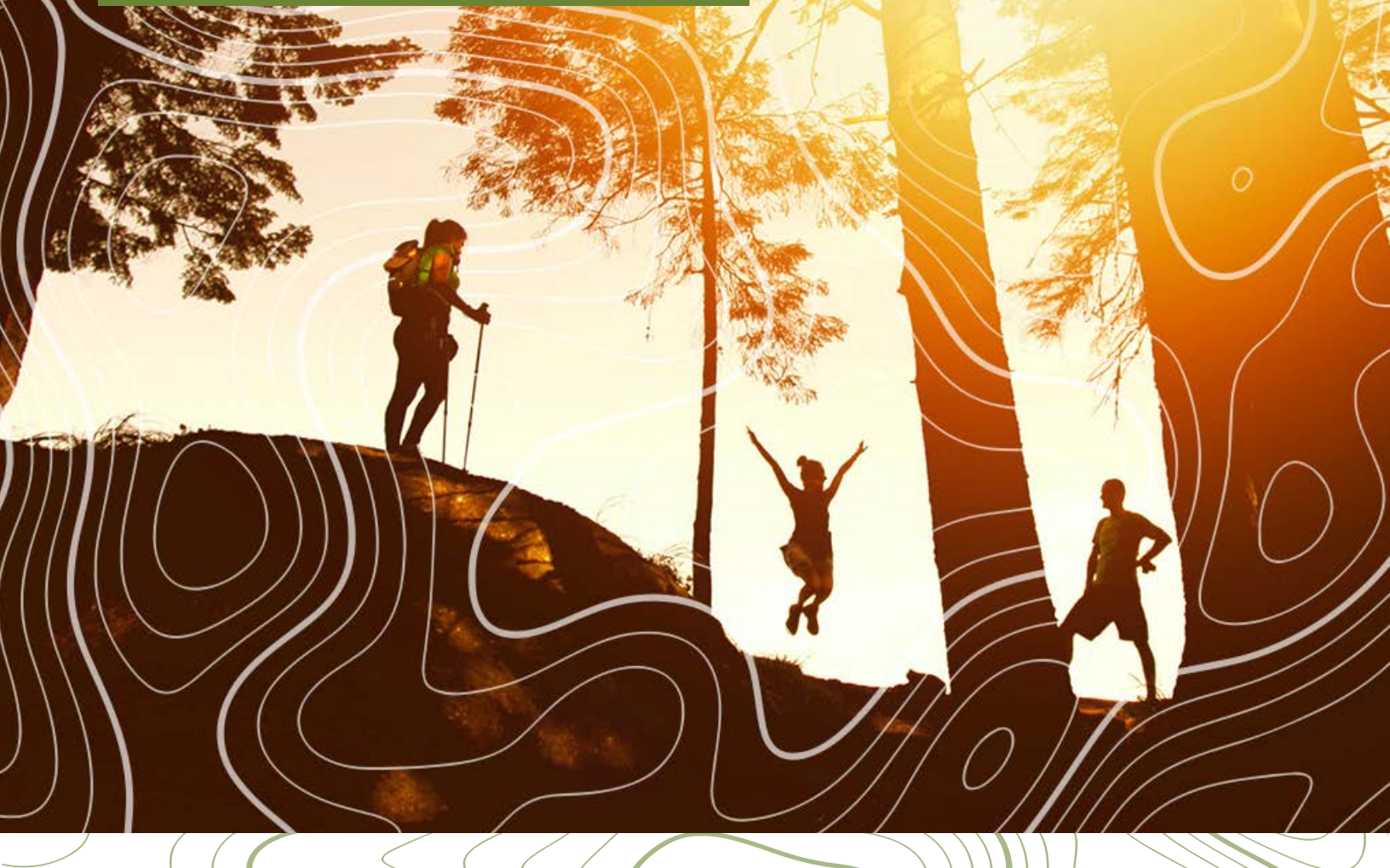


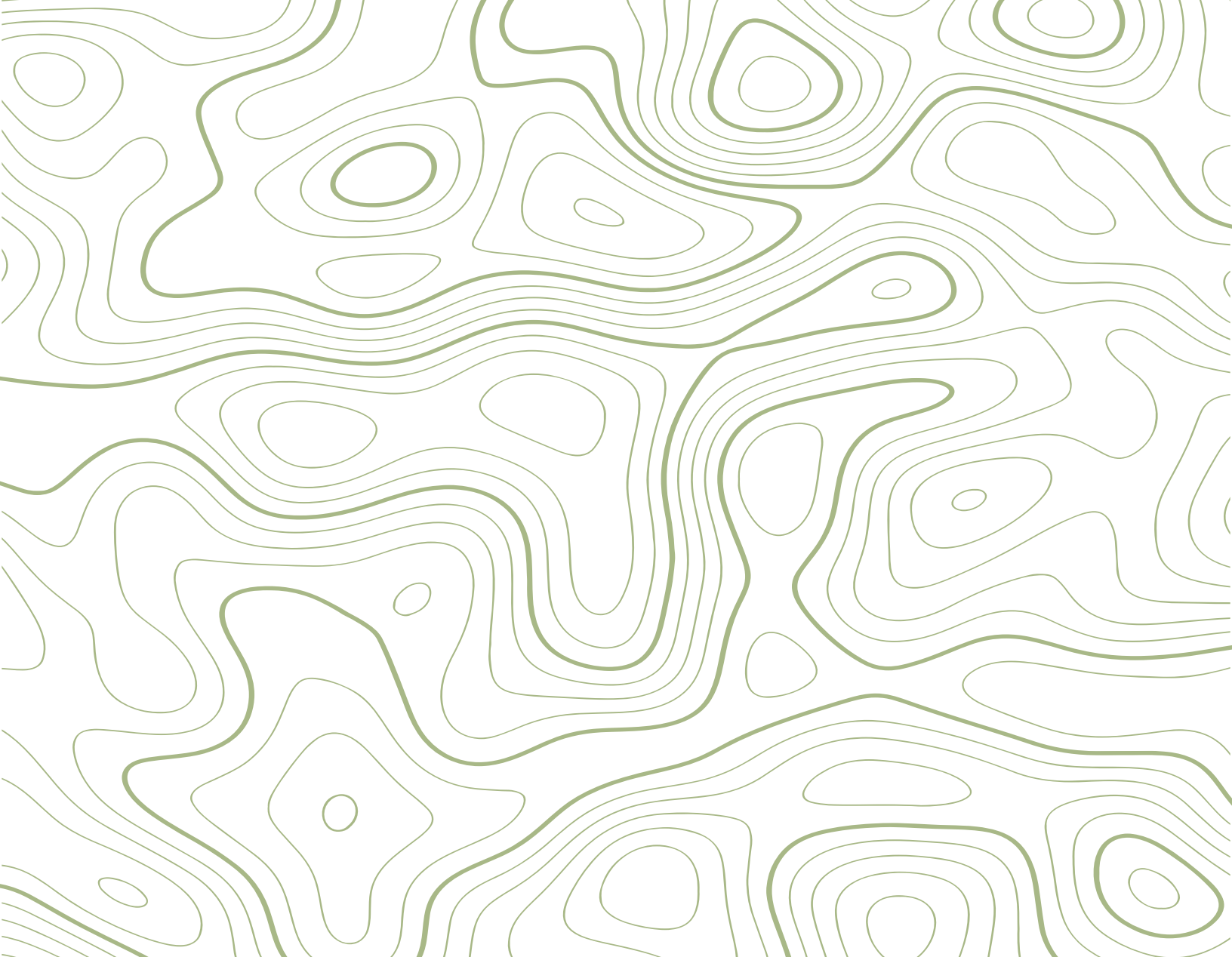
From Rust Belt to Rec Belt

Growing the Outdoor
Recreation Economy in
North Central Appalachia



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Fourth Economy designed and supported the development of this publication for the Pennsylvania Environmental Council.

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Prioritizing Outdoor Economy Development as a Key Economic Strategy

By Jerry Paytas, Ph.D., and Nicole Muisse-Kielkucki, Fourth Economy

Our interest in the outdoor recreation sector – as a foundation on which to build economic and community development – has blossomed since conducting our first outdoor economy project in 2014. There’s increasing demand among leadership in towns, regions, and states looking to activate local outdoor assets to realize economic growth, generate new tourism, catalyze entrepreneurship, and bring and retain talent and new businesses to their communities. Given the industry’s value as an economic generator, and the benefits it provides for the health and wellbeing of both people and places we’ve seen growing interest from clients in this emerging sector.

Our recent work with the Pennsylvania Environmental Council revealed best practices from places around the country that have excelled in building strong outdoor economies. This work also uncovered several trends and challenges to capitalizing on a region’s outdoor recreation and natural assets, including:

- **Opportunities for workforce development** and exposure to a new generation of outdoor enthusiasts
- **Rural activation** and bringing new investment to rural places while supporting the community who is already there
- Ensuring these **resources are shared equitably**, making efforts to attract diverse populations and ensuring they feel empowered to participate in outdoor recreation

These and other topics are explored in the following report and supplemental materials.

Benefits to the Economy

Investing in the outdoor economy stimulates local economic growth and creates jobs. Visitors spend money on lodging, food, and other services, while businesses that provide services, such as outfitters and guides, also contribute to the local economy.

In the United States, the outdoor recreation economy accounted for **\$454 billion of current-dollar gross domestic product (GDP) in 2021**. Nationally the outdoor economy generates nearly \$80 billion annually in tax revenues, split almost evenly between the federal government and state and local governments.

Fourth Economy's 2021 analysis of the Great Allegheny Passage (GAP) Trail found an economic impact of \$800,000 per mile, with more than \$8.7 million (\$58,000 per mile) in annual tax revenues to state, county, and local governments. With maintenance costs of just \$1,000 to \$5,000 per mile, **this asset pays for itself** and distributes benefits to the many rural communities along the GAP.

As for jobs, in the Pittsburgh region there are as many people employed in the outdoor economy as in the IT sector. Our outdoor assets also help attract tech and other workers, who see access to nature and outdoor recreation as critical amenities.

Benefits to People and Places

Given the range in cost and accessibility of outdoor activities, people of all ages, abilities, and socioeconomic backgrounds can participate in outdoor recreation. However, many Americans do not spend time outdoors or experience the benefits of engaging with the natural environment.

The Outdoor Industry Association's 2018 Outdoor Participation Report shows that only **49 percent** of the U.S. population age six and older participated in at least one outdoor activity in 2017. What's more, according to the 2019 Outdoor Participation Report, **fewer than 10 percent** of African Americans participate in outdoor recreation. Many factors contribute to this, including the legacy of who outdoor recreation has historically been available to, representation in outdoor sector occupations, cost of recreation equipment or facility fees, and environmental factors like exposure and access to safe outdoor recreation opportunities. This means many disadvantaged communities are missing out on the health benefits of outdoor recreation. Leveraging groups that promote outdoor activities to beginners, including bike organizations that work to encourage racial diversity, is critical to changing this.



in the Pittsburgh region there are as many people employed in the outdoor economy as in the IT sector.

- **Health benefits:** Investing in the outdoor economy can promote a healthy lifestyle for community members and contributes to overall well-being. Spending time outdoors can improve physical and mental health by providing opportunities for exercise, as well as stress relief, enhanced mood, and reducing symptoms of depression and anxiety.

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- **Quality of Life & Social Connections:** Outdoor recreation can improve quality of life for many, especially seniors, youth, and new community members. Participating in team sports, joining a hiking group, or going camping with friends can expand social circles, strengthen existing relationships, and help to build community.
 - **Environmental Benefits:** The outdoor economy relies on the natural resources found in our parks, forests, and waterways. Investing in the outdoor economy can advance conservation efforts, protect the natural environment, and promote sustainable use of these resources. Exposure to outdoor recreation helps people connect with, and then value nature, wildlife, and the environment. Outdoor activities help individuals appreciate ecosystems and natural resources, and foster a deeper stewardship of the natural world.

Conclusion

If your community is looking to make investments in the outdoor economy, it's important to start with proactive planning and robust public engagement, so that all community members see themselves in the vision that is established, and can be co-creators of that future. Fourth Economy has developed strategic planning around the outdoor economy as an emerging practice, and is excited to work with communities who are ready to leverage outdoor recreation for robust economic and community development.



Executive Summary



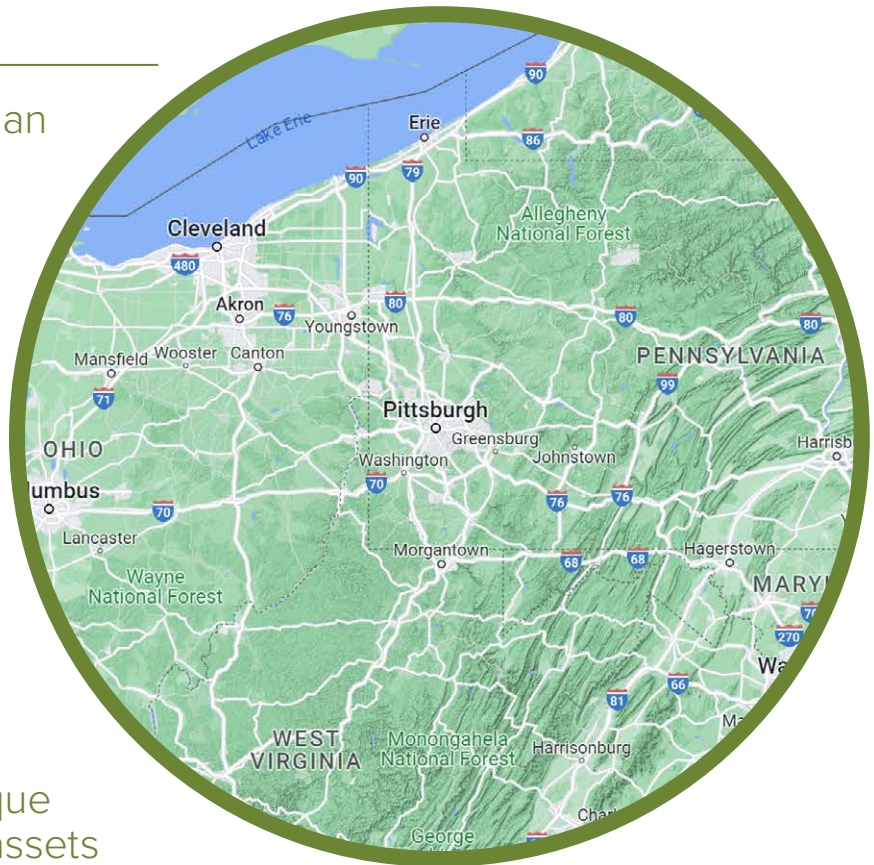
Executive Summary

The North Central Appalachian Rec Belt is the region within a 3-hour drive time of the Pittsburgh International Airport, which includes 11.5 million people in Pennsylvania, Ohio, and West Virginia, as well as smaller portions of Maryland and New York. The region boasts a strong outdoor economy, with a location that is conveniently accessed by or in close proximity to much of the nation's population, and unique topographical and physical assets that make the outdoors in this region truly special to visitors and locals alike.

The region also has a concentration of people, organizations, and funders working to support and bolster outdoor recreation. Plentiful opportunities exist for the region to:

- develop and highlight specializations (such as biking, hiking, water sports, astrotourism, hunting, and fishing),
- promote and activate outdoor assets for greater accessibility, advance diversity, equity and inclusion in the outdoors,
- collaborate on building connected infrastructure, and
- communicate the impacts of the outdoor economy in a unified voice.

However, these opportunities can only be acted upon through a concerted effort of stakeholders working together to achieve these goals.



Outdoor recreation offers the opportunity to drive economic benefits and community improvements, including job creation, small business development, tourism spending, talent attraction and retention, and societal values like improved physical health and mental wellbeing. The region's rural and formerly industrial areas in particular, which have greater obstacles to economic growth and development, stand to benefit through a collaborative model that has been deployed in several of the case studies investigated for this report. However, actualizing this opportunity also requires coordination among entities that are often siloed, such as chambers of commerce and main street organizations, and parks and recreation departments and outdoor advocacy groups.

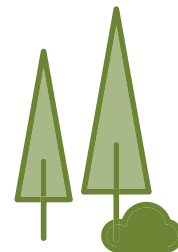
Recommendations to advance the regional outdoor economy for broad economic and social benefit were developed with input from local stakeholder interviews, data analysis, and case study review, and fall into four major categories:

Leveraging Regional Strengths

- Advocate for the outdoor economy as a key driver of economic development, workforce, public health, education, and other related sectors.
- Provide support for local outdoor economy businesses and entrepreneurship as part of the broader ecosystem.
- Elevate the hospitality experience and visitor readiness, particularly in the context of rural activation, through training and awareness-building.

