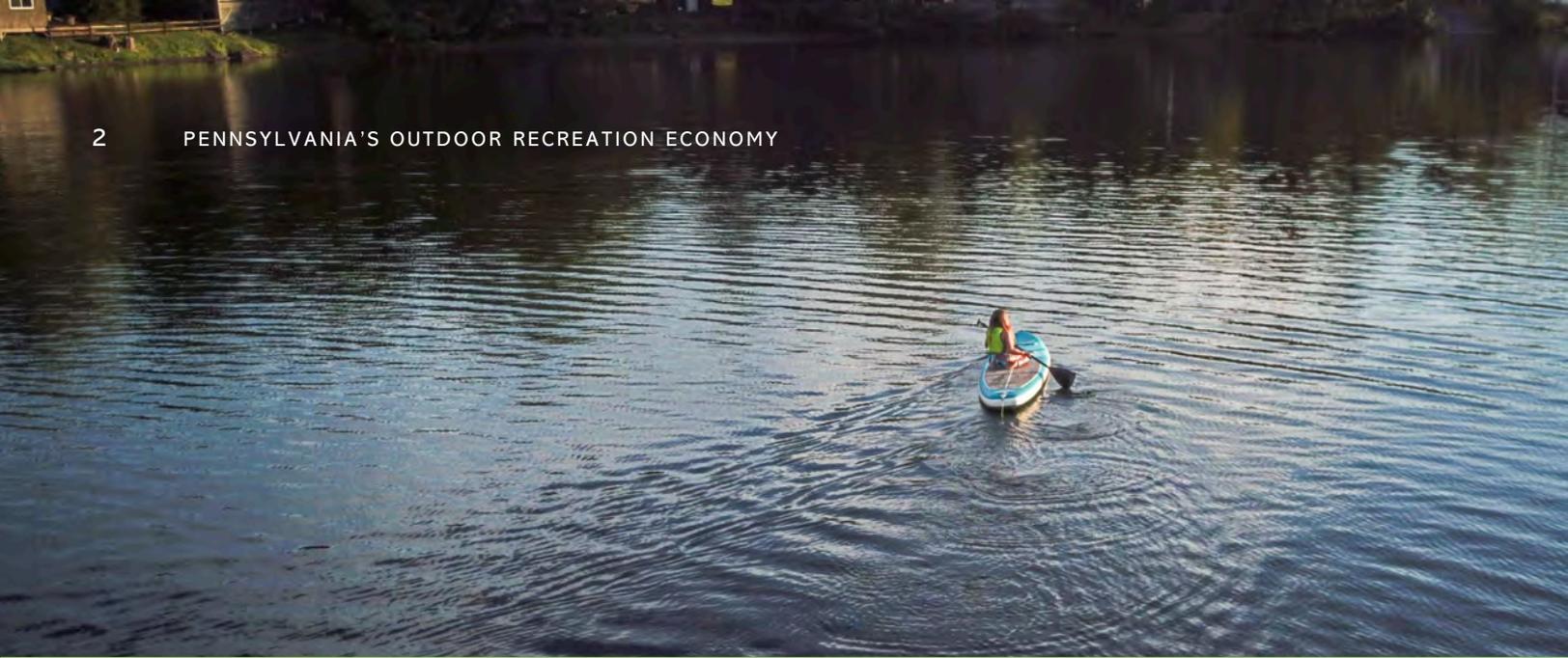




PENNSYLVANIA'S OUTDOOR RECREATION ECONOMY

EXPLORING THE ECONOMIC DEVELOPMENT POTENTIAL OF NATURE-BASED PLACEMAKING



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Jon Stover & Associates

Analysis and report by Jon Stover & Associates (JS&A), an Economic Development Consulting firm, specializing in economic impact analysis, economic revitalization strategy, and development and enhancement strategy. JS&A works to bridge the gap between the very different worlds of the private, nonprofit, and government sectors to create thriving local economies. For more information, please visit: www.jonstoverandassociates.com.

PENNSYLVANIA'S OUTDOOR RECREATION ECONOMY

EXPLORING THE ECONOMIC DEVELOPMENT POTENTIAL OF NATURE-BASED PLACEMAKING

For many communities in Pennsylvania, the availability of and access to outdoor recreation assets is taken for granted. Rivers, lakes, state and national forests, state game lands, wildlife refuges, and trails of all types number in the thousands of miles and millions of acres. Many of these outdoor assets are close to communities that have historically relied on the traditional agricultural, extractive, and manufacturing industries for their economic well-being. But as national and global business environments transition to a post-industrial, knowledge-based, digital economy, these communities that have been traditionally focused will benefit by adapting to the new models of business and regional development. The above-mentioned outdoor recreation assets of this Commonwealth provide a critical economic advantage for business and residential development in those communities willing to capitalize on the opportunities they present.

This study assesses the statewide economic and fiscal impact of outdoor recreation activity in the Commonwealth of Pennsylvania. It also examines the role of the outdoor recreation economy through case studies of several Pennsylvania communities. These case studies assess how local economies are supported by and could grow through the careful planning and implementation of Nature-Based Placemaking (N-BP). These strategies are focused on the careful stewardship of outdoor recreation assets and the economic and quality-of-life opportunities these assets provide.

This study, commissioned as part of the Pennsylvania Downtown Center's (PDC's) Nature-Based Placemaking initiative, was funded by the Pennsylvania Department of Conservation and Natural Resources and prepared by Jon Stover & Associates, an economic development consulting firm. Along with the Nature-Based Placemaking companion pieces, PDC's Nature-Based Placemaking Handbook and an aspirational video showcasing N-BP efforts already underway, it is our hope that these tools will inspire you and your community to consider Nature-Based Placemaking as a viable and important part of your community's revitalization strategy.





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EXECUTIVE SUMMARY

OUTDOOR RECREATION IS AN INCREASINGLY LARGE PART OF PENNSYLVANIA'S ECONOMY. COMMUNITIES THROUGHOUT THE COMMONWEALTH CAN CAPITALIZE ON NEARBY OUTDOOR RECREATION ASSETS TO ATTRACT MORE CUSTOMERS TO THEIR DOWNTOWN BUSINESSES WHILE CREATING A DESIRABLE ENVIRONMENT FOR RESIDENTS AND VISITORS ALIKE. THIS APPROACH TO LOCAL ECONOMIC DEVELOPMENT IS KNOWN AS NATURE-BASED PLACEMAKING.

PURPOSE OF THIS STUDY

This study assesses the statewide economic and fiscal impact of outdoor recreation activity in the Commonwealth of Pennsylvania. The study also examines the role of "Nature-Based Placemaking" in several Pennsylvania communities, assessing how these local economies are supported by the recreational activity supported by nearby natural assets, such as hunting grounds, trails, and parks.



PENNSYLVANIA'S OUTDOOR
RECREATION ECONOMY GENERATED

\$28.5 BILLION

IN TOTAL ECONOMIC IMPACT DURING 2019

\$19.8 BILLION IN DIRECT OUTDOOR RECREATION INDUSTRY SALES

1.2% SHARE OF OVERALL PENNSYLVANIA GDP

\$1.1 BILLION OF TAX REVENUE, OR 3.1% SHARE OF
PENNSYLVANIA'S TOTAL FISCAL REVENUE

246,520 JOBS

DIRECTLY SUPPORTED BY OUTDOOR RECREATION
INDUSTRIES, RESULTING IN A 3.2% SHARE OF
TOTAL JOBS IN PENNSYLVANIA

The outdoor recreation employment sector is larger than many other major industries in Pennsylvania, with more jobs than sectors such as architecture and engineering, trucking, or food and beverage manufacturing industries.

Note: Total Economic Impact includes direct, indirect, and induced economics impact.

PENNSYLVANIA'S NATURE-BASED ASSETS AND OUTDOOR RECREATION TRENDS

PENNSYLVANIA'S SCENIC LANDSCAPE, RENOWNED OUTDOOR ASSETS, AND ACTIVE RESIDENTS AND VISITORS GENERATE ROBUST OUTDOOR RECREATION INDUSTRIES ACROSS THE STATE.

Among Pennsylvania's beloved state parks and beautiful landscapes, valued historical sites and points of interest, and expansive trail and recreation networks, Pennsylvania offers a substantial inventory of outdoor recreation opportunities during all seasons of the year.

Pennsylvania's agencies, partners, and stakeholders typically define outdoor recreation as free-time activities outside. These outdoor recreation activities provide Pennsylvanian residents and tourists with a range of opportunities including leisurely enjoying nature in parks and scenic vistas, actively exercising via running and biking trails, and excitedly seeking adrenaline-inducing experiences such as riding ATVs or skiing down slopes. Other common outdoor recreation activities include camping, hunting, fishing, bird watching, and paddling. Although some of these experiences may be replicated indoors, outdoor recreation focuses specifically on the activities outside in nature.

These outdoor recreation activities and their supporting industries provide substantial quality-of-life amenities, support healthy lifestyles, and attract visitors from across the country to Pennsylvania. Importantly, outdoor recreation also generates significant revenue for businesses across the state and provides jobs and employment opportunities at all income levels, vital components of the state's economy.

NATURE-BASED PLACEMAKING

Commonly referred to as N-B Placemaking in Pennsylvania, is the leading outdoor recreation-based revitalization strategy. These efforts leverage natural, outdoor recreational resources in local communities, the activities associated with such resources, and the opportunity to enhance local spending to provide quantifiable and qualitative benefits to the local community. Findings throughout this report explore the tangible and intangible economic impacts of these efforts.

PENNSYLVANIA'S REGIONS PROVIDE AMPLE AND DIVERSE SETTINGS FOR A WIDE VARIETY OF NATURE-BASED ASSETS AND OPPORTUNITIES TO RECREATE.

From historic civil war battlefields in the Gettysburg and Dutch Country region to the solitude of the Pocono Mountains, Pennsylvania offers outdoor experiences for everyone.



(Graphic from PACamping.org)

These regions and their associated Nature-Based assets are available and leveraged for outdoor recreation through extensive, strategic partnerships and collaboration among Pennsylvania's conservation and recreation leaders. Key partners include the PA Department of Conservation and Natural Resources, the PA Game Commission, the PA Fish and Boat Commission, the PA Historical and Museum Commission, and numerous federal and local asset management organizations including Conservation Landscape organizations and PA Heritage Areas. These efforts are marketed and supported by many county and regional destination management/marketing organizations (DMOs). Collectively, these entities form the base of a strong team focused on developing and maintaining these N-B assets and thereby providing opportunities for strong economies and an enhanced quality of life. The Pennsylvania Downtown Center is proud to be a partner in this effort.

