knowledgeable about the key economic development related stakeholders in the community, and, thus, our sample was not random. Next, we conducted a public meeting in Belpre on March 23, 2017 to present the data from our economic development scan and ask for comprehensive input to economic development priorities for Belpre in a public setting. Overall, these community engagement activities helped identify community goals and promote buy-in from the citizenry.

Our series of interviews specifically contained individuals from local government entities, churches, businesses, and schools. The interviews ranged from 30 minutes to 1 hour in length. Several reoccurring themes emerged from this interview process. First, a majority of interviewees mentioned the underutilization of the Ohio River as a key natural asset in Belpre. Discussions in this regard centered on how the river is not being used to its full capacity for events and other occasions that could enhance economic activity in the area. A number of interviewees specifically recommended further development of the bike path along the river, beautification efforts, and potential fairs or festivals along the river way.

Moreover, several interviewees identified the Marietta Memorial Hospital campus in Belpre to be an economic asset to the area. However, infrastructure issues, such as water pressure and natural gas availability, have hindered the full development of the campus. While many referred to it as “the best thing to happen to Belpre in recent years,” they were also quick to point out that these infrastructure issues needed to be dealt with for Belpre to continue to pursue health care industry businesses/jobs.

Finally, some stakeholders noted Belpre’s strategic location in the area as the city is surrounded by educational hubs such as Ohio University, Washington State Community College, and Marietta College. They understood that economic success for Belpre is tied to future of the broader region and major employers, and training and education was the impetus for future industrial and business development. Relatedly, many expressed a desire for investment in a hotel and/or chain restaurants in the community, which is perhaps hindered by current alcohol laws, housing stock issues, and other social problems such as drug abuse. Several mentioned how the inability to sell alcohol deters various businesses from coming to the area, that nicer homes in the area were in short supply and expensive, and drug concerns are becoming more prevalent in the Belpre community. Despite these challenges, through this interview process, it became apparent that Belpre has a strong sense of community pride, which offers a promising path forward for economic development efforts in the community.

Our second aspect of the community engagement research for this project involved a formal meeting that was open to the public. This meeting served as a platform to provide citizens and Belpre leadership with objective information about the area’s economy and subsequently seek feedback on determining the community’s economic development priorities. We sent several invitations to local business owners, nonprofits, churches, and other community organizations for the meeting, which was also advertised in print and news media. Over 80 individuals attended.

After a formal presentation of the economic scan data (e.g., age, educational attainment, household income, unemployment rates, employment by industry, school enrollments, commuter patterns, etc.), our team asked two specific questions of attendees: “What jobs or businesses would you like to see in Belpre?” and “What changes need to occur in Belpre to capitalize on business and job opportunities?” We gathered every response on a series of posters, and then asked attendees to place either a green or red sticky dot next to each of the categories that they felt should or should not be focused on. Each attendee was given four green (to signify positive) and one red (to signify negative) dot. The detailed results of this exercise are displayed below in Tables 11 and 12.

Table 11: What jobs or businesses would you like to see in Belpre?

Job/Business	Number of Green	Number of Red
Tourism (Recreation/Boating)	20	
Warehouse Distribution	15	
Restaurants	14	1
Technology Company	13	
Hotel	11	
Walkable Business (e.g., coffee shop)	11	
Ohio University Campus	10	
Street Beautification	10	
Retail Shopping	10	
Light Manufacturing	9	
Executive Offices	9	
Family Fun (Kids Events)	9	
Kinko's/FedEx	7	
Stadium / Outward Ready Retail	7	
Local / State Government Office	6	
Casino Boat	6	19
Gym	5	1

Athletics Facilities	5	
Wildlife Refuge Park	5	1
Veteran's Center	4	
Adult / Child Care	4	
Fabrication	4	
Historic District	3	
Business Incubator	3	
Refinery	2	
Taco Bell	2	10
Convention Center	2	
Food Manufacturing	2	
Construction/Trade	2	
Support Hino Motors in Williamstown, WV	2	
Appliance Store	2	
Museum Promotion	1	
Small Wood Manufacturing	1	
Multi-Use Complex	1	
Government Contracting Outfit		1
Interstate		

Table 12: What changes need to occur in Belpre to capitalize on business and job opportunities?