Enhancing the Regional Profile

Invest in improved multimodal regional access and linkages between outdoor recreation opportunities, like mountain biking destinations.



Expanding Audience and Accessibility

Ensure that regional outdoor recreation is welcoming to and utilized by new and diverse audiences through promotion and programming.

Building Connectivity of the Outdoor Economy

Coordinate priorities, agendas, marketing, and fundraising among and across different entities and destinations to promote outdoor recreation and create a regional identity.

By pursuing these recommendations, stakeholders can help the region achieve the vision of cultivating a thriving regional outdoor economy that is known nationwide and enjoyed by both visitors and all who call the region home.

These recommendations elevate a few key goals – supporting the region's current outdoor recreation components; investing in key areas for improvement; and coordinating together to promote the sector overall, in order to drive tourism, increase the local user base, create opportunities for economic development, and generate improved quality of life for all.

Intro / About the Project

Motivated in part by an interest in how Bentonville, Arkansas – a city of just over 50,000 people nestled in the Ozark Mountains – built a globally-known cycling culture, the Pennsylvania Environmental Council partnered with Fourth Economy Consulting in 2022 to investigate what it would take to do something similar in the North Central Appalachian region in order to increase development and promotion of our world class outdoor economy. How could the area take better advantage of its outdoor recreation assets – like the abundance of world class biking, hiking, sportsmanship, and water sport activities in the region’s plentiful state and national parks, forests, and gamelands? How could it enhance its supporting infrastructure – such as the supporting organizations that fund and program these amenities. How can it leverage the Pittsburgh International Airport as the anchor and gateway into the region?

The region already has a strong base to build from. In 2019, pre-pandemic, Pittsburgh had 33 million visitors and \$6.5 billion in tourism spending, and Pittsburgh International Airport saw almost 5 million passengers. Known as a sports town, the Metropolitan Statistical Area (MSA) also boasts a diverse mix of urban and rural amenities, and a strong reputation and recognition that drives visits to the region. The region’s universities, in particular, promote diversity and generate important traffic to the area, including youth and talent.

This report offers recommendations for leveraging these strengths to promote the outdoor economy as an asset and driver of tourism, economic development, and a high quality of life for residents, while also building up the sector by investing in key areas for improvement. These recommendations were derived through an assessment of the region’s current outdoor economy, data analysis, desktop research, and interviews with regional stakeholders, as well as a deep dive into comparable, case study communities to pull out promising practices from other strong outdoor economies throughout the country.

Despite Pittsburgh’s strong tourism numbers and visitor spending performance, which is on par with MSAs like Denver and D.C., the region lags behind some of its peers in terms of population growth and employment in the Arts, Entertainment, and Recreation Industries. While past efforts to attract and retain young talent have yet to influence these economic indicators, stakeholders hope to improve these population and employment trends by building a strong outdoor recreation economy.



Community Comparison

MSA	Pittsburgh	Bentonville	Duluth	Chattanooga	Flagstaff	Denver	DC
Population (2021)	2,324,447	546,725	289,276	561,055	142,254	2,928,437	6,250,309
Pop. Growth (2010-20)	0.62%	24.2%	0.34%	6.53%	8%	16.5%	13%
Density (ppl per sq mi)	446	213	28	272	8	356	968
Geography	5,283 sq mi across 7 counties	2,623 sq mi across 3 counties	10,522.7 sq mi across 4 counties and 2 states	2,088.8 sq mi across 9 counties and 2 states	18,616 sq mi across 1 county	8,345 sq mi across 10 counties	6,567.7 square miles over 2 states and the capital
Biome	Temperate Forest	Temperate Forest	Temperate Forest	Temperate Forest	Desert, Temperate Sierras	Forest Mountains, Great Plains	Temperate Forest
Median Household Income 2020	\$61,969	\$61,761	\$58,729	\$54,42	\$59,000	\$83,289	\$106,415
Sector Employment and % of Total 2021	20,692 / 1.79%	3,434 / 1.35%	3,593 / 2.55%	4,972 / 1.87%	2,404 / 3.64%	40.226 / 2.52%	68,951 / 2.06%
Visitors/yr 2019	33M	650K	6.7M	3M	6M	31.7M	19.1M
Tourism Spend (2019)	\$6.5B	\$548M	\$780M	\$1.5B	\$90M	\$6.6B	\$5.4B
Airport Annual Passengers 2019*	6.4M (2021)	1.2M (2021)	130K (2021)	1M (2019)	125K (2018)	59M (2021)	47.5M (2018)

*Note - 2019 airport passenger numbers were used to provide a more accurate comparison, as this gives a snapshot of the environment before the COVID-19 pandemic. Traffic at these airports has recovered, to varying degrees, as of spring 2023..

Defining the Outdoor Economy - Vision / Goals

The Bureau of Economic Analysis offers a straightforward yet poetic definition of the outdoor economy that it uses in its Outdoor Recreation Satellite Account:

“All recreational activities undertaken for pleasure that occur outdoors”

- Bureau of Economic Analysis

Building on that, this report defines the outdoor economy as the goods, services, and facilities related to outdoor recreation, but also the complimentary restaurants, retail, and other establishments that cater to outdoor recreationists or enhance their overall experience of the outdoor recreation landscape.

For data analysis, we use the following industry codes to compare the size and scope of the outdoor economy in this region against benchmark MSAs (note - these industries do not encompass the more expansive and inclusive outdoor economy definition described above and used for qualitative analysis, but provide good metrics to compare MSAs against one another):

NAICS CODE(s)	Industry Title
487110, 210, 990	Scenic and Sightseeing Transportation, Land, Water, Other
481219	Non Scheduled Air Transportation
712100	Museums, Historical Sites, and Similar Institutions
713100	Amusement Parks and Arcades
713990	Other Amusement and Recreation Industries
721100	Traveler Accommodation
721200	RV (Recreational Vehicle) Parks and Recreational Camps
711200	Spectator Sports
711300	Promoters of Performing Arts, Sports, and Similar Events
561500	Travel Arrangement and Reservation Services

Note: full list of industries used in data analysis available in the appendix

Historically, the region's outdoor economy has been defined largely by hunting, fishing, ATV/UTV, and wildlife viewing. More recently, it has grown to include a broader definition across business sectors and recreational activities, including physical activities like hiking, biking, skiing, and paddling, and more passive activities like picnicking, beverage and artisanal trails, and more. The community is beginning to think about its outdoor economy as the provision of experiences (eg. guides), supplies (eg. equipment for rent or purchase), design/manufacturing, and professional services (eg. legal services, accounting, workforce development).

The vision is to cultivate a thriving regional outdoor economy that is known nationwide and enjoyed by both visitors and all who call the region home.

Stakeholders can achieve that vision by pursuing a few key goals:

- Collaborating to enhance the region's current outdoor recreation amenities (e.g., adding programming, supporting local entrepreneurship and complimentary businesses)
- Coordinating investments in key areas for improvement (e.g., shared use facilities, multimodal connectivity between assets)
- Creating a unified regional identity and promoting the sector overall to drive tourism, increase the local user base, create opportunities for economic development, and generate improved quality of life for all





Case Studies

In order to evaluate the potential of creating an outdoor adventure hub centered in North Central Appalachia, we began by studying communities across the country that are recognized as outdoor recreation destinations.

We did this by performing a demographic and economic analysis of several communities, in order to assess the alignment between the presence of outdoor assets, the population, and regional growth, as well as how those compare and contrast with the Pittsburgh region. We used this analysis to select six communities to study further – Bentonville, Arkansas; Chattanooga, Tennessee; Denver, Colorado; Duluth, Minnesota; Flagstaff, Arizona; and Washington, D.C..

For these case studies, we compiled desktop research and conducted interviews with individuals engaged in the outdoor sector, in order to identify the drivers of support for these outdoor economies, lessons learned along the way, and how they have achieved their level of impact.

What follows are profiles that document the key components of each community's outdoor economy and the funding mechanisms, policies, and partnerships that support them.



Bentonville, AR

Located in the Ozark Mountains and home to Walmart World Headquarters, Bentonville also offers a small downtown area with cultural amenities, including galleries, museums, award-winning restaurants, and breweries. Just one block away from its downtown center, the region's nationally recognized outdoor landscape begins. Bentonville's outdoor recreational opportunities take advantage of all four seasons and varied terrain. Bentonville's outdoor recreation economy is relatively niche, centered around mountain biking.

Population: 546,725

Visitors/year: 33M

Tourism spend: \$548M

Employment in sector: 3,434 (1.35% of total employment)

Top Outdoor Natural Attractions/Assets:

Ozark Mountains, local lakes and streams (Beaver, Bella Vista, Elmdale, and Table Rock), four state parks and national forest¹

Outdoor Rec Specialization:

Mountain biking

Top Outdoor Rec Activities:

Mountain biking, rock climbing, swimming, fishing, boating, hiking, and camping



Location Features

Bike Trails: Bentonville offers a variety of trails – including gravel, single track, steep, technical climbs, and on-road routes. They cover diverse terrain near the downtown center and more remote locations. Examples include Slaughter Pen, Blowing Springs, Back 40, and Little Sugar Trail.

Water Activities: Local and regional lakes – such as Beaver, Bella Vista, Elmdale, and Table Rock – provide a variety of recreational opportunities, including swimming, fishing, kayaking, boating, and camping.²

Parks: Of Bentonville's 16 parks, Orchard and Osage are among the most popular and feature wetlands, boardwalk, archery range, and more.

Unique Regional Features

Among its music and entertainment amenities, Forest Concert Series brings national and local musics together around an outdoor concert stage surrounded by forest. The city also promotes motorcycling, for example, through its “Bentonville Ride Guide”. Bentonville's public art program, Art Along the Trails, is Bentonville's public art program, which features 100 installations that can be seen by bicycle. The city's four large “Bike Towers”, designed using discarded bike parts, are particularly popular.³



Key Findings

Funding

- The City of Bentonville Advertising & Promotion Tax (referred to as the ‘hospitality’ tax) comprises a 2% hotel and accommodation tax and a 1% prepared food tax. In 2022, the A&P Tax totalled \$2.5M.
- Walton Family Foundation has invested more than \$70M into the region's trail system.
- Bike Bentonville was absorbed by the City of Bentonville and the city's tourism bureau, Visit Bentonville, to utilize tax base resources for trail growth and development, youth development, education, advocacy and outreach, events, and programming.

Impact

- Northwest Arkansas reports higher daily cyclist trail use than bike-friendly areas like San Francisco and more pedestrians per capita using trails than heavily populated areas like San Diego County.
- Trails and paved paths are being used for both practical and recreational use, with the highest levels of use by cyclists and pedestrians being in densely populated and low-to-medium income areas.⁴
- More than 90,000 mountain bike tourists visited the region in 2017, spending \$27 million at local businesses. Locals reported spending more than \$21 million on bicycling goods and events during that same period.

Lessons Learned for North Central Appalachia

Create concerted, coordinated efforts to carve a niche across a variety of stakeholders in order to raise a national/global awareness to an area that might not otherwise be known for its outdoor economy.

Biking and trails is what began Bentonville's rise on the outdoor recreation scene, and still remains a cornerstone of their outdoor economy offering. Bike Bentonville was established in 2009 as a nonprofit with the mission of creating a bicycle and multisport friendly community. In 2015, the organization was absorbed by the City of Bentonville and the city's tourism bureau, Visit Bentonville, to utilize the tax base resources afforded to these municipal organizations.

Capitalizing on their trail system, in 2020 Bentonville declared themselves the Mountain Biking Capital of the World. When Bentonville began investing in bike trails, they had one bike shop in town. The investment in the bike trails led to similar growth in related or adjacent fields; for example, there are now nine sustainable bike shops in the City. Similarly, there used to be two tour guide companies in town, and now there are more than a dozen. These associated assets are able to cross-promote and uplift each other.

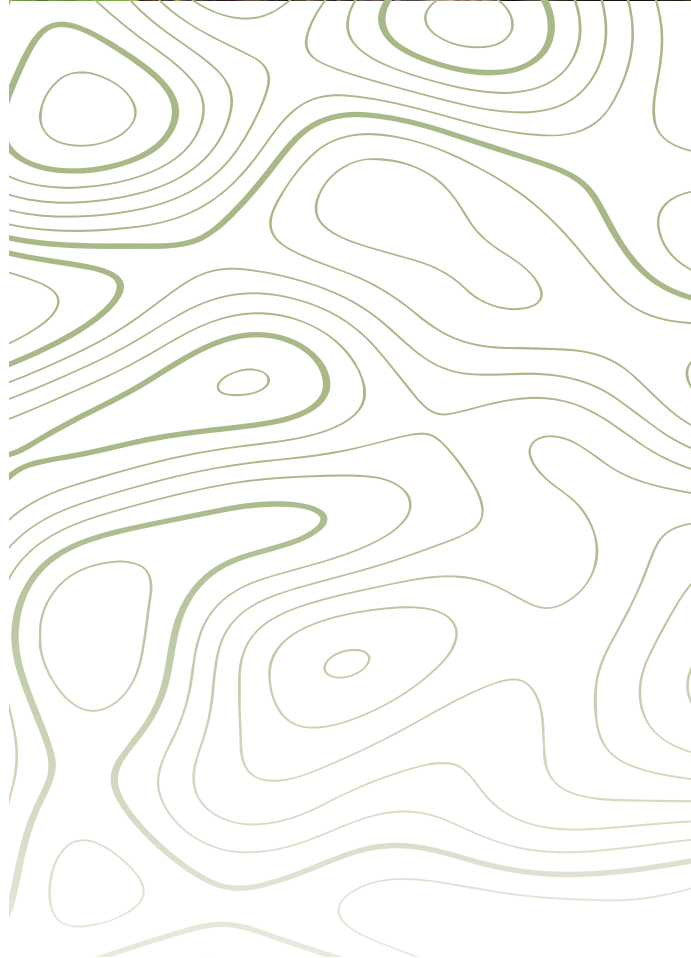
The mission of Bike Bentonville has been enhanced by its new partners who work to increase production of cycling events and programming while adding permanent cycling amenities to be enjoyed by locals and visitors alike. It is important to note that while biking may be what Bentonville is known for, it also has a diverse array of other offerings – including museums, climbing attractions, and local parks — which only adds depth to their specialization approach.

Emphasize research around impact and communicating potential Return-On-Investment (ROI) in order to help drive collaboration, coordination, and support.

The Walton Family Foundation researches and emphasizes direct and indirect benefits of bicycling to the community, going beyond visitor and local spending but also calculating health benefits and savings, and other social and quality of life measures.

For example, Northwest Arkansas reports higher daily cyclist trail use than bike-friendly areas like San Francisco and more pedestrians per capita using trails than heavily populated areas like San Diego County. More than 90,000 mountain bike tourists visited the region in 2017, spending \$27 million at local businesses. Locals reported spending more than \$21 million on bicycling goods and events during that same period. The Walton Family Foundation has partnered with PeopleForBikes to offer resource templates free of charge to cities and regions interested in measuring the economic benefits of cycling in a standardized way. The templates will be available through PeopleForBikes later in 2023.

This specific data-oriented approach to understanding the broader benefits of bicycling is something that could be replicated in the North Central Appalachian Outdoor Rec Belt region.



Chattanooga, TN

Chattanooga stands out as a city of transformation. In 1969, the city had the dirtiest air in the country according to the federal government.⁵ After concerted cleanup and investment, it's now known as a top place to live and visit. Recent accolades include "Best Town Ever" (Outside Magazine), "Top 45 Places to Go in the World" (the New York Times), and "Best in the U.S." and "10 U.S. Destinations You Need to See" (Lonely Planet). Chattanooga's now vibrant downtown scene, which incorporates its riverfront into its identity and offerings, complements its more robust outdoor recreational assets which begin just 15 minutes from city-center.⁶

Population: 561,055

Visitors/year: 3M

Tourism spend: \$1.5B

Employment in sector: 4,972 (1.87% of total employment)

Top Outdoor Natural Attractions/Assets:

Divided by the Tennessee River, Chattanooga is between the Appalachian Mountains and the Cumberland Plateau.

Top Outdoor Rec Activities: Running, biking, water recreation, camping, hang gliding, cultural and historic amenities



Location Features

Hiking & Trail Running: With 100 miles of trails within its parks, greenways, and natural areas, Chattanooga also has more than 150 miles of hiking trails within a 15-minute drive of downtown. The 16-mile paved Chattanooga Riverwalk connects nature, culture, and cuisine. It offers accessibility and variety, with scenic sections like Bluff View Art District and attractions like Hunter Museum of American Art. Outdoor amenities along the riverwalk include picnic tables, shelters, playgrounds, boat launches, fishing piers, and connections to greenways.

