Pennsylvania’s outdoor assets have long served as economic engines for the tourism industry. In 2012, 19 percent of the 189 million travelers to the state indicated their primary reason for travel was outdoor related. Those travelers listed swimming, visiting a state park or national park, camping and hiking as top outdoor activities they did on their vacation. Each visit to those lakes, parks, trails and forests generates income for local communities.

But the economic value of outdoor recreation is not just limited to tourist spending. Close-to-home recreation, trails and green spaces promote active lifestyles and add to the economic viability and livability of communities. Increasingly, citizens are seeking out communities that offer outdoor amenities, open spaces and recreational opportunities. Some of the country’s biggest cities, like Pittsburgh and Philadelphia, and small towns like Confluence and Ridgway in western and northwestern Pennsylvania have recognized the value of their rivers, trails and parks and are hoping a renewed focus on these amenities will draw businesses and people to downtowns. Employers are using outdoor amenities to draw a highly skilled workforce looking for quality of life features outside of work. Some entrepreneurs, who can locate anywhere because of an online business presence rather than traditional bricks and mortar, are choosing places that offer extraordinary outdoor amenities and scenic beauty.

Heritage areas and conservation landscapes are another way to garner more interest in recreation. Visitors are coming to many areas to experience the landscapes and the heritage tourism sites and are participating in outdoor recreation while doing so. Agricultural tourism features like corn mazes, farmer’s market tours and wine trails are a growing trend and can be economic drivers in Pennsylvania’s rural communities. Festivals, fairs and competitions focused on outdoor activities and natural assets attract people year-round to the unique experi-

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Pennsylvania’s outdoor assets have long served as economic engines for the tourism industry.
ences offered by Pennsylvania’s big cities and small towns. From a national Bassmaster tournament held in 2014 on the Delaware River, to dark sky parties at Cherry Springs State Park in the PA Wilds, to dozens of endurance adventure races through Pennsylvania’s forests, these outdoor-related events infuse tens of millions of dollars into the local economies. When woven together, recreation-, heritage- and agriculture-based tourism provide a robust marketing strategy for attracting tourists to a region.

Pennsylvania’s vast state park and forest system is — and always has been — a significant draw to tourists. To develop a better understanding of the site-specific impact of these areas, DCNR commissioned the Pennsylvania Visitor Use Monitoring project to survey expenditures by visitors in select state parks and forests. Average trip expenditures for a visitor to six state parks studied in the Pennsylvania Wilds region were $124; in a similar study for state parks in the Laurel Highlands and Poconos, trip expenditures averaged $187.22.

In February 2012, DCNR commissioned Penn State University to update its 2009 economic analysis of Pennsylvania state park impact. Key findings showed that Pennsylvania state parks hosted 37.9 million visitors who spent $859 million on their trips. The direct contribution of visitor spending to the state economy was $628.7 million in sales, supporting 9,435 jobs. The study found that for every dollar invested in Pennsylvania state parks in 2010, $12.41 of income is returned to the state economy.

“Our economy is no longer just about companies. It is about two other things: people and places. It’s about how we want to live our lives and what kind of places we want to live in.”

– Richard Florida in global bestseller The Rise of the Creative Class

This level of return was higher than previous estimates due to increased visitation over the initial report. Similar to the site-specific visitor analysis, vehicle gas and oil represented the largest percentage of visitor spending.23
A snowmobile study conducted in 2013 showed that resident snowmobilers spend $96 million in Pennsylvania on their trips, and an additional $57 million on equipment purchases. Add in out-of-state travelers, and the total economic impact of snowmobiling in Pennsylvania topped $159 million a year.

On a broader scale, Tourism Economics completed an economic analysis of tourism in Pennsylvania for visitpa.com. This 2012 study found that tourism industry sales in Pennsylvania were $38.4 billion in 2012, with just under 17 percent in spending associated with recreation (both indoor and outdoor). This equates to roughly $6.4 billion dollars in spending, making it the third most profitable industry in relation to tourism (behind transportation and food/beverage services). Since 2008, recreation-related spending has increased 14.3 percent from $5.6 billion in 2008 to $6.4 billion in 2012. Though the classification for “recreation” in this study included both indoor and outdoor recreation and places like amusement parks, it is clear that outdoor recreation can be considered an important component to Pennsylvania’s tourism and economic well-being.24