Potential Change	Number of Green	Number of Red
New School Facility	22	
Improved Sewer/Water/Gas/Etc.	18	
Wirt Street Bridge (CSX)	15	
Alcohol Laws	11	2
Improved Road Signage	9	
Improved Communication & Marketing (e.g., website)	9	
Getting Ahead of Oil/Gas Curve	9	
Grant Writing Assistance	6	
Nature Tourism / History	6	
City/Street Beautification	6	
Trolley Car / Public Transit	5	2

Rezoning: Commercial v. Residential	5	
Sidewalks / Walkable Space	5	
Money Attraction/Capital Investment	4	
Commercial/Residential Parcels Deteriorating	4	
Wood/Washington County Collaboration	4	
Revise/Review Local Tax Laws (Economic Development Incentives)	3	
Volunteer Support (e.g., fire)	3	
Attitude/Perception	2	
Main Street Revitalization	1	
Bike Path	1	
Buy Local / Branding Culture		
Route 50 to 32 Interstate		3
Affordable High Speed Internet		1

The most desired job/business type identified in this exercise was tourism-based employment (e.g., recreation/boating/etc.). There was also a strong interest in warehouse distribution, restaurants/hotels, and other firms in the technology and manufacturing industries. Several attendees also indicated a desire to have walkable businesses in the community and more retail shopping options. However, there was stark dissent in bringing a casino boat or a Taco Bell to Belpre. Some individuals later noted that they were not specifically opposed to Taco Bell, but they did not want to make recruitment of fast food restaurants a centerpiece of their economic development efforts.

Some of the noted top changes that need to occur to capitalize on these opportunities included a new school facility, infrastructure upgrades (e.g., water, sewer, bridges, roadway signage), and alterations to the city’s alcohol laws. There were not a significant number of red dots placed next to any of these options, although three attendees disagreed that a Route 50 to 32 interstate highway was a preferable strategy to aid in the development of the businesses noted in the first question. Overall, this exercise, and the community engagement activities as a whole, helped inform our formal recommendations surrounding community branding & placemaking, as well as restaurant & retail development, as detailed in latter sections of this report.

7. Case Studies

In order to identify current best practices and facilitate learning from other communities, a series of short case studies were developed. These case studies explore the approaches of other small towns/cities of similar size and population and comparable natural assets to Belpre, Ohio. We particularly investigated municipalities that focused their development efforts in the areas of tourism, downtown development, industrial development, and organizational development. Though the cases identified are not an exact match to that of Belpre, many lessons can be learned and applied to Belpre's efforts.

Case Study #1: Tourism, downtown development, industrial development (Etowah, Tennessee)⁵

The city of Etowah, Tennessee is similar in size to Belpre (pop. 3,660) and their development goals (tourism, downtown development, and industrial development) correspond well to those of Belpre. Etowah's strategy for economic development was to build from its existing assets. For example: to use its heritage assets to attract tourists; to create a dynamic and thriving downtown corridor with retail and service amenities that attract visitors as well as locals; and to leverage the town's quality of life factors and its existing industries to further expand its industrial base.

The town's strategic planning exercise in 1998 shed light on the fact that the old abandoned rail line, which stretched up into the national park, was an asset that the town could use to create a draw for tourists. At the time, the rail – built in 1890 – was owned by a private holding company. In 2001, opportunity presented itself and the community raised \$1.6 million to purchase the line. The City of Etowah collaborated with the Tennessee Valley Authority (TVA) to rehabilitate the rail line, which provided TVA with access to the Appalachia Powerhouse (a power generator on the Hiwassee River) and provided Etowah with a prominent tourism asset. The Tennessee Overhill Heritage Association, in partnership with the town, received a grant from the National Trust for Historic Preservation to initiate rail excursions.

