# PENNSYLVANIA WILDS INITIATIVE PROGRAM EVALUATION

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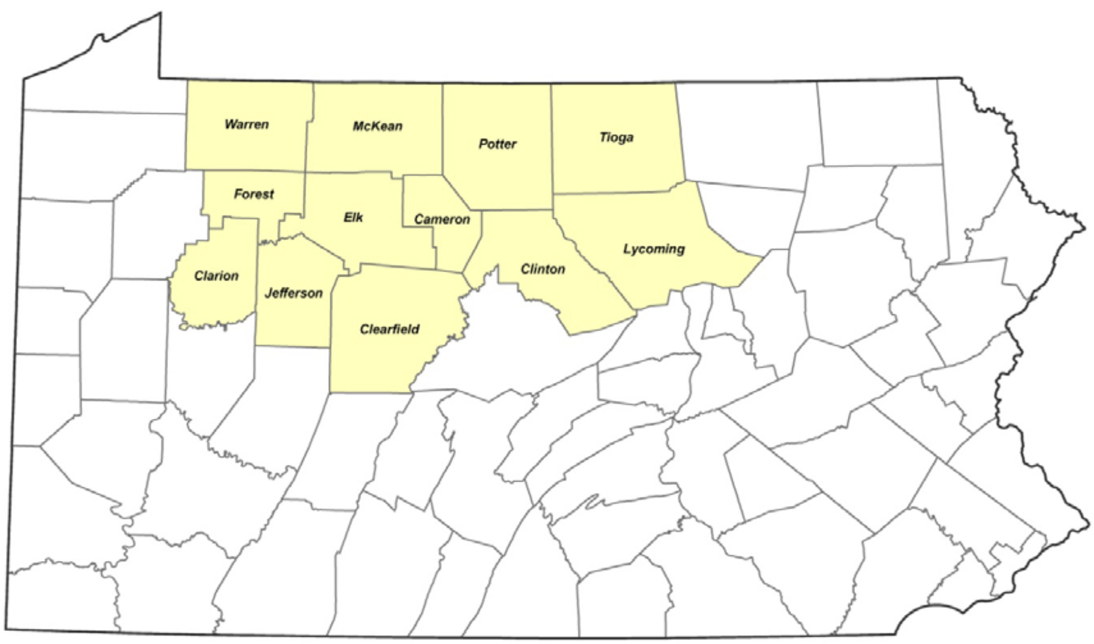
# Executive Summary

## *Introduction*

In 2003, Governor Edward G. Rendell established the Pennsylvania Wilds initiative to coordinate the efforts of various state agencies as well as local jurisdictions, tourism promotion agencies, economic development leaders, and the private sector to **conserve the natural resources and energize the economies of the 12 counties** located in the north-central region of the Commonwealth of Pennsylvania. The Pennsylvania Wilds region is a vast and largely rural section of the Commonwealth that is home to some of the best opportunities for outdoor recreation and wilderness adventure experiences in the eastern US (see Figure ES.1. An important objective of the Pennsylvania Wilds initiative is to **brand the Pennsylvania Wilds region as a distinct entity and world class destination for outdoor recreation experiences**, thus attracting tourists, creating jobs, and sustaining communities.

Figure ES.1 – The 12 Counties of the Pennsylvania Wilds Region




*Source: Wharton GeoSpatial Initiative (2009)*

In 2009, the Commonwealth commissioned Econsult Corporation and Wharton GeoSpatial Initiative to provide a more quantitative analysis of the Pennsylvania Wilds region and of the Pennsylvania Wilds initiative. Thus, a main purpose of the Econsult report is to **assess the extent to which the Pennsylvania**

Wilds initiative has had an economic impact on the Pennsylvania Wilds region, and to identify improvements in data collection and performance measurement that can improve similar evaluation efforts in the future.[1] As with any such evaluative undertaking, fundamental to this process was the determination of the characteristics and inputs of the program (in this case, the Pennsylvania Wilds initiative), and their effect on outputs and outcomes within the area in which the program was intended to improve (in this case, the Pennsylvania Wilds region). Therefore, the report is organized into four sections:

1. *<u>Demographic and Economic Overview of the Pennsylvania Wilds Region</u> - A demographic and economic overview of the Pennsylvania Wilds region, to establish the context in which the Pennsylvania Wilds initiative has operated and to help identify relevant trends across time and county.*

The Pennsylvania Wilds is overwhelmingly rural, and, like much of the Commonwealth as a whole, has had to make a long, challenging, and in some cases painful transition over the past few decades from a manufacturing-heavy economy to a more modernized, knowledge-based economy. Geographic isolation is increasingly becoming a competitive disadvantage in a globalized and mechanized economy.