On a national level, the Outdoor Industry Association publishes an annual Outdoor Recreation Economy guide that details the economic value of outdoor recreation in the United States. Based on survey data collected in 2011 and 2012, OIA estimated that Americans spent $646 billion annually on outdoor recreation supporting 6.1 million jobs. OIA’s analysis of Pennsylvania-specific numbers showed outdoor recreation accounted for $21.5 billion in consumer spending, 219,000 direct Pennsylvania jobs, $7.2 billion in wages and salaries, and $1.6 billion in state and local tax revenue. The figures include both tourism and outdoor recreation product manufacturing.25

Not only does outdoor recreation provide important physical and mental benefits, it also provides tangible economic impacts to the areas in which it occurs. These financial benefits and the demonstrated positive return from outdoor recreation infrastructure investments means that it is important to sustain funding for this activity. In the face of budgetary challenges, there is a need to substantiate the economic value of funding for parks and outdoor recreation and sustain the investment through effective communications to decision makers and our citizens.

- **CHALLENGE**

Meaningful impact data is needed to inform decision makers of economic benefits.

Sound economic data draw the attention of decision makers. Selling the benefits of outdoor recreation — both social and economic — will require better data and outreach to local officials and leaders. By focusing on return on investment, recreation providers can make the case that this is money well spent.

Despite tourism being a leading industry in Pennsylvania, and outdoor recreation being a significant portion of that industry, there is little concerted effort to document its economic value in an organized manner. Proven success stories, which demonstrate how new businesses are drawn to trail sides, riverfronts and thriving recreation venues, are becoming more prevalent. The challenge is that local recreation providers and land managers often do not have the time or resources to commission, seek out or analyze data from existing economic studies to make the case for outdoor recreation investments.
New eateries and bike shops have emerged along long-distance trails like the Great Allegheny Passage and the Schuykill Heritage River Trail. Wineries, artisan shops, country stores, lodging establishments and more have seen exponential growth in the Pennsylvania Wilds since its focused tourism strategy began driving people to the region in 2003. If shared, these success stories could aid other efforts that are struggling to find financial, citizen and political support. However, the decentralized nature of eco-tourism initiatives and tourism promotion in general in the state, coupled with the complexity of Pennsylvania’s governmental structure, can be barriers to communicating effectively and sharing success stories. People must be aware of the existing data, how to access it and how best to communicate it to different stakeholder groups, so they can be effective in sustaining and increasing support for the outdoor recreation and tourism industries in the state.

One such trail need is for off-highway motorized vehicle use, particularly ATVs, which has grown dramatically over the past couple of decades, generating pressure for the development of more trails on public lands to meet rider demand. In Pennsylvania’s online survey, about 10 percent of the respondents specifically wanted ATVs addressed in the outdoor recreation plan. While large-scale public land development is unlikely due to user conflicts and the significant resources needed for trail management and maintenance, private sector off-highway vehicle parks are receiving state grant funding, such as the Rock Run Recreation Area and the Anthracite Outdoor Adventure Area. An ongoing assessment of these ATV parks and trails can help to determine what additional public-private partnerships can help address this user interest.

Indicating another possible business development opportunity for both the public and private sectors, 56 percent of respondents in Pennsylvania’s resident survey believe that more rental cabins are needed to satisfy user demand. More data may be needed to determine whether this is a perceived need or an actual facility limitation in Pennsylvania.
Specific incentives are needed to further develop Pennsylvania’s outdoor recreation industry.

If you build it, they will come. This age-old adage may be true, but it takes guidance and financial assistance for small businesses and entrepreneurs to get off the ground and develop a successful business dependent on the outdoor recreation product.

Outdoor recreation-based businesses — from the bed and breakfasts dependent on the trail traveler to the makers of snowboards and kayaks located in Pennsylvania — face challenges that other businesses do not, such as seasonality, weather, water levels and snowfall.

Often times, tourism-related businesses have a difficult time getting traditional financing, so success is dependent on public-private investment models where the commonwealth provides capital investment or grant funding to match local government or private sector funds.

DCED’s First Industries Fund for Tourism has helped nonprofit and for-profit organizations to undertake tourism-related projects through grants, loans and loan guarantees; however, new funding dollars are needed to continue the program.