The second pillar of Etowah's economic development strategy is to build a downtown corridor with services and amenities that attract tourists and locals alike. In the vacuum created by economic shocks of the late 1990s, a second-hand-item market developed in Etowah's downtown retail corridor. Shops selling antiques and sundries took root in previously unoccupied storefronts. According to a prominent town official, "Etowah's second-hand stores attract shoppers from as far away as two hours." Their main challenge, which was articulated during Etowah's strategic planning efforts of 1998, was their lack of capacity for marketing and advertising.

The final pillar in Etowah's economic development strategy was industrial development. The

⁵ From Lambe, 2008.

town manager coordinated recruitment and expansion activities, in close partnership with the chamber executive and McMinn County Economic Development Authority. When Etowah was working on its community strategic plan, it became apparent that being proactive in the area of industrial development could complement Etowah's tourism and downtown development activities.

While the Etowah, Tennessee approach may not be fully replicable for Belpre, there remain key strategies to glean from the process. The Etowah program demonstrates an ability to build from existing assets. Furthermore, the Etowah strategy is applicable to Belpre via tourism around the Ohio River, and in the area of industrial development to help make the community a more vibrant place to live, work, and play.

Case Study #2: Rural Development, Economic Development and Diversification (Tioga County, NY)⁶

In this case study, we are comparing a county; however, there is information from this case study that can be helpful to the City of Belpre. Tioga County is similar in size to Washington County, Ohio (pop, 51,150) as well as in characteristics; Tioga County like Belpre serves as a bedroom community for larger surrounding metro areas. Nearly 75 percent of Tioga County residents work outside of the county.

The county has a long history of relying heavily on single, large employers. In the past, it was Endicott Johnson, then IBM, and now Lockheed Martin. Tioga County experienced a large increase in employment diversity between 2009 and 2012. Tioga County moved from having below average economic diversity (30th percentile of counties nationally) to near average diversity (46th percentile). In most instances, large increases in diversity during this particular economic period resulted from major recession-inspired economic shocks—such as the loss of one major employer or significant downsizing in one dominant industry. This has been the case in Tioga County, where Lockheed Martin recently employed as many as 4,000 employees, but lost nearly 1,600 jobs due to the company's loss of the Marine One Presidential Helicopter contract. These job losses highlighted the extent to which the county relies upon this one employer, and in a sense, shows how the county faces a crisis of diversity. Tioga County's 2010 Economic Development Plan (approved in 2005) listed the erosion of the county's economic base as a critical challenge. The plan also identified greater diversity as an economic goal and sought to target other activities such as tourism, wood products, agriculture, electronics, and metal fabrication for development. Recently, Tioga County received some modest state funding through the 2012 New York State Regional Economic Development Councils awards to renovating buildings in the Town of Nichols and to support two multi-county initiatives aimed at developing tourism and food processing.

Tioga County's diversification and economic development efforts rely on practitioners

⁶ From Porter, 1998.

operating in a collaborative manner. Given its small size, the county lacks the resources to pursue extensive business recruitment and attraction. Yet, it was successful by strengthening relationships both locally and regionally. Locally, area stakeholders make continuous efforts to build cohesion amongst local service providers. The goal is to provide a 'no wrong door' approach to providing business assistance to Tioga County companies. While further efforts are being made to build regional relationships as well, especially with Broome County (Binghamton) to the east, and Chemung County (Elmira) to the west. These efforts have largely centered on information sharing. This often plays out when dealing with businesses that are looking to relocate across county lines. By having these open lines of communication, these counties can avoid wasteful beggar-thy-neighbor activities by not providing incentives to companies that are staying in the region, but just changing their address.

Furthermore, Tioga County is also engaged in other efforts to diversify its sources of wealth. For instance, it has embraced its role as a bedroom community and has invested in making itself an appealing place for commuters to live. For instance, investments have been made in developing Owego's downtown. As a result, the downtown has numerous shops and businesses, many of which have recovered from the flooding damage brought by Hurricane Irene in 2011. Focusing on making Tioga County attractive to commuters has several benefits. For instance, these workers pay taxes and spend a good portion of their money in Tioga County even though they do not work in the county. It also helps to counterbalance the 'Brain Drain' affecting Tioga County and many other Upstate New York communities. In some instances, these residents have brought companies with them. For example, one life sciences company in Owego came out of a Cornell University spinoff. The founder of the company previously worked at Cornell University in Ithaca, but lived in Tioga County.