Climbing & Caving: Sandstone cliffs and boulders surround the city and the woods have immense boulder fields. With more rock to climb within a 25-mile radius of Chattanooga than Boulder, Colorado, the region's landscape offers hundreds of routes for bouldering, top roping, sports climbing, and traditional climbing. Popular locations include: Stone Fort, which is part of the Triple Crown Bouldering Series, Rocktown, and Sunset Rock. The city has three climbing gyms, including High Point Climbing, which has more than 30,000 sq ft of indoor and outdoor climbing.⁷ With over 7,000 caves within an hour's drive of Chattanooga, this is another unique offering of the area.

Key Findings

Partnerships

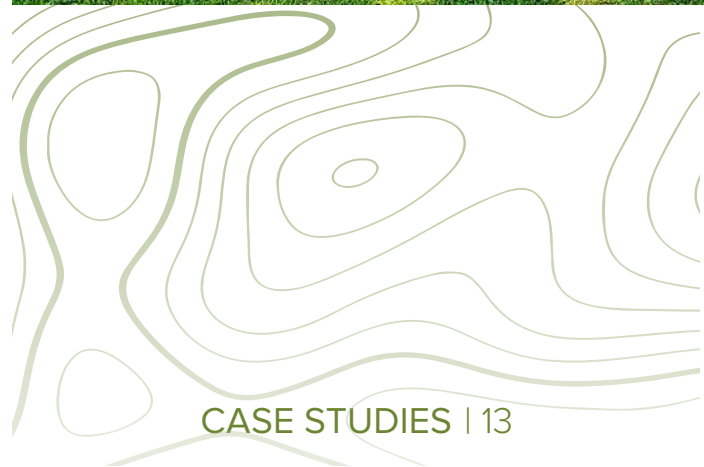
Chattanooga has cultivated collaboration efforts among multiple chambers of commerce organizations, healthcare, and educational institutions, exemplifying cross-jurisdictional coordination efforts. Lyndhurst Foundation's Conservation and Physical Health Program promotes active living and physical health through outdoor rec, in addition to protecting natural resources. The University of Tennessee Chattanooga has its Sport, Outdoor Recreation, and Tourism Management (SORT) program which, beyond coursework, encourages its students to take full advantage of Chattanooga's premier outdoor destination attractions and event calendar through experiential learning courses. The program consists of two pre-internship field experience courses, as well as one mandatory internship.

Chattanooga has a strong partner in the **Thrive Regional Partnership's** "Natural Treasures Alliance," a collective of organizations and individuals that ensures a legacy of the region's landscape, including its natural, scenic, and nature-based cultural and recreational assets, as well as the places that sustain people across the region with wholesome food, renewable forests, clean air, and freshwater." The 2020 Regional Outdoor Recreation Survey by Thrive Regional Partnership provides valuable information about outdoor recreation in the tri-state region. "Conducted just before the COVID-19 pandemic, a survey of 632 recreationists across the tri-state region... indicates that recreationists desire to explore the less-traveled corners and communities of our Appalachian landscape." The survey identified where respondents recreate vs. where they would like to recreate by region and county, most popular outdoor activities, group composition, time spent outside, and expenditures.

Unique Regional Features

1 of 6 U.S. cities chosen to take part in a new 2022 Park Equity Accelerator with the Trust for Public Land. As part of this program, Chattanooga will field-test policy and innovation ideas over 12-15 months. The Trust for Public Land will use the findings to scale the model to additional cities.

Huemans Outdoors, an inclusive, beginner-friendly, outdoor program aims to connect underserved youth and families in Chattanooga with the therapeutic benefits of nature.





Lessons Learned for the North Central Appalachia

Focus on regionality by highlighting and promoting all of the region's specialties.

Chattanooga's marketing positions the city as a hub with multiple spokes to explore, demonstrating the diversity and quality of activities that are available throughout the region. For example, Outdoor Chattanooga, a division of City Parks and Outdoor Department that is supported by a 501(c)3, publishes a resource guide for each category of outdoor recreation that it offers, including descriptions of specific activity types related suppliers (equipment, rentals), tours, community organizations, tips/guides for recreationalists, and related programming, all in a centralized resource.

Leverage outdoor recreation as a key component of environmental revitalization.

Known as having among the worst air quality in the country in the 1960s, Chattanooga is now a destination welcoming both new residents and visitors, in part due to its robust outdoor economy, which starts at the city's center and expands outward. The North Central Appalachian Rec Belt region, which is also known for its industrial past and challenges faced from that economic transition, can learn from Chattanooga's emphasis on outdoor recreation as a catalyst for progress and revitalization.

Strong partnerships with the economic development community can help bolster tourism efforts.

For example, The Southeast Tennessee Tourism Association launched #AdventureSmartTN, an educational campaign coordinated with the Cleveland/Bradley Chamber of Commerce, the Polk County Chamber, and the Meigs County Chamber. With a mission to promote trail and water safety, packing out trash, and advance planning for families to enjoy the outdoors. Locally in the North Central Appalachian Rec Belt region, the Warren County Chamber of Business and Industry is a strong example of a Chamber of Commerce taking a unique leadership role in outdoor recreation, and there may be opportunity to promote this strategy across the entire tri-state region.

Denver, CO

Dubbed the “Mile High City” due its state capital building sitting exactly 5,280 feet above sea level, Denver is located on high rolling plains 12 miles east of the “foothills” which is an area of mountainous transition climbing between about 6,000 to 11,000 feet that segways in to the “Front Range of the Rocky Mountains,” a series of peaks reaching 14,000 feet. From Denver, there are 200 visible named peaks, but the area boasts more than 1,000 peaks in total.

Denver has a dry, mild climate with an average of 300 days of sunshine per year. Denver offers urban amenities, with more remote outdoor recreation accessible within less than thirty minutes from downtown.

Population: 2,928,437

Visitors/year: 31.7M

Tourism spend: \$6.6B

Employment in sector: 40,226 (2.52% of total employment)

Top Outdoor Natural Attractions/Assets:

Denver is on the Front Range of the Rocky Mountains.

Outdoor Rec Specialization:

Denver provides a breadth of outdoor recreation opportunities, but skiing and climbing are among its top offerings.



Location Features

Climbing and Repelling: Denver is renowned for its outdoor rock climbing and, according to the Denver Climbing Co., one of the few places that caters to climbers of all experience sets and levels.

Skiing and Snowboarding: Denver features world famous resorts including Breckenridge, Copper Mountain, Keystone, and Vail, Winter Park Resort. Denver has several tour companies that provide transportation and planning for ski, snowboard, and snowshoe adventures.

Other Amenities: Denver boasts wildlife sanctuaries as well as cultural activities, like museums and zoos, and unique experiences in mountain towns, golf, and professional sports.

Key Findings

Workforce

“Colorado’s outdoors are the backbone of the state’s economy. Outdoor recreation is one of the largest employment sectors in the state. 330,000 jobs directly support outdoor recreation in Colorado. 83% are outside Denver metro. About half are on the western slope. As [the state thinks] about the future of our rural economies, outdoor recreation offers enormous opportunity. And not just the ski towns, but towns like Meeker and Craig where people go for hunting and fishing.”⁸

The Colorado Outdoor Recreation Industry Office also touts creating a talent pipeline locally with outdoor recreation economy degrees available at Colorado State universities.

Funding

- **EDA & ARPA:** The state is splitting its approximate \$10M EDA grant between OREC and its tourism office. This grant will support nonprofits, local governments, higher education and tribes.⁹ Approximately \$2 million in ARPA funding will support those negatively impacted by COVID. Unlike the EDA grant, the ARPA funding will support for-profit businesses in addition to nonprofits.¹⁰
- **Regional Grants:** The Colorado Industry Recreation Grant that will run through 2025 is tailored to non-profit organizations, tribes, and higher education institutions. The Colorado Outdoor Industry Impact Fund is specific to for-profit businesses.¹¹
- **Historic Preservation Tax Credit:** Colorado’s Office of Economic Development and International Trade is working with History Colorado to rehabilitate the North London Mine and Mill in Park County to be used by historic preservationists and backcountry huts for back-county enthusiasts, including skiers, snowshoers, cyclists, and hikers.¹²

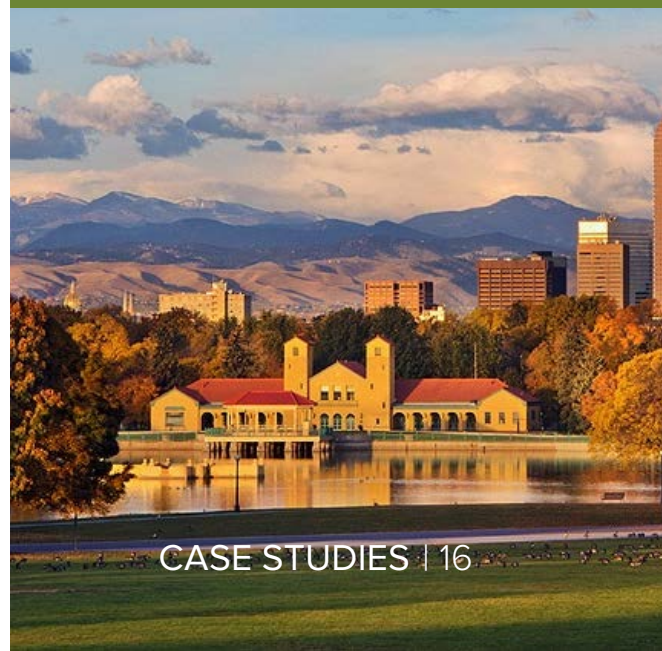
The reuse of coal mines, industrial areas, and other infrastructure pays homage to the economic roots of the region while also activating the outdoor economy. Shifting from mining to outdoor recreation is also a sustainable economic transformation for many of these communities that are looking for their next key economic driver.

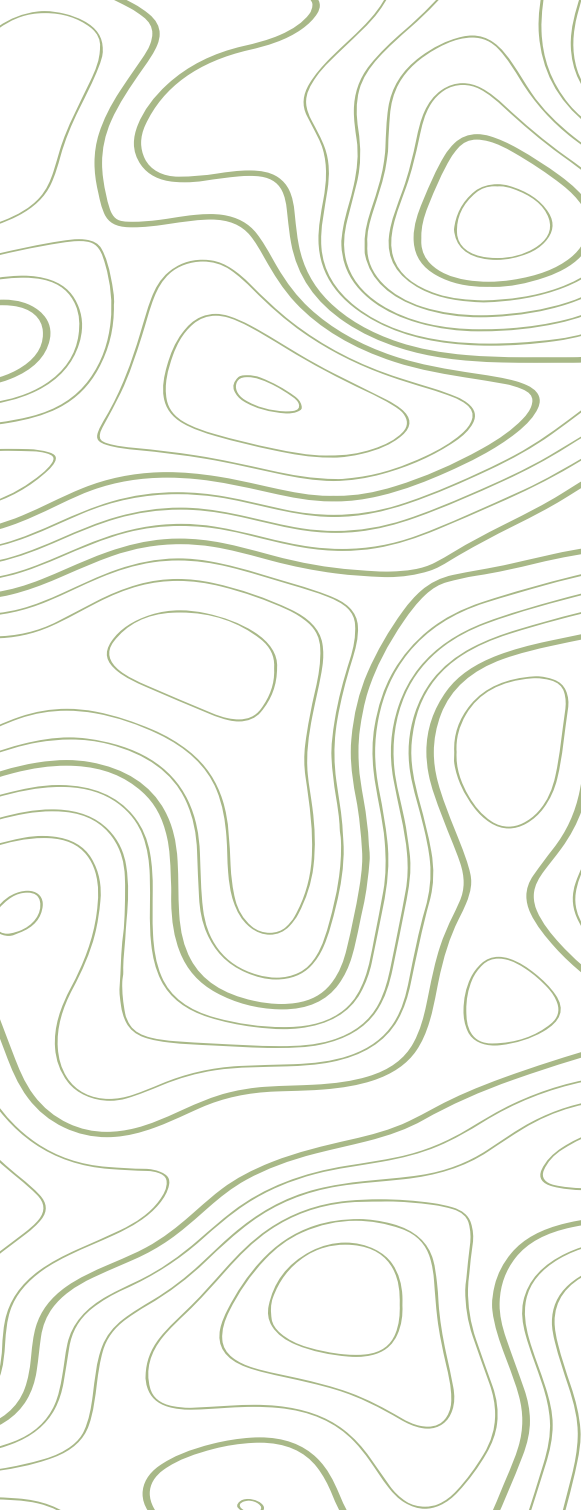
- **Outdoor Equity Grant Program:** Colorado’s Outdoor Equity Grant Program supports opportunities for under-represented youth and their families to access the outdoors. Funded by the Colorado Lottery, the grant was established to provide about \$3M annually.¹³

Unique Regional Features

The Denver area contains City, County, and State parks with hiking, biking, whitewater rafting, fishing, camping, and water sports. Denver boasts wildlife sanctuaries as well as cultural activities, like museums and zoos, and unique experiences in mountain towns, golf, and professional sports.

Besides the large number of state parks, greenways, and promenades located throughout the greater metro area, Denver is also home to a collection of beautiful public parks. The city’s premier park is City Park, a three hundred thirty acre park located close to downtown. City Park is home to the Denver Zoo and the Denver Museum of Nature & Science, and the two lakes within the park bounds provide great opportunities for water recreation during the summer months. Additionally, there are playgrounds, sports fields, and picnic areas.



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Lessons Learned for the North Central Appalachia

Regions benefit from strong, central coordination at the state level and an emphasis on the economic impact of the outdoor recreation industry.

The Colorado Outdoor Recreation Industry Office (OREC) sits under the Department of Colorado Office of Economic Development and International Trade and provides a central point of contact, advocacy, and resources at the state level for the diverse constituents, businesses, and communities that rely on the continued health of the outdoor recreation economy. The second of its kind in the country, OREC started with a focus on attracting businesses and trade shows and transitioned over time to promote conservation and the management of outdoor recreation resources. The state's outdoor recreation industry has seen growth relative to extractive industries like oil and gas, which have historically had the most influence in Colorado's government. Outdoor recreation reached \$52 billion in economic spending in 2022, a larger influence than oil, gas and mining combined.

Seek ways to connect existing assets and areas of relative density to one another, while also concentrating new assets and investments along these connected corridors.

In Denver, biking infrastructure connects multiple bike parks through 196 miles of bike lanes. The High Line Canal, one of the longest urban trails in the county offering 71 miles of mixed surfaces, connects to areas of interest like Red Rocks Amphitheater, among other assets. Additionally a Denver Moves plan is being deployed to increase active transportation within the city and beyond through a larger network of trails.



Duluth, MN

Duluth, a hillside city located along Lake Superior, the world's largest freshwater lake by surface area, is known as a traditional rust belt city that has been transformed into an outdoor recreation and tourist destination. Named the "Best Town Ever" by Outside Magazine in 2014 and designated 1 of only 6 Gold-Level Ride Centers in the world, the city is gaining national attention for its amenities. The Port of Duluth-Superior is North America's farthest-inland freshwater seaport, the Great Lakes' largest port by tonnage, and one of the top 20 in the U.S.¹⁴

While water is a primary component of its outdoor economy, Duluth is made up of a variety of terrain including glacial bedrock, lake shoreline, forested areas, steep hills, and creeks. Supported in large part by its cargo shipping industry, the city is also home to many restaurants, breweries, and retail stores that complement its outdoor economy. Additionally, Duluth's airport is just 2-hours away from the Boundary Waters wilderness area, which spans approximately 1 million acres and attracts around 200,000 visitors annually.