The Pennsylvania Wilds region is particularly feeling the impacts of the current economic slowdown: counties lack sufficient representation in their local economies in more recession-proof sectors such as health care and higher education, reduced global production has exacerbated a decades-long decline in manufacturing activity and employment, and producers of automobile parts have particularly struggled on account of challenges faced by auto manufacturers. Consider that the Pennsylvania Wilds region accounts for 23 percent of the Commonwealth's land mass, but only 4 percent of its population and 2.4 percent of its income, and contributes less than 0.2 percent to Gross State Product.

The Pennsylvania Wilds region has experienced population stagnation for decades: even the Commonwealth, which was one of the slower-growing states in the US, had a population growth rate over six times that of the Pennsylvania Wilds region from 1970 to 2008 (+0.18 percent per year versus +0.03 percent per year). These declines have seemed to accelerate in recent years: the Pennsylvania Wilds

[1] It is important to mention the consequence on such an endeavor of the relative lack of data available and the relative dearth of data collection mechanisms in place. Rural areas are, by definition, more spread out in terms of economic activity, and in addition to numbers being smaller, oftentimes data is sparser. Even within the short span of the past five years, data collection techniques have improved markedly, thus further complicating the ability to properly interpret trends during this time period. Furthermore, many of the important indicators of success within the Pennsylvania Wilds region and of the Pennsylvania Wilds initiative do not easily lend themselves to economic quantification: conservation, environmental purity, quality of life. Finally, precise cause-and-effect relationships remain unavailable at this early stage: much of the Pennsylvania Wilds initiative's successes will require a long-term perspective to properly identify and analyze, and thus correlation, let alone causation, cannot be proven at this juncture.

This does not argue for a less analytical approach; on the contrary, it makes rigorous data collection and performance evaluation efforts all the more necessary, in light of the fact relative dearth of source material from which to derive interpretations. Nevertheless, impacts must also be expressed in anecdotal terms, and future performance measurement efforts considered, as part of the overall data collection and performance evaluation effort.

region actually had almost 8,000 fewer residents in 2008 than in 2003, and has experienced particular declines among younger populations.

Meanwhile, from 2003 to 2008, per capita incomes within the Pennsylvania Wilds region grew more slowly than within the Commonwealth as a whole (+1.75 percent per year versus +2.24 percent per year). Population losses and weak income growth within the Pennsylvania Wilds region were both cause and effect for business and job losses: from 2002 to 2006, while the Commonwealth had net increases of about 6,800 businesses and 143,500 jobs, the Pennsylvania Wilds region had net decreases of about 250 businesses and 1,400 jobs. Over the last decade, unemployment rates within the Pennsylvania Wilds region have been consistently a percentage point or two higher than those within the Commonwealth as a whole; during the current recession, unemployment rates spiked up to 10 percent.

2. *Intended Objectives and Actual Actions of the Pennsylvania Wilds Initiative – A description of the intended components of the Pennsylvania Wilds initiative, and of the actual efforts that were undertaken within those categories, to quantify the inputs contributed by the initiative towards its stated objectives.*

Too often, nature and commerce are pitted against each other: preservation versus development, or solitude versus congestion. But far from being mutually exclusive, nature and commerce can be mutually reinforcing: nature can support robust activity in such industries as sustainable timber harvesting and recreation, while tourism can provide the financial and organizational resources to help enhance the experience of nature by current generations and safeguard that opportunity for future generations. Accordingly, the mission of the Commonwealth's Department of Conservation and Natural Resources (DCNR), and the purpose of the Pennsylvania Wilds initiative, is about both conservation and economic activity, and four major sets of efforts were undertaken:

- *Investments in Recreational Facilities* - The Pennsylvania Wilds initiative focused and funneled programmatic dollars in support of strategic investments in recreational facilities: $13 million in direct investments to local communities in the Pennsylvania Wilds region from 2003 to 2008 in support of various recreational enhancements such as parks, trails, and conservation projects, and an additional $120 million in direct recreational investments, to create new attractions and enhance existing ones.