While Tioga County is not an ideal match to Belpre, there is much information that can be gleaned due to similarities between the two rural areas. For instance, Tioga County like Belpre has a history of depending on one large employer for its economic viability, while also being a bedroom community for larger adjacent municipalities. The steps that Tioga County has taken to diversify its economy, while also making Tioga County a more attractive place to live, while working with the larger metro area are steps that the City of Belpre can take to make Belpre, Ohio great again.

Case Study # 3: Locally-Driven Community and Economic Development (Bakersville & Hayesville, North Carolina)⁷

Bakersville, North Carolina is a small mountain community that sits roughly an hour's drive from the nearest major city. For a large majority of the town's recent economic history, the economy was driven by manufacturing and agriculture. Recently, these industries have experienced a stark decrease in demand and resulting in a decline in employment. Most of the long-term residents in the area have experienced the perpetual boom and bust cycle of Bakersville's

⁷ From Lambe, 2008.

economy.

Bakersville's approach to economic development was focused in community development. In early 2000, through a volunteer civic organization called BIG, Bakersville completed a creek walk that provided access for catch-and-release fishing. The walk includes a handicap-accessible platform for fishing as well. Through donations, the town installed decorative lighting along the walkway and for donations of \$1,000+ donors would receive a commemorative plaque that would be displayed on one of the light fixtures.

The success of this project further enhanced community buy-in and onset a series of related projects that developed parks and playgrounds around the same area. Within a decade, these efforts had developed into the creation of a 15-mile bike path. Since the creation of the creek walk, four new businesses and created 9 new jobs that can be directly attributed to the walk. To help raise funds to maintain the bike path and continue projects, the organization began hosting various street festivals including an annual Christmas parade, a fireworks celebration for the 4th of July, and the annual Rhododendron Festival, which is the city's celebration of the world's largest rhododendron gardens.

Hayesville is a river town in western North Carolina with an expansive view of the southern portion of the Appalachian Mountains. Hayesville has a large retiree population and is currently working to build a new development of homes for this population. This once industrial city took a major economic hit when mining industries began to decline. Adding the economic distress, a highway bypass was built in the 1980's that deterred traffic from entering downtown Hayesville taking a major hit on the local economy. Due to the town's close access to Lake Chatuge and their mountainous terrain, Hayesville's economy has shifted to a reliance on recreational tourism.

Similar to Bakersville, Hayesville began improvements through local volunteer initiatives. A resident and local entrepreneur named Glen Love sparked a movement in 1996 when he took it upon himself to clean and paint the awnings of stores in the downtown area. A local civic organization was formed out of his efforts and they immediately began to take on downtown beautification projects. The town began hosting an annual Car-B-Q which is an antique car show and barbeque festival. In 2006, three retailers including a bookstore and multiple services businesses moved into Hayesville's downtown area.

Though Bakersville and Hayesville are uniquely different from one another, the towns took a similar approach to economic and community development strategy. Both areas wanted to develop on their small-town culture and develop the infrastructure necessary to implement locally driven community and economic growth and expansion. Bakersville worked to enhance the civic infrastructure of the town as an effort to attract local boutique-style retailers. Hayesville was focused in beautification of downtown spaces to attract more tourists and build a stronger sense of community. Additionally, in both communities, change was driven by local volunteer groups/organizations as responses to various hits their respective economies had

taken in part due to limited financial resources and small populations.

Case Study #4: Downtown Revitalization, Streetscape Improvements, Green Space, and Festival Organizing (Greenville, Kentucky)⁸

Greenville, Kentucky was once a prosperous, vibrant industrial town set in the heart of rural Kentucky. This small town with only about 4500 residents as of 2010, has experienced economic frustrations resulting from the boom and bust cycles associated with industry and mining (Schwartz, 2012). The city had once prided itself on its strong sense of community pride but that has since deteriorated.