Examples of support and incentives for small businesses and entrepreneurs do exist in Pennsylvania. The Progress Fund, a community redevelopment financing agency in southwestern Pennsylvania, has financed 29 businesses along the Great Allegheny Passage and received $2 million in federal funding in 2014, which will be used to make additional loans to new and existing businesses along the trail.

In the PA Wilds, the commonwealth has invested in a small business ombudsman position that serves as a clearinghouse and a connector for businesses in the region who are seeking to invest or grow in the eco-tourism market. The ombudsman recently created the PA Wilds Center for Entrepreneurship to help small businesses learn what it takes to be successful. The position not only offers technical assistance and helps businesses navigate the existing service provider network, it also promotes, shares and builds excitement for the outdoor recreation industry. This model may be well suited for other areas of the state.

More agency and partner coordination is essential to successfully promote the state as an outdoor recreation destination.

With multiple agencies and organizations charged with managing the state’s outdoor tourism product, messages and promotional efforts often compete. Because of the economic value associated with tourism, there are incentives to stay parochial to get the best payoff for the local communities.

Interagency cooperation can help determine how to attract those who travel across Pennsylvania to get from one place to another and help with local initiatives to seek more tourism. Many tourist promotion agencies understand the value of their outdoor recreation places and spaces, like the Cumberland Valley Visitors Bureau, which has made outdoor destinations a central theme in its marketing strategy. However, some fail to include trails, parks and rivers in their promotional materials and messages.

The new Pennsylvania Tourism Partnership, formed with public and private funding and leadership, is charged with developing and promoting a cohesive Pennsylvania brand that will bolster local messages and campaigns. There is an opportunity in the development of the brand and messaging to highlight Pennsylvania’s outdoor recreation product.
The Pennsylvania conservation landscape and heritage areas programs, established to promote broad-based economic strategies for key landscapes across the state, have become models for cross-agency cooperation of businesses, tourism agencies and local elected leaders. But even these established areas have not made all the connections to maximize the tourism potential.

**OPPORTUNITY**

Pennsylvania is known for exceptional outdoor recreation assets and experiences.

Verdant hillsides, dark skies, deep forests and tranquil waterways define Pennsylvania. These natural resources are the backdrop for nearly every kind of outdoor recreation pursuit. With its four seasons and millions of acres of public lands, Pennsylvania can rival any state in the country for its outdoor recreation options. Added to the wealth of facilities and options are hundreds of unique towns and cities that celebrate the spirit of the outdoors through fairs and festivals.

### Pennsylvania’s Assets:
**Opportunities Galore**

- 120 state parks
- 2.2 million acres of state forest land
- 1.3 million acres of state game lands
- 500,000-acre Allegheny National Forest
- 85,000 miles of waterways
- 76 natural lakes creating 5,266 acres of flatwater
- 2,300 impoundments creating 200,000 acres of boatable waters
- More than 11,000 miles of trails, including more than 1,700 miles of rail trails
- 18 national park sites
- 12 heritage areas
- 3 national wildlife refuges
Pennsylvania often makes the “best of” lists — from its long-distance trails like the Great Allegheny Passage, to its dark skies at Cherry Springs State Park, to its fishing and boating opportunities on Lake Erie at Presque Isle State Park. Columbia Borough, a river town on the banks of the Susquehanna River in Lancaster County, was named one of the “20 Best Small Towns to Visit in 2014” by Smithsonian Magazine. In its reporting of the recognition, the magazine cited its proximity to nearby state parks.

Pennsylvania’s consumptive sports, like hunting and fishing, have been long-held traditions that have large economic impact. Tracts of state game lands, making up a land base larger than the state of Delaware, exist in all but two counties of the state. More than 85,000 miles of streams and 75 natural lakes provide endless opportunities for fishing. Factor in the growing outdoor recreation activity — watching wildlife — and these sports fuel outfitters, guides, bait and tackle shops and mom-and-pop businesses throughout all of Pennsylvania.

• OPPORTUNITY

More economic opportunity exists through development of specific outdoor recreation travel and experiential packages.

Communities can take advantage of public investments and make a living by providing services to those coming to recreate. Significant investments have been made in public lands in recent years through the Growing Greener and the Enhance Penn’s Woods programs, creating new and improved facilities that enhance the outdoor experience. New overnight accommodations, visitor centers, viewing areas, trails and events help visitors to make more connections with nature through extended stays.