- *Technical and Financial Assistance to Businesses and Communities* - The Pennsylvania Wilds initiative also became a coordinating and championing entity in making technical assistance resources from the Commonwealth and other public and private sector providers to tourism and other related businesses and to the communities in which they are located, to bolster their organizational capacity to offer the kinds of products, services, and experiences to visitors that would synchronize with how external advertising and branding has depicted the Pennsylvania Wilds region.

- *Branding, Advertising, and Promotion* - The Pennsylvania Wilds initiative has channeled approximately $5 million to market the Pennsylvania Wilds region, and the many individual communities and attractions that are contained within its 12 counties, as one cohesive unit to potential visitors.

- *Inter-Organizational Coordination of State and Other Entities* - Finally, the Pennsylvania Wilds initiative has served as an efficient mechanism by which the Commonwealth's many relevant entities could interface with each other and with other public and private sector entities that share the same goals for the Pennsylvania Wilds region, with the Pennsylvania Wilds Design Guide being a noteworthy outcome of such collaborations.

3. *Economic and Fiscal Impacts on the Pennsylvania Wilds Region - Multiple aspects of economic and fiscal impact on the Pennsylvania Wilds region resulting from the Pennsylvania Wilds initiative, to demonstrate whether and where the initiative has achieved its objectives.*

In spite of its relative infancy, the Pennsylvania Wilds initiative has had a positive effect on the Pennsylvania Wilds region. In the midst of a long decline in many parts of rural Pennsylvania, key economic indicators, particularly those influenced by tourism, are largely positive, contributing to some promising, albeit limited economic and fiscal successes:

- The Pennsylvania Wilds region experienced annual Gross Domestic Product growth of 3.7 percent from 2004 to 2007.

- From 2004 to 2008, while national park attendance was relatively flat and state park attendance throughout the Commonwealth declined, attendance at state parks within the Pennsylvania Wilds region increased by 3.3 percent per year.

- The Pennsylvania Wilds region enjoyed a sharp increase in overnight leisure travel (+5.3 percent per year, versus +1.9 percent per year for the Commonwealth as a whole) and leisure overnight trip length (+4.6 percent per year, vs. +0.0 percent per year for the Commonwealth as a whole) from 2003 to 2007, while from 2002 to 2006, visitor spending within the Pennsylvania Wilds region grew by 6.3 percent per year (versus +4.9 percent per year for visitor spending within the Commonwealth as a whole).

- From 2002 to 2007, tourism employment within the Pennsylvania Wilds region grew by +0.5 percent per year (versus -2.2 percent per year for tourism employment within the Commonwealth as a whole), and tourism earnings within the Pennsylvania Wilds region grew by +5.4 percent per year (versus -2.8 percent per year for tourism earnings within the Commonwealth as a whole).

- From 2005 to 2008, state sales tax revenue from tourism categories within the Pennsylvania Wilds grew by 2.7 percent per year (versus +0.6 percent per year for state sales tax revenue from tourism categories within the Commonwealth as a whole), while from 2004 to 2007, hotel tax revenues within the Pennsylvania Wilds grew by 13.1 percent per year (versus +8.0 percent per year for hotel tax revenues within the Commonwealth as a whole).

- From 2003 to 2008, the Pennsylvania Wilds region experienced a net change in chain hotel establishments of +12, or an almost 40 percent increase.

In short, at a time and place in which demographics and economics would seem to suggest stagnation, tourism-driven economic growth in the Pennsylvania Wilds region has been a bright spot. Specific categories of action items have shown to have, in aggregate, an effect on the Pennsylvania Wilds region, which hopefully encourages policy makers to continue this positive momentum and welcomes additional public and private sector leaders to join in on the collaboration, for the benefit of the Pennsylvania Wilds region as well as the Commonwealth as a whole.

*4. Programmatic and Evaluative Recommendations - Recommendations for future programming, data collection, and performance measurement efforts, to increase the efficiency and effectiveness of the initiative in meeting future objectives.*

As evidenced by changes in key economic indicators, the Pennsylvania Wilds initiative has had a positive effect on the Pennsylvania Wilds region, and those positive effects are likely to continue as efforts gain further traction. Nevertheless, it is important to note that tourism alone will not reverse decades of decline in many areas of the Pennsylvania Wilds region; from an economic development standpoint, other efforts will need to be undertaken which similarly trade on the unique assets and characteristics of the Pennsylvania Wilds region, and that, together with tourism and other outdoor-oriented industries, create more diversified, knowledge-based, and competitive local economies.