When Greenville Mayor DeArmond took office in 2007, he began his active push for downtown revitalization and community development (Schwartz, 2012). The first task completed was streetscape improvements focused in beautification and increasing pedestrian access. The city launched their “Let’s Paint The Town” which encouraged volunteers to paint the outside of buildings along main city streets. Over 15 buildings received facade restoration including one building in which hand painted signs were discovered after the removal of the building’s siding. The signs were restored.

With the hopes of attracting visitors to provide bursts to the city’s economy, the Mayor invested in building up local street festivals. To help fund a tourism commission that would fund these events, the Mayor proposed and easily passed a hotel and restaurant tax which generates roughly \$275,000 in revenue. In fact, a portion of these revenues were used to help provide paint for the “Let’s Paint the Town” event. These funds are also used to pay for live bands for a concert series that the city hosts every summer now.

While these projects are taking place, a resident of the city proposed the idea of developing a nature park in the downtown area. Through grant funds and local donations, the city was able to bring this idea to fruition.

⁸ From Schwartz, 2012.

8. Locally-Driven Community and Economic Development Strategies: Placemaking, Branding, Tourism, and Economic Gardening

8.1 Placemaking

What is Placemaking?

Placemaking is a community-centered approach to the planning, implementation, and maintenance of public gathering places. Placemaking is a useful tool for developing a public space from streets to sidewalks to make them a healthier and more social gathering place for all community members. Though the cleaner, prettier, more accessible public spaces are an important factor in placemaking, the greater gain is the process in which these areas are developed that creates not only a greater sense of value in these spaces but a gives the community a personal stake in them.

Placemaking is the concept of building upon both physical and intangible assets that a city or town already has to create spaces that foster public health and overall well-being. Placemaking encourages and inspires residents to reimagine current spaces in their communities to increase their value. This grassroots movement to community and economic development began in the 1960's and gained traction in the 1990's (Martin, 2003). Since then, placemaking has been used as a successful tool of development in both rural and urban communities across the nation.

How is it Done?

Community members play the largest role in determining success in placemaking. The community typically determines the purpose of public spaces, as well as what the function of these spaces should be. Moreover, since these new public spaces serve as a reflection of what the community values most, it is crucial that there is community feedback and input during the entire process (Martin, 2003).

Placemaking looks different for every community. The first step for several communities include introductory steps such as a clean-up day in which volunteers remove litter from the streets to painting murals or the facades of old buildings in the downtown area. Other communities begin by planting flowers in the springtime to add a bright pop of color to the space.

Placemaking can be used to enhance spaces in a variety of ways. Placemaking can enhance the social aspects of an area, the usage or function, the access, or just the overall image of a space. Project for Public Spaces (2009) identifies 3 steps to placemaking; effectively integrating all community wishes and opinions into one concise vision, turn the vision into a simple plan of action, and finally implement the plan.

Simple, Quick, and Cheap

In many situations, economic development strategies can be complex, leading to large costs and long timeframes for completion. Placemaking is typically about simple and quick changes to a community space that cost very little. This does make the process more incremental but the ease and cost effectiveness helps contribute to community buy-in for additional projects.

MEMFix: An Example

MEMFix was a movement that began in 2010 in Memphis to attack the problem of the deteriorated Broad Avenue. A nonprofit organization called Livable Memphis, in combination with local residents, merchants, and donors, wanted to redesign this commercial strip that was once lively but has since lost its spark. The movement began by hosting a community forum to hear from community members exactly what they wanted to see change in their areas. MEMFix started as a beautification project for the downtown corridor and a street festival to bring attention to the area. The movement now hosts multiple events each year, each dedicated to promoting change in the neighborhood. These events draw attention to low risk and low-cost solutions to neighborhood change like building bike paths or creating pedestrian access ways to community spaces like gardens and parks.

8.2 Rural Community Branding

What is Community Branding?