Population: 289,276

Visitors/year: 6.7M

Tourism spend: \$780M

Employment in sector: 3,593 (2.55% of total employment)

Top Outdoor Natural Attractions/Assets:

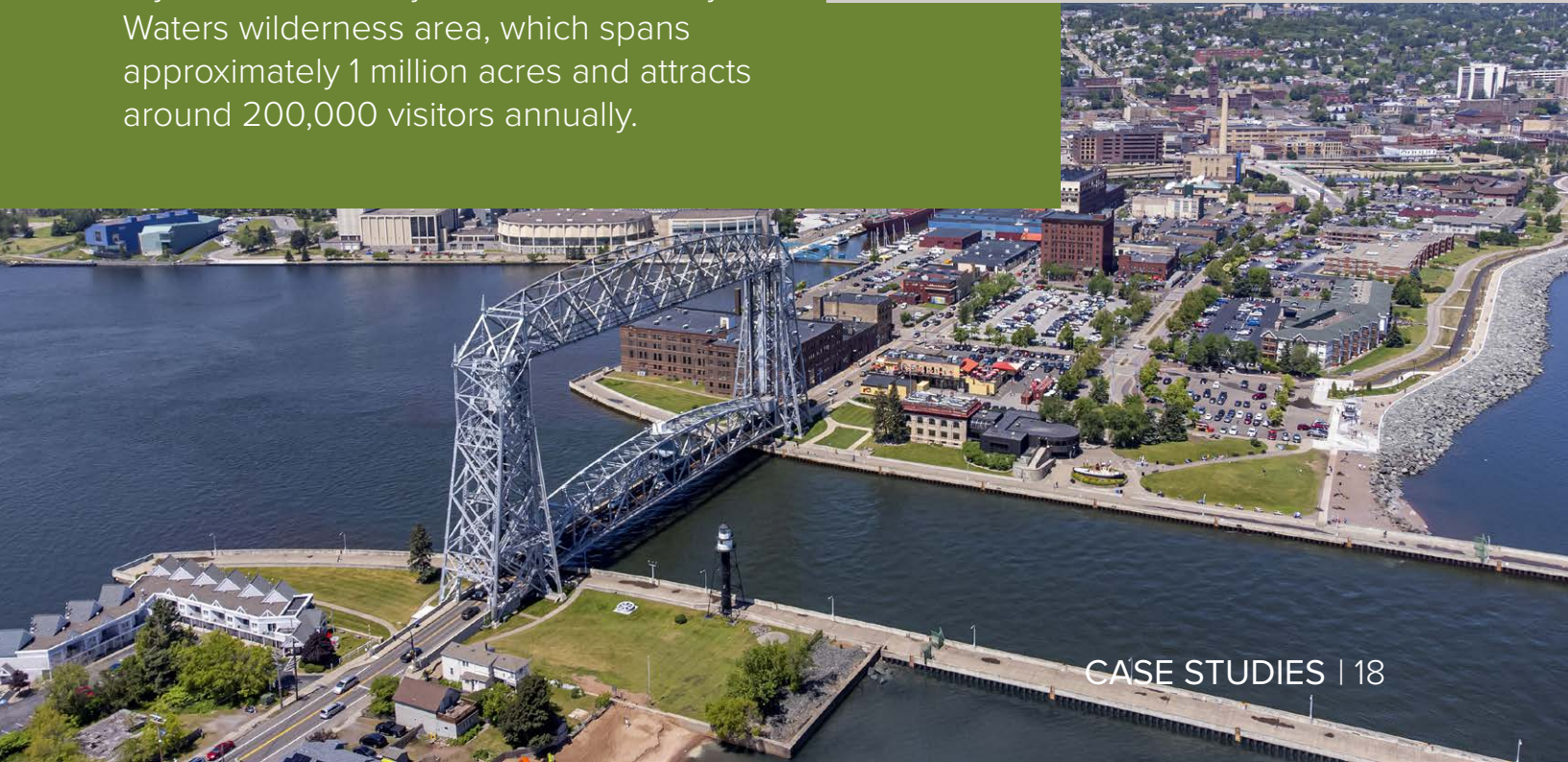
Lake Superior, St. Louis River, Boundary Waters Wilderness Area

Outdoor Rec Specialization:

The 192 mile-long St. Louis River is considered world-class whitewater paddling. Surfing, windsurfing, and kitesurfing are year-round activities, but are particularly popular in early fall and spring when Lake Superior swells are largest.

Top Outdoor Rec Activities:

water recreation, hiking, bicycling, and winter activities



Location Features

Water Recreation: The St. Louis River Estuary National Water Trail is a public, multi-use waterway amidst the urban landscape of the Twin Ports. It is intended for various watercraft uses including boating and fishing, and 11 loop trails for paddlers of all experience levels.¹⁵

Hiking: A 34.5 mile section of the 296-mile Superior Hiking Trail runs through Duluth from Jay Cooke State Park and along the North Shore. A challenging and scenic experience, the hike offers views of Lake Superior, waterfalls, and forests.

Biking: Designated one of only six Gold-Level Ride Centers in the world by the International Mountain Bicycling Association (IMBA), Duluth has more than 90 miles of trails that range in experience level and include smooth flow lines and technical descents.¹⁶ Popular biking locations include Duluth Traverse, a 100-mile long mountain bike trail that spans the length of the city's ridgeline, and Spirit Mountain.

Winter Activities: In addition to its cross-country skiing and snowmobiling, Duluth's Mont du Lac and Spirit Mountain, which has the second largest vertical drop in the Midwest, offer downhill winter sports.¹⁷ Ice climbing sites include Casket Quarry in Duluth, Gooseberry Falls State Park, the Cascade and Devil Track Rivers on the North Shore of Lake Superior and Robinson Park in Sandstone. The John Beargrease Sled Dog Marathon, established in 1980, is a 400-mile event and the longest sled dog race in the lower 48 states. It is a qualifier for the famous Iditarod race in Alaska.

Key Findings

Employment and Spending

Sector Employment: 2.55% of Duluth MSA workers are employed in Arts, Entertainment, and Recreation Industries, compared to 2.08% of workers in all of Minnesota. Duluth's share of employment within Traveler Accommodations is double that of Pittsburgh, though the Museum, Historical Sites, and Similar Institutions share is very similar.

Spending: Duluth's Entertainment and Recreation spending was marked by several specific peak points in 2022. Overall Entertainment and Recreation spending did not change dramatically between 2019 (\$54.5M) and 2022 (\$58.6M), however, annual Travel and Hospitality spending more than doubled between 2022 (\$414.1M) and 2019 (\$154M).

Unique Regional Features

The Lake Superior Railroad Museum was voted the "best transportation museum in America" by USA Today. The Great Lakes Aquarium is located along the Duluth waterfront and is one of only a few aquariums in the U.S. that focuses on freshwater exhibits. Other noteworthy attractions include: Bent Paddle Brewing Company, the Duluth Art Institute, Zeitgeist Center for Arts and Community, the Duluth Depot, and Frost River Trading Company.



Equity

Many outdoor amenities are being built in the western side of the city, which is much more racially diverse and has larger disparities in income, health and education compared to Duluth as a whole. That said, there are barriers, particularly for young residents. Organizations such as Valley Youth Center and Duluth Climbers Coalition are working to reduce these barriers. Similarly, the city is trying to secure funding to increase access to assets such as the Duluth Traverse by buying a mobile mountain bike fleet for public use and providing skills training.

Lessons Learned for the North Central Appalachia

Educate the public on the benefits of the outdoor recreation economy (across jobs, health, quality of life) in order to garner broad support and public funding.

Duluth voters, similar to Minnesota voters as a whole, have historically approved property taxes that raise funds to support parks and recreation development. Since 1988, 31 of 37 parks or land conservation measures at the state or local level have passed, a higher success rate than park referendums nationally.

- A voter approved property tax increase in 2011 raises \$2.6M annually to support parks and rec.
- In 2014, city council passed a 0.5% tax on lodging, restaurants, and bars - projected to generate \$18 million over 15 years to support trails, canoe-kayak launches, and other park improvements
- More than \$2 million in public funding has been spent to build the Duluth Traverse, a 100-mile long mountain bike trail that spans the length of the city's ridgeline.
- The Greater Minnesota Regional Parks and Trails Commission offers support through grants. In 2022, it provided \$1.25M to Spirit Mountain and \$160K to Duluth Traverse.

Leverage funding sources that relate directly to outdoor recreation, but also those that have indirect benefits to it.

Funded in part by the federal infrastructure law, the U.S. EPA announced more than \$100 million to fund Duluth area Great Lakes Restoration Projects to protect and enhance clean drinking water, fish and wildlife, and outdoor recreation opportunities. Recreational improvements will span 138 acres and include trail infrastructure, interpretive signage, and publicly accessible waterfront.

Collaborate across jurisdictions to connect outdoor recreation infrastructure development to economic development efforts.

Duluth has become a mecca of mountain biking partially through building infrastructure in concert with rehabilitation efforts of old mine sites, connecting communities to generate multi-night tourism stays and an economic boost to towns, and enacting DEIB initiatives. To support this work, statewide entities like Explore Minnesota, Minnesota Land Trust, Minnesota Department of Natural Resources, and Minnesota Department of Employment and Economic Development coordinate their efforts to advance the region's outdoor economy, a multi-jurisdictional approach that ensures promotion of the state and region's outdoor economy is happening at all levels of the government.

For example, the Duluth Traverse is a 100 mile, hand cut trail system linking neighborhoods and people to green spaces and parks overlooking Lake Superior and stretching the entire ridge line of the city. The trail system is part of a larger initiative to re-brand the region as a major adventure destination, transforming and repurposing the formerly industrial sites that once drove the state's economy.

Flagstaff, AZ

Located at 7,000 feet in the high country mountains of northern Arizona, Flagstaff comprises the world's largest contiguous emerald green ponderosa pine forest. Flagstaff features significant biodiversity, including piñon-juniper studded plateaus, high desert, alpine forest, and barren tundra. A nationally and internationally recognized destination, Flagstaff's accolades include: One of the best for the 4th of July holiday, one of 5 small U.S. towns worthy of your destination bucket list, one of the top 10 places to get physically fit, one of 30 most visited U.S. cities by foreigners, best foodie town, the most bike-friendly, and the most pet-friendly.

Population: 142,254

Visitors/year: 6M

Tourism spend: \$90M

Employment in sector: 2,404 (3.64% of total employment)

Top Outdoor Natural Attractions/Assets:

Flagstaff is best known as the gateway to the San Francisco Peaks mountain range and the Grand Canyon.

Outdoor Rec Specialization:

Flagstaff, often described as "Arizona's Winter Wonderland," on average, annually it has 266 days of sunshine and 108.8 inches of snowfall.



Location Features

Winter Sports: Located 12 miles outside Flagstaff among the aspens and pine trees of Coconino National Forest in the foothills of Arizona's tallest mountain range, the Arizona Nordic Village (ANV) is the premier cross-country ski location in Arizona with 25 miles of groomed cross-country area and 10 miles of snowshoe trails. The region has been home to the Arizona Snowbowl one of the oldest continually run ski areas in the United States, since 1938. The Snowbowl offers skiing, snowboarding and ski bikes but no sledding.. Flagstaff Snow Park is dedicated to providing exceptional snow play, and Coconino National Forest is also a snow play area (sledding, tubing, etc.)

Ecotourism and Astrotourism: Both are prominent components of its outdoor economy - Flagstaff is the World's First International Dark Sky City. Sites of interest include Meteor Crater and Lowell Observatory.

Hiking: "Hiking and biking are the most popular ways to travel through the San Francisco Peaks with trails available for all skill levels" including an ancient underground tunnel at the Lava River Cave, the Kachina Trail which features the highest point in Arizona, and trails at Buffalo Park.¹⁸

Climbing: From Oak Creek Canyon up through Walnut Canyon to the San Francisco Peaks, Flagstaff offers a multitude of opportunities for outdoor professional climbing and bouldering (Solitude Canyon, Hobo Jungle and the Oak Creek Canyon Overlook). Indoor gyms include Flagstaff Climbing Center, Main Street Boulders, Beta Bouldering Gym.

Key Findings

Sector Employment

The Flagstaff outdoor economy differs from other peer benchmarks in that Traveler Accommodation and Other Amusement and Recreation Industries both surpass Spectator Sports in terms of top numbers of establishments. Traveler Accommodations is by far the largest establishment type, with more than 100 more establishments than Other Amusement and Recreation Industries.

Impact

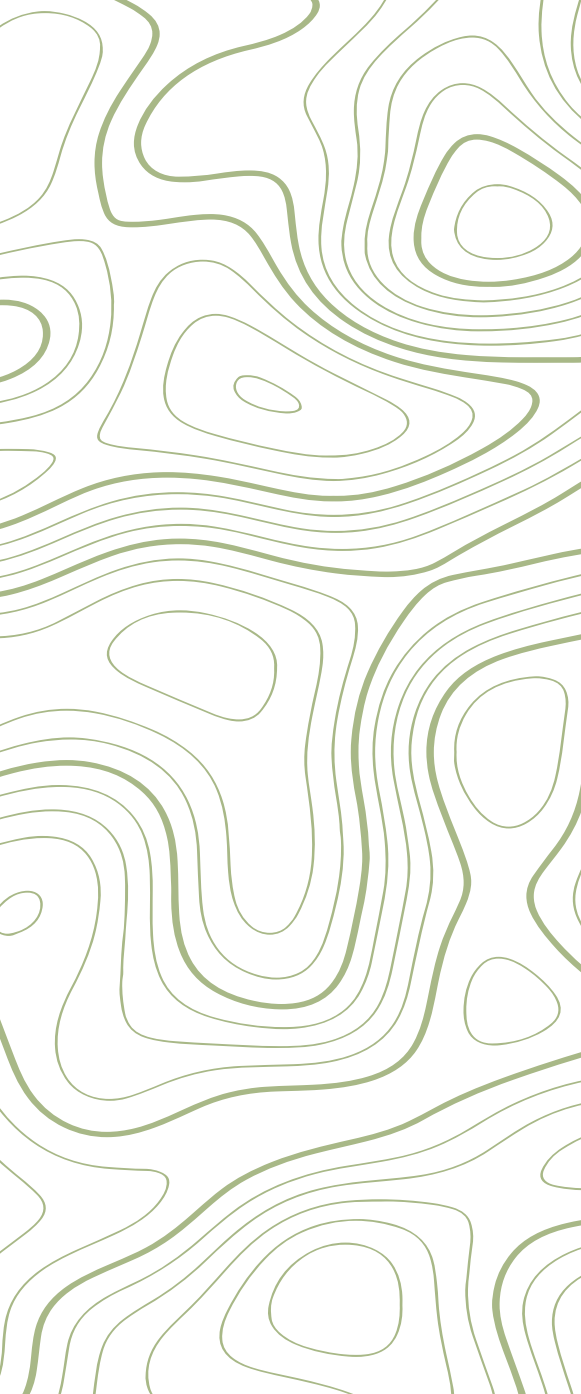
- The Arizona tourism industry generates an annual tax savings of \$1,360 for every Arizona household according to the Arizona Office of Tourism.
- Tourism generates nearly 8,000 jobs in Flagstaff according to Northern Arizona University research.

Unique Regional Features

Flagstaff offers many Native American and "Old West" attractions. Flagstaff also boasts 8 neighboring national monuments including Sunset Crater Volcano National Monument, Walnut Canyon National Monument, and Wupatki National Monument where visitors can view rock walls of 800-year-old pueblos which dot a desert landscape once home to thousands of people.

Live music and entertainment events such as the Fat Tire Film and Brew Festival, Celtic Festival, Pickin' in the Pines bluegrass festival and Route 66 nostalgia are also significant draws. Flagstaff is a partner in the Historic Arizona Route 66 Geocaching Project.





Lessons Learned for the North Central Appalachia

Find unique ways to promote and market sustainability alongside the outdoor recreation economy.

Flagstaff has doubled down on Ecotourism and Astrotourism, as the World's First International Dark Sky City. In the North Central Appalachian Rec Belt region, Cherry Springs State Park provides an opportunity as the world's second certified International Dark-Sky Park. According to the PA Wilds, "Inspiring awe and delight, [Cherry Springs State Park] is world-famous for being one the best places in the USA for stargazing and the study of astronomy." The region can leverage this and other strengths in ecotourism, astrotourism and sustainability.

Promote the economic and community benefits of outdoor recreation to garner financial and political support.

Flagstaff measures and communicates how the tourism industry generates economic and community benefits. For example, the 2% Bed, Board, and Booze tax contributes to a higher quality of life for residents, partially funding city services and programs like Beautification, Economic Development, Tourism, Arts & Sciences, and Recreation. Enacted by voters in 1988, the original motivations in favor of the tax was the clean up and beautification of Route 66 and to attract employers to town. It was set to expire in 10 years but was renewed by the voters in 1996 and 2010, due in part to the quality of life benefits it helps to fund.



Washington, D.C.

Our nation's capital is known for its museums and cultural amenities, yet it also offers a wide-range of outdoor assets and proximity to National Parks, scenic vistas, historic sites, and connectivity to a wide variety of trail networks including the Great Allegheny Passage, Chesapeake & Ohio National Historic Park trail, and the East Coast Greenway.

