



Pennsylvania Outdoor Business Alliance: Opportunity Ahead

**Assessing the Outdoor Recreation Industry and
Establishing a Statewide Industry Organization**

June 30, 2025

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Executive Summary

What is an Outdoor Business Alliance (OBA) and why is it needed?

State outdoor business alliances are non-governmental organizations that support outdoor recreation businesses and industries at the state level. There are approximately 25 state outdoor business alliances in the U.S., and their forms and functions vary by state.

There is currently no statewide organization representing and addressing the needs of the entirety of Pennsylvania's growing outdoor recreation industry.

A Pennsylvania outdoor business alliance can respond to these needs, serving as the voice of the industry, while also delivering programming and network building, and representing the interests of the business community among decision makers, funders, and the public.

What is the outdoor recreation industry, and why does it matter?

The outdoor recreation industry encompasses the businesses, organizations, and activities related to outdoor leisure and recreational pursuits. It also includes those that create, sell, plan, build, support, and service the outdoor recreation industry.

These businesses create jobs, revenues, and entrepreneurship opportunities. They also create great places, enabling Pennsylvania residents and visitors to experience and enjoy the outdoors by manufacturing tents and other gear, building trails and marinas, selling frisbees and ATVs, guiding hikes and outdoor tours, hosting guests, renting equipment and lodging, and more.



ARE YOU PART OF PA'S OUTDOOR RECREATION INDUSTRY?

The outdoor recreation industry encompasses the businesses, organizations, and activities related to outdoor leisure and recreational pursuits and includes businesses that create, sell, plan, build, support, and serve outdoor recreation. They are **Producers, Providers, and Professionals**.



Producers

Those that design, manufacture, distribute, sell, and repair outdoor clothing, gear, equipment, and vehicles.



Providers

Those that provide outdoor experiences, such as hospitality, guides and outfitters, ski areas, campgrounds, adventure centers, event organizers, educators, and trainers.



Professionals

Those that support outdoor recreation businesses and infrastructure, such as planners and designers, marketing and communication professionals, organizers and conveners, content creators, consultants, and other professional service providers.

ECONOMIC IMPACT

The outdoor recreation industry is a large and growing segment of Pennsylvania's overall economy. Since 2014, this vital sector for Pennsylvania has grown nearly 5 percent annually, including 10% between 2022 and 2023 alone.

The Pennsylvania outdoor recreation industry's contributions to statewide and local economies include:

\$19 B

annual economic impact

2%

of state GDP

168,000

direct jobs

\$9 B

in wages and salaries

2.7%

of the state's total employment



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How can an OBA serve the outdoor recreation industry in Pennsylvania?

The creation of an organization representing outdoor recreation businesses can strengthen the industry in many ways, such as:

- Providing a unified voice for the needs of the industry
- Raising the profile of the outdoor recreation industry as a key contributor to the state's economy and enabler of community and economic development
- Working with the Commonwealth to adapt policies and regulations to better meet industry needs
- Advancing marketing for and recognition of Pennsylvania's outdoor recreation industry
- Expanding opportunities for networking and learning
- Collectively addressing workforce issues for employers and employees

About/Establishing the Pennsylvania OBA

Mission

The OBA will unite, advocate for, and support all outdoor recreation businesses across the Commonwealth, fostering a thriving and sustainable outdoor recreation industry and helping to advance outdoor recreation-based community and economic development throughout the state.

Objectives

The OBA will drive value to the outdoor recreation industry by providing opportunities for networking, communications, analysis, and provision of technical and capacity-building resources.

Target Stakeholders

The OBA will serve all businesses within the outdoor recreation industry in Pennsylvania (e.g., outfitters, guides, retailers, manufacturers, lodging providers, gear rental companies, event organizers, photographers, and other professionals), as well as support organizations (such as trade organizations, chambers, economic development organizations, environmental non-profits, and tourism-focused entities). This includes individuals, nonprofits, businesses, and sponsors.

Legal Structure

Based on analysis conducted over the course of this study, the form that best meets Pennsylvania's outdoor recreation industry's needs is an independent, 501c3 non-profit organization and network association driven by a board of directors, executive director, and staff who are responsive to the outdoor recreation industry's needs.



Key services and impact

The OBA will champion the entirety of Pennsylvania's outdoor recreation industry. It will be a primary voice for the industry's businesses and facilitator of activities that grow and strengthen the industry.

It will focus around the following scope of services to achieve broad-based impact:

- **Business Growth and Development:** Support the growth, development, and connections among businesses in the outdoor recreation industry.
- **Access to Capital, Funding, and Financing:** Help build a more robust funding environment for outdoor recreation businesses to access the financial capital they need to grow.
- **Workforce:** Elevate the pathways that exist to family-sustaining jobs for those interested in working in the outdoor recreation industry.
- **Advocacy:** Serve as a resource to collect advocacy issues from businesses in the outdoor recreation industry to bring to state and local policymakers.
- **Peer Networking:** Create forums for building connections among businesses in the outdoor recreation industry to foster peer learning and business-to-business (B2B) partnership opportunities.
- **Marketing:** Raise visibility of the businesses within Pennsylvania's outdoor recreation industry.