In today’s world of abundant choices and information overload, many consumers turn to recreation providers for help in creating a meaningful outdoor experience. Some of Pennsylvania’s heritage areas are offering pedal-paddle trips, where participants ride along the trail to a destination — often times a trail town — then paddle a canoe or kayak back to their point of origin. Private sector entities in the towns along the trails, like bed and breakfasts and cafes, can partner with recreation providers to create inclusive packages.

Sojourns — long distance journeys — by bike or boat have gained in popularity, providing multi-day immersion experiences into local cultures and recreation. Participants show up prepared for fun, with the worry of logistics left to the sojourn organizer. In 2013, organizations offered 15 river sojourns that traveled more than 650 river miles, carrying 3,100 participants on journeys of fun and learning.

Quaint, small-town charm is one of Pennsylvania’s tourism selling points. Many travelers today are looking for authentic experiences. Surveys show that most outdoor enthusiasts also enjoy history and heritage and often combine these experiences in their trips. Visiting historic sites is the second most popular outdoor activity cited in the resident survey. Heritage areas, recreation professionals and tourism promotion agencies should work together to create authentic experiences that combine visitors’ love of walking, scenic driving and heritage to promote economic development in communities.

A recent example of coordinated heritage/recreation tourism was Pedaling Through National Parks, a two-day, 60-mile bicycling trip through the Schuylkill River Heritage Area showcasing the regional trail and three national parks.
• OPPORTUNITY

Detailed case studies are showing return on investment.

Although a statewide comprehensive approach to documenting the economic impact of outdoor recreation has not been developed, numerous site- or facility-specific studies show significant contributions of trails, visitor centers, state parks and forests.

With funding from DCNR, the Rails-to-Trails Conservancy has conducted eight visitor use and economic impact studies on rail trails in Pennsylvania over the past few years. A 2012 study on the D & L Trail in northeastern Pennsylvania concluded that 282,769 annual user visits to the trail resulted in a total economic impact of $19 million. From this figure, $16 million was estimated to be directly injected into the local economy.

The 19-mile-long Perkiomen Trail in Montgomery County hosts nearly 400,000 unique visits each year, and those visitors generate an estimated $19.8 million in economic activity.

The Great Allegheny Passage in southwestern Pennsylvania completed its final missing connectors in 2013, making it one of the country’s longest trails — 334 miles from Pittsburgh to Washington D.C. In a survey of businesses along the trail in Pennsylvania, on average about 30 percent of gross revenues were attributed to the trail, about five percent higher than a survey done in 2008-2009.

Pennsylvania’s 12 heritage areas, five of which have national designations, have generated significant economic benefits for local communities. In 2014, a study of the Lackawanna Heritage Valley National and State Heritage Area found that the region contributes $31 million in economic impact, supporting 386 jobs and generating $2 million in tax revenue.

• OPPORTUNITY

Public private partnerships leverage resources to support outdoor recreation assets and private sector investment.

In the Greater Philadelphia region, the Circuit is widely known in the planning and recreation community, but perhaps is not as well known to area residents. Behind the scenes, the Circuit is working to build a 750-mile pedestrian and bicycle network linking the entire greater Philadelphia region. A spider web of lanes and trails covering about 300 miles are in place, with an additional 50 miles in progress. Trail and circuit development was enhanced in 2014 with a $7 million commitment from the William Penn Foundation, adding to $10 million in grants to kickstart the effort in 2012.

An effort of this size requires a partnership of enormous magnitude, from small towns, to state agencies, to city government, to foundations and non-profits. As in the case of the Great Allegheny Passage in southwestern Pennsylvania, small victories and success stories of business development create excitement and build momentum.

In the Pennsylvania Wilds, outfitters, bed and breakfasts and local country stores have noted a marked increase in business since the state began making strategic investments into the outdoor recreation product in an effort to increase tourism to the area. The Benezette Hotel in Elk County invested in 2012 to expand its overnight capacity to meet the tourist
PRIORITY • Tourism and Economic Development

- TOURISM AND ECONOMIC DEVELOPMENT

Demand caused by the public-private investment that created the Elk Country Visitors Center just up the road. The more than 300,000 people who flock to the new center each year to see the largest elk herd in the Northeast, also are creating a demand for more rooms, eateries and places to visit. The center was the result of financial contributions of the commonwealth, the non-profit Keystone Elk Country Alliance and private investors. The center gift shop also provides a venue for 60 small businesses to sell locally made products and artisan wares.