Population: 6,250,309

Visitors/year: 19.1M

Tourism spend: \$5.48B

Employment in sector: 68,951 (2.06% of total employment)

Top Outdoor Natural Attractions/Assets:

The Potomac River, Chesapeake Bay, and nearby Blue Ridge Mountains via Shenandoah National Park

Outdoor Rec Specialization:

Hiking and biking stand out among the greater Washington D.C. region's top outdoor recreation attractions. Popular routes are the 18.5 mile Mount Vernon Trail, Capital Crescent Trail between Georgetown and Bethesda, 45 mile Washington and Old Dominion route between southern Arlington and Purcellville, in Loudoun County, and bikepacking via the 184.5 mile Chesapeake & Ohio National Historic Park trail that connects with the 150 mile Greater Allegheny Passage.



Location Features

Hiking and Biking: Popular routes are the 18.5 mile Mount Vernon Trail, Capital Crescent Trail between Georgetown and Bethesda, 45 mile Washington and Old Dominion route between southern Arlington and Purcellville, in Loudoun County,¹⁹ and bikepacking via the 184.5 mile Chesapeake and Ohio National Historic Park trail that connects with the 150 mile Greater Allegheny Passage.²⁰

Climbing: Great Falls Park, 20 miles north from D.C., has Class 3 to 5.10 cliffs and outcroppings that attract climbers of all experience levels. Carderock and Annapolis Rock are also popular places for climbing, including ice climbing.²¹

Parks: Rock Creek Park has more than 2,000 acres of greenspace and facilities including tennis courts, an equestrian center, and a nature center. Great Falls National Park offers hiking, biking, climbing, as well as leisurely recreation like picnicking.²²

Camping: Shenandoah National Park and the Blue Ridge and Appalachian Mountains offer hiking, biking, climbing and camping. Popular destinations include: Hawksbill Summit with the tallest peak in Shenandoah National Park, the 10-mile Old Rag Mountain hike, Whiteoak Canyon and Cedar Run with the tallest waterfalls in the park, and Luray Caverns. In addition to Shenandoah National Park, Greenbelt Park and Little Bennet Regional Park offer camping even closer to D.C.

Skiing: White Tail and Liberty Mountain Resorts are about 1.5 hours from D.C. While Wintergreen, Wisp, and Seven Springs are all about 3 hours away.

Water Sports: The Potomac River offers flat and white water activities. The Potomac River Gorge is 30 minutes outside of D.C. and attracts top-level competitive kayakers. Eastern Shore attractions such as Assateague Island National Seashore, Cape Henlopen State Park, and Jane's Island State Park provide access to fishing, ocean kayaking in the Atlantic, and miles of water trails within the Chesapeake Bay.

Key Findings

Spending

Since bottoming out in 2020, Entertainment and Recreation spending in Washington D.C. rebounded, with 2022 numbers slightly exceeding 2021. Overall Travel and Hospitality spending increased from 2019 (\$2,056,934,904) and 2022 (\$2,614,658,565).

Equity

In 2022, the Trust for Public Land ranked Washington D.C. #1 in its ParkScore index which compares park systems across the 100 most populated cities in the U.S. Scores index five characteristics of an effective park system including: Investment (100/100), Access (99/100), Equity (87/100), Amenities (84/100), Acreage (55/100).

According to Trust for Public Land's 2022 ParkScore Index, D.C. residents living in neighborhoods of color have access to 17% more nearby park space than those living in white neighborhoods, and residents living in lower-income neighborhoods have access to 7% more nearby park space than those in higher-income neighborhoods. Additionally, 98% of people of color and low income residents, respectively, live within a 10-minute walk of a park. DC has led the way in ensuring connectivity between and access to recreational and cultural attractions.

Unique Regional Features

Washington, DC is best known for the National Mall, White House, and many significant historic and cultural attractions including:

- Manassas National Battlefield Park: the location of two major battles during the American Civil War, this park includes informational historical posting and canon replicas.
- The National Arboretum: founded in 1927, the National Arboretum recognizes the importance of innovative landscaping, garden design, and the environmental role that green spaces have in human life.
- Enid A. Haupt Garden: Smithsonian Museums' 4.2 acre Enid A. Haupt Garden, which was designed to memorialize 19th century American Victorian Gardens, brings art outside for horticulturalists to enjoy for free.
- Shenandoah Valley Wine Trail: The approximately 200 mile long trail takes visitors through 19 different vineyards, various mountain towns, and past plenty of restaurants and other points of interest worthy of a stop.



Funding

D.C. has \$284 per capita park spending, compared to the national average of \$98. This is comprised of: City agency of \$161 (57%), Other public agencies of \$73 (26%), Private organizations of \$15 (5%), and Monetized volunteer hours of \$34 (12%)

Lessons Learned for the North Central Appalachia

Build connected biking infrastructure through regional collaboration for greater impact and use

The Capital Trails Coalition and Washington Area Bicyclist Association (WABA), with financial support from REI, Planet Bike, and Morris and Gwendolyn Cafritz Foundation, have begun implementing a plan to create **one of the largest trail networks in the U.S.**, 881 miles by 2030, spanning Washington D.C., the City of Alexandria, Arlington and Fairfax counties in Virginia, and Prince George's and Montgomery counties in Maryland.

These organizations envision this trail network as an opportunity to connect assets to one another. Organization leaders urge others engaged in the outdoor economy to think about trails not only as recreation, but also as transportation, connecting people from their homes to work to critical social infrastructure. Likewise, these networks allow visitors to experience the whole of the place. The project has faced challenges, such as managing high-traffic roads and coordination efforts across D.C. Department of Transportation, multiple county jurisdictions, and six different units of the National Park Service. Despite these challenges, the project's \$1.09B investment is anticipated to generate a \$2.05B economic impact from construction over the course of 25 years, supporting 16,100 jobs and generating more than \$64M in tax revenue (\$37M for Maryland, \$18M for D.C., and \$9M for Virginia). Amenities within the network will include trailheads, signage, wayfinding, comfort stations, public art, and access to parks, museums, offices, hospitals and shops.





Local Interview Key Takeaways



Local Interview Key Takeaways

In order to capture the key opportunities and challenges facing the North Central Appalachian Rec Belt region, Fourth Economy conducted 20 interviews with people from organizations deeply entrenched in the outdoor economies of Pennsylvania, Ohio, and West Virginia, including representatives from tourism agencies, outfitters, land management, heritage areas, funders, manufacturers and small businesses. The full list of interviewees included in the appendix.

Feedback that came out of the interviews generally fell into one of the following categories:

Documenting Regional Strengths and Opportunities

- Highlighting the region as a strong outdoor economy

Emphasizing Economic Benefits

- Understanding economic development benefits in addition to tourism impacts

Understanding the Sector's Potential Impact on People

- Making connections to better health outcomes and career development
- Increasing DEIB efforts

Developing Partnerships & Collaboration

- Need for coordination within the industry (e.g., for streamlining processes, functions, fundraising, and strategic planning)



Documenting Regional Strengths and Opportunities

When speaking with local entities, we defined the North Central Appalachian Rec Belt as the region within a 3-hour drive time of the Pittsburgh International Airport (shaded area in the map at right). Parts of Maryland and New York, as well as larger portions of Ohio and West Virginia are within that radius. The region boasts more than 20 state and national parks and forests, historic sites, and recreation areas, including world-class outdoor destinations like New River Gorge, Ohiopyle State Park, Laurel Highlands, and the Allegheny National Forest.



Interviews with key stakeholders working on various aspects of the outdoor economy in the region highlighted a number of strengths to build from and capitalize on:

Strong Statewide Outdoor Economy:

Pennsylvania has the 6th largest outdoor recreation economy in the country in terms of value added to the overall economy.²³

Advantageous Location: Approximately 50 million people (~15% of the US population) live within a day's drive of the region.²⁴

Regional Geophysical Assets: The Rec Belt's topography is defined by the Allegheny Mountain range of the Appalachian Mountains, which set the region against a stunning landscape of mountain valleys, rivers, and forests and provide a unique variety of physical assets and natural features and ample opportunities for outdoor activities.

- Pennsylvania has ~200,000 acres of state parks, 2.2M acres of state forests, and 1.5M acres of state game lands.
- Public lands are considered the backbone of the outdoor economy, and the tri-state region is home to more than 2 million acres of public lands.²⁵
- The newest National Park, New River Gorge, became the 63rd National Park in 2020. The New River is “estimated to be between 10 million and 360 million years old, making it the second oldest in the world. The forest around it is home to over 1,500 different plant species, one of the most biodiverse in the Appalachian region.²⁶” Recreational activities include white-water rafting, kayaking, stand up paddleboarding, fishing, hiking, climbing, and mountain biking.

Top Recreational Activities

The region's strong offerings include biking, hiking, water sports, fishing and hunting, and skiing. However, increasingly mild winters, induced by climate change, make developing four season attractions for activities like skiing, snowmobiling, and snowshoeing, a challenge.



Biking

The region boasts several world-class rail-trails and mountain bike trail systems, as well as tens of thousands of miles of gravel roads and notable bike events.

Rail-Trails: Rail-trails are characterized by a gentle grade and oftentimes, a relatively smooth surface of crushed stone or pavement, making them an accessible option for riders of all ages and abilities. In addition to countless local trails, the region is home to a number of notable, long-distance rail-trails.

- Great Allegheny Passage - 150 miles from Pittsburgh to Cumberland, MD, one of the most popular trails in the U.S.
- Erie to Pittsburgh Trail - a collection of trails stretching from Pittsburgh to Erie, includes the Three Rivers Heritage Trail, Allegheny River Trail, Armstrong Trail, Oil Creek State Park Trail, and others.
- North Bend Rail Trail - 72 miles from Wolf Summit to Parkersburg, WV
- Mon River Trail System - 48 miles near Morgantown, WV
- Ohio and Erie Canal Towpath Trail - 90 miles from Cleveland to Zoarville, OH
- Montour Trail - 61 miles on the western side of Pittsburgh
- Redbank Valley Trail - 51 miles from near East Brady to Brookville, PA
- Ghost Town Trail - 48 miles from near Blairsville to Ebensburg, PA, also connects to the 12-mile Hoodiebug Trail and is part of the Trans-Allegheny Trails network

Mountain Biking:

- Allegrippis Trails (Huntingdon, PA) - 30+ miles of nationally-acclaimed purpose-built trail on the shores of Raystown Lake
- Jake's Rocks (Warren, PA) - 30+ miles of purpose-built trail in the PA Wilds
- Big Bear Lake Trail Center (Bruceton Mills, WV) - Nearly 50 miles of trail across a variety of terrain, from huge rocks and long descents to smooth, flowy trails through ferns. Hosts a mountain bike festival, Big Bear Bike Bash, every summer.
- Canaan, WV - Home to the Canaan Mountain Bike Festival, Tucker County, West Virginia is known for over 100 miles of world-class trail, most of which can be accessed by bike from the town of Davis. The area also boasts two rail trails and plenty of gravel road riding.
- Athens, OH - With 80+ miles of singletrack nearby (and at least 50 more miles planned) between Baileys Trail System, Strouds Run State Park, and Lake Hope State Park, Athens, Ohio has defined itself as a town known for biking.





Gravel Riding: Gravel (sometimes referred to as “mixed-surface”) riding is a form of cycling that mainly utilizes gravel and dirt roads, but also incorporates paved road connections, rail trails, singletrack and doubletrack to form routes. Gravel riding is currently one of the fastest growing forms of cycling as it is versatile, approachable, and offers a middle ground between road or rail-trail riding and mountain biking. Unlike rail-trails and mountain bike trail systems, gravel riding isn’t confined to a particular area or trail, but certain parts of the region lend themselves to being more suitable than others for this discipline – namely, large swaths of public lands with a high concentration of gravel and dirt forest roads.

The Ohio Gravel Grinders website has a library of 425+ routes in Ohio and surrounding states, as well as a database of events, ride recaps, and other information on gravel riding.

Notable gravel events in the area include:

- Gravel Race Up Spruce Knob (GRUSK) - ride to the highest point in West Virginia, with distance options ranging from 27 to 260 miles.
- Rothrock GRIT - 25, 49, and 65 mile options in the ridges and valleys of Rothrock State Forest near State College, PA.
- The Quick and the Dead - ride around and up to Mt. Davis, the highest point in PA, with 73 & 53 mile options.
- unPAved of the Susquehanna River Valley - the largest gravel event in Pennsylvania and nationally-known, bringing in over 2,000 riders to Lewisburg, PA for 120, 90, 50, and 30 mile routes.

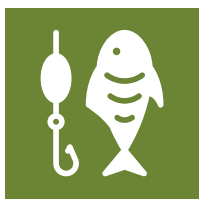




Hiking

A large portion of the region consists of public lands, including state forests, national forests, and state

parks. The PA Wilds, which is located in the north east portion of the Greater Pittsburgh region, for example, has 2 million acres of public lands which feature exceptional hiking. Popular hiking locations include Mid-State Trail, North Country Trail, and Baker Trail. Other notable trails are Allegheny County Parks (180 miles of trails), Rachel Carson Trail (35.7 mile connecting Allegheny County and Harrison County parks), Laurel Highlands Hiking Trail (70 miles), Allegheny National Forest (200+ miles of hiking trails), Dolly Sods (47 miles), Oil Creek, New River Gorge, and Cuyahoga Valley National Park (125+ miles).²⁷



Fishing and Hunting

Pennsylvania has 1.5 million acres of designated game lands and additional public land that allows hunting and

fishing. Popular game include: white-tailed deer, black bear, wild turkey, game bird, and a variety of small game. PA boasts 85,000 miles of stream and 4,000 lakes. The Greater Pittsburgh Region offers fishing at several locations, including Cross Creek Lake (258 acres), Highland Park Dam (recognized by USA Today and Game & Fish Magazine as a top fishing spot in Pennsylvania), Presque Isle Bay (on the Great Lakes panfish, perch, bass, muskellunge, walleye, northern pike, crappies, smelt, and steelhead), Neshannock Creek (20 mile freestone stream popular for fly fishing), Slippery Rock Creek (year-round fly fishing), and Lake Arthur (3,225 acres).²⁸



Skiing

The Allegheny Mountains provide opportunities for downhill and cross-country skiing. Popular locations

include: Seven Springs Resort, Laurel Mountain Ski Resort, Laurel Ridge Cross Country Ski Center, Canaan Valley Ski Resort and White Grass Cross Country Skiing. Additional offerings in the region include: 53 miles of cross-country skiing and 18 miles of interpretive trail²⁹ in the Allegheny National Forest, Holiday Valley Ski Resort in Ellicottville, NY, Wisp Resort in Maryland, and Snow Shoe Resort in West Virginia.



Water Sports

The region is one of the top places for whitewater paddling on the east coast. The Youghiogheny River,

about a 1-hour drive from Pittsburgh, starts in Ohio's State Park and has Class III - V rapids spanning about 27+ miles. An 11 mile stretch of Cheat River offers 30+ rapids ranging from Class III - V. Other popular locations include: New River Gorge, Gauley River, and Stonycreek River. Man-made rapids can be found at Deep Creek and Greenhouse Park on the Stonycreek River in Johnstown. Meanwhile, Presque Isle State Park in Erie, PA is a 3,200-acre sandy peninsula along Lake Erie, one of the five Great Lakes. Recreationalists can find many activities here, including swimming, boating, fishing, hiking, bicycling, in-line skating, and wildlife viewing. Erie's multi-day Tall Ships Festival and its Maritime Museum celebrate the area's rich history and heritage, for example the War of 1812's Battle of Lake Erie.



A Concentration of Outdoor Recreation Support/Resources

A strong network of funders, organizations, and human capital supports the region's outdoor economy.

Funding mechanisms include but are not limited to:

Federal

Great American Outdoors Act: Enacted in August 2020, this act created the National Parks and Public Land Legacy Restoration Fund for maintenance of critical facilities and infrastructure on public lands, authorized at up to \$1.9 billion annually for five years from Fiscal Year 2021 to Fiscal Year 2025. Allegheny National Forest, New River Gorge, and Cuyahoga Valley National Park are among the public lands that have received funding from the program to date.³⁰

Regional

Appalachian Regional Commission: ARC offers grants through its Area Development program (priorities include: Building Businesses, Workforce Ecosystems, Community Infrastructure, Regional Culture and Tourism, and Leaders and Local Capacity), POWER Initiative (to support coal-impacted communities recovering from related economic transition), and its INSPIRE Initiative (to support communities' Substance Abuse Disorder and recovery-to-work efforts).

State

Ohio Department of Natural Resources Funding: ODNR offers various grants to organizations and individuals, including: Natural Areas Research Grant, Clean Ohio Trail Fund, LWCF Outdoor Recreation Legacy Partnership Program for qualifying urban areas, and NatureWorks for the acquisition, development, and rehabilitation of recreational areas.