Intended Outcomes/Impact

Through this work, the OBA will achieve the following outcomes:

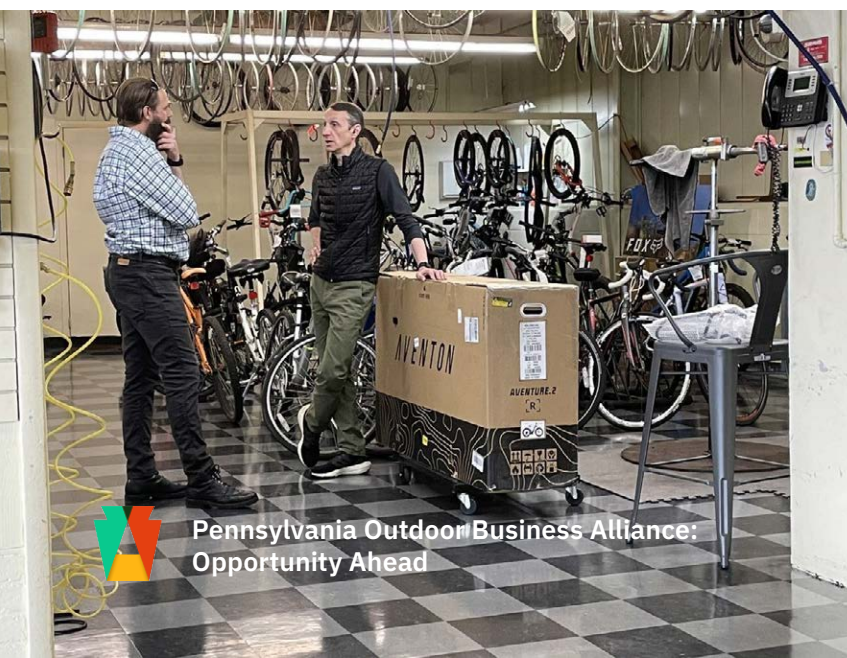
Short term – enhanced business-to-business relationships; elevated profile of PA's outdoor recreation industry; deepened understanding of the industry's needs for development.

Intermediate – enhanced outdoor recreation business development and consequent outdoor-related community and economic development.

Long term – enhanced youth and workforce retention and recruitment in PA; expanded access to entrepreneurship, business ownership and economic mobility; enhanced quality of life through enhanced outdoor recreation experience.

As it prepares to launch in 2025, the Pennsylvania OBA is committed to serving the whole of the statewide outdoor recreation industry, being a good partner to the many organizations it will collaborate with, and remaining focused on its mission to serve all outdoor recreation businesses across the Commonwealth.

As it becomes established and grows its capacity, the Pennsylvania OBA will lean on the wealth of trade associations, outdoor recreation businesses, and support entities that exist throughout the state. The OBA will be most effective and impactful by working with partner organizations to amplify common interests and derive mutual benefit – reinforcing that the outdoor recreation industry is stronger together.



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Acknowledgements

Numerous partners played a role in laying the groundwork for Pennsylvania's OBA. Thank you to all planning team members and the Office of Outdoor Recreation staff who worked to help make this plan possible.

A special thank you to our Steering Committee members for guiding and supporting this work:

Steering Committee

- Dick's Sporting Goods
- Fish USA
- Gilson Snow
- Juniata Trading Post
- New Trail Brewing
- Pennsylvania Chamber of Business and Industry
- Pennsylvania Department of Community and Economic Development
- Pennsylvania Economic Development Association
- Pennsylvania House Tourism, Recreation, and Economic Development Committee
- Pennsylvania Outdoor Recreation Association
- Pennsylvania Restaurant and Lodging Association
- Pennsylvania Wilds Center for Entrepreneurship
- Pocono Whitewater and Pocono Biking
- Purple Lizard Maps
- REI, Inc.
- Rich Port Adventure Company
- Tricycle Café & Velojawn



This initiative is an example of how our commitment to outdoor recreation can lift up communities, create good jobs, and fuel economic growth across Pennsylvania. Outdoor recreation isn't just about business or economics – it's about our quality of life and enjoying the incredible natural beauty we're lucky to have here in Pennsylvania.

– Gov. Josh Shapiro





Introduction and Background

What has led to this point – why an OBA, why now?

The outdoor recreation industry is a significant and growing segment of Pennsylvania's overall economy, providing vital contributions to communities statewide as well as enabling an enhanced quality of life. The industry encompasses the businesses, organizations, and activities related to outdoor leisure and recreational pursuits, as well as those that create, sell, plan, build, support, and service the outdoor recreation industry.

These businesses create great places, enabling Pennsylvania residents and visitors to experience and enjoy the outdoors by manufacturing tents and other gear, building trails and marinas, selling frisbees and ATVs, guiding hikes and outdoor tours, hosting guests, renting equipment and lodging, and more.

State-level outdoor recreation industries have been organizing OBAs to better support themselves, their businesses, and the communities they benefit. OBAs of one type or another exist in half the states. The Growing Outdoor Recreation for Pennsylvania roadmap recommends establishment of an OBA in Pennsylvania as its top priority.

In 2024, Southern Alleghenies Planning and Development Commission (SAP&DC) hired Fourth Economy Consulting and Firefly Outdoor Economics Consultancy to assess the current state of the outdoor recreation industry in Pennsylvania and explore opportunities for the creation of a statewide outdoor business alliance to organize and advocate for outdoor-related businesses across the state.



This work was funded through grants from the Appalachian Regional Commission and the PA Department of Conservation and Natural Resources.