PENNSYLVANIA'S NATURE-BASED ASSETS BY THE NUMBERS



2,355 MILES OF WATER TRAILS

Including
19 State and Federal Scenic Rivers



2.7 MILLION ACRES OF PARK LAND

Including
121 State Parks
20 State Forests
6,100 Local Parks



487 SKI TRAILS

Including
164 Lifts
16,772 Feet of Elevation
22 Ski Resorts



200,000 ACRES OF BOATABLE WATERS

Including
76 Natural Lakes
2,300 Impoundments



3 NATIONAL WILDLIFE REFUGES

Including
America's First Urban Refuge



12,000 MILES OF TRAILS

Including
1,700 Rail Trails Miles

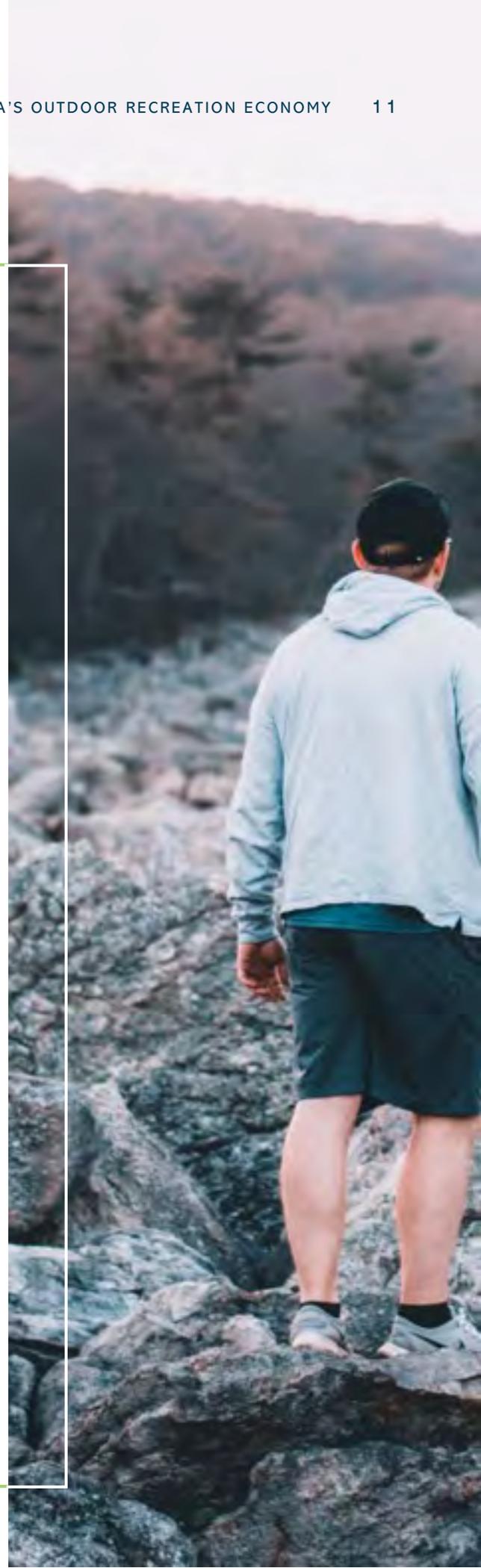


19 NATIONAL PARKS

Including
26 National Natural Landmarks



1.5 MILLION ACRES OF STATE GAME LAND



KEY INDUSTRY SNAPSHOTS AND TRENDS

OUTDOOR RECREATION INDUSTRY IN RECENT YEARS

The following snapshots exemplify outdoor recreation trends both nationally and within Pennsylvania, connecting the industry with leading consumer preferences, best practices, and related considerations exploring outdoor recreation industries.

HALF OF ALL AMERICANS PARTICIPATED IN OUTDOOR RECREATION IN 2018.

Nationally, approximately 151.8 million Americans participated in at least one outdoor recreation activity in 2018. One-third of these participants spent at least ten total days out of the year engaging in outdoor recreation.

Nine out of ten of Pennsylvania's outdoor enthusiasts who were surveyed reported that they participated in outdoor recreation in 2019. Over 88% of surveyed enthusiasts indicated that outdoor recreation is an essential part of their lives, and 80% stated a desire to participate in more outdoor activities.

(2019 Participation Report, Outdoor Foundation; Pennsylvania Statewide Outdoor Recreation Plan 2020-2024)



OUTDOOR RECREATION PREFERENCES

Nationally in 2019, the most common outdoor recreation activities across the country included running, jogging, and trail running (19.2%); freshwater, saltwater, and fly fishing (16.4%); road, mountain, and BMX biking (16%); hiking (15.9%); and camping (13.9%). *(2019 Participation Report, Outdoor Foundation)*



CONSUMER BEHAVIOR AND EXPERIENCE-BASED PURCHASING TRENDS

Recent consumer trends have shifted retail purchasing power from products toward experience-based purchasing. Consumer preferences of increased spending allocated to experiences exemplify opportunities to capture enhanced spending patterns in outdoor recreation industries.



RISE IN TECHNOLOGY AND INFLUENCER CULTURE

With 44% of Pennsylvania's population in the Millennial and Gen Z generation cohorts (ESRI, 2020), social media and influencer culture are becoming increasingly important within outdoor recreation industries. Social media platforms introduce new audiences to Nature-Based assets and generate viral content related to outdoor recreation, as demonstrated with the 16+ million tags on Instagram for #optoutside, a social media campaign initiated by REI in 2015.



INCREASING DEMAND FOR OUTDOOR OPPORTUNITIES WITH ONGOING MAINTENANCE NEEDS

The tangible and perceived value of outdoor recreation assets and opportunities creates a high demand for more. Approximately 70% of surveyed Pennsylvanians believe that outdoor amenities, such as trails and parks, attract new residents and businesses to communities. However, limited resources, funds, and increasing maintenance needs demonstrate the paradox of these supply and demand factors. *(Pennsylvania Statewide Outdoor Recreation Plan 2020-2024)*



PROMOTING INCLUSIVITY: OUTDOOR EXPERIENCES FOR ALL

Pennsylvania, along with nationwide trends in outdoor recreation management, identified “Recreation for All” as a key priority area. State-level strategic actions aim to ensure that socioeconomic and demographic factors are not barriers to outdoor recreation opportunities. Inclusivity considerations range from prioritizing underserved populations with limited local parks and Nature-Based assets to improving connections and state park access. *(Pennsylvania Statewide Outdoor Recreation Plan 2020-2024)*

DATA-DRIVEN IMPACT MEASUREMENT OF OUTDOOR RECREATION INDUSTRIES

More states and regional entities conduct economic impact assessments of outdoor recreation industries to identify and attribute these industry shares to overall economies. These analyses continue to increase the breadth of data available to inform decision-making and allocation of resources. Furthermore, these impact assessments demonstrate how outdoor recreation industries can serve as economic development strategies at local municipality and state levels.

THE RESILIENCY OF OUTDOOR RECREATION

Outdoor recreation industries and Nature-Based assets showcased their resiliency during the disruptive times of the COVID-19 pandemic. Stay-at-home orders and social distancing guidelines generated a strong connection to the outdoors. Non-motorized trail usage in Pennsylvania in March 2020 highlights this resilient connection to the outdoors. Trail counts increased 52% compared to 2019 figures, with an estimated 122,139 more monthly trail passes during this time.

(The COVID-19 Pandemic's Impact on Pennsylvania's Non-Motorized Trails, Pennsylvania Environmental Council, 2020)

PAST STUDIES PROVIDE CONSIDERABLE INSIGHTS ON THE IMPACTS OF OUTDOOR RECREATION IN PENNSYLVANIA

Over the years, substantial analysis has gone into measuring the economic impact of outdoor recreation nationally and even at Pennsylvania’s state level. In 2017, the outdoor Industry Association reported that outdoor recreation in Pennsylvania generated approximately \$29.1 billion in consumer spending. This spending supported 251,000 jobs with \$8.6 billion in salaries and wages and an estimated \$1.9 billion in fiscal revenue. These creditable findings have been used in various planning processes and strategic efforts across Pennsylvania.

OIA STUDY FINDINGS (2017)



Furthermore, the value of understanding these impacts sparked interest in diving deeper into analyzing the impacts of outdoor recreation. Specifically, this study keys in on the economic impact of outdoor recreation centered around Nature-Based assets, the value of Nature-Based Placemaking, and local impacts achieved by leveraging recreational assets at the community level.

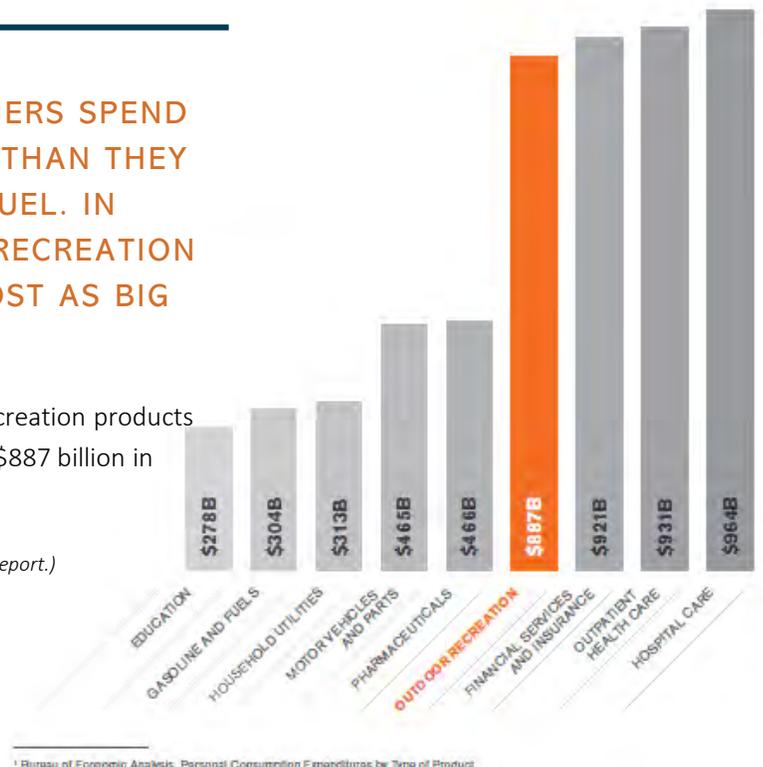
While the methodology varies between the 2017 OIA analysis and this assessment, and thus findings differ, these previous studies remain a crucial component of understanding Pennsylvania’s outdoor recreation industry.

(The Outdoor Recreation Economy, Image taken directly from report.)

“EVERY YEAR, AMERICAN CONSUMERS SPEND MORE ON OUTDOOR RECREATION THAN THEY DO ON PHARMACEUTICALS AND FUEL. IN FACT, THE IMPACT OF OUTDOOR RECREATION ON AMERICA’S ECONOMY IS ALMOST AS BIG AS THAT OF HOSPITAL CARE.”

This consumer spending includes both outdoor recreation products and trip and travel spending generating a total of \$887 billion in annual consumer spending.

(The Outdoor Recreation Economy, OIA. Chart taken directly from report.)