Local

Philanthropic and corporate sponsors:

These other sponsors have played an important role in the region's outdoor recreation funding environment, particularly given the presence of Dick's Sporting Goods (Public Lands) headquarters in Allegheny County.

The Progress Fund: This fund has provided financing and business coaching to help people grow businesses and create jobs for communities in Pennsylvania, West Virginia and Maryland. Since its founding in 1997, the organization has led to more than 638 loans totaling more than \$94M and 5,821 created or retained jobs. Loans range from \$5K to over \$1M and have supported accommodations, attractions, entertainment, farms, outdoor recreation, restaurants, retail, service business, wine and spirits makers and other small businesses. The Progress Fund encourages job creation, historic preservation, diverse business ownership, local agriculture and trail-based development. In 2007, it expanded its offerings with the Trail Town Program.³¹



Examples of key stakeholders and programs include:

DCNR's Office of Outdoor Recreation

In 2022, Pennsylvania established the position of Director of Outdoor Recreation to expand and ensure the benefits of outdoor recreation for all Pennsylvanians as individuals, communities, and a commonwealth. The director serves as a liaison among industry, non-governmental organizations, users, and government partners to: communicate the significance of outdoor recreation; address needs for systematic support and investment in outdoor recreation; and welcome all residents of and visitors to Pennsylvania to enjoy and benefit from the commonwealth's diverse and exceptional outdoor experiences. DCNR has convened a Recreation Engagement Coalition (REC) with members representing disciplines and geographies throughout Pennsylvania. The REC will outline priorities for the outdoor recreation sector in Pennsylvania and serve as primary advisers in building the commonwealth's Office of Outdoor Recreation.

Pennsylvania Wilds Center

According to Destination Stewardship Center, an organization working at the intersection between tourism and stewardship, "the PA Wilds Center (and its associated Planning Team) constitute a good example of a destination stewardship council because to this organization, tourism and sustainability go hand in hand. This is not just stated in the organization's mission statement or values, but also demonstrated by its actions. The organization goes beyond the normal scope of work of a Destination Management Organization (i.e., focusing on

accommodations and operations) to integrate tourism as an important element of rural economic development. TED speaker Ed McMahon, a national expert on sustainable community development, calls the PA Wilds Center's effort "one of the greatest, rural, natural resource-based economic development programs in the US."³²

Shops, Outfitters, and Event Producers

The region boasts a variety of outdoor recreation-related businesses, including manufacturers, distributors, retailers, guides, outfitters, and resorts. In addition to providing equipment, apparel, and supplies, these businesses provide experiences such as events and demonstrations that increase exposure for new and prospective recreationalists, improve accessibility, and grow outdoor recreation overall. Such shops and outfitters include, but are not limited to, 3 Rivers Outdoor Company, Allegheny River Outfitters, Ascend Climbing, Athens Bicycle, Golden Triangle Bike Rentals, Organic Climbing, Purple Lizard Maps, Seven Springs Mountain Resort, and Wilderness Voyagers.

Venture Outdoors

Working to remove barriers that prevent people from connecting to the outdoors, the organization serves community members of all ages from Western Pennsylvania, including individuals, students ranging from preschool college-age, and corporate teams. While it works with people of all ages, the organization is noted for its success in its work in connecting young adult and higher-ed students with the community.

Visitors Bureaus, Chambers of Commerce, and Development Authorities

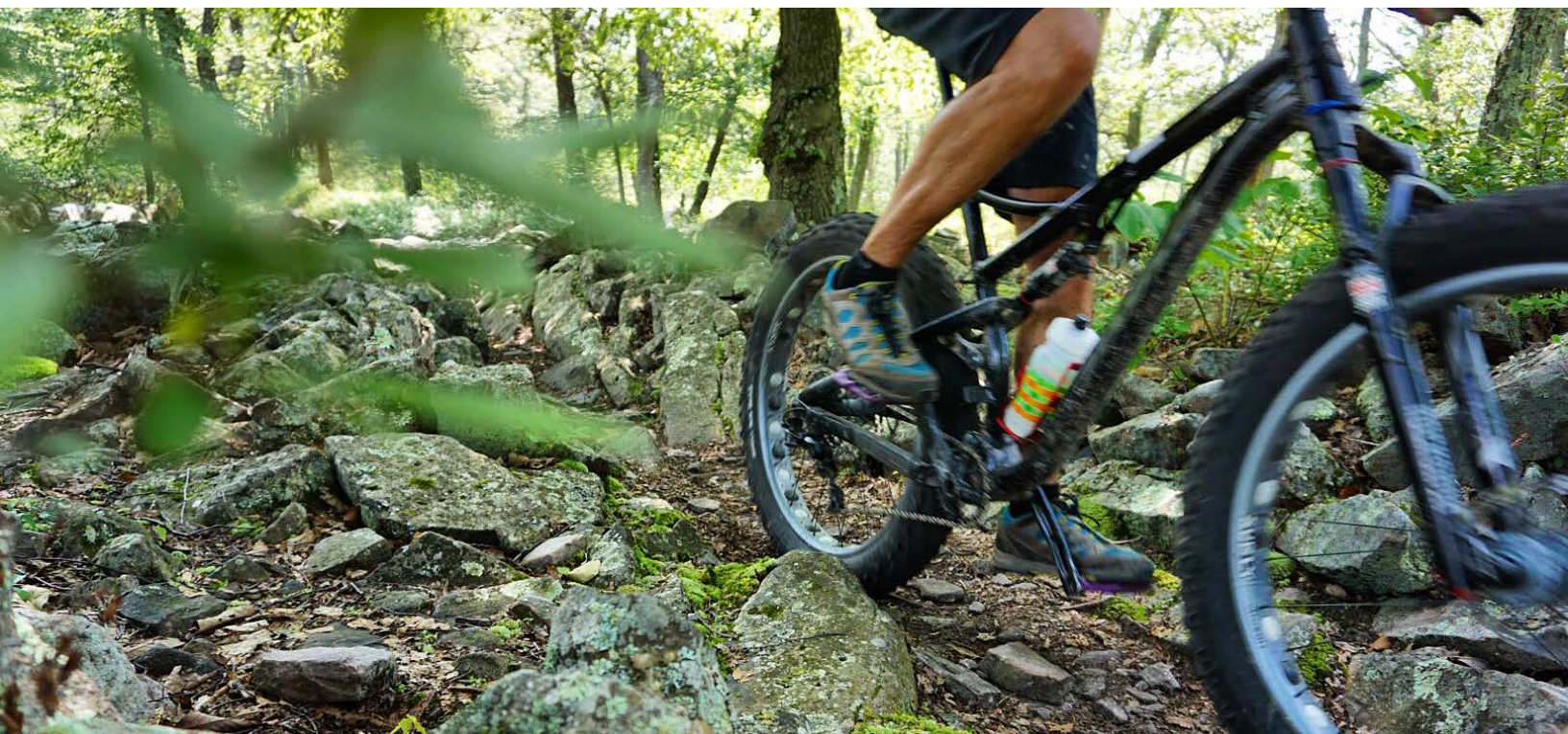
Established in 1935, VisitPITTSBURGH is a not-for-profit organization dedicated to generating convention, trade show, and leisure travel business for the Pittsburgh region. As part of its marketing and business membership services, VisitPittsburgh provides activity and trip planning resources to residents and tourists looking to experience outdoor recreation in Pittsburgh and surrounding counties throughout Southwestern Pennsylvania.

visitPA.com is the Pennsylvania Tourism Office's primary marketing tool. The site includes an extensive database of attractions, events, road trips, and trails. Visitors can use visitPA resources to plan their trips by region, including attractions in "Pittsburgh and Its Countryside" and the "Pennsylvania Wilds."

Other important regional stakeholders that serve similar roles include, but are not limited to, GO! Laurel Highlands, Happy Valley Adventure Bureau, National Road Heritage Corridor, New River Gorge Regional Development Authority, Oil Region Alliance, PA Route 6 Alliance, and Warren County Chamber of Business and Industry.

WVU Outdoor Economic Development Collaborative

Through alliances between West Virginia University, educators, state and local leaders, and outdoor enthusiasts, the collaborative is redefining its state and enhancing the quality of life for West Virginians. Initiatives include: remote work program, science adventure school, science behind the sport, outdoor infrastructure and community development, and research and asset mapping.



Emphasizing Economic Benefits

There are many economic benefits to developing a strong outdoor economy, in addition to simply an increase in tourism, including creating the ability to access outside funding and new sources of investment, even for communities with limited development opportunities other than outdoor assets. This is especially true in small, rural communities and those built on natural resource extraction, which make up much of the North Central Appalachian Rec Belt region.



The Importance of Connecting into Broader Economic Development Efforts

Outdoor recreation and economic development aren't always considered together by decision makers and funders, as more traditional economic development is typically still weighed more heavily than other strategies, and building a strong outdoor economy is widely viewed as a nice-to-have rather than a key component of economic growth.

However, the area has seen increased interest and investment in outdoor recreation by local chambers of commerce and other regional economic development organizations. For example, there is current work happening in the region to advance rural economic development via the PA Wilds and DCNR's Conservation Landscapes.

Business Attraction and Expansion

Volvo recently announced an expansion of its manufacturing plant in Shippensburg, Pennsylvania, including the construction of a workforce training center.³³ The company's investment in the region was due in part to the area's access to outdoor recreation amenities which was appealing for the company's talent attraction and retention strategies.³⁴

Talent Attraction

Jobs are created in other sectors as companies and workers are increasingly interested in relocating to areas with ample outdoor opportunities.³⁵

Needed Support for Small Businesses and Visitor Readiness

Recreationalists used to be self-sufficient (bring their own gear, food), but recent years have seen a shift in users wanting a combination of outdoor recreation and refined services, engaging more with local communities. When outdoor recreation infrastructure is updated or built, increased support of new, nearby businesses is often needed until usage and number of visitors increases, including things like marketing and advertising. The Laurel Highlands is seeing development of main street and business corridors in close proximity to outdoor recreation, and the PA Wilds is supporting entrepreneurship for outdoor economy related and adjacent businesses, including makers, artisans, manufacturers, micro manufacturers, services, and content creators / creatives.

Understanding the Sector's Potential Impact on People

Interviewees expressed that there are often differences in thinking about regional collaboration for those living in rural versus urban areas, due in part because there may be an asymmetrical understanding of the value proposition. For example, urban stakeholders may feel more connected and closer to rural communities than vice-versa. At the same time, rural communities want to improve access to outdoor recreation for their local residents (e.g. through instruction, programming, equipment rentals and sales) not just increase the number of urban recreationalist visitors coming into their communities.

There is an opportunity to emphasize and promote mutual benefits, including how rural residents can benefit from proximity to and collaboration with the region's cities, for example, in the form of increased access to funding, facilities, and amenities. This can be used to attract new residents and outdoor recreation staff who want to live in rural communities but also need and want access to urban assets.



Connections with better health outcomes and career development

Health benefits and cost savings

Anecdotally, there has been increased interest in the outdoor sector among corporate health and wellness programs, and a local initiative with a local health system will measure the impact of getting outside on peoples' lifespan.³⁶

Environmental benefits and cost savings

Environmental stewardship is a major component of the outdoor economy that should be emphasized and focused upon. The benefits of active transportation and preservation of natural landscapes is well-documented.

Career Pathways

Outdoor recreation provides a wide array of employment and lifelong career opportunities in a variety of fields: business strategy, communications and branding, biology, engineering, guiding and outfitting, retail sales, and advanced manufacturing. The outdoor workforce is diverse and growing, but unfilled positions remain a challenge.

Recruiting Staff

It can be challenging to recruit workers due to seasonality, and the lack of housing and quality of life assets in some rural communities. The opportunity to highlight the closeness of Pittsburgh is a draw for rural recruits to work in the outdoor economy.



Educational Partnerships

The WVU Outdoor Economic Development Collaborative is an alliance between West Virginia University, educators, state and local leaders, and outdoor enthusiasts, which is redefining its state and enhancing the quality of life for West Virginians. Initiatives include: remote work program, science adventure school, science behind the sport, outdoor infrastructure and community development, and research and asset mapping.

Increasing DEIB Efforts

Diversity, Equity, Inclusion, and Belonging is a growing and needed area of focus in the region. There is a huge opportunity to engage youth, BIPOC communities, and people with disabilities, as well as create recreation that is all-age friendly. There are also opportunities to partner with local and national groups that promote diversity in different recreation activities.

History of outdoor recreation: In recent years, the focus of the region’s outdoor recreation has shifted, from hunting and fishing to physical exercise, and tensions exist between different users of the outdoors. The region seeks to accommodate all users, and recognizes the need to support all types of recreationalists and promote outdoor recreation as a whole to encourage more outdoor users overall.

Visitor Demographics: An analysis of regional tourism reports finds that Pittsburgh visitors are whiter than benchmark metros such as Denver and Duluth. Over 90% of both overnight and day trips are made by white visitors. The median age (43.7) of Pittsburgh visitors is slightly older than Denver (42) but similar to Duluth (44).

	Overnight Trips			Day Trips		
	Pittsburgh	Denver	Duluth	Pittsburgh	Denver	Duluth
White People	91%	74%	88%	93%	76%	86%
Black People	3%	16%	3%	1%	16%	5%
People of Other Racial Identities	4%	15%	9%	6%	12%	9%

Source: Longwoods



According to the [2019 Outdoor Participation Report](#), fewer than 10 percent of African Americans participate in outdoor recreation. Connecting and leveraging groups that [promote racial diversity](#), such as Black Girls Do Bike, will be critical.

Outdoor Inclusion Coalition: Founded in 2019, the organization is focused on “making quality recreation experiences more accessible while reshaping urban recreation to be a pathway for greater exploration both professionally and recreationally. From our backstory stems our mission: to support Pennsylvanians through programs dedicated to attracting, engaging, and retaining underrepresented populations in the outdoor industry.”³⁷

For example, the organization helped gain approval by Pittsburgh City Council for a program to allow camping in city parks.

Language Accessibility: VISITPittsburgh’s multi-lingual visitor’s guide is offered in 7 different languages.

Developing Partnerships & Collaboration

Finally, many advocacy, nonprofits, and state coalitions exist but could be better connected to one another (e.g. South Western PA Climbers Coalition, PA Wilds Intergovernmental Cooperative, PA’s Growing Outdoor Recreation for Pennsylvania coalition, and Conservation Landscapes). The mosaic of entities managing outdoor recreation is complicated; greater coordination is needed to improve navigation of funding opportunities, regulations, permissions, legislation, etc.

Knowledge Sharing, Strategic Planning, Communications: Greater collaboration could help with coordinated data collection/analysis, project prioritization, and fundraising, as well as a shared effort at raising awareness and promoting the outdoor recreation ecosystem regionally.

Shared infrastructure: Stronger partnerships could lead to developing and funding shared infrastructure that supports multiple types of recreation occurring at the same or nearby locations (e.g. parking lots, bathrooms, trail heads that lead to multiple assets).

Connectivity of Assets Across Jurisdictions: Working together can help enhance the connection of physical assets regionally, since recreationalists and regional assets cross county borders.





Recommendations



Recommendations

By synthesizing the insights of regional economic and demographic data analysis, the case study review, and input from local stakeholders, the following recommendations emerged to advance the regional outdoor economy for broad economic and social benefit. Recommendations fall into four major categories:

Enhancing the Regional Profile

1. Coordinate Promotion of Specialization and Regional Identity
2. Invest in Building Connected Infrastructure

Expanding Audience and Accessibility

3. Prioritize DEIB
4. Activate Assets through Programming

Leveraging Regional Strengths

5. Leverage Manufacturing History and Industrial Heritage
6. Integrate with Existing Economic Development Efforts
7. Cultivate Partnerships with Healthcare, Education, and Sustainability

Building Connectivity of the Outdoor Economy

8. Coordinate Marketing, Branding, Communications, and Promotion
9. Communicate Sector Impact
10. Advance Regional Collaboration



Enhancing the Regional Profile

Two aspirations or recommendations to strengthen the overall profile of the regional outdoor economy were elevated by local interviews, perspectives on new or emerging opportunities, and inspiration from the case studies and are described below.

1 Coordinate Promotion of Specialization and Regional Identity

The region would benefit from a concerted effort by stakeholders to embrace and coordinate promotion of its natural specialties like biking, hiking, water sports, hunting, fishing, and skiing. This would create several strong “nodes” of entry that appeal to different audiences, rather than a “hub and spoke” approach that creates broad appeal, in order to attract people in and direct them out to niche pockets of activity. We can look at the lack of comprehensive messaging on water activities across the Rec Belt, which creates missed opportunities for the region.