Pennsylvania's outdoor recreation industry contributes greatly to statewide and local community and economic development, including 2.0% of Pennsylvania's GDP (\$19 billion), \$8.9 billion in wages and salaries, 168,322 in direct jobs, and 2.7% of the state's total employment. What's more, the industry overall has experienced 5% annual growth over the last decade, including 10% growth from 2022-2023. Despite this position of economic strength, there is no central organizing force to represent the needs and advocate for this impactful and growing sector.

In defining this industry, we include the businesses, organizations, individuals, and activities that enable outdoor leisure and recreational pursuits, such as producers, creators, and sellers, as well as those that plan, build, support, and provide services to the outdoor recreation industry as a whole. This includes gear manufacturers, retailers, and wholesalers; outfitters, guiding services, and tour companies; event organizers and hospitality providers; trail, marina, and other infrastructure builders; and professionals supporting the industry through marketing, research, creation, professional service, and more.

Pennsylvania currently lacks an existing organization with support for the whole of the outdoor recreation industry as its core mission. Businesses in this industry have reported a need for business development, access to capital, marketing support, peer connections, and policy outcomes that benefit their ability to operate sustainably in the state. In addition, the industry's workforce is unable to accommodate business needs, and interventions are needed to recruit and retain workers and develop family-sustaining employment. While many entities exist across the Commonwealth to assist businesses of all types, industries, and sizes, more holistic and focused support is needed to accompany the work of these economic development, industry support, and environmental organizations to aid the outdoor recreation industry specifically.

An OBA will benefit outdoor recreation businesses by building the capacity needed to elevate and address the needs of Pennsylvania's outdoor recreation industry. It will orient and enhance the collective identity of the businesses, organizations, and individuals who make up the outdoor recreation sector, bringing sometimes disparate organizations under a common umbrella. It will serve as an advocate and state government partner in advancing the sector.



Outdoor recreation is a strategic tool for addressing many of Pennsylvania's population, economic development, and community challenges. A strong and thriving outdoor recreation industry is critical for outdoor recreation to work as an economic development tool. This adds an economic and community development layer to Pennsylvania's need for an OBA.

Across the country, OBAs work to increase the impact of the outdoor recreation industry and support the businesses within it. This is Pennsylvania's opportunity to do the same.

Methodology

The project team undertook a multi-phased approach to assess the state of the outdoor recreation industry across the Commonwealth, understand the needs of businesses, and apply best practices from comparable organizations across the United States to best set the Pennsylvania OBA up for success.



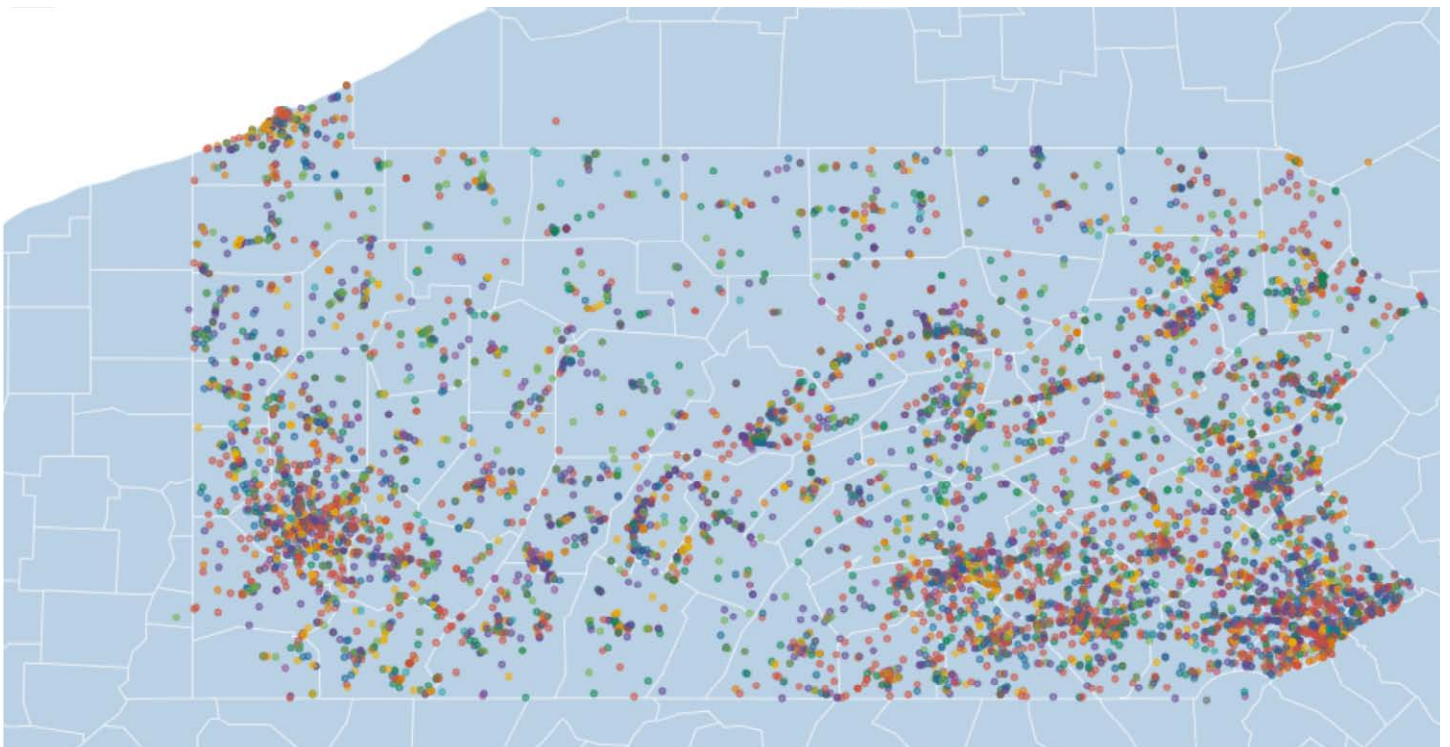
1. Peer Research into Best Practices: Direction for Pennsylvania's OBA is built off research into over 60 comparable industry associations, coalitions, and collaboratives, both in PA and across the country. All existing OBAs nationwide were studied in terms of their programming, governance, and impact. Similarly, in-state organizations were examined to determine potential synergies and alignment for future programming. Interviews with 30 of these organizations helped to confirm findings and build momentum for the planning process.