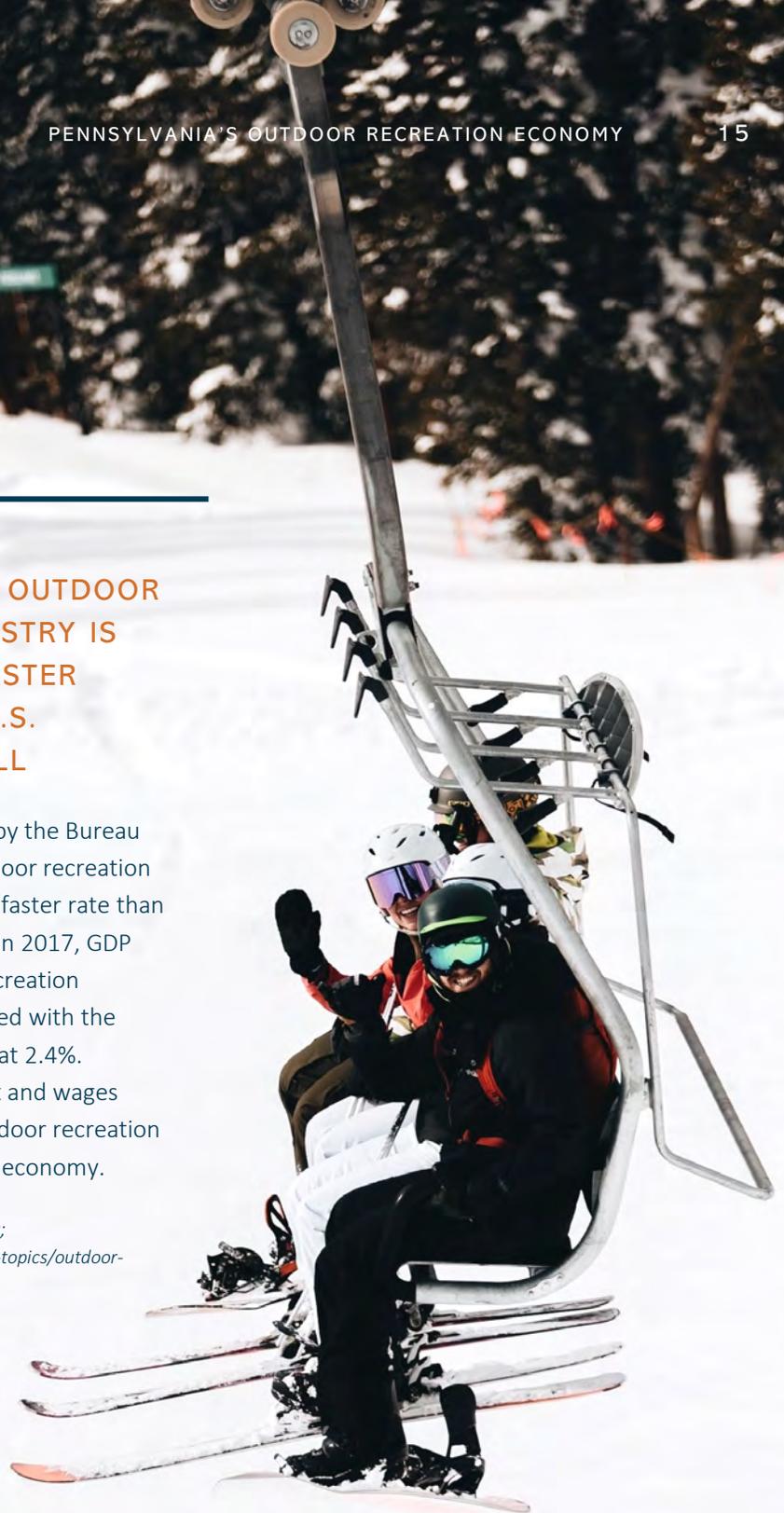


¹ Bureau of Economic Analysis, Personal Consumption Expenditures by Type of Product

NATIONALLY, THE OUTDOOR RECREATION INDUSTRY IS GROWING AT A FASTER PACE THAN THE U.S. ECONOMY OVERALL

Based on trends assessed by the Bureau of Economic Analysis, outdoor recreation industries' GDP grows at a faster rate than the overall U.S. economy. In 2017, GDP attributable to outdoor recreation increased by 3.9% compared with the overall economy's growth at 2.4%. Furthermore, employment and wages increased faster in the outdoor recreation industries than the overall economy.

*(Bureau of Economic Analysis, 2019;
<https://www.bea.gov/data/special-topics/outdoor-recreation>)*



INDUSTRY INSIGHTS

OUTDOOR RECREATION INDUSTRIES

CORE OUTDOOR RECREATION INDUSTRIES

Outdoor industries center around the Nature-Based assets and other sectors that outdoor recreation participants directly engage in. The core outdoor recreation industries include three primary groups: experience, material, and service-based industries.



EXPERIENCE-BASED INDUSTRIES

Activities exploring and recreating around Nature-Based assets that generate economic value are the foundation of these core industries. From paying to park at state parks to reservation fees for campsites to lift passes at ski resorts, experience-based industries generate revenue for big and small businesses. Foundational industries include the following:

- Hunting and Trapping
- Boating, Kayaking, Canoeing, and Watersports
- Skiing, Snowboarding, and Snowsports
- Road, Mountain, and BMX Bicycling
- Hiking, Backpacking, and Camping



MATERIAL-BASED INDUSTRIES

Consumer purchases for goods used for outdoor recreation purposes include items such as backpacks, canoes, tents, hiking boots, bicycles, and more. Material-based industries include sporting goods stores, recreational vehicle dealers, and recreational goods rental companies. Although mass retailers like Target and e-commerce platforms such as Amazon often sell these goods, this analysis assesses consumer sales generated specifically at sporting goods stores as attributable to outdoor recreation.

- Sporting Goods Stores
- Recreational Goods Rental Companies
- Recreational Vehicle Dealers



SERVICE-BASED INDUSTRIES

Guided kayaking tours of autumn foliage at Lake Nockamixon, family ski lessons down the slopes of Blue Mountain, and booking a thrill-inducing vacation through a specialty travel agent are all examples of service-based industries in outdoor recreation. These categories include the following:

- Tour Operators
- Sports and Recreation Instruction
- Travel Adventure Services

INDUSTRIES SUPPORTED BY OUTDOOR RECREATION

The outdoor recreation industry attracts high tourism levels, with participants traveling outside of their community to recreate at Nature-Based assets. As a result of this tourism, different industries are impacted through visitor spending and are thus partially supported by outdoor recreation industries. These supporting industries are referred to in this analysis as “trip-related expenditures” and include five key industries.



FOOD AND RESTAURANT INDUSTRY

Between cups of joe during morning hours, drive-thru burgers on the road, grab-and-go sandwich shops, and memorable fine dining experiences, the food and restaurant industry includes expenditures specific to dining and meals, including full-service and limited-service restaurants, and all other food and drinking establishments.



SHOPPING AND RETAIL INDUSTRY

From grabbing granola bars at the grocery store before a hike to purchasing a souvenir T-shirt, these industries include expenditures at clothing and accessories stores, health and personal care stores, convenience stores, grocery stores, and general merchandise stores.



LODGING AND ACCOMMODATIONS INDUSTRY

Regardless of whether a stay is one night or two weeks, lodging and accommodations industries include the costs and fees associated with short-term overnight stays at hotels and motels.



INDOOR RECREATION INDUSTRY

Exploring museums, touring buildings, completing a workout at a fitness center, and enjoying bowling and arcades represent a selection of experiences encompassed within the indoor recreation industry.



TRANSPORTATION INDUSTRY

Regardless of driving an hour to the next town over or driving across the state, transportation industry expenditures include gasoline, tolls, and related transport services.

This study uses the following NAICS code classifications and definitions for businesses within the outdoor recreation industry. Experience-Based: Hunting and Trapping; Scenic and Sightseeing Transportation, Water; Zoos and Botanical Gardens; Nature Parks and Other Similar Institutions; Golf Courses and Country Clubs; Marinas; All Other Amusement and Recreation Industries; RV Parks and Campgrounds; Recreational and Vacation Camps. Material-Based: Recreational Vehicle Manufacturing; Outdoor Recreation Goods Manufacturing; Recreational Vehicle and Supply Dealers; Hunting Apparel; Sporting Goods Stores; RV Rentals and Leasing; Recreational Goods Rental; Camping Tent & Trailer Rental. Service-Based: Golf Vacation Packages; Travel Adventure; Adventure Vacations; Tour Operators; Sports and Recreation Instruction.

PENNSYLVANIA'S CORE OUTDOOR RECREATION INDUSTRIES INCLUDED NEARLY 7,730 BUSINESSES IN 2019.

THESE CORE INDUSTRY BUSINESSES EMPLOYED ALMOST 86,000 EMPLOYEES AND GENERATED \$13 BILLION OF ANNUAL REVENUE.

Core outdoor recreation industries often evoke businesses that are experience-based, such as hunting, fishing, skiing, and hiking. However, the core industry includes many additional types of businesses. In fact, only four out of every ten core outdoor recreation establishments are within the experience-based category. Material-based outdoor recreation businesses represent an almost equal number of establishments within the broader core industry classification. Service-based outdoor recreation businesses, such as tour operators and adventure travel agencies, represent approximately 16% of the core outdoor recreation businesses.

Customer dollars spent at these businesses generate revenue directly to these core industries and generate full-time, part-time, and seasonal jobs at the establishments. The sales and employment provide tax revenue to local municipalities and the state and contribute to the greater statewide economy.

PENNSYLVANIA'S CORE OUTDOOR RECREATION INDUSTRY

(ESRI, InfoGroup, 2019)



7,729
CORE INDUSTRY
BUSINESSES

Representing all businesses concentrated in the core industries as determined by NAICS industry classifications



85,939
CORE INDUSTRY
EMPLOYEES

Representing the total jobs, full-time, part-time, and seasonal, at these industry businesses



\$13 BILLION
CORE INDUSTRY
REVENUE

Representing all sales and business transactions at these establishments



BREAKDOWN OF CORE RECREATION INDUSTRIES

During 2019, Pennsylvania's core outdoor recreation industries included the following:

EXPERIENCE-BASED

3,219 BUSINESSES

52,538 JOBS

\$6.9 BILLION REVENUE

MATERIAL-BASED

3,173 BUSINESSES

26,829 JOBS

\$5.6 BILLION REVENUE

SERVICE-BASED

1,263 BUSINESSES

6,572 JOBS

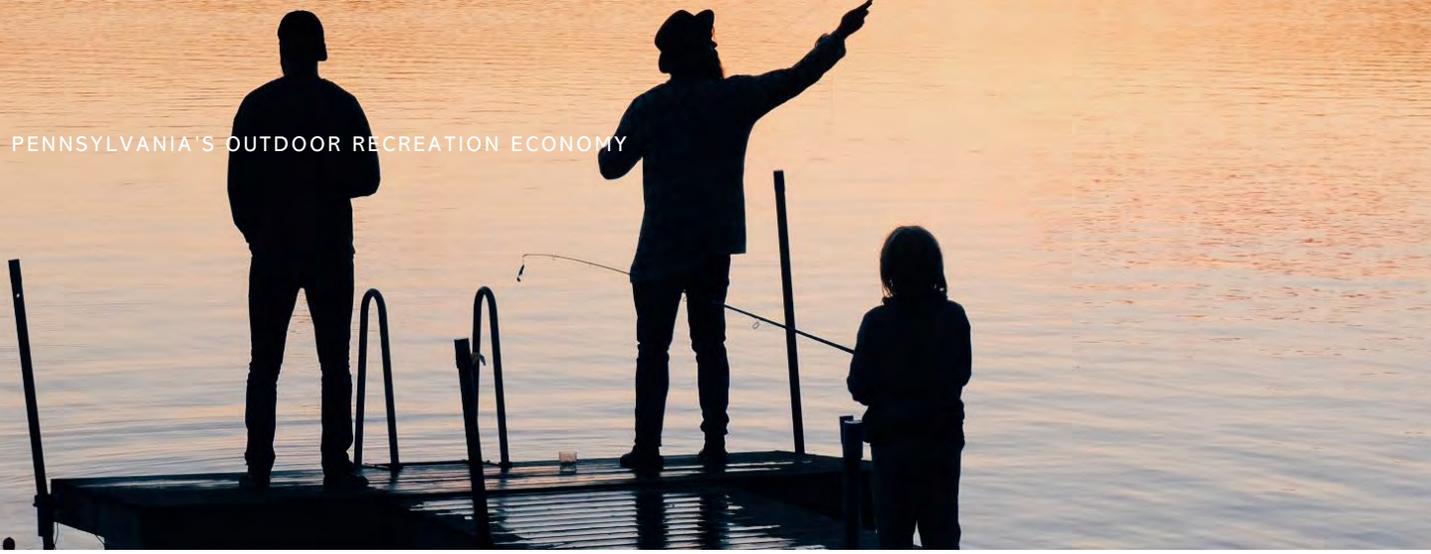
\$511 MILLION REVENUE

(ESRI, InfoGroup, 2019)

SNAPSHOT: HOW AN ATV ENTHUSIAST SUPPORTS THE CORE INDUSTRIES

Outdoor recreation enthusiasts support many different types of businesses as a direct result of their hobbies, adventures, and experiences. To illustrate how outdoor recreation users are customers of this range of core industries, the below diagram exemplifies how an ATV rider purchases from these different types of businesses.