- OPPORTUNITY

Creating connections between outdoor recreation and towns expands economic potential.

A top recreation priority in Pennsylvania has been the development of long-distance trails. Trail developers and advocates argue that the longer the trail — particularly longer than 50 miles — the more people it attracts, and in turn, the greater the economic return. Longer trails become destination trails. These ribbons of recreation make connections between places and are helping to build economic development and promote business opportunities that serve trail user needs.

The Trail Town concept emerged in 2005 as the product of the work along the Great Allegheny Passage in southwestern Pennsylvania. Trail Town technical assistance helps towns along a long-distance trail identify the assets that will be most attractive to trail users and capitalize on them. Based on the premise that trail users will venture off the trail to enjoy a town’s heritage, retail shops, eateries and other attractions, a trail town puts out a coordinated “welcome mat” to encourage tourism.

The Trail Town Program work started by the Allegheny Trail Alliance has been replicated in other landscapes. The Schuylkill Heritage Area developed a toolkit that had grant funding attached, which towns used to put ideas into action. In Pottstown, grants were used to create signs and kiosks along the trail to guide riders through town via bike lanes.

Trail Town successes have led to the development of River Towns, with the river as the visitor draw rather than a specific trail. In the Susquehanna Riverlands conservation landscape in Lancaster and York counties, the river towns of Marietta and Columbia benefit from a recently developed riverfront park, boat access area and trail that all provide recreational access to hundreds of acres of open space along the Susquehanna River preserved by the five municipalities and Lancaster County. Users of these recreational facilities spur visitation to history and heritage sites and businesses within the towns.


River Towns
Where they once carried commerce and served as the backbone of our industrialization, Pennsylvania’s rivers are again fueling new growth.

Launched in 2011 by the Pennsylvania Environmental Council, the River Town program focused on five communities along the Monongahela River as pilots to demonstrate how economic development based around the natural resource could spur growth and employment. In the three years since the program’s launch, more than $1 million has been raised for projects focusing on trail development, river accessibility, providing scenic views from unforgettable locations and essential tourist services and amenities. Recently, the River Town Program published a five-year strategic plan, “The Monongahela River Valley Plan: A Five-Year Action Agenda to Increase Tourism to the Region” and proposed five key regional initiatives geared towards attracting more visitors and businesses to the Monongahela River Valley.

Get on the Trail
Entrepreneurial Business Contest

Using natural assets like trails and rivers to drive economic development is a practice that is having growing success across Pennsylvania. A new program is rewarding these natural connections along the Erie to Pittsburgh Trail.

The Get on the Trail Entrepreneurial Business Contest, sponsored by the Oil Region Alliance of Business, Industry and Tourism, offered financial and technical assistance to new and expanding businesses that submit solid business plans to provide goods and services to trail users. This pilot program, now evolving into a business incubator concept, encourages businesses to reach out to a new clientele riding or paddling on the trail or waterway, connecting to the downtown business districts along the routes.

In the first two years, 19 businesses submitted plans. While every business can continue to receive assistance, the contest had six winners ranging from the traditional to the unique. A refurbished bed and breakfast will serve local products. A mobile ice cream vending cart serves locally produced treats at trail events. A coffee shop rents GPS units leading trail users on tours. A fine dining restaurant will have expanded outdoor seating, and a local outfitter will rent specialized bikes to assist mobility challenged customers and winter equipment to extend the season. An antique and gift shop will expand marketing to attract trail users into town.

The contest was funded with $16,000 from the PA Department of Community and Economic Development as well as free services for website and logo development.

Endurance Challenges
All across the country, endurance races are surging in popularity. While marathons, 5Ks and 10Ks have been around for decades, grueling events that take advantage of the challenges and natural beauty of the forests and mountains are all the rage — and not just during the warm months. From 100-mile races to canoe competitions to obstacle courses, these new or growing race events are winning widespread community support for the boost they give local businesses and how they inspire healthy living and pride of place.