2. Business Directory and Map: Using modern digital scraping technologies, the planning team built a comprehensive listing of over 9,000 outdoor businesses operating in Pennsylvania. These businesses were codified under different outdoor activities and then mapped according to their location, providing insight into regional clusters of outdoor recreation businesses and activities. A preview of the map is shown below.

3. Business and Partner Surveys: To set priorities for the OBA, a statewide survey was released that captured information on the perspectives of both outdoor recreation businesses and non-profit groups that support them. Questions gauged business needs, ongoing challenges, and priorities for the OBA to take on. In total, over 443 individuals responded to the survey, including 230 businesses across the outdoor recreation industry.

4. Industry Engagement Workshops: In March 2025, the planning team led 10 workshops across the state with key industry members, supporters, and funders. The purpose of these events was to gather critical information and ideas regarding the state of support for outdoor recreation businesses, regional and statewide needs, and specific ideas that a future OBA could take on as its core activities. In total, around 500 people attended workshops across the 10 locations.

PA Outdoor Recreation Industry Map



View the interactive map at: public.flourish.studio/visualisation/20419431/





Market Assessment

There are a number of factors pointing to the feasibility of a statewide OBA in Pennsylvania. This includes the size and significance of the industry, its current challenges and opportunities, and the current landscape of support and gaps in service delivery for outdoor recreation businesses.

State of the Industry

The outdoor recreation industry is an important sector in Pennsylvania, accounting for 2.7% of statewide employment and 2.0% of statewide GDP in 2023.¹ The contribution of the industry to Pennsylvania's economy is over \$19 billion annually - a 10% increase from 2022. In total, Pennsylvania ranked 8th among all states in outdoor recreation value added to GDP in 2023. Over 168,000 jobs are created by the industry across over 9,000 businesses,² accounting for close to \$9 billion in statewide wages. Industry

employment grew by 4% between 2022 and 2023, outpacing the national growth rate in the industry of 3.3%.

The top recreational activities within the industry as measured by value added to Pennsylvania's GDP are:

- Boating/Fishing;
- RVing;
- Motorcycling/ATVing;
- Hunting/Shooting/Trapping; and
- Bicycling.

1. US Bureau of Economic Analysis, 2023

2. Fourth Economy Analysis of Pennsylvania Outdoor Recreation Businesses, 2024



By industry, Pennsylvania's most productive components of the outdoor recreation economy by value added are:³

- Retail trade;
- Arts, entertainment, and recreation;
- Manufacturing;
- Accommodation and food services;
- Wholesale trade; and
- Transportation and warehousing.

Pennsylvania also hosts some of the most productive sub-industries of the outdoor recreation industry in the country. Nation-leading statewide activities in terms of value added include:

- Bicycling (2nd most productive out of all 50 states);
- Motorcycling/ATVing (5);
- Equestrian (7);
- Climbing/Hiking/Tent Camping (8);
- Hunting/Shooting/Trapping (9); and
- RVing (10).

Existing Landscape of Outdoor Industry Support

The outdoor recreation industry in Pennsylvania is supported by numerous statewide industry associations. However, most of these entities work on behalf of specific users or activities, rather than the industry as a whole. A full listing of these organizations and information regarding their service offerings is included in Appendix B: Case Study Spreadsheet.

The project team had the opportunity to interview several of these in-state organizations, along with national OBAs during the project's initial phases. These interviews helped the project team learn more about potential service offerings, governance models, and goals. Ultimately, these conversations helped to define what a best-in-class OBA looks like nationwide, and what shape this could take in Pennsylvania. Interviewed organizations include:

National Organizations

- Outdoor Recreation Roundtable
- Confluence of States
- Outdoor Alliance
- Maine Outdoor Brands
- Alaska Outdoor Alliance
- California Outdoor Recreation Partnership
- Colorado Outdoor Business Alliance
- Idaho Business for the Outdoors
- Land of Outsiders
- Business for Montana's Outdoors
- North Carolina Outdoor Recreation Coalition
- Granite Outdoor Alliance
- EndeavOR New Mexico
- Nevada Outdoor Business Coalition
- Recreation Northwest
- Outdoor Business Alliance of WNC
- Pikes Peak Outdoor Recreation Alliance

In-State Organizations

- Team PA
- Pennsylvania Restaurant & Lodging Association
- Pennsylvania Outdoor Recreation Association
- PA Chamber of Business and Industry
- PA Economic Development Association
- Ben Franklin Technology Partners
- Pennsylvania Recreation & Park Society
- PA RV & Camping Association
- PA Chapter - Backcountry Hunters & Anglers
- WeConservePA
- Pennsylvania Heritage Foundation
- Williamsport/Lycoming Chamber of Commerce
- SEDA Council of Governments
- Blair Alliance

Pennsylvania's organizations work to catalyze various successes and deliver services throughout the state, yielding outcomes such as increased access to outdoor recreation areas; stronger marketing of assets, businesses, and tourist attractions; and new pipelines for workforce development and job access. While these wins are critical for the growth and development of industry-specific activities, they do not create cohesive, widespread impacts for the outdoor recreation industry as a whole.