36 MILLION TRIPS OCCURRED IN PENNSYLVANIA DURING 2019 WITH OUTDOOR RECREATION AS THE PRIMARILY PURPOSE OF THE TRIP.

Both in-state and out-of-state visitors explored Pennsylvania's natural assets, skied the mountain slopes, trekked along renowned recreational trails for days, explored state parks and forests, and experienced the captivating fun the commonwealth offers. Day trips and overnight trips with outdoor recreation as the getaway's main driver create substantial consumer spending through a wide range of industries that ultimately support outdoor recreation.

18% OF ALL TRIPS IN PENNSYLVANIA ARE DRIVEN BY OUTDOOR RECREATION.

2019's Outdoor Recreation Trips in Pennsylvania Included

24 MILLION DAY TRIPS

Defined as a Trip More Than 50 Miles from the Point of Origin

12 MILLION OVERNIGHT TRIPS

Including In-State and Out-of-State Three-day Average Trip Length

(Tourism Economics, The Economic Impact of Travel in Pennsylvania: Tourism Satellite Account Calendar Year 2018)

PENNSYLVANIA'S TOURISM ECONOMY CENTERED AROUND NATURE-BASED ASSETS SUPPORTS THE LARGER OUTDOOR RECREATION INDUSTRY.



Nearly 36 million day trips and overnight trips occurred in PA in 2019 as a direct result of outdoor recreation and Nature-Based assets.

These visitors spend money on food, shopping, gasoline, and lodging during their trips that are attributable to outdoor recreation.

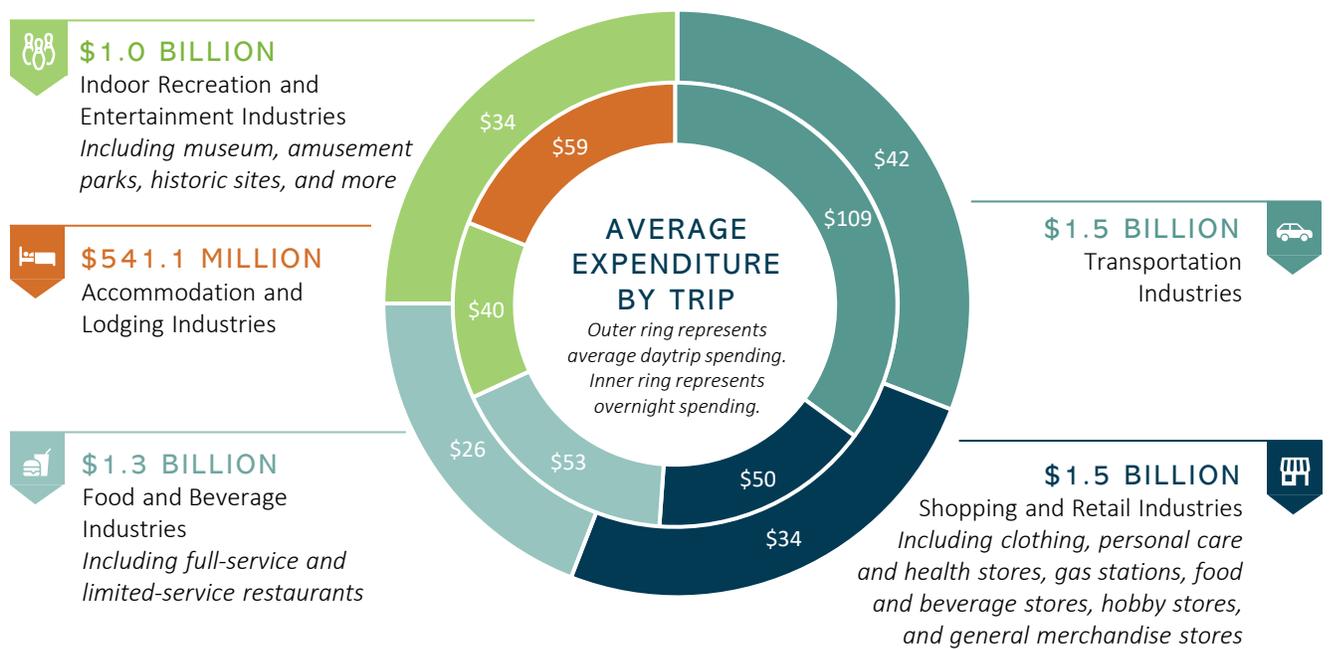
As a result, these dollars spent at these supporting industries support outdoor recreation industries at-large.

Enhancing the impacts of outdoor recreation beyond the core industries, these supporting industries receive significant revenue attributable to PA's Nature-Based assets.

PENNSYLVANIA'S TOURISM SPURRED BY OUTDOOR RECREATION BROUGHT OVER \$6.8 BILLION OF CONSUMER SPENDING IN 2019.

As a result, this trip spending supporting outdoor recreation accounted for 34% of consumer spending within outdoor recreation that year.

TRIP-RELATED EXPENDITURE BY SUPPORTING INDUSTRY



Note: Average expenditure by trip based on statewide data for leisure-classified day trips and overnight trips. Daytrip classification based on 50-mile trip length from point of origin. (Tourism Economics, The Economic Impact of Travel in Pennsylvania: Tourism Satellite Account Calendar Year 2018)

PENNSYLVANIA'S MOST POPULAR VISITOR OUTDOOR RECREATION ACTIVITIES

More than one out of every two overnight visitors in Pennsylvania engage in outdoor recreation during their trip. The most popular activities for these visitors include:

-  **HIKING**
-  **BOATING**
-  **CAMPING**
-  **PLEASURE BIKING/BIKE TOURING**
-  **CANOEING/KAYAKING**

(2017 Pennsylvania Travel Profile, Longwoods International)

ECONOMIC IMPACT OF THE OUTDOOR RECREATION INDUSTRY

IN 2019, THE OUTDOOR RECREATION
INDUSTRY OF PENNSYLVANIA GENERATED
AN OVERALL ECONOMIC IMPACT OF

\$28.5 BILLION.

THIS ECONOMIC IMPACT IS A RESULT OF APPROXIMATELY
\$19.8 BILLION OF CONSUMER SPENDING WITHIN CORE AND
SUPPORTING INDUSTRIES. THIS IMPACT IS DERIVED FROM
DOLLARS SPENT ON EXPERIENCE, MATERIAL, AND SERVICE-
BASED OUTDOOR RECREATION INDUSTRIES AS WELL AS THE
TRIP-RELATED EXPENDITURE OF VISITORS DRAWN TO
PENNSYLVANIA'S NATURE-BASED ASSETS.

*Note: \$28.5 billion impact includes direct, indirect, and induced impacts. Share of GDP based on direct
\$9.8 billion value-added impact and \$797 billion of statewide GDP.
(IMPLAN, Jon Stover & Associates)*

THE DIRECT ECONOMIC IMPACT OF THE
OUTDOOR RECREATION INDUSTRY REFLECTS A

1.2% SHARE

OF PENNSYLVANIA'S GDP.

With a total value of \$9.8 billion in goods and services, Pennsylvania's outdoor recreation economy accounts for approximately 1.2% of the state's gross domestic product.



HOW OUTDOOR RECREATION IMPACTS PENNSYLVANIA'S ECONOMY

\$15.5 BILLION



INDUSTRY OPERATIONS

DIRECT IMPACT

When a patron spends money purchasing new equipment, pays for lessons, and spends money traveling to a Nature-Based asset, this revenue directly supports business operations, employee wages, and generation of city and state tax revenues.

\$5.4 BILLION

BUSINESS-TO-BUSINESS EXPENSES



INDIRECT IMPACT

Dollars spent at outdoor recreation and supporting establishments not only impacts the business where the transaction takes place but also impacts additional industries that rely on purchases made by those businesses.

\$7.6 BILLION



SPENDING OF WAGES

INDUCED IMPACT

Household spending of income earned by those employed in outdoor recreation and related industries supports additional business activity and job creation.

\$28.5 BILLION

TOTAL ECONOMIC IMPACT

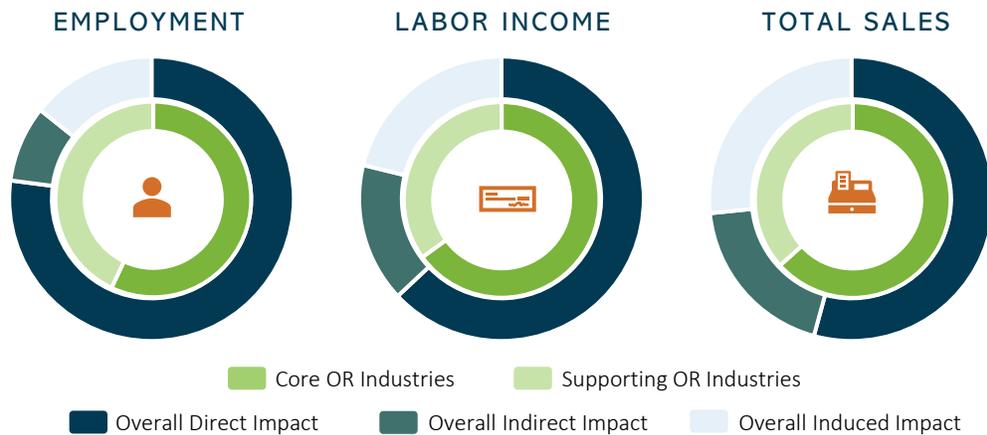
DIRECT, INDIRECT, AND INDUCED IMPACTS

The \$28.5 billion impact of outdoor recreation in Pennsylvania over 2019 includes \$19.8 billion of impact from the experience, material, and service-based core industries as well as the attributable trip-related expenditures within supporting industries.

TOTAL IMPACT OF OUTDOOR RECREATION IN PENNSYLVANIA

IMPACT	EMPLOYMENT	LABOR INCOME	TOTAL SALES
Direct Impact	246,520	\$7,802,140,014	\$15,454,483,372
Indirect Impact	27,720	\$1,958,108,405	\$5,448,186,647
Induced Impact	45,651	\$2,623,566,347	\$7,583,706,709
TOTAL IMPACT	319,891	\$12,383,814,766	\$28,486,376,728

Note: The "Total Sales" column reflects "Industry Output," which is the value of production of core and supporting outdoor recreation industries in a calendar year. Specifically, this figure describes annual revenues plus net inventory change. An Industry Contribution Analysis Model in IMPLAN was used to determine the attributable impact of outdoor recreation in Pennsylvania. This model accounts for industry-specific business-to-business indirect expenditures to limit overcounting contributions within the industries themselves. (IMPLAN, 2019)



HOW THESE IMPACTS AFFECT EMPLOYMENT SECTORS

Direct, indirect, and induced impacts of outdoor recreation support employment in a wide range of industry sectors.