A community brand is a clear, concise message and image that effectively portrays what the community represents. Every community has the opportunity to put a set of ideas in the minds of potential visitors. Communities need to ask two questions:

1. What comes to mind when people think of your community?
2. What do you want to come to their minds when they think of your community and how can you further develop that?

A brand is the ideas or perceptions that customers hold about a product. Therefore, branding is the process of creating these held ideas or perceptions. Similarly, community branding is the process of developing the perceptions that people hold of a particular city or town. Community branding is typically done through highlight key landmarks or assets within the area. Every experience someone has in a town determines the community's brand.

What Does it Look Like?

Community branding is heavily dependent on social media and online presence. Promoting various tourism initiatives in rural areas are platformed by city/community website or Facebook pages (Boyne & Hall, 2004). A community should brand itself on assets that already exist in the city. If a community has a great capacity for recreation the city should work to develop that further but also highlight the recreational experiences available in the area on the city's website or social media networks.

Many rural communities have economies that are based in agriculture and therefore food. Food has been seen as a growing area of interest in tourism and many rural areas have been able to build off of this attraction by promoting their local food initiatives in the public eye. This is also a key factor of my “buy local” campaigns (Chen, Gompers, Kovner, & Lerner, 2009).

Buy Local campaigns/initiatives have gained a lot of traction in recent years. Encouraging community members to buy local not only keeps more money in the area from sales, but also helps create and sustain jobs in the area (Chen et al., 2009). Effective buy local campaigns not only add value to the products that farmers in the area are producing, but it also helps provide a marketing platform for these farmers. Successful buy local campaigns are effective tools to bolster economies in rural areas (Chen et al., 2009). Often times the most effective tool of these campaigns are local farmer’s markets.

In order for community branding to be successful, there must be community buy-in. All stakeholders in the community must fully believe in the brand identity the community is aiming to develop (Insch, 2011). It is also necessary to understand that successful community branding is much more than a simple catchy logo or a trendy new website design for the community (Insch, 2011). All community members have to make a broad, strategic effort to adopt this brand as their identity.

Why Engage in Community Branding?

Successful community branding can be incredibly beneficial to communities of all types. First and foremost, a community’s brand is one of the quickest ways to get the community on the map and visible to potential visitors. Additionally, it is a way to enhance the sense of pride within the community. Effective community branding can also make the area more attractive for new businesses/investments or even as a location for large events.

Belpre’s Brand?

Increasing tourism was common theme in both stakeholder interviews and the community meeting. Residents have a great deal of pride in the Ohio River access and views available in Belpre as well as pride in the city’s unique history. Yet Belpre lacks a distinct brand in the marketplace and is not well represented as a tourist destination.

Belpre appears to have a limited relationship with the Washington County Convention and Visitor’s Bureau. The WCCVB has a strong base of information for Marietta but currently provides little information regarding travel to Belpre. Currently, the main tourism information/marketing source for visitors to Belpre is found on the Belpre Area Chamber of Commerce’s site and the information, though beneficial, is brief.

8.3 Rural Economic Gardening

What is Economic Gardening?

Economic gardening is a development model that focuses on the entrepreneur. Shifting from traditional economic development models, this practice focuses on building upon the businesses that already exist in the community (Gibbons, 2010). Traditionally, economic development strategies have focused on attracting new business through various incentive drives. A lot of times, these business attractions provide short-term bursts to the economy. As a more sustainable approach to economic development, economic gardening focuses on cultivating the existing local entrepreneurship capacity.

Especially in rural communities, small, local businesses serve as a strong asset to the economy. Economic gardening recognizes this and works to provide resources and develop infrastructure to these businesses to help them develop further. These resources vary from data mining tools to market analyses.

The Origins of Economic Gardening

Originating in the late 1980's from the efforts of Chris Gibbons, director of Littleton, Colorado's business and industry affairs, economic gardening started as an attempt to innovate the economic development efforts in his area to be more cost effective and to build upon what the city already has. During the time that Littleton engaged in economic gardening, the city saw a two-fold increase in jobs and over a 300% increase in sales tax revenues (NCEG). Given the success of the approach, Gibbons went on to found the National Center for Economic Gardening.