3. US Bureau of Economic Analysis, 2023



Meanwhile, the national OBAs interviewed provided useful insights about best practices for serving the outdoor recreation industry at a state-wide level. Insights gleaned from these interviews delved into successes and failures in advocacy, optimal governance and partnership structures, and concepts for programming. Leadership from these nationwide OBAs also provided advice on what it may look like for Pennsylvania to form a similar organization with collective buy-in from key stakeholders and funders.

Value-Add of the OBA

An OBA can differ from existing organizations and activities in its unified approach to supporting the outdoor recreation industry altogether. Through targeted programs, resources, and campaigns that work to better support all outdoor recreation businesses, the OBA can work to drive collective impact. The OBA can work to amplify existing initiatives, establish collective priorities, and achieve a slate of impacts that benefit businesses across the outdoor recreation industry.

A deep assessment of the state's outdoor recreation industry and support ecosystem helped to identify potential goals, priorities, and activities that a future OBA could take on. This assessment included multiple rounds of stakeholder engagement, research into best practices, a detailed analysis of the state's outdoor recreation industry and businesses, and the creation of priority areas for impact based on existing programming, challenges, needs, and opportunities. These priorities include:

- 1. Business Growth and Development Services:** Technical assistance is needed for creating an ecosystem where businesses thrive.
- 2. Access to Capital, Funding, and Financing:** Businesses need better financial support for startup, continuity, and expansion.
- 3. Workforce:** A bigger pool of skilled workers is key for continued industry growth.

- 4. Advocacy:** Policy wins at the local, statewide, and national level can give the outdoor recreation industry a better environment for doing business.
- 5. Peer Networking:** Getting industry businesses, partners, and supporters together is critical for relationship building, knowledge sharing, coalition development, and developing business-to-business (B2B) opportunities.
- 6. Marketing:** Both businesses-to-business and business-to-consumer marketing and branding are needed to increase outdoor recreation enthusiast purchasing from Pennsylvania businesses.



“There’s a significant connection between tourism and outdoor recreation, especially in Pennsylvania. As the trade association that represents tourism and hospitality in the Commonwealth, we hope to continue engaging and being part of the conversation to develop and advance a sustainable organized outdoor industry that includes a positive community and economic impact.

We look forward to participating and collaborating with an outdoor business network, and we hope to help amplify the outdoor industry’s connection in an effort to bolster tourism and hospitality. Pennsylvania has so much to offer, and we’re excited about all that is happening to magnify that.”

– Zakary Pyzik

Senior Director of Public Affairs, Pennsylvania Restaurants and Lodging Association



**Pennsylvania Outdoor Business Alliance:
Opportunity Ahead**

Nearly 1,000 touch points across industry representatives, stakeholders, and supporters helped to further define how the OBA can align within existing programs, fill needed gaps, and turn long-standing challenges into opportunities and momentum. The following is a summary of our findings from these conversations, analysis, and engagement with key partners.

Business Growth and Development Services

What is Already Happening?	What Hurdles Exist?	What is Needed?
Existing business-support organizations and programs assist outdoor recreation businesses on an as-needed basis. These include statewide small business development centers (SBDCs) and specialized, local organizations, such as the BLOOM Business Empowerment Center in York.	Hands-on support for these businesses is limited at a statewide level. There is no industry-specific programming for the outdoor recreation industry, leaving businesses to receive more generalized support from their existing partners.	The OBA could help to create specific programs for supporting outdoor recreation businesses, including funding opportunities for business growth, technical assistance, and helping businesses navigate state programs and regulations.

Access to Capital, Funding, and Financing

What is Already Happening?	What Hurdles Exist?	What is Needed?
The state has multiple programs for getting capital to businesses, but not directly for outdoor recreation businesses. The PA Wilds Center for Entrepreneurship is a good regional example of how an entity can help to facilitate capital connections for private industry.	Outdoor recreation businesses struggle to receive traditional financing types from government programs, philanthropies, and private funders. This leaves businesses to bootstrap together their own funding for startup costs and expansions.	The OBA could help businesses present better investment cases and get better access to existing financial programs and tools, advocate for more favorable funding types, and even explore the creation of an industry-specific financing mechanism.

Advocacy

What is Already Happening?	What Hurdles Exist?	What is Needed?
Statewide, there are numerous organizations that support activities within the outdoor recreation industry, such as PORA and PRLA . The state's current political climate is open to further supporting the growth and development of the outdoor industry.	Outdoor recreation businesses and supporters lack a comprehensive, unified voice for statewide advocacy. Existing industry associations and advocacy groups are siloed by activity, limiting collective impact.	The OBA could help to drive a coordinated approach to advocacy that supports the growth and development of the outdoor recreation industry as a whole. The OBA can also support policy solutions and policymakers from the local to national level.