DIRECT IMPACTS

Customer spending on outdoor recreation supports the following top employment sectors:

- Transportation
- Amusement and Recreation Industries
- Accommodations
- Retail Sporting Goods, Hobby, and Bookstores
- Indep. Artists, Writers, and Performers

INDIRECT IMPACTS

The purchases made by outdoor recreation businesses support the following top employment sectors:

- Real Estate
- Services to Buildings
- Food and Drinking Places
- Staffing and Employment Services
- Management of Companies

INDUCED IMPACTS

The spending of wages of employees in outdoor recreation supports the following top employment sectors:

- Hospitals
- Full-Service Restaurants
- Limited-Service Restaurants
- Individual and Family Services
- Offices of Physicians

DIRECT ECONOMIC IMPACT INSIGHTS

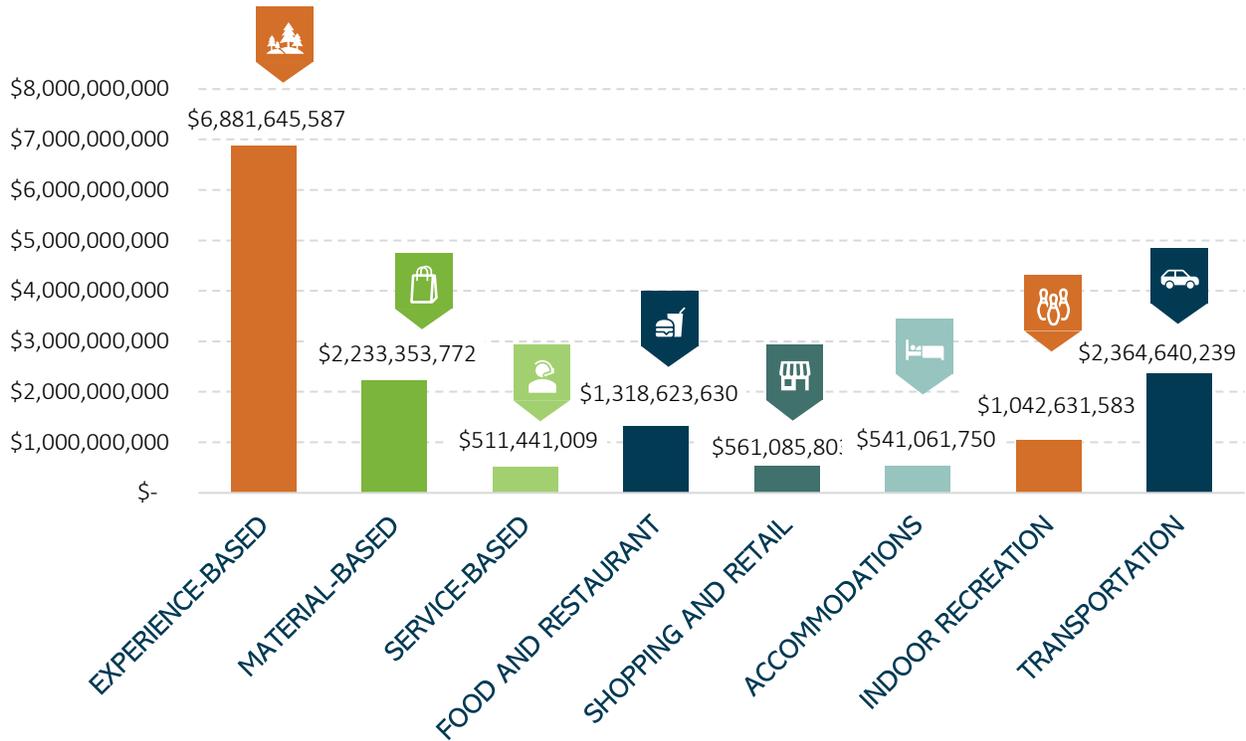
Nearly two-thirds of the direct economic impact of outdoor recreation is attributable to core outdoor recreation industries, including the experience-, material-, and service-based outdoor recreation industries. Approximately 45% of the total direct economic impact is a result of the experience-based outdoor recreation industries. Trip-related expenditures in supporting industries account for 27% of the direct economic impact.

DIRECT ECONOMIC IMPACT



CORE, 63%
SUPPORTING, 27%

DIRECT ECONOMIC IMPACT BY INDUSTRY



(IMPLAN, 2019)

JOBS BY OUTDOOR RECREATION INDUSTRY

Collectively, all jobs supported by outdoor recreation generated nearly \$7.9 billion of salaries and wages for employees. Just over half, (54%) of these jobs are attributable to core industries with 46% of the jobs supported through consumer trip-related spending. Notably, nearly 40% of the employment supported by outdoor recreation are within experience-based core industries.



96,127 JOBS
EXPERIENCE-BASED



59,021 JOBS
TRANSPORTATION



27,825 JOBS
MATERIAL-BASED



7,506 JOBS
SHOPPING & RETAIL



18,964 JOBS
FOOD & RESTAURANT



12,101 JOBS
ACCOMMODATIONS



8,596 JOBS
SERVICE-BASED



16,379 JOBS
INDOOR RECREATION

(IMPLAN, 2019)

246,520 JOBS

ARE DIRECTLY SUPPORTED BY OUTDOOR RECREATION. THESE JOBS MAKE UP A

3.2% SHARE

OF ALL JOBS IN PENNSYLVANIA.

Overall, the outdoor recreation industry economy is a significant contributor to Pennsylvania's employment base, with more jobs than the state's architecture and engineering sector, and three times the number of those in the legal industry.

(IMPLAN, 2019)

FISCAL IMPACT OF THE OUTDOOR RECREATION INDUSTRY

THE OUTDOOR RECREATION INDUSTRY
DIRECTLY GENERATED OVER

\$1.1 BILLION

IN ANNUAL STATE AND LOCAL TAX REVENUE FOR
PENNSYLVANIA IN 2019.

This includes \$432 million in sales taxes, \$404 million in commercial property taxes, and \$176 million in personal income taxes. Outdoor recreation also directly generates approximately \$1.6 billion in annual federal tax revenue. The business-to-business expenses (indirect impact) and spending of wages (induced impact) supported by the outdoor recreation industry generates an additional \$674 million in state and local tax revenue, resulting in a total annual fiscal impact of \$1.8 billion.

THIS DIRECT FISCAL IMPACT OF THE OUTDOOR
RECREATION INDUSTRY REFLECTS A

3.1% SHARE

OF TOTAL FISCAL REVENUE IN PENNSYLVANIA.

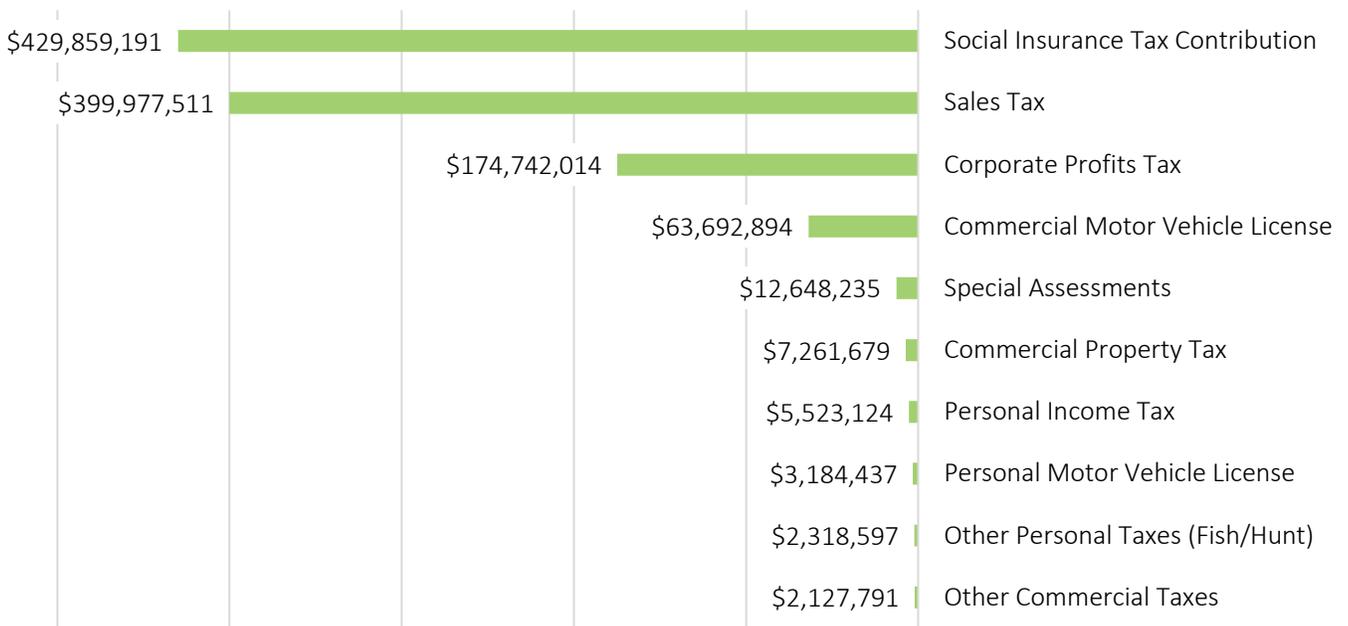
The tax revenue generated by outdoor recreation in Pennsylvania is equivalent to, on average, \$215 contributed to each household within the state.

Note: The share of the total fiscal revenue in Pennsylvania is based on FY2019 \$35.7 billion revenue, which includes general fund, non-general fund, gas tax, and miscellaneous fine and fee revenues. (IMPLAN, 2019)

BREAKDOWN OF FISCAL IMPACTS

The majority of direct tax revenue generated by Pennsylvania's outdoor recreation industry is generated through social insurance taxes (39%), sales tax (36%), and corporate profits tax (16%).

2019 DIRECT FISCAL REVENUE BY SOURCE



(IMPLAN, 2019)



PUTTING THESE NUMBERS INTO CONTEXT

The \$1.1 billion in state and local revenue generated by the outdoor recreation industry is equivalent to the annual wages of approximately

- 16,000 Registered Nurses, or
- 16,000 Police Officers, or
- 17,000 Kindergarten Teachers, or
- 19,000 Firefighters, or
- 32,000 EMTs and Paramedics.

(BLS, Pennsylvania Occupation Employment and Wage Estimates, May 2019)

CASE STUDIES: THE ECONOMIC IMPACT OF OUTDOOR RECREATION ASSETS ON THREE LOCAL COMMUNITIES

AND HOW NATURE-BASED PLACEMAKING CAN ATTRACT FURTHER CUSTOMER TRAFFIC AND SALES TO DOWNTOWN BUSINESSES

PENNSYLVANIA'S OUTDOOR RECREATION INDUSTRY ECONOMIC AND FISCAL IMPACTS ARE THE CULMINATION OF THE LOCAL IMPACTS ACROSS THE STATE.

COMMUNITIES ACROSS PENNSYLVANIA CAN DRIVE THEIR LOCAL ECONOMIES THROUGH OUTDOOR RECREATION BY EXPLORING NATURE-BASED PLACEMAKING AND LEVERAGING NEARBY NATURAL ASSETS TO SUPPORT ALL TYPES OF BUSINESSES IN DOWNTOWN COMMERCIAL DISTRICTS.

As the leading outdoor recreation-based revitalization strategy in Pennsylvania, Nature-Based Placemaking leverages natural, outdoor recreational resources in or near downtown commercial districts. This placemaking and place management approach enhances local spending to provide both quantifiable and qualitative benefits for all types of communities. Going beyond traditional placemaking efforts of beautification and physical improvements, nature-based placemaking approaches a comprehensive realm of strategies to support downtown communities as desirable and resilient places to live, work, play, and visit.