For example, water recreation (flatwater, whitewater, surfing, fishing) sets Duluth apart compared to the other benchmarks studied. Meanwhile, West Virginia highlights its “2,032 miles of whitewater—the greatest density in the country.” This recommended approach to marketing would include all of the region’s naturally occurring water assets as a specialized offering that is unique to this region’s specific topography. In addition to whitewater, promotional materials would include activities like fishing, boating, hiking, backpacking, and camping, as water assets support these other forms of recreation through scenic views and access to drinking water. Materials could also include the relationship between water access and climate

change throughout the region. Coordination can lead to more inclusive and comprehensive marketing products.

2 Invest in Building Connected Infrastructure

Ensuring that residents and tourists alike have equal opportunity to access the region’s various outdoor recreation amenities is important for increasing diversity and visitorship. Connecting outdoor assets to one another is an essential way to leverage a density of different assets and build visitorship across a region. In particular, non-motorized access to and between outdoor recreation assets in the North Central Appalachian Outdoor Rec Belt can improve usage and related economic and social benefits.

According to VISITPittsburgh, the region “is within 500 miles of nearly half the U.S. population and less than a 90-minute flight from nearly half of North America’s population. It’s under 6 hours by car or train to 10 states, Washington, D.C., and Canada.³⁸” Meanwhile, Pittsburgh International Airport offers more than 50 domestic and international destinations on 13 commercial carriers and more than 170 daily flights. Amtrak has two routes that travel through Pittsburgh. The long-distance train, Capitol Limited, travels from the Midwest, connecting Chicago to Washington D.C. through Indiana, Ohio, Pennsylvania, West Virginia and Maryland.



Its second route, the Pennsylvanian, remains mostly in the state of Pennsylvania with stops including Harrisburg, Philadelphia and New York City.

While access between major assets within the region are mainly available by personal vehicle, trail systems — like the Erie to Pittsburgh Trail and the Great Allegheny Passage — provide non-motorized connectivity. Rail to trail has been a successful model in the region that has provided greater access to the outdoors while creating economic benefits, and which could be replicated across other types of recreation, particularly mountain biking, ATV/UTV, and water recreation.

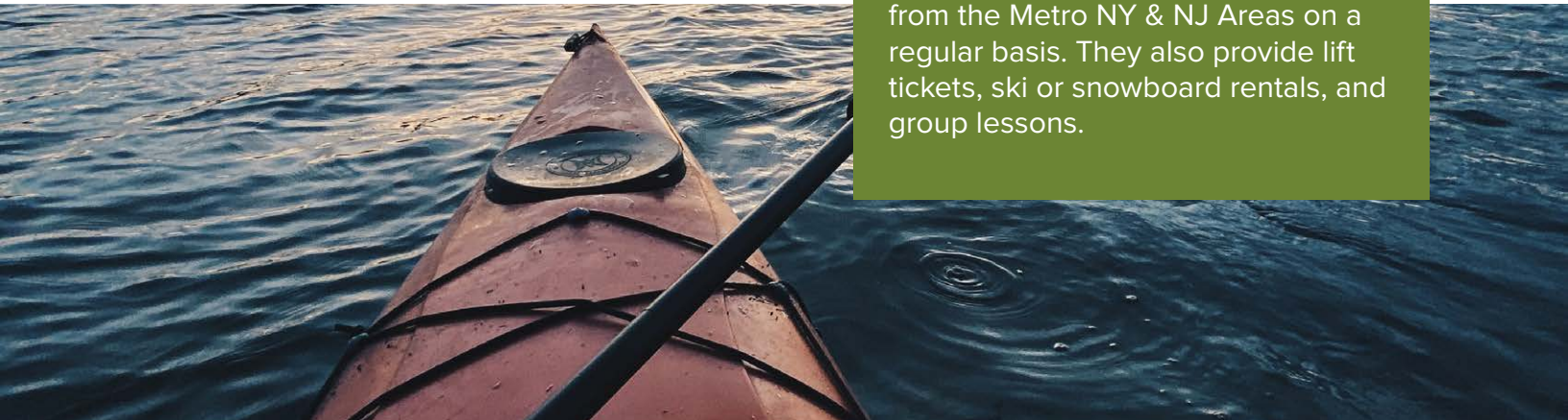
For mountain biking in particular, there is an opportunity to use purpose-built trails to generate a greater ROI, improve safety and sustainability, rehabilitate former industrial sites, and create connectivity to formerly underutilized places.

Meanwhile, hubs within the region, like Pennsylvania Wilds, Laurel Highlands, Monongahela National Forest, and Wayne National Forest, could be better connected via trail systems or outfitter shuttle systems. Tours, trails, and non-motorized transportation could also better connect outdoor users to breweries, restaurants, retail, and lodging in the towns surrounding these hubs.

Examples

Rail to Trail: The region has many significant rail-to-trails, including the Great Allegheny Passage and C&O Canal Trail, which connect 335 miles across Pennsylvania, Maryland, and Washington D.C., Pine Creek Rail Trail Jersey Shore, PA, West Creek Rail Trail, Snow Shoe Rail Trail, Panhandle Trail, Montour Trail, Butler-Freeport Community Trail, Westmoreland Heritage Trail, Ghost Town Trail, and Armstrong Trail. The Erie to Pittsburgh Trail is a 270-mile corridor connecting trails between Pittsburgh and Erie. As of 2022, the trail connection is 66% complete.³⁹

Transportation Shuttles: Private companies and organizations providing transportation shuttles to outdoor assets are key. There are two groups based in Cleveland, Ohio that organize trips to Pittsburgh area ski resorts and other locations – Esprit The Ultimate Ski and Sports Club; The Inner City Ski Club. In New York and New Jersey: Charter Bus Tour Operators provide travel to the Hunter Mountain ski resort from the Metro NY & NJ Areas on a regular basis. They also provide lift tickets, ski or snowboard rentals, and group lessons.



Expanding Audience and Accessibility

The region's audience and accessibility includes the profile of local users and visitors, the travel infrastructure that enables physical access to the region's outdoor economy, as well as efforts to introduce people to the outdoors, such as through diversity, equity, inclusion, and belonging initiatives, and programming that can help introduce a new generation of outdoor enthusiasts to the region's many outdoor assets.

3 Prioritize DEIB

The North Central Appalachian Outdoor Rec Belt contains different types of diversity that are not being entirely captured by existing outdoor recreation opportunities. Intentionality and direct investment in building greater diversity, equity, inclusion, and belonging is a cornerstone of how the regional outdoor economy will continue to grow. Stakeholders should ensure that assets appeal to and are utilized by a diverse audience — age, race, ethnicity, ability, socioeconomic status, and skill level.

It will be important for the region to advance existing regional efforts to promote diversity, equity, inclusion, and belonging in the outdoors. There is opportunity, for example, to elevate outdoor recreation as a lifelong activity to retired community members who are getting introduced or more involved to these types of activities. It can also model western U.S. initiatives that work to intentionally create a welcoming, encouraging environment through guidebooks, signage, adequate and safe parking, and support of public lands. The region should promote existing initiatives such as the Outdoor Inclusion Coalition, and amplify message and marketing for all ages.

Overall, the region should capitalize on the wide variety of people and population centers within the region and target diverse audiences through marketing, improving accessibility, offering recreation assets with different skill levels, and directing funding towards engaging vulnerable or marginalized populations.

4 Activate Assets through Programming

In addition to the promotion of physical assets, enhanced programming (e.g., for beginners – introducing them to the asset and how to use it), and access to supplies for purchase or rent (e.g., some rural communities have nowhere to rent or buy a bike, kayak), can help ensure access not just to the region's outdoor assets but also the equipment and knowledge to participate.

For example, DCNR partnered with the Trust for Public Land and WeConservePA to map 10-minute service areas for Pennsylvania's parks, trails, public lands, and water access points at the county and municipal level. Assets like trailheads and boat launches are geographically accessible but employ limited staff for activation and programming. This presents an opportunity to partner with local groups like Venture Outdoors or Black Girls Do Bike, or university student groups and their Outdoor or Adventure Clubs.

Leveraging Regional Strengths

The North Central Appalachian Recreation Region has a deep history in manufacturing; strong healthcare and educational institutions; and a robust economic development community that supports small business development and business and talent attraction and retention. Leveraging these strengths by making stronger partnership connections can benefit the outdoor economy while generating additional economic and social benefits to communities.

5 Leverage Our Manufacturing History and Industrial Heritage

There are many opportunities to leverage what makes the North Central Appalachian Outdoor Rec Belt unique, paying homage to the heritage of the region while also using that history to create a vision for the future that elevates the outdoor economy. Reuse of old mines and leaning into the rust belt identity of Pennsylvania, Ohio, and West Virginia could help uplift outdoor recreation for locals and visitors who are interested in how the region's unique past shapes its present.

The region's industrial past and longstanding culture of creativity are often tied to its outdoor recreation. Important attractions that combine outdoor recreation with regional history include: Meadowcroft Rock Shelter, Heritage Farm and Museum, Route 6 Heritage Community, West Virginia Railroad Museum, Altoona Railroad Museum, Erie Maritime Museum, and Rivers of Steel Sites and River Tours.

There is an opportunity to increase the spotlight on these connections to the region's past and present, including support for local outdoor recreation manufacturing and micro-manufacturing companies and the talent pool within these industries.

Celebrating and promoting what makes a place special and unique is one way to ensure that the outdoor recreation offerings are authentic and community-driven.





6 Integrate with Existing Economic Development Efforts

There is an opportunity to position outdoor recreation as more than a “nice-to-have” but rather a key driver of economic development. Known for its industrial past and challenges faced from that economic transition, the region can continue to emphasize outdoor recreation as a catalyst for progress and revitalization. Closer coordination with economic development entities can result in more integrated, and thus impactful, planning and development.

Examples

Business and Talent Attraction: Regions around the country are realizing that businesses follow people, rather than the other way around. And people want to be in places where their quality of life is high. Outdoor recreation opportunities are a major contributing factor to quality of life; investments in the outdoor economy can directly benefit the larger economy of the region by spurring talent and business attraction and retention.

Enabling infrastructure like wi-fi and improving housing and quality of life such as restaurants and service providers like hair salons and health care are needed to recruit new businesses and talent, including remote workers and staff to fill open outdoor recreation positions.

Entrepreneurship Ecosystem and Visitor Readiness: When new outdoor recreation infrastructure is built, greater support of and investment in nearby small businesses is needed, especially until usage increases.

In order to compete, local businesses need wraparound support like funding and technical assistance such as branding and digital marketing, hospitality management, technology upgrades, and professional development/workforce training.

7 Cultivate Partnerships to Healthcare, Education, and Sustainability

The North Central Appalachian Outdoor Rec Belt region has the opportunity to utilize a multi-pronged approach to growing the outdoor economy that includes land management, environmental stewardship, economic development, tourism, healthcare, education, and other avenues. A collaborative, interdisciplinary, multi-sector, and multi-jurisdictional approach brings partners together around shared goals and ensures that everyone benefits from the sustainable growth of the outdoor economy.

Examples

Workforce Development/Education Partnerships: There is opportunity to create partnerships with higher education and workforce development institutions to market careers in outdoor recreation and develop certificate or degree programs across professional levels that pertain to the outdoor economy. Building a robust network of local and regional partners in the higher education and workforce development space creates self-sustaining talent pipelines that ensure the continued growth of the outdoor economy.



Connections to Healthcare, Wellness, and Sustainability: Investments in outdoor recreation have a multidimensional impact that includes enhanced public health and wellness outcomes and an important tie in to sustainability. The North Central Appalachian Outdoor Rec Belt can utilize its extensive local healthcare network to cross-promote outdoor recreation, and to gather

and broadcast data related to the health outcomes associated with a more robust outdoor economy.

For example, the region might promote outdoor recreation through a health and wellness lens by engaging regional healthcare providers, like UPMC – an international health care leader as both a provider and an insurer.

Building Connectivity of the Outdoor Economy

The region has a plethora of incredible outdoor assets, from unique and breathtaking parks and natural areas, to thrilling man-made trails and adventure areas. However, there is a sense that these remain hidden or unknown to many, and that there is more than meets the eye. To connect this vast geography of assets, the region needs a strong, regional identity that is developed and co-promoted by stakeholders across the sector. Advanced collaboration by the sector's supporters around planning, prioritizing, marketing, and investment can enable that connectivity.

8 Coordinate Marketing, Branding, Communications, and Promotion

The region lacks cohesive marketing, with different entities promoting pockets of the outdoor economy by sub-region/geography, or activity type. This is unique relative to the role and approach taken by tourism agencies in the benchmark communities profiled.

Enhancing and growing the outdoor economy will only be as successful as cross sector communications and marketing to residents, tourists, and potential new residents and businesses. Coordinating branding and marketing for outdoor recreation across jurisdictional boundaries and sectors has worked well in other regions around the country.

The North Central Appalachian Outdoor Rec Belt should coordinate regionally to promote and grow the region's assets amongst recreationalists, decision makers, funders, investors, and the general public. There is opportunity to integrate efforts of various regional tourism entities to better promote and highlight impacts of outdoor recreation. For example, entities might encourage multi-site trips by promoting connectivity between assets across the state, through events, races, tours, trails, or passports.

9 Communicate Sector Impact

Emphasizing research around impact and communicating potential ROI can drive collaboration, coordination, and support for the sector.

A regional comprehensive plan that is focused on generating measured benefits is needed to understand where investments will have the greatest impact at both the regional and state level, and the centralization of data collection could help streamline what information entities are collecting and communicating. This can help elevate issues and opportunities to the attention of public offices and elected officials, ingraining the outdoor economy into municipal budgets. For example, research demonstrates that local officials who understand how parks help raise property values were less likely to cut parks and recreation budgets and even add to budgets.

10 Advance Regional Collaboration

Across public jurisdictions, nonprofit organizations, quasi government chambers of commerce, and private industries, collaboration in the field of the outdoor economy is tantamount to its continued growth and success in many of the places around the country most lauded for outdoor recreation.

There is opportunity to better connect the work of the many advocacy, nonprofit, and state coalitions that exist to streamline data collection, knowledge sharing, communications, marketing, strategic planning and project prioritization, fundraising, and investing.. This also opens the door to more public-private partnerships, such as tapping more into Dick's Sporting Goods Public Lands and REI and greater public/private partnership.

Many of the communities who have successfully grown their outdoor economy have a central connecting or coordinating body at the heart of their collaboration. DC has Washington Area Bicyclist Association and the Capital Trails Coalition, which brings together government officials from the federal government, states, and municipalities, and Denver has OREC with the full backing of the state behind it, just to name a few. PEC is arguably already serving this role for the greater Pittsburgh region, but has the opportunity to do so in a more coordinated fashion, bringing all of the major outdoor economy players together to collaborate for greater impact.





Implementation Scenarios



Growing Forward

All of these recommendations require concerted and coordinated effort by stakeholders working in various segments of the regional outdoor economy. This work would be well worth the effort, as scenarios developed show significant economic impacts resulting from additional visits and spending in the sector, as well as the job creation required to support that growth.

The MSA currently sees **\$6.5B in tourism spending from 33 million visitors**, which equates to \$197 per visitor. What would happen if we got one out of ten to stay another day, or one out of 100? Or if we got 1,000 additional visitors, or 10,000?



	Visitors*	Tourism Spending*
	33,000,000	\$6,500,000,000
Increase	Additional visitors/ visits	Additional Spending
.03%	10,000	\$1,969,697
1%	330,000	\$65,000,000
10%	3,300,000	\$650,000,000

*Pittsburgh MSA, 2019

Getting existing visitors to extend their stays can be a powerful strategy, and can be supported through investments in lodging and other local businesses that complement the outdoor recreation sector, infrastructure that connects assets for better accessibility, and enhanced advertising of opportunities to explore nearby attractions.

Attracting new visitors can be accomplished through the development of a strong regional identity and regional specializations, leaning into the region’s manufacturing history and industrial heritage, and coordinated marketing, branding, communications, and promotion of the sector to external audiences.

Cultivating more local users, especially among those who are new to outdoor recreation, is an impactful way to build a customer base sustainably over time, as the sector needs to develop new audiences who have a lifelong appreciation of the outdoors. This can be achieved through developing partnerships with education institutions to instill an appreciation of the outdoors at an early age, prioritizing DEIB initiatives, and cultivating a welcoming environment for people of all backgrounds, ages, and abilities, including by better activating outdoor spaces with programming and access to equipment for all skill and interest levels.