Workforce

What is Already Happening?	What Hurdles Exist?	What is Needed?
Workforce programming within the outdoor recreation industry exists, but lacks a robust, statewide approach. The PA Outdoor Corps is a public sector example of a statewide initiative working to get youth into this industry. Equivalent private sector-focused programs are lacking.	Outdoor recreation jobs are often in rural areas where necessary housing, transportation, and infrastructure is lacking. The seasonality of employment in the industry hinders strong, consistent employment and workforce development opportunities. This reality also restricts wages and benefits packages.	The OBA could work to expand existing workforce development programming, assist businesses with major employment challenges, and create tools and programs that help to codify career pathways and skills for industry workers. The OBA could also work towards creating an industry with accessible, family-sustaining jobs.

Peer Networking

What is Already Happening?	What Hurdles Exist?	What is Needed?
Programming exists for outdoor recreation businesses to get engaged, but primarily at the regional level. Multiple meet-ups of outdoor recreation content creators to share notes, stories, and ideas have been hosted by Hemlocks to Hellbenders. In Philadelphia, industry meetups exist, but at an informal, grassroots level.	There is no calendar of events - either statewide or regional - for outdoor recreation businesses to get involved, limiting relationship-building, knowledge-sharing, and industry development.	The OBA could work to create a marquis, annual event that convenes all statewide outdoor recreation businesses and supporters who would like to attend. This event can be supplemented by a more frequent, consistent calendar of smaller statewide and regional convenings.

Marketing

What is Already Happening?	What Hurdles Exist?	What is Needed?
Businesses market themselves through physical and online channels and partner with local and regional tourism and marketing organizations. Visit Erie and Discover NEPA are strong examples of places with a strong emphasis on marketing regional outdoor recreation attractions and businesses.	Many businesses struggle with the tools and demands that go into consistent, attractive digital marketing. The state also lacks a cohesive campaign, such as a "Made in PA" program, for its outdoor industry outfitters, experiences, and manufacturers.	The OBA could help to shape branding and marketing strategies for the state's outdoor recreation businesses. The organization can also help to facilitate connections between businesses, tourism groups, and other industry support organizations.



Services, Activities, Programming

Through surveys, workshops, interviews, and other engagement, Pennsylvania outdoor recreation businesses and organizations that support them shared ideas about what a statewide OBA might do to create value for the industry overall. Several priorities rose to the top, recommended by multiple stakeholders in several locations throughout the state, and after additional assessments of feasibility and impact. The following are recommended services, activities, and programs that the OBA should undertake in order to be responsive to the industry's needs and opportunities, described above.

Business Growth and Development Services

Goal: To support the growth, development, and connections among businesses in the outdoor recreation industry.

To achieve this goal, the OBA will:

1. Cultivate outdoor recreation industry-specific technical assistance and build awareness of business development resources among outdoor recreation businesses.
2. Provide mechanisms for business-to-business connections to enable co-manufacturing, supply chain connections, mutual-marketing, and other B2B partnerships.
3. Collect, synthesize, and make available outdoor recreation industry data to aid in business planning and operations, fundraising, and development.



4. Organize educational events targeted at both outdoor businesses and those who support them.
5. Stimulate innovation within Pennsylvania's outdoor recreation industry.

Access to Capital, Funding, Financing

Goal: To help build a more robust funding environment for outdoor recreation businesses to access the financial capital they need to grow in Pennsylvania.

To achieve this goal, the OBA will:

1. Deepen understanding among private and public business financiers of outdoor recreation businesses and their unique structures, challenges, and opportunities.



2. Analyze and communicate the state of and needed future directions for outdoor recreation business funding.
3. Provide data and technical assistance to help outdoor businesses successfully secure funding for start-up and growth.
4. Host digital resource hubs that highlight relevant funding opportunities available to outdoor recreation businesses.
5. Launch incubation activities to boost startup and growth of outdoor recreation businesses, such as an industry-specific accelerator, mini-grant program, and pitch competition.

Workforce

Goal: To help outdoor recreation businesses access the workforce they need, and elevate pathways to family-sustaining jobs for those interested in working in the industry.

To achieve this goal, the OBA will:

1. Help to stabilize employment for seasonal businesses and workers, and support family-sustaining jobs in the outdoor recreation industry.
2. Support awareness of and enhancing the career pipelines that exist, highlighting and helping to build industry-specific workforce development programs and opportunities, including certification, skill-building, and hands-on learning.
3. Highlight workforce needs within the outdoor industry and support job-matching services that facilitate consistency and quality in employment for both workers and businesses.
4. Represent the interests of the outdoor recreation industry in workforce-related policymaking (e.g., housing, education, transportation, childcare).

Advocacy

Goal: To serve as a resource to gather advocacy issues from businesses in the outdoor recreation industry and messaging/packaging them to inform state and local policy makers.

To achieve this goal, the OBA will:

1. Advance advocacy efforts and policy on behalf of outdoor recreation businesses and Pennsylvania's outdoor economy, monitoring and influencing relevant legislation and regulations.
2. Host engagement activities that connect policymakers with industry leaders to grow awareness of the outdoor recreation industry within government.
3. Craft an "industry elevator pitch" and supporting materials to streamline communications to policymakers and elected officials at all levels of government.
4. Play a leadership role in national advocacy in coordination with entities like the State Outdoor Business Alliance Network (SOBAN).