EXPLORING THE ECONOMIC IMPACT OF LAKE NOCKAMIXON ON DOWNTOWN QUAKERTOWN

Turning Lake Nockamixon visitors into patrons for local businesses in Downtown Quakertown

EXPLORING THE ECONOMIC IMPACT OF THE GREAT ALLEGHENY PASSAGE ON CONNELLSVILLE

Capturing more spending dollars by encouraging trail users to linger longer in Downtown Connellsville

CAPTURING IMPACTS FROM THE HUNTING INDUSTRY IN CLEARFIELD

Strengthening the area's brand identity, leaning into the hunting industry to bring more dollars to businesses

HOW NATURE-BASED PLACEMAKING GENERATES ECONOMIC IMPACTS

TURNING NATURE VISITORS INTO LOCAL CUSTOMERS

Nature-Based Placemaking efforts target and help connect visitors to natural assets with nearby commercial districts and local businesses. By promoting and connecting these communities with the nature attraction, visitors become customers as they shop and dine in the communities during their visit to and from the natural assets.

LENGTHENING VISITS, CREATING MORE OPPORTUNITIES TO CAPTURE DOLLARS

Oftentimes, as visitors spend longer periods of time in commercial districts, their spending increases. A lunchtime stop may turn into strolling along and shopping in local boutiques, followed by dinner or a snack. Successful commercial districts encourage customers and visitors to stay longer.

DEVELOPING BRAND IDENTITY AND UNIQUE IDENTIFIERS

Placemaking efforts foster stronger senses of place and brand identities specific to each individual community. Leveraging community brands to be associated with nature assets leads to stronger associations and enhanced visitor traffic.





NATURE-BASED PLACEMAKING CASE STUDY

EXPLORING THE ECONOMIC IMPACT OF LAKE NOCKAMIXON ON DOWNTOWN QUAKERTOWN

“THE 5,286-ACRE NOCKAMIXON STATE PARK IS IN THE ROLLING HILLS OF SCENIC BUCKS COUNTY, CLOSE ENOUGH TO PHILADELPHIA FOR A DAY TRIP, BUT FAR ENOUGH AWAY FOR A VACATION.”

Pennsylvania Department of Conservation and Natural Resources

Quakertown, located 15 miles south of Allentown within Bucks County, is nearby Lake Nockamixon State Park. The park, whose namesake is a 7-mile-long lake, is a popular destination for boating, fishing, windsurfing – attracting visitors from across the region. Located only 10 miles away from Lake Nockamixon, downtown Quakertown has been able to take advantage of its strategic location and capture out-of-town Lake Nockamixon visitors to eat, drink, and shop at its local businesses.

Quakertown’s Main Street program, Quakertown Alive!, has played a leading role in bringing stakeholders together, organizing events, and coordinating marketing efforts that help further capitalize on the town’s proximity to Lake Nockamixon.



IN 2019, LAKE NOCKAMIXON ATTRACTED NEARLY 1,252,527 VISITORS.

While Lake Nockamixon brings many local visitors to the state park, serving as an amenity to nearby residents, the park brings a substantial number of visitors from other areas of the region. Between overnight accommodations at the state park's cabins, local bed and breakfasts and hotels, and nearby cabin and Airbnb rentals, there are many options for visitors to lengthen their stay in Bucks County.

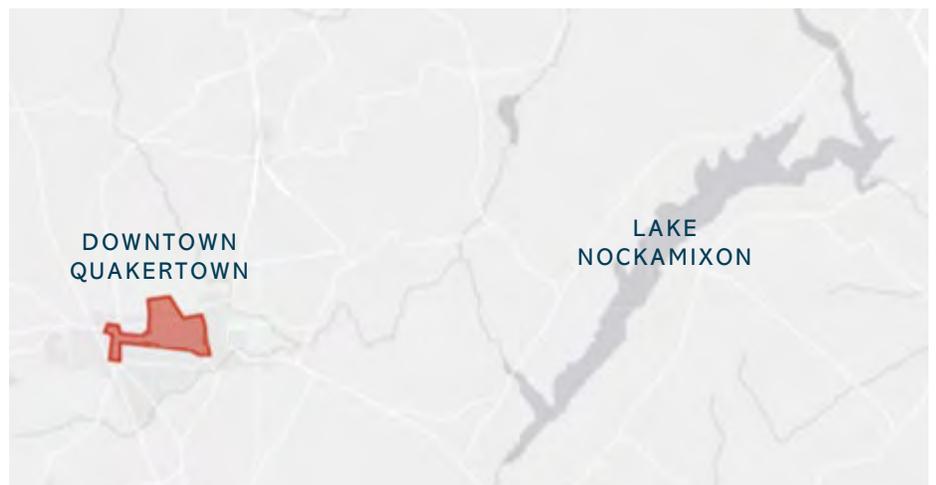
75% LOCAL VISITORS (Reside Within 50 Miles of the State Park)



20% DAY TRIP VISITORS



5% OVERNIGHT VISITORS



*Adjacent: Quakertown Alive!
Programmatic area highlighted in red with Lake Nockamixon shaded in gray.*

NONLOCAL AND OVERNIGHT VISITORS TO LAKE NOCKAMIXON GENERATED AN ECONOMIC IMPACT OF OVER \$88 MILLION IN 2019 AS A RESULT OF THEIR SPENDING. NATURE-BASED PLACEMAKING STRATEGIES CAN HELP ATTRACT ADDITIONAL VISITOR SPENDING AT LOCAL BUSINESSES.



IF HALF OF THE NONLOCAL VISITORS BOUGHT COFFEE AND A SNACK FOR TWO IN TOWN (\$10),

\$780,000 COULD BE GENERATED EACH YEAR COLLECTIVELY AT LOCAL RESTAURANTS.



IF ONE OUT OF FOUR NONLOCAL VISITORS BOUGHT A T-SHIRT OR A FEW BOOKS AT A LOCAL SHOP IN TOWN (\$25),

ALMOST \$2 MILLION COULD BE GENERATED EACH YEAR FOR THE COMMERCIAL DISTRICT. THAT'S NEARLY \$8,000 MONTHLY PER STORE.



IF EVERY VISITOR SAT DOWN FOR A MEAL, SPENDING \$65 FOR A GROUP OF FOUR AT A LOCAL RESTAURANT DOWNTOWN,

LOCAL RESTAURANTS COULD GENERATE APPROXIMATELY \$5.1 MILLION ANNUALLY IN REVENUE, OR ABOUT \$7,500 MONTHLY PER RESTAURANT.

Note: The visitor spending dollars attributable to Lake Nockamixon are a result of the average spending profiles of day trip and overnight visitors. Local visitor spending is non-attributable. Visitor category classification based on provided estimates.



Photo Credits: Visit Bucks County (Top), Bucks County Magazine, Jeffrey Marshall (Middle), Trolley Barn Public Market (Bottom)

KEY ECONOMIC INDICATORS

Supporting industries in outdoor recreation include



41 BUSINESSES IN SUPPORTING INDUSTRIES

23% of Businesses in Quakertown Alive!
Programmatic Area



315 EMPLOYEES IN SUPPORTING INDUSTRIES

20% of Employees in Quakertown Alive!
Programmatic Area



\$46 MILLION OF REVENUE AT SUPPORTING INDUSTRIES

20% of All Business Revenue in the
Quakertown Alive! Programmatic Area

(nfoGroup, 2019)



NATURE-BASED PLACEMAKING CASE STUDY

EXPLORING THE ECONOMIC IMPACT OF THE GREAT ALLEGHENY PASSAGE ON CONNELLSVILLE

Connellsville, Pennsylvania, located 60 miles southeast of Pittsburgh, is situated along the Great Allegheny Passage – one of the longest hiking and biking trails in the Appalachian region. The 150-mile trail comprises half of the over 300-mile trail connection between Washington, DC, and Pittsburgh.

The Great Allegheny Passage runs directly through Downtown Connellsville – making the town a popular resting place for hikers and bicyclists. Several stores have opened in Downtown Connellsville as a direct result of the trail, including a bicycle repair store and a Comfort Inn. The local Main Street program, Downtown Connellsville, has taken a leading role in implementing several Nature-Based Placemaking strategies that encourage more trail users to visit downtown businesses and spend the night in town – growing the economic impact of the Great Allegheny Passage on Connellsville.



1 IN 4 BUSINESSES IN DOWNTOWN CONNELLSVILLE ARE SUPPORTED BY OUTDOOR RECREATION INDUSTRIES.

Of the downtown's businesses, 26% of the establishments fall within retail, accommodations, food and dining, and recreation industries.

These industries generate over one-third of the collective \$145 million revenue of downtown businesses, representing approximately \$54 million of sales in 2019. Similarly, 37% of the jobs in downtown Connellsville are located at these supporting industries.

THE GREAT ALLEGHENY PASSAGE TRAIL STRETCHES BETWEEN CUMBERLAND, MARYLAND, AND PITTSBURGH, PENNSYLVANIA, AS ONE OF THE COUNTRY'S PREMIERE RECREATIONAL TRAILS.



(Map from www.gaptrail.org)

Connecting with the C&O Canal Towpath in Cumberland toward the south and the Montour Trail in Clairton to the north, the Great Allegheny Passage allows outdoor enthusiasts to traverse between the District of Columbia and Pittsburgh.

CONNELLSVILLE: A TRAIL TOWN DESTINATION FOR OUT-OF-TOWN VISITORS

Surveyed downtown Conneville businesses reported that nearly 40% of their customers are from outside of the area, generating a substantial customer base to complement local customers and demonstrating the value of the Great Allegheny Passage to the downtown community. According to these businesses, nearly one-third of the out-of-town customers spend the night in or near Conneville.



REGIONAL IMPACT OF THE GREAT ALLEGHENY PASSAGE

IN 2018, NEARLY A MILLION PEOPLE USED THE GREAT ALLEGHENY PASSAGE TRAIL SYSTEM. Regionally, the Great Allegheny Passage, C&O Canal Towpath, and Montour Trail serve as recreational assets and economic drivers for many towns and cities along the trails. Conneville is one of several communities that particularly benefit from the GAP trail and its visitors. From bike-packing traveling the entire stretch over weeklong trips to families enjoying an afternoon of exercise, the Great Allegheny Passage generates economic impacts across Washington, DC, Maryland, and Pennsylvania.

(Analysis of 2018 Trail Usage Patterns along the Great Allegheny Passage)

IF CONNELLSVILLE CAN ATTRACT 10% MORE TRAIL USERS TO STOP IN TOWN FOR A MEAL, THE AVERAGE RESTAURANT IN DOWNTOWN CONNELLSVILLE WOULD INCREASE THEIR REVENUE BY OVER \$500 A MONTH.



35,000 TRAIL USERS
passed through the Connellsville section of the GAP Trail in 2019.



Nature-Based Placemaking
ENCOURAGES MORE TRAIL USERS TO STOP IN TOWN
through promotions, marketing, and physical improvements.



TRAIL USERS WHO STOP IN CONNELLSVILLE SPEND MONEY AT BUSINESSES
while shopping and dining. Placemaking efforts encourage these customers to stay longer during their visit, including overnight.

NATURE-BASED PLACEMAKING BRINGS MORE CUSTOMERS TO DOWNTOWN BUSINESSES



If distributed evenly, each restaurant in Downtown Connellsville could
INCREASE REVENUE BY OVER \$500 A MONTH
as a result of Nature-Based Placemaking.