How It Works

Economic gardening means not only that a community is developing and promoting growth in existing businesses, but allowing for the development of new businesses. To start this process, there must be an understanding of the cluster of industries in the area and the concentration of the industries. In other words, one needs to understand what all is involved to make these industries work (Barrios & Barrios, 2004). Identifying the suppliers, distributors, and other partners in the success of these businesses is key. The various actors in the industry will provide information regarding what barriers exist to furthering their success.

Similar to startup initiatives, gardening is used to provide various business services to the businesses already in the area to promote growth. As opposed to startup businesses, gardening takes on the second stage of business development. At this point the business is already up and running making the business services needed by these organizations innately different than those of startups. Gardening for these second-stage businesses are focused in market analysis, expanding of brand promotion, innovation, and rethinking of business strategy (Gibbons, 2010).

Per the National Center for Economic Gardening, economic gardening differs from traditional approaches of economic development business assistance like workforce development

trainings. Gardening, instead, is focused on using strategic and valuable research to help make the business stronger. This research can be used to help businesses better identify any unknown resources or to learn more about their current customer base as well as potential customers.

Why Invest in Economic Gardening?

The main argument for economic gardening is cost savings. Many have found that per jobs created, gardening is cheaper than the traditional incentive or relocation focused strategies. In many cases, economic gardening has strengthened business' relationship with the community and encourages businesses to further invest in the communities. Additionally, Barrios & Barrios (2004) explain that business success spurred by economic gardening encourages the development of startups in the area.

8.4 Shop Local Campaigns for Small Towns

For many municipalities, large and small, Buy Local campaigns have been a common approach to boosting retail sales for local businesses. Studies show that some Buy Local campaigns have been successful. For example, The Independent Business Forum (IBF) conducted a survey on Buy Local campaign during the 2006 holiday season. They found that independent retailers in cities with a buy local campaign reported an average gain in sales of about 2% over 2006. Compared to just 0.5% in cities without a campaign.

The following are examples of successful Buy Local campaigns. A systematic guide on how to develop a successful campaign can be found in Shop Local Campaign for Small Towns by Becky McCray.

Think Local First, Bellingham, WA

In 2006, a survey on Bellingham's three year Think Local First program showed that 58% of residents had changed their behavior, and were now more deliberate about choosing local, independently owned businesses first (McCray, 2009, 3).

Buy Local, Portland, Maine

Portland, Maine's Buy Local project also generated measurable positive results. In a 2007 survey, more than 60 percent of businesses said so, citing improved customer loyalty and sales. Almost 75% said customers told them that they are making an effort to do more or all of their shopping at locally owned businesses. Forty percent of businesses said they had gained new customers from the project (McCray, 2009, 4).

Buy Local, Philadelphia

After a month-long pilot program in 2005, surveys showed that one in six people were aware of the initiative, and 40% of those had been motivated to shop at an independent business as a result. More than half of the participating business owners who were surveyed said the project had made a positive impact on their business (McCray, 2009, 4).

9. Conclusion

This report represents a student-led and faculty/staff supported effort to assist the Belpre Area Chamber of Commerce and the City of Belpre in identifying economic and community development opportunities. The recommendations found in the Executive Summary provide a framework, and both short-term and long-term steps, for Belpre to pursue as part of the community's economic development agenda. Fully implementing these recommendations will require an active, and more expansive, group of citizen volunteers.

The decades-long population stagnation and an overall decline in working age adults and school enrollment remains the major challenge for Belpre. Over one-third of Belpre's population is 55 or older. The availability of quality housing is limited, which restricts Belpre's ability to address this population decline and boost school enrollment by attracting middle-class families. Community members identified several key issues in the interview process, such as improving the availability of quality housing and new school facilities, which were beyond the scope of this study. Our hope is that this study and the accompanying public meetings are starting points for the community to continue conversations about Belpre's future economic development direction

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