Many times registration for endurance events open and close within days due to their cult-like followings. Outfitting businesses are getting in on the action too, realizing their participation in the events can help to fuel business. When Country Squirrel Outfitters, formerly located in Colorado, moved their business to Ridgway in the PA Wilds, the owners were surprised to see such a vast number of endurance events in the region, something that was common in Colorado. Race enthusiasts flock to the region for the wildly-popular Hyner View Trail Challenge, Megatransect and Prowl the Sproul events. More than 150 diehards tackle the Frozen Snot Run each year — a 13.5-mile run over Bald Eagle Mountain during the coldest week of the year.

See Appendix I for more case studies.
1. Organize and market outdoor recreation and heritage tourism assets and amenities more effectively.

**ACTION STEPS**

a. Work with the PA Tourism Partnership to include outdoor recreation and heritage tourism as key components of the state tourism promotion and branding strategy, and specifically call out the significance of trails within this.

b. Establish a state agency workgroup to more cohesively promote outdoor recreation and heritage tourism.

c. Work with tourism partners to develop itineraries and travel packages that target the outdoor recreation product and experiences.

d. Actively market and promote hunting, fishing and recreational shooting opportunities and events to further engage all audiences in these traditional activities.

e. Obtain a major sponsor to fund a statewide marketing effort promoting Get Outdoors PA to prospective community partners, program providers and the public at large.

f. Identify gaps and issues with current wayfinding signage for outdoor recreation and heritage destinations, and make recommendations to PennDOT and State Signing Trust.

g. Republish the statewide PA Outdoor Adventure Guide bi-annually.

2. Develop and implement a plan for communicating the economic and community benefits of outdoor recreation, heritage tourism and land conservation.

**ACTION STEPS**

a. Continue the development of the Nature-based Placemaking Program (e.g. trail towns, river towns, community gateways, etc.), and pilot community projects to provide technical assistance, training, mentoring and information resources and exchange for local government and business leaders.

b. Work with tourism partners and chambers of commerce to hold at least one meeting per region per year that focuses on the value of the outdoor recreation economy and ways to encourage growth in this industry sector.

c. Place case studies, economic data and other resources on agency and partner websites.

d. Develop a short video on model initiatives as a tool for building greater awareness on economic benefits to communities.

3. Increase access to business development resources and incentives for small tourism and outdoor recreation businesses and entrepreneurs.

**ACTION STEPS**

a. Seek public-private partnerships to provide non-traditional opportunities for outdoor recreation businesses, leverage outdoor recreation infrastructure investments and assist state agencies in cost-effectively delivering outdoor recreation experiences across the state.

b. Establish a new loan investor program or more fully equip existing programs that provide gap financing for entrepreneurs developing businesses and products based upon the state’s outdoor recreation assets.

c. Replicate the PA Wilds Small Business Ombudsman model in other places in the state to support small business development around outdoor recreation assets.

d. Continue the First Industries Loan Fund for Tourism to support tourism-related businesses that dovetail with outdoor recreation assets and assist continued expansion of the outdoor recreation industry sector in the state.

4. Use new and existing research to document the economic benefits of outdoor recreation, heritage tourism and land conservation.

**ACTION STEPS**

a. Produce a broad, statewide analysis on the benefits and economic impact of all types of recreational trails including rail trails, hiking trails, water trails, mountain biking trails, equestrian trails and motorized trails.

b. Work with the outdoor recreation industry to produce a statewide assessment of the economic impact of outdoor recreation and outdoor recreation-based businesses on the state’s economy and publicize the results with key stakeholders.

c. Through a collaborative effort among agencies and partners with an outdoor recreation interest, publish a report every three years that aggregates and documents economic impact data and case studies for outdoor recreation.

d. Undertake a targeted return-on-investment study around a few specific outdoor recreation infrastructure investments (e.g. Elk Country Visitor Center, critical trail links) to document resulting business development activity and direct economic impact.
# Tourism And Economic Development: Creating Opportunities for Community Prosperity