"At REI Co-op, we believe in the power of the outdoors to bring people together, strengthen communities, and support vibrant local economies. We're encouraged to see Pennsylvania taking steps to elevate its outdoor sector through the formation of an Outdoor Business Alliance. When outdoor businesses, community leaders, and advocates come together around shared goals, we can build a more inclusive and resilient outdoor economy—one that serves people and nature for generations to come."

– Tina Molski

Director of Operations for REI's northeast distribution center in Bedford, PA



Peer Networking

Goal: To create forums for building connections among businesses in the outdoor recreation industry to foster peer learning and B2B partnership opportunities.

To achieve this goal, the OBA will:

1. Create an annual statewide convening for outdoor recreation businesses that showcases the breadth, impact, and opportunity of Pennsylvania's outdoor recreation industry.
2. Facilitate strategic partnerships and celebrate B2B relationships among Pennsylvania outdoor recreation businesses.
3. Provide support and capacity to regional or sub-sector peer-to-peer networks and integrate them within the broader statewide work.

Marketing and Promotion

Goal: To raise visibility of the businesses within Pennsylvania's outdoor recreation industry to consumers, decision makers, and other businesses.

To achieve this goal, the OBA will:

1. Support collaborative statewide storytelling for the state's outdoor industry.
2. Match outdoor recreation businesses with content creators and assist with individual business marketing.
3. Support programs that recognize, market, and sell Pennsylvania outdoor recreation products, services, and experiences.



"Purple Lizard Maps strongly supports the Pennsylvania Outdoor Business Alliance. We believe a unified voice is essential for the outdoor recreation industry in the Commonwealth. As a Pennsylvania-focused recreational map publisher, we value the OBA's focus on B2B connections which will benefit our partnerships, growth and product development to better serve the outdoor community."

**– Michael Hermann
Founder, Purple Lizard Maps**





About the OBA

The OBA will become the lead collective advocate for Pennsylvania's outdoor industry and a primary private sector partner of Pennsylvania's Office of Outdoor Recreation. Though the mission, vision, and objectives of the OBA may evolve as the organization is established, the current framework is as follows:

Mission

The OBA will unite, advocate for, and support all outdoor recreation businesses across the Commonwealth, fostering a thriving and sustainable outdoor recreation industry and helping to advance outdoor recreation-based community and economic development throughout the state.

Vision

To be the leading voice and resource for the outdoor recreation industry in Pennsylvania, recognized for its positive impact on the economy, environment, and quality of life across the Commonwealth.

Objectives

The OBA will drive value to the outdoor recreation industry by providing opportunities for networking, communications, analysis, and provision of technical and capacity-building resources.

Outcomes

The core goals that will guide the OBAs operations and decisions are both immediate and longer-term.

- **Short term** – enhanced B2B relationships; elevated profile of PA's outdoor recreation industry; deepened understanding of the industry's needs for development.
- **Intermediate** – enhanced outdoor recreation business development and consequent outdoor-related community and economic development.
- **Long term** – enhanced youth and workforce retention and recruitment in PA; expanded access to entrepreneurship, business ownership and economic mobility; enhanced quality of life through enhanced outdoor recreation experience.



Operations

The following outlines recommended operational considerations for the OBA, based on research and engagement with comparable organizations both in Pennsylvania and outside of the state.

Engagement revealed strong support for a new, independent entity to represent PA's outdoor business community, and clear needs and opportunities for programming, network building, financing, advocacy, and technical assistance.

The creation of a new entity will also be marked by a necessary transition period, during which the form and function of the business alliance may evolve as the entity gains traction, before establishing full staffing, board development, and governance structure.

Proposed Structure and Governance

- **Legal structure.** Comparable organizations and trade associations typically operate as a 501c3 or c6, and each has its strengths and potential weaknesses. Several entities in other states also operate as quasi-governmental bodies.

During the course of this study, a general consensus emerged around a **501c3** structure being necessary to securing charitable donations and competitive grants, which will be critical to the entity during both startup and as it becomes established.

This will require close collaboration with partner organizations to effectively advocate and **lobby** without jeopardizing the entity's nonprofit designation.

- **Board of directors.** The OBA will need a strong and engaged board of directors representing a broad array of outdoor business interests reflective of the industry it represents.

Model boards from peer organizations tend to include a balance of influential or well-funded members who can bring partners and funding to the table, and individuals representative of the businesses who will benefit most from educational, funding, technical assistance, and other services. Representatives from state government and elected officials may serve as non-voting members, while the executive director may serve in an ex-officio role.

The typical size of an OBA's board of directors, based on feedback from comparable organizations, ranges from smaller groups (5-9 members) to bigger, 15-19 person boards. Almost all organizations have an active board of directors to help give capacity to a smaller staff. Many organizations have ex-officio members and complementary advisory committees that delve into specific topics such as workforce development, marketing, equity and access, and event planning.



Partnerships

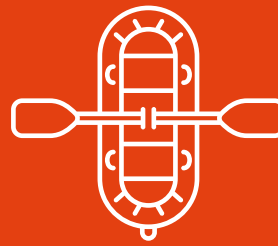
The OBA will operate alongside other, complementary organizations within the outdoor recreation industry at the local/ regional, state, and national levels to achieve its goals. This includes partnering with and supporting the work of regional, peer, or sub-sector organizations, including trade associations, economic development organizations, lobbying groups, and nonprofits serving the outdoor recreation industry.