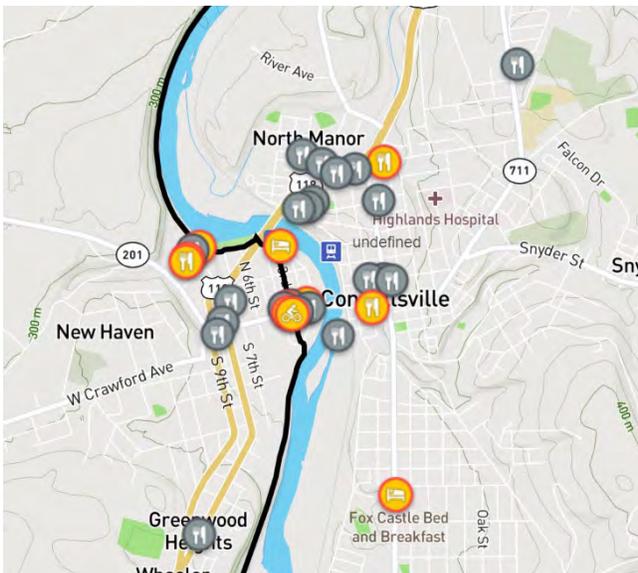
If Nature-Based Placemaking efforts encourage 10% of the trail users to stop and dine in Connellsville and these visitors spent \$15 on a meal during their visit, the downtown could
GENERATE OVER \$52,000 IN SALES.

CAPTURING MORE SPENDING FROM GAP TRAIL USERS. Currently, one-third of surveyed downtown businesses relied on GAP trail users for at least 25% of their sales. Over 20% of businesses said that over half of their customer traffic is a result of the GAP. Leveraging Nature-Based Placemaking efforts encourages customers to stay longer in Connellsville.

(Survey of Downtown Businesses, 2020)

CONNELLSVILLE'S NATURE-BASED PLACEMAKING STRATEGIES

Public, nonprofit, private stakeholders in Connellsville work together to implement strategies designed to encourage users of the Great Allegheny Passage to stop, visit downtown businesses, and spend the night in town. Successful placemaking strategies include:



PHYSICAL IMPROVEMENTS | *Creating a Beautiful Bike-Friendly Community*

- Installing bicycle racks in front of restaurants and cafes (financed by a grant from the Lower Highlands Visitors Bureau)
- Installing additional benches, flowerpots, and public art pieces throughout Downtown Connellsville to encourage visitors to spend more time in town

WAYFINDING | *Connecting Trail Users with Establishments and Points of Interest*

- Creating a downtown walking map to help visitors navigate throughout downtown, find local businesses and landmarks, and highlight how the town's location makes it an ideal place to spend the night immediately before or after Pittsburgh (created by the Fayette County Cultural Trust)

PARTNERSHIPS FOR ACCOMMODATIONS | *Developing Public-Private Partnerships to Increase Support for Overnight Visitors*

- Offering trail users access to showers at the local Comfort Inn for a small fee (made possible through a partnership between Comfort Inn and the Allegheny Trail Alliance)
- Creating Adirondack shelters along the Allegheny Passage that allow trail users to comfortably spend the night in Connellsville (made possible through a partnership between the Connellsville Art Museum and the Connellsville Area Career & Technical Center)
- Working with Amtrak to add more bicycle storage on train cars along the route that stops in Connellsville, providing more transportation options for bicyclists considering stopping and/or spending the night in town



NATURE-BASED PLACEMAKING CASE STUDY

SUPPORTING THE HUNTING INDUSTRY AS AN ECONOMIC DRIVER IN CLEARFIELD

Located in the Pennsylvania Wilds, Clearfield County is a prominent destination for hunting in central Pennsylvania. With a large supply of State Game Lands, the county is home to several businesses, a gun range facility, and multiple sporting goods stores that directly serve the needs of hunters.

IN 2019, HUNTING-RELATED BUSINESSES IN CLEARFIELD COUNTY CREATED A TOTAL ECONOMIC IMPACT OF \$8.7 MILLION IN SALES. THIS IMPACT SUPPORTED NEARLY \$3.5 MILLION IN WAGES FOR OVER 100 FULL-TIME JOBS.

The downtown of Clearfield Borough, positioned centrally in Clearfield County off I-80 (which runs from New York City to San Francisco), features charming streets of retailers and restaurants, with the West Branch of the Susquehanna River cutting through the historic downtown. Supported by the Clearfield Revitalization Corporation, the area's Main Street program, the downtown attracts not only local residents but large numbers of visitors during the hunting season.

Note: Impact figures reflect direct, indirect, and induced impacts. The "Total Sales" column reflects "Industry Output," which is the value of production of outdoor-related businesses in a calendar year. Specifically, this figure describes annual revenues plus net inventory change. Hunting-related industries included sporting goods stores, gun stores, and hunting range facilities.

(IMPLAN, 2019)

CRAFTING A COMMERCIAL DISTRICT BRAND

Downtown Clearfield's central location near hunting areas and the mix of retailers in the commercial district position the area to take further advantage of the surrounding hunting activity. Local businesses can increase their revenue serving the customer base of hunters and their families.



CONCENTRATED HUNTING INDUSTRY. HUNTING BUSINESSES IN DOWNTOWN CLEARFIELD GENERATE NEARLY TWO-THIRDS OF HUNTING-RELATED REVENUE IN CLEARFIELD COUNTY. These businesses, which include several major sporting goods stores that rely on customer traffic from hunters, comprise 30% of the county's total supply of hunting-related businesses.



POSITIONED FOR SUCCESS. 1 IN 5 BUSINESSES IN DOWNTOWN CLEARFIELD ARE POSITIONED TO CAPTURE MORE REVENUE FROM HUNTERS AT NEARBY STATE GAME LANDS. These include local restaurants, cafes, clothing stores, merchandise retailers, hotels, and other local stores that out-of-town hunters and their families typically patron during their visits to Downtown Clearfield.



NEARBY NATURE-BASED ASSETS. NEARLY 12,000 ACRES OF STATE GAME LAND ARE WITHIN A 30-MINUTE DRIVE OF DOWNTOWN CLEARFIELD, including Game Lands No. 90, 94, and 331. Additionally, Moshannon State Forest and Potter Dam State Forest are within a 20-minute drive.



Photo Credits: (Left) KTH Architects, (Center and Right) Jeff Corcino

STRENGTHEN A COMMERCIAL DISTRICT'S BRAND IDENTITY

Visit Clearfield County, a nonprofit tourism bureau and economic development organization representing the county, and the Clearfield Revitalization Corporation, the commercial district's Main Street organization, have implemented various Nature-Based Placemaking strategies to capture more spending dollars from hunters, fishers, and gamers visiting the area. These efforts have been designed to encourage more visitors to shop locally by fostering the region's unique identity with prime hunting, abundant state game lands, and cherished local businesses and places. Nature-Based Placemaking strategies include the following:

ATTRACTING NEW VISITORS TO THE AREA | *Regional Marketing and Promotions Efforts*

State game lands bring visitors from other Pennsylvania regions, as well as hunters and fishers from surrounding states, including New York, New Jersey, West Virginia, Maryland, and Ohio, for getaways and trips to enjoy the prime hunting grounds. While the hunting industry's reputation is strong in this area, Visit Clearfield County actively introduces new visitors to Clearfield and other nearby cities during the hunting season through strategic and targeted participation at industry tradeshows in adjacent states.

INTRODUCING VISITING HUNTERS TO LOCAL BUSINESSES | *Targeted Marketing Strategies*

Through geotargeted advertisements on the population navigation app, Waze, visitors are introduced to Visit Clearfield County, connecting these drivers and passengers with places to shop and dine. Generated as an



on-the-go marketing strategy, the organization informs visitors of businesses to visit during their trips, funneling more dollars to local establishments.

CAPTURING ANCILLARY SPENDING | *Local Business Promotions and Programming for Hunting-Related Visitors*

While the local hunting and sporting goods stores generate substantial revenue as a direct result of their proximity to the state game lands, other downtown businesses strategize to capture more spending dollars, particularly the visitors who accompany hunters on their getaways but do not engage in hunting themselves. Events such as wine walks, craft shows, and special promotional sales targeted to non-hunters all generate economic impacts and increased revenue for downtown businesses.

GENERATING A STRONGER SENSE OF PLACE | *Attracting Outdoor Industry and Related Businesses and Physical Placemaking Efforts*

Nature-Based Placemaking helps preserve and improve the downtown community while creating an enjoyable environment for all. Downtown Clearfield's River's Landing development, a newly constructed multi-tenant building, will include a restaurant directly overlooking the Susquehanna River for patrons to enjoy. The recently completed River Walk, a gateway park into the downtown, provides a scenic recreational opportunity for residents and visitors. Grant programs available to businesses in the area, such as Visit Clearfield County's Destination Marketing Grant, allows local businesses to improve their operations and attract more customers.

LEVERAGING BEST PRACTICES | *Involvement in Nature-Based Placemaking Initiatives*

As active participants in Pennsylvania Downtown Center's Nature-Based Placemaking Initiative, the local and regional place-based organizations gain guidance on new placemaking strategies, share learned lessons, and develop collaborative relationships with other communities.

KEY ECONOMIC INDICATORS

Downtown Clearfield's businesses supported by the hunting industry include retailers, restaurants, entertainment venues, and accommodations. These supported industries play a vital role in the local economy. In 2019:



41 DOWNTOWN BUSINESSES WERE INDUSTRIES SUPPORTED BY HUNTING CUSTOMERS

This represents approximately 20% of the total businesses in the Clearfield Revitalization Corporation programmatic area.



645 EMPLOYEES IN DOWNTOWN SUPPORTING INDUSTRIES

30% of all employees in the programmatic area are employed in the retail, restaurant, accommodations, and entertainment industries.



SUPPORTED BUSINESSES GENERATED OVER \$70 MILLION

Approximately 40% of the collective revenue of all the businesses in the programmatic area are within the supporting industries.

(InfoGroup, 2019)

MOVING FORWARD

STRATEGIES FOR STRENGTHENING THE ECONOMIC IMPACT OF OUTDOOR RECREATION ASSETS

Nearby natural assets and outdoor recreational activity can help attract more customers to downtown businesses, improve the desirability of commercial districts, create and sustain jobs, and increase local economies' resiliency. The following strategies are common ways in which commercial business district management organizations and government agencies support their local businesses by strengthening the economic impacts of outdoor recreation.



CREATE AN ATTRACTIVE ENVIRONMENT THAT DRAWS IN POTENTIAL CUSTOMERS

Placemaking efforts toward vibrant and healthy commercial corridors generate strong local economies. These districts attract new businesses, inspire budding entrepreneurs, and foster a community culture desired by residents and visitors.

LINKAGES WITH NATURE-BASED ASSETS

Between wayfinding or signage and physical connections such as trails and paths, providing an experiential relationship with Nature-Based assets to downtown communities strengthens the opportunities for more visitors to turn into customers frequenting commercial districts and local businesses.

COMMERCIAL DISTRICT PLACEMAKING EFFORTS

Vibrant, safe, and well-maintained commercial districts attract more visitors to the area. As a result, these places encourage customers to stay longer, increasing customers' opportunities to spend more dollars at local businesses.



DIRECT OUTDOOR RECREATION VISITORS TO LOCAL BUSINESSES

Businesses increase their revenue by increasing their customer base. Introducing more customers to places results in higher revenues for the establishments.

MARKETING AND BRANDING

Supporting individual businesses in their promotional efforts and branding initiatives such as improved signage and fostering unique community identities and brands spark the interest of new and returning customers to businesses and communities.

CUSTOMER ATTRACTION STRATEGIES

Through targeted strategies such as promotions, events, and unique offerings, downtown commercial districts attract customers to support local businesses.



SUPPORT BUSINESS OPERATIONS

Many challenges face small and local businesses – from navigating regulatory processes to operation and business planning, employee attraction, seasonal adjustment strategies, and maintaining quality, enticing storefronts.