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<td>b. Establish a state agency workgroup to more cohesively promote outdoor recreation and heritage tourism.</td>
<td>DCNR, PFBC, PGC, PHMC, PDA, DCED, Heritage Areas</td>
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<td>c. Work with tourism partners to develop itineraries and travel packages that target the outdoor recreation product and experiences.</td>
<td>TPAs, CVBs, PATT, PTP, PDC, Heritage Areas</td>
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<td>d. Actively market and promote hunting, fishing and recreational shooting opportunities and events to further engage all audiences in these traditional activities.</td>
<td>PGC, PFBC, NWTF, TU, PFSC, TPAs, Sportsmen’s Organizations</td>
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<td>e. Obtain a major sponsor to fund a statewide marketing effort promoting Get Outdoors PA to prospective community partners, program providers and the public at large.</td>
<td>Get Outdoors PA Flagship Partners</td>
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<td>f. Identify gaps and issues with current wayfinding signage for outdoor recreation and heritage destinations, and make recommendations to PennDOT and State Signing Trust.</td>
<td>PennDOT, State Signing Trust, Heritage Areas, DCNR, DCED, PHMC, TPAs, RPOs, MPOs</td>
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<td>g. Republish the statewide PA Outdoor Adventure Guide bi-annually.</td>
<td>DCED, DCNR, PFBC, PGC</td>
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<td>a. Continue the development of the Nature-based Placemaking Program (e.g. trail towns, river towns, gateway communities, etc.), and pilot community projects to provide technical assistance, training, mentoring and information resources and exchange for local government and business leaders.</td>
<td>PDC, DCNR, PPFF, PHMC, PEC, SGP, Heritage Areas, Conservation Landscapes, Progress Fund Trail Towns Program</td>
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<td>b. Work with tourism partners and chambers of commerce to hold at least one meeting per region per year that focuses on the value of the outdoor recreation economy and ways to encourage growth in this industry sector.</td>
<td>DCED, TPAs, DCNR, PPFF, PTP, PATT, PDC, Heritage Areas</td>
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<td>c. Place case studies, economic data and other resources on agency and partner websites.</td>
<td>DCED, PGC, PFBC, DCNR, PDC, PALTA, Heritage Areas, Conservation Landscapes, County and Regional Economic Development Agencies</td>
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<td>d. Develop a short video on model initiatives as a tool for building greater awareness on economic benefits to communities.</td>
<td>DCNR, PGC, PFBC, DCED, PDC</td>
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### Recommendations and Action Steps

#### 3. Increase access to business development resources and incentives for small tourism and outdoor recreation businesses and entrepreneurs.

<table>
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<tr>
<td>a. Seek public-private partnerships to provide non-traditional opportunities for outdoor recreation businesses, leverage outdoor recreation infrastructure investments and assist state agencies in cost-effectively delivering outdoor recreation experiences across the state.</td>
<td>DCED, DCNR, PDC</td>
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<td>b. Establish a new loan investor program or more fully equip existing programs that provide gap financing for entrepreneurs developing businesses and products based upon the state’s outdoor recreation assets.</td>
<td>DCED, LDDs, RPOs, IDAs, Progress Fund</td>
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<td>c. Replicate the PA Wilds Small Business Ombudsman model in other places in the state to support small business development around outdoor recreation assets.</td>
<td>Conservation Landscapes, Heritage Areas, DCED</td>
</tr>
<tr>
<td>d. Continue the First Industries Loan Fund for Tourism to support tourism-related businesses that dovetail with outdoor recreation assets and assist continued expansion of the outdoor recreation industry sector in the state.</td>
<td>DCED</td>
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#### 4. Use new and existing research to document the economic benefits of outdoor recreation, heritage tourism and land conservation.

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<td>a. Produce a broad, statewide analysis on the benefits and economic impact of all types of recreational trails including rail trails, hiking trails, water trails, mountain biking trails, equestrian trails and motorized trails.</td>
<td>PA Trails Advisory Committee, Trail Stakeholder Organizations</td>
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<td>b. Work with the outdoor recreation industry to produce a statewide assessment of the economic impact of outdoor recreation and outdoor recreation-based businesses on the state’s economy and publicize the results with key stakeholders.</td>
<td>PTP, DCNR, DCED</td>
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<td>c. Through a collaborative effort among agencies and partners with an outdoor recreation interest, publish a report every three years that aggregates and documents economic impact data and case studies for outdoor recreation.</td>
<td>DCNR, PFBC, PGC, DCED, USFWS, NPS, ANF</td>
</tr>
<tr>
<td>d. Undertake a targeted return-on-investment study around a few specific outdoor recreation infrastructure investments (e.g. Elk Country Visitor Center, critical trail links) to document resulting business development activity and direct economic impact.</td>
<td>DCNR, DCED, PDC</td>
</tr>
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