Staff and Organizational Capacity

Stakeholders engaged for this study shared a strong preference for an organization that has low overhead and an efficient staff. Given this preference, support from consultants, partners, and outsourced services will likely be necessary in the short and long term.

Most comparable organizations have full-time staff dedicated to the organization. Ideally, Pennsylvania's OBA will hire one or more positions to support the organization's work, including an executive director who can oversee implementation of the OBA's objectives and be a prominent representative of the outdoor business community within and beyond Pennsylvania.

- **Executive Director.** This individual will ultimately drive forward the OBA's work and establish the OBA as a trusted and valued partner. This role requires familiarity with Pennsylvania's outdoor recreation industry, funding landscape, agency relationships, and outdoor businesses. The executive director will be expected to foster critical relationships with the board of directors, Office of Outdoor Recreation, institutional funders, and the business community.
- In the **short term**, during entity creation and the first 12 to 18 months of programming, the OBA will necessarily rely on support from the Office of Outdoor Recreation and consultants, until dedicated staff can carry core OBA functions forward.



"PORA strongly supports the creation of Pennsylvania's Outdoor Business Alliance because our \$19 billion industry needs a unified voice. While PORA serves our members through targeted programming and advocacy, the OBA would amplify our collective impact across the entire outdoor recreation sector. The OBA creates the statewide infrastructure that will serve Pennsylvania's outdoor recreation industry far better than any of us working alone."

- Lutricia Eberly
Executive Director, PA Outdoor Recreation Association

- In the **long term**, similar entities have added staff with strengths in fundraising, administration, programming, and technical assistance.

During the study period, some stakeholders expressed concern with an overreliance on consultants, lobbyists, and trade association management professionals who are often employed to provide capacity for other industry associations. The outdoor business community, they argue, will value authentic engagement by OBA staff over transactional relationships. The OBA board and staff should keep this in mind.



Target Stakeholders

The OBA will serve all businesses within the outdoor recreation industry in Pennsylvania (e.g., outfitters, guides, retailers, manufacturers, lodging providers, gear rental companies, event organizers, photographers, and other professionals), as well as support organizations (such as trade organizations, chambers, economic development organizations, environmental non-profits, and tourism-focused entities). This includes individuals, nonprofits, businesses, and sponsors. Target stakeholders are the Producers, Providers, and Professionals that make up the outdoor recreation economy in Pennsylvania.

Funding/Revenue

Financial sustainability through diverse and reliable revenue streams is critical to an OBA's success. In the early phase of establishing the Pennsylvania OBA, institutional investors will serve as the primary funding sources and capacity builders to drive forward the organization's work. This includes parties within state government, philanthropic organizations, and industry employers.

Following this startup period and once the organization has an appropriate level of staff capacity to support additional fundraising, the OBA will cultivate an investor base that is inclusive of those initial foundational funders, other sponsors and benefactors, businesses within the outdoor recreation industry, nonprofits that support the industry, and individuals that are engaged in the industry in some way. This may take the form of a tiered investment model, with guiding criteria such as organizational size/ revenue or type:

- Investor Tiers
- Institutional Investor
- Sponsor/Benefactor
- Business
- Nonprofit
- Individual
- Pro-bono or In-kind



Producers

Those that design, manufacture, distribute, sell, and repair outdoor clothing, gear, equipment, and vehicles.



Providers

Those that provide outdoor experiences, such as hospitality, guides and outfitters, ski areas, campgrounds, adventure centers, event organizers, educators, and trainers.



Professionals

Those that support outdoor recreation businesses and infrastructure, such as planners and designers, marketing and communication professionals, organizers and conveners, content creators, consultants, and other professional service providers.



It will be important to develop compelling messaging highlighting the benefits of investment, as well as providing consistent value to investors across the board. Investors and supporters need to understand the tangible benefits and clear value proposition the organization provides. This can be aided by the development of testimonials and case studies, as well as by creating forums for outdoor recreation businesses and entrepreneurs to network, learn from one another, and benefit from the OBA's programs and services.

Outreach

Awareness will be built through participation in industry events, discussions with contemporary and potential partners, delivery of services and programming, recognition and celebration of member achievements, as well as through traditional marketing channels:

- Website and online presence
- Social media engagement
- Email marketing and newsletters
- Public relations and media outreach

Retention of partners, funders, and supporters will rely on fostering a strong sense of community and added-value. Successful OBAs adapt their offerings to meet evolving needs, which can be achieved by actively and regularly soliciting feedback from members and other partners.

Startup

In the short term, over the next six to 12 months, the OBA will be best set up for success by taking the following steps:

1. Identify prospective OBA board members
2. Finalize the organizational structure, governance, and operations plan
3. Determine the organization name and branding
4. Engage in legal entity formation
5. Initiate implementation of funded scope of work
6. Continue fundraising focused on building and advancing programming

Implementation of recommended programming will be phased over the short, mid, and long term, and supported by a number of partners, detailed in the implementation plan.



"I am grateful for the creation of the OBA and I am beyond excited to see what this alliance can accomplish in the years to come. The outdoor industry makes up a shockingly large portion of the Pennsylvania GDP, and we haven't had consolidated representation until now. I am excited to see what connections, discoveries and efficiencies are uncovered through this work, all in an effort to better serve Pennsylvania's outdoor enthusiast and the many visitors who come to our state to get outside"

– Nicholas Gilson
CEO, Gilson Snow





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