TECHNICAL ASSISTANCE

Supporting businesses through technical assistance ranges from helping companies with operational systems such as bookkeeping and inventory management to marketing and social media planning to providing direct financial assistance through loans and grants.

REGULATORY SUPPORT AND GUIDANCE

From applying for business licenses to permits for renovations to approvals for specific occurrences, guiding businesses through regulatory challenges allows business owners to traverse regulatory issues promptly and keep their time and attention on their core business operations.



ADVOCATE FOR OUTDOOR RECREATION AND YOUR NATURAL ASSETS

Advocate for the resources needed to maintain your region's outdoor recreation assets, to honor and preserve its natural heritage, and to promote awareness for local residents and outside visitors alike. To build support, help spread the word about the strong economic impacts outdoor recreation can have on downtown communities.

KNOWING THE NUMBERS

Sharing and promoting the economic impact figures presented in this report help communicate the important value Outdoor Recreation industries have on the Pennsylvania economy, providing quantitative data for qualitative experiences.

PARTNERSHIP DEVELOPMENT

Inclusive and collaborative partnerships among a wide variety of stakeholders best position successful advocacy efforts. Aligning shared visions and goals between commercial districts and Nature-Based asset supporters can generate strong partnerships.

POTENTIAL POST-PANDEMIC ISSUES AND TRENDS

Support for outdoor recreation businesses is more critical than ever due to the onset of the COVID-19 pandemic's challenges. Outdoor recreation industry businesses faced new issues, including dramatic swings in operating models, ongoing and frequent shifts in regulations, supply chain issues, and increasing need for digital presence. And of course, due to the pandemic, outdoor natural assets are more essential outlets for recreation than ever before.

MOVING FORWARD

NATURE-BASED PLACEMAKING: A FRAMEWORK FOR CONNECTING NATURAL RESOURCES TO DOWNTOWN PROSPERITY

Nature-Based Placemaking is an emerging process for leveraging nearby natural assets to support downtown commercial districts. Below are recommended strategies that local governments, statewide agencies, and place-based organizations can implement to catalyze local economic development through Nature-Based Placemaking.



CONNECT COMMUNITIES WITH NATURE-BASED DESTINATIONS THROUGH CIVIC STEWARDSHIP

Local communities can strengthen the experiential connection between nearby natural assets and commercial districts through strategic leadership and engagement. Through balancing educational awareness of the benefits of the natural assets with the joyful experiences of exploration, these communities can draw more customers to the local establishments.



LEVERAGE NATURE-BASED PLACEMAKING AS A TRANSFORMATIONAL STRATEGY

Downtown local leadership can leverage the Nature-Based Placemaking concept to transform and revitalize their business districts. With a strategic and uniformed economic development and placemaking strategy, communities can catalyze the impacts to achieve vibrant and well-served downtowns.



COLLABORATE AND STRATEGIZE THROUGH PUBLIC-PRIVATE PARTNERSHIPS

Local and statewide Nature-Based Placemaking efforts can prioritize the inclusion of stakeholders from across different sectors to build community buy-in and strengthen programmatic effectiveness and long-term sustainability. Key potential stakeholders include local municipalities, place-based economic development organizations (such as Main Street programs, community development corporations, and chambers of commerce), business owners, conservation-related nonprofits, and statewide agencies, including DCNR, DCED, DEP, and PENNDOT.



EXPLORE POLICIES TO SUPPORT OUTDOOR RECREATION ECONOMY

Outdoor recreation stakeholders can develop and prioritize a set of legislative measures that can support the outdoor recreation economy's long-term resiliency. These measures may include, but are not limited to, funding for the identification of new lands for possible preservation, maintaining and preserving natural assets, grants for outdoor education programming, and dedicated state conservation funding.



BECOMING A NATURE-BASED PLACE

Implementing the Pennsylvania Downtown Center's Nature-Based Placemaking concept catalyzes local public-private partnerships among outdoor recreation stakeholders and helps communities establish clear benchmarks for leveraging nearby natural assets to support local business growth and job creation. The program provides communities with access to various marketing and financial resources, such as specialized technical assistance, workshops, corporate sponsorship opportunities, the use of a statewide NBP identification system, and inclusion in an annual recognition program. Additional information about the process is available from PDC through the Nature-Based Placemaking Handbook.



TO LEARN MORE ABOUT NATURE-BASED PLACEMAKING ...

... and how you can get involved, visit the Pennsylvania Downtown Center website at padowntown.org or email padowntown@padowntown.org.

APPENDIX







METHODOLOGY

The overall economic impact of outdoor recreation in Pennsylvania was analyzed based on the cumulative economic contribution of (a) industry sectors that are directly centered around outdoor recreation and nature-based assets, and (b) trip-related expenses attributable to outdoor recreation trips by in-state and out-of-state visitors.

INDUSTRY SECTORS This study assesses the impact of “Core” industry sectors that are directly centered around outdoor recreation and Nature-Based assets. These sectors are based on the Bureau of Economic Analysis’ “Outdoor Recreation Satellite Account, U.S. and State Prototype.” This study breaks down these industry sectors into three classifications: “experience-based” industries directly involved in the facilitation of outdoor recreational activities, “material-based” industries that produce goods for outdoor recreation purposes, and “service-based” industries that provide services directly linked to outdoor recreation. (See Glossary of Terms for full definitions of these industry terms).

VISITOR TRIP COUNTS AND TRIP-RELATED EXPENSES This study assesses the amount of consumer spending on lodging, food and beverage, transportation, indoor recreation, and shopping attributable to outdoor recreation trips. The total amount of “trip-related expenses” was measured by multiplying the annual number of outdoor recreation trips by average per-trip

expenses. A “trip” is defined as any journey for pleasure, outside one’s community and not part of one’s normal routine, that includes an overnight stay or a day trip at least 50 miles from home. The analysis includes only trips where an outdoor-related activity is the primary purpose of the trip, to ensure that all trip-related expenses are directly attributable to outdoor recreation. Annual trip counts and per-trip spending figures are based on the *Annual Pennsylvania Travel Profile, 2017* by Longwoods International and *The Economic Impact of Travel in Pennsylvania, 2018* by Tourism Economics. Figures are adjusted for expected annual growth through 2019.

ECONOMIC AND FISCAL IMPACT MODEL This analysis used an impact modeling software called IMPLAN, which leverages data and multipliers specific to the Commonwealth of Pennsylvania to calculate the indirect and induced economic impact and direct fiscal contribution.

CONTRIBUTION ANALYSIS A Contribution Analysis Model in IMPLAN was used to determine outdoor recreation’s role in the greater economy. This economic impact model assessed all outdoor recreation industry sectors and trip-related expenses and accounts for industry-specific business-to-business indirect expenditures to limit overcounting contributions within the industries themselves.

DATA SOURCES

THIRD-PARTY DATA Statewide business counts and industry sales were obtained through ESRI Business Analyst. Industry classifications are based on the 2012 North American Industry Classification System (NAICS). IMPLAN was used for statewide employment and GDP data. Bureau of Labor Statistics was used for statewide industry-level employment, salary, and wage data. Annual tax revenue data is based on the Pennsylvania Revenue Department's FY2019 budget. Per-trip visitor spending is based on Tourism Economics' *The Economic Impact of Travel in Pennsylvania, 2018*. Estimates of total annual outdoor recreation trips are based on Longwoods International (*Annual Pennsylvania Travel Profile, 2017*).

BENCHMARK STUDIES REVIEW Recently conducted analyses and studies specific to the subject matter were reviewed and assessed for best practices, particularly the "Outdoor Recreation Satellite Account, U.S. and State Prototype" analysis and methodological framework developed by the Bureau of Economic Analysis. Relevant state-level plans, such as the Outdoor Recreation Plan and Pennsylvania Downtown Center's Nature-Based Placemaking Handbook were also reviewed.

BUSINESS OWNER SURVEYS As part of this study, electronic surveys were completed by business owners in the three Case Study Communities highlighted in the study. The survey quantified the needs and concerns of these businesses and the extent to which businesses are capturing spending by visitors to nearby natural assets. The survey was administered electronically by the Pennsylvania Downtown Center and local community partners.





GLOSSARY OF TERMS

CONTRIBUTION ANALYSIS An impact methodology that identifies the impact of specific industries on a regional economy.

ECONOMIC IMPACT The impact of spending in a particular industry or industries on a given region.

Direct Impact The businesses, revenue, jobs, wages, and other economic activity generated from the operations of a particular industry or industries.

Indirect Impact The supply chain of goods and services from other industries that enable activity in a particular industry or industries.

Induced Impact The results, or spending, of increased personal income (salary and wages) caused by the direct and indirect impacts.

FISCAL IMPACT The amount of tax revenue to Pennsylvania generated as a result of economic activity, including sales tax, alcohol tax, income tax, and the issuance of licenses and permits.

IMPLAN An input-output economic impact assessment modeling system that models impacts of economic changes on a specific region.

JOBS The total number of full- and part-time jobs.

NAICS CODE Business establishment classification is based on the type of economic activity generated by the establishment.

NATURE-BASED ASSETS Any lake, river, trail, mountain, greenway, etc. that draw users and visitors for recreational activity.

NATURE-BASED PLACEMAKING The leading outdoor recreation-based revitalization strategy that leverages nature, outdoor recreation resources, and nature-based assets to enhance local spending to provide quantitative and qualitative benefits to communities.

OUTDOOR RECREATION Activities that people do outdoors in their free time such as walking, bicycling, picnicking, hunting, fishing, and camping. Indoor activities are not included.

OUTDOOR RECREATION INDUSTRIES The variety of industries in which economic change, or spending, occurs as a result of outdoor recreation.

Core Industries. The experience-, material-, and service-based industries directly centered around outdoor recreation and nature-based assets.

Supporting Industries. The industries that receive economic activity as a direct result of the core outdoor recreation industries.

TRIP-RELATED EXPENDITURE Visitor spending at supporting industries as an attributable result of outdoor recreation tourism.

ADDITIONAL INFORMATION ABOUT

OUTDOOR RECREATION IN PENNSYLVANIA AND NATURE-BASED PLACEMAKING



The **PENNSYLVANIA DEPARTMENT OF CONSERVATION AND NATURAL RESOURCES (DCNR)** works to conserve and sustain Pennsylvania's natural resources for present and future generations' use and enjoyment. DCNR maintains and oversees state parks and state forest land, provides information on the state's ecological and geological resources, and establishes community conservation partnerships. For more information, please visit: <https://www.dcnr.pa.gov>.



The **PENNSYLVANIA DEPARTMENT OF COMMUNITY AND ECONOMIC DEVELOPMENT (DCED)** works to revitalize Pennsylvania's communities through various funding opportunities that may be used to facilitate Nature-Based Placemaking efforts. For more information about DCED, please visit: <https://www.dced.pa.gov/>.



PENNSYLVANIA DOWNTOWN CENTER (PDC) is the only statewide nonprofit dedicated solely to the revitalization of the commonwealth's core communities. Primarily through utilization of the National Main Street Center®, PDC provides outreach, technical assistance, and educational services to assist communities in revitalizing their central business district and surrounding neighborhoods. For more information, please visit: <https://padowntown.org>.



NATURE-BASED PLACEMAKING, an initiative overseen by Pennsylvania Downtown Center, is about the connection and collaboration among the focus areas of civic, tourism, and businesses as a comprehensive strategy recognizing and embracing natural assets as a generator for economic activity in communities. For more information, please visit: <https://padowntown.org/programs/nature-based-placemaking-program>.

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