Any increase in recreationalists, whether local or tourist, would require the support of additional workers in the outdoor recreation sector. With 20,552 people working in outdoor recreation industries in 2021, representing 1.8% of the region's total employment, adding 1,000 jobs to the outdoor economy could add:

336

jobs in other
industries

\$47M

in additional
earnings

\$8.8M

in taxes

\$18.6M

additional spending on
Entertainment & Recreation

\$31.2M

additional spending on Airline,
Hospitality, and Car Rental



Funding and Support to Enable Implementation

For these scenarios to be realized, additional funding and organizational capacity would be needed to support the implementation of the recommendations discussed. In recent years, local and state governments have implemented multiple funding mechanisms for outdoor recreation, utilizing bonds, general appropriations, lottery proceeds, vehicle registration fees, oil and gas royalties, taxes on temporary lodgings, real estate transfers, and more. Several of the case studies profiled have unique or notable strategies for funding their outdoor economies:

Bentonville, AR

The City of Bentonville's **Advertising & Promotion Tax** (referred to as the 'hospitality' tax) includes a 2% hotel and accommodation tax and 1% prepared food tax. In 2022, revenues totalled \$2.5M.

The **Walton Family Foundation** has invested more than \$70M into the region's trail system over the past decade.

Denver, CO

Federal EDA & ARPA Funding:

- The state is splitting its approximate \$10M EDA grant between OREC and its tourism office.
- The Colorado Industry Recreation Grant will run through 2025 and is tailored to non-profit organizations, tribes, and higher education institutions.
- The Colorado Outdoor Industry Impact Fund is specific to for-profit businesses.
- Approximately \$2 million in ARPA funding will support those negatively impacted by COVID. Unlike the EDA grant, it will support for-profit businesses in addition to nonprofits.

Historic Preservation Tax Credit: Colorado's Office Of Economic Development and International Trade is working with History Colorado to rehabilitate the North London Mine and Mill in Park County to be used by historic preservationists and huts for backcountry enthusiasts, including skiers, snowshoers, cyclists, and hikers.

Colorado's Outdoor Equity Grant Program supports opportunities for under-represented youth and their families to access the outdoors. Funded by the Colorado Lottery, the grant was established to provide about \$3M annually.

Duluth, MN

Duluth voters, similar to Minnesota voters as a whole, have historically approved property taxes that raise funds to support parks and recreation development. Since 1988, 31 of 37 parks or land conservation measures at the state or local level have passed, a higher success rate than park referendums nationally.

- **A voter-approved property tax increase** in 2011 raises \$2.6M annually to support parks and rec.
- In 2014, city council passed a **0.5% tax on lodging, restaurants, and bars**, which is projected to generate \$18 million over 15 years to support trails, canoe-kayak launches, and other park improvements.

More than **\$2 million in public funding** has been spent to build the Duluth Traverse, a 100-mile long mountain bike trail that spans the length of the city's ridgeline.

The Greater Minnesota Regional Parks and Trails Commission offers support through grants. In 2022, it provided \$1.25M to Spirit Mountain and \$160K to Duluth Traverse.

Funded in part by the federal infrastructure law, the U.S. EPA announced **more than \$100 million to fund Duluth area Great Lakes Restoration Projects** to protect and enhance clean drinking water, fish and wildlife, and outdoor recreation opportunities. Recreational improvements will span 138 acres and include trail infrastructure, interpretive signage, and publicly accessible waterfront.

Flagstaff, AZ

The **Bed, Board and Booze 2%** tax generates \$6 million annually. The tax started in 1988, enacted by voters, and partially funds city services and programs including: Beautification, Economic Development, Tourism, and Recreation.

Federal Funding

There is also significant federal funding available to state and local governments. States can access federal funding for outdoor recreation projects from multiple sources, including the [Land and Water Conservation Fund](#) and the [Outdoor Recreation Legacy Partnership Program](#). Funded at \$900 million annually, the Land and Water Conservation Fund provides grants to states for the acquisition and development of public outdoor recreation areas and facilities, such as parks, trails, campgrounds, bike paths and boating areas.

The newly revived [Federal Interagency Council on Outdoor Recreation](#) is expected to encourage additional collaboration between the federal government and states.

Collaborating to track and communicate the outdoor economy's impact on the region as well as projected ROI of additional investments can help with fundraising for the sector, as it assists in generating public and private support.





Conclusion





The North Central Appalachian Rec Belt is well-positioned to develop as a thriving regional outdoor economy that is known nationwide and enjoyed by visitors and all who call the region home. Crossing Pennsylvania, Ohio, West Virginia, and parts of Maryland and New York, the area's broad range of geophysical assets, parks, and world class outdoor destinations offer a unique, Appalachian experience at urban, suburban, and rural scales. The region's diverse offerings are appealing to people with different skill levels and interests, from casual users to expert enthusiasts. In particular, multi-use trails are major regional draws, exemplifying the demand for these mixed-use assets.

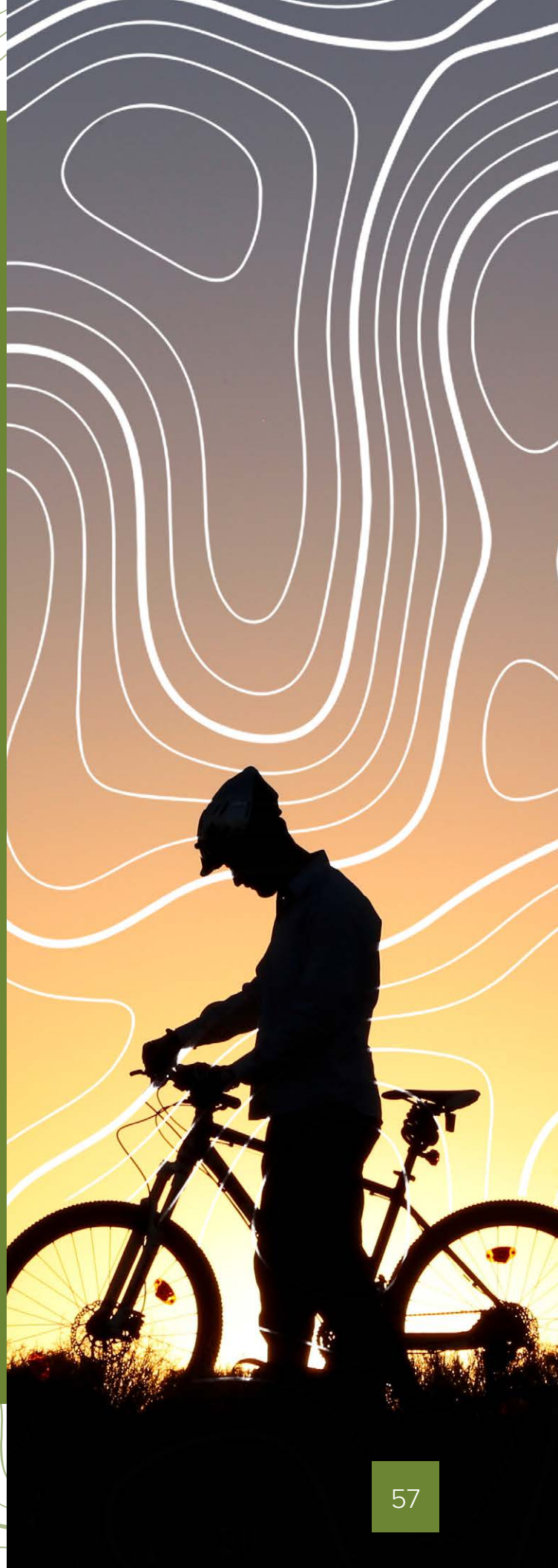
In order to achieve this vision, regional stakeholders must coordinate to achieve a few key objectives:

- **Enhancing the region's profile** through the development of natural specializations and a strong regional identity, as well as investing in building a stronger network of connected infrastructure;
- **Expanding the audience and accessibility of the outdoor economy**, by prioritizing DEIB initiatives, and activating assets through programming for all backgrounds, ages, abilities, and skill levels;
- **Leveraging regional strengths** like the region's manufacturing history and industrial heritage, existing economic development efforts, and partnerships with entities working on the region's healthcare, education, and sustainability, and;
- **Building connectivity of the outdoor economy** through coordinated marketing, branding, and promotion, sector impact tracking and communications, and advanced regional collaboration for planning, prioritization, and investment.

In general, stakeholders across the region sense that there is more than meets the eye in the North Central Appalachian Rec Belt — and partners are ready to put a spotlight on all the region has to offer.

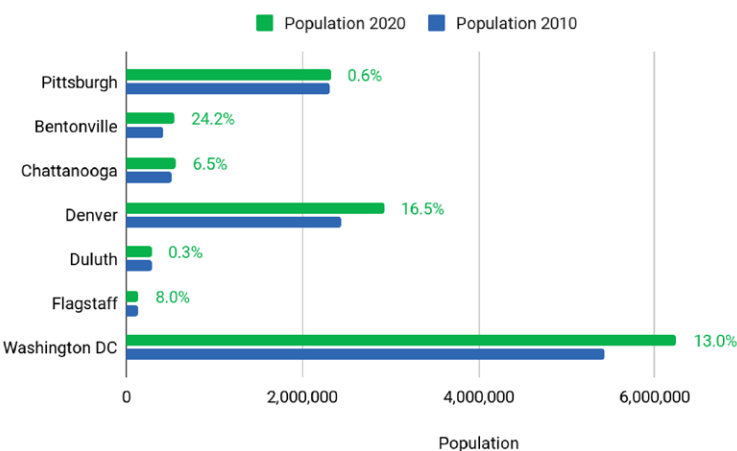


Appendix



Benchmarking Data

Benchmark Community Population 2010-2020

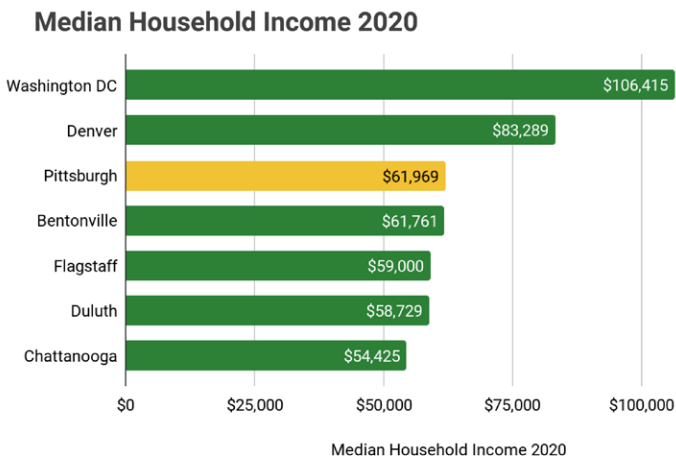


Most benchmark MSAs are growing, while **Pittsburgh remains stagnant**. Only Duluth experienced a slower population growth rate between 2010 and 2020.

Aspirational outdoor economies have the largest populations of benchmark MSAs.

Source: American Community Survey 5-Year Estimates (2016-2020)

Benchmark Community Income and Value



Source: American Community Survey 5-Year Estimates (2016-2020)

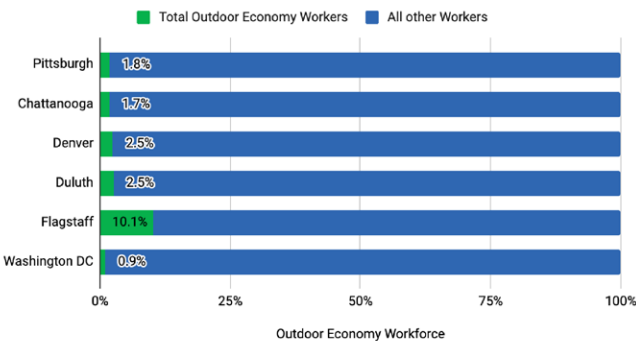
Price Parity

Real Value of \$100 in 2020	
Washington DC	111.5
Colorado	102.9
Arizona	99.1
Minnesota	99.1
Pennsylvania	97.6
Tennessee	92.2
Arkansas	89.2

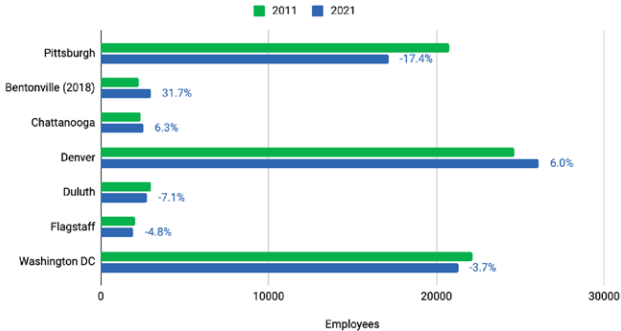
Source: BEA

Benchmark Community Outdoor Sector Size

Outdoor Economy Industries - Number of Workers

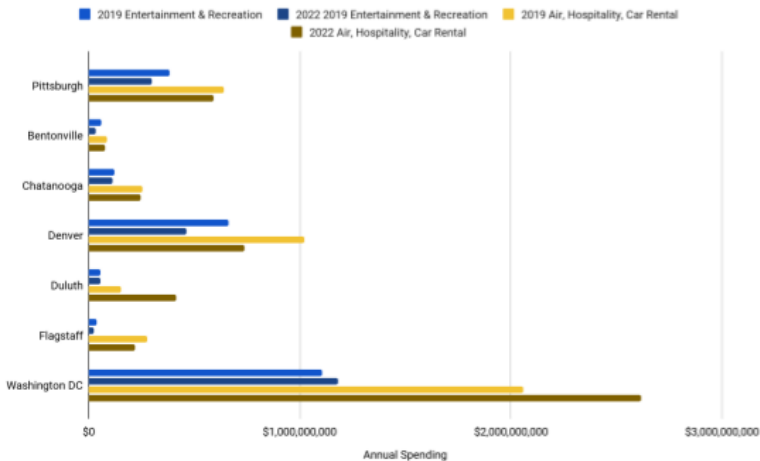


Arts, Entertainment, and Rec Employment 2011-2021



Source: Census LEHD 2011-2021

Benchmark Community Tourism Spending



Entertainment & recreation data: a broader array of leisure related activities, including museum, historic sites, and similar institutions; spectator sports; amusement parks and arcades, non-scheduled air transportation, scenic and sightseeing tours, and other amusement/recreation industries

Airline, hospitality, and car rental data: explicitly travel-related purchases such as transportation, like flights and car rentals, and accommodations, like hotels. Included in this category are traveler accommodations, travel arrangement and reservation services, and RV parks.



Interviews

Sarah Collier	National Road Heritage Corridor
Jim Decker	Warren County Chamber of Business and Industry
Tom Demagall	Golden Triangle Bike Rentals
Ta Enos	PA Wilds Center
Paul Guarino	South Western PA Climbers Coalition / Ascend Climbing Gym
Kim Harris	Oil Region Alliance
Josh Helke	Organic Climbing/Nittany Mountain Works/Climb Nittany
Brian Hill	Richard King Mellon Foundation
Michael Kane	Community Foundation of the Alleghenies
Peter Kotses	Athens Bicycle
Eric Martin	Wilderness Voyagers
Andy Mowen	Penn State University
Ann Nemanic	GO! Laurel Highlands
John Norbeck	Pennsylvania Department of Conservation and Natural Resources
Chris Perkins	Recreation Round Table
Nathan Reigner	Pennsylvania Department of Conservation and Natural Resources
Troy Schooley	P3R
Ed Stoddard	Happy Valley Adventure Bureau
Andy Williamson	WVU Outdoor Economic Development Collaborative



Outdoor Economy Industries

We define the outdoor economy by industry, using select NAICS codes. We also distinguish between primary outdoor economy industries – those directly related to recreational activities or outdoor experiences – and secondary industries – those that support or compliment such experiences.

Primary Industries

NAICS CODE(s)	Industry Title
487110	Scenic and Sightseeing Transportation, Land
487210	Scenic and Sightseeing Transportation, Water
487990	Scenic and Sightseeing Transportation, Other
481219	Nonscheduled Air Transportation
712100	Museums, Historical Sites, and Similar Institutions
713100	Amusement Parks and Arcades
713990	Other Amusement and Recreation Industries
721100	Traveler Accommodation
721200	RV (Recreational Vehicle) Parks and Recreational Camps
711200	Spectator Sports
711300	Promoters of Performing Arts, Sports, and Similar Events
561500	Travel Arrangement and Reservation Services

Secondary Industries

NAICS CODE(s)	Industry Title
722300	Special Food Services
722400	Drinking Places (Alcoholic Beverages)
722500	Restaurants and Other Eating Places

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