Furthermore, from a performance management standpoint, this evaluative effort confirms the need for more feedback loops to assist future quantitative evaluation efforts. Accordingly, programmatic and measurement enhancements were considered and performance "dashboard" indicators developed for the Pennsylvania Wilds initiative and for the four sets of efforts it undertakes to improve the Pennsylvania Wilds region:

- *Investments in Recreational Facilities and Supportive Infrastructure* – There is a particular need for investment in accommodations and related amenities, to respond to pent-up demand, and for more and better signage and more visitor centers, so that tourists can find their way to and around the Pennsylvania Wilds region with greater ease. In addition, mechanisms need to be put in place to monitor the impact of existing and proposed recreational investments: at the point of investment, DCNR can pay particular attention to the extent to which increased activity results from new or enhanced facilities.

- *Technical and Financial Assistance to Businesses and Communities* - The need to disseminate information and resources to geographically disparate communities argues for a more robust online presence for the Pennsylvania Wilds initiative, while another important set of functions is the brokering of relationships with other technical assistance providers, most notably the Small Business Development Centers that serve the Pennsylvania Wilds region. Combined technical assistance efforts should be monitored and measured more effectively through the use of a "performance dashboard" of key inputs and outputs, which can help coordinate efforts by the Commonwealth and key providers to dispense technical assistance resources and see businesses and communities succeed as a result of them.

- *Branding, Advertising, and Promotion* - The initial promotional work of the Pennsylvania Wilds initiative has laid the groundwork for important follow-on efforts to build on the awareness of the Pennsylvania Wilds brand and specific attractions and experiences available within the Pennsylvania Wilds region. Broader branding campaigns about the Pennsylvania Wilds region can now give way to messaging that elaborates on the many intricate aspects of the Pennsylvania Wilds region that made visiting the area so unique and special. The Commonwealth should also set up feedback mechanisms for promotional efforts, so as to monitor effectiveness over time; specifically, follow-up surveying can help determine the extent to which specific advertising campaigns had an effect on tourism activity.

- *Inter-Organizational Coordination of State and Other Entities* - Inter-entity collaborations involving a government as large and complex as the Commonwealth's are expected to be challenging. Continued positive attention should be paid to successful linkages the Commonwealth is able to foster through the Pennsylvania Wilds initiative and on behalf of the Pennsylvania Wilds region, and new networks should be identified, built, and monitored. DCNR's efforts to both market and protect the Pennsylvania Wilds region will need to be coordinated with common but important considerations under PennDOT's purview such as road signage and transportation infrastructure investments, as well as with governing entities such as the Game Commission and the Fish and Boat Commission as it relates to allowable recreational activities and permitted users.

## *Conclusion*

Many challenges remain for the Pennsylvania Wilds region and the Pennsylvania Wilds initiative: geographically isolated regions must contend with a variety of macro-economic trends that do not work in their favor, and innovative efforts like the Pennsylvania Wilds initiative can be challenging to sustain over time, given the difficulties associated with collaborating across so many agencies and entities, particularly in a constrained economic and fiscal time. Nevertheless, the Pennsylvania Wilds initiative, while young, has had a successful first few years of operations, building from the Commonwealth's rich legacy of conservation and commerce in the communities of the Pennsylvania Wilds region.

Continued such efforts in the years to come will build on these successes; and establishing some evaluative frameworks will provide the data and metrics with which to analyze results over time, report successes to partners and stakeholders, and make any necessary adjustments. At stake is not only the wise use of Commonwealth resources, but also the fate of this unique region's precious environmental resources as well as the economic vitality of its communities, establishments, and individuals.

# 1.0 Introduction

## 1.1 Overview of the Pennsylvania Wilds Region and the Pennsylvania Wilds Initiative

In 2003, Governor Edward G. Rendell established the Pennsylvania Wilds initiative to coordinate the efforts of various state agencies as well as local jurisdictions, tourism promotion agencies, economic development leaders, and the private sector to conserve the natural resources and energize the economies of the 12 counties located in the north-central region of the Commonwealth of Pennsylvania.[2] While the initiative is relatively new, it draws from a deep legacy of conservation within the Commonwealth, as noted by the Governor in his January 2007 introduction to a report on the Pennsylvania Wilds initiative:

> "[The Pennsylvania Wilds initiative] really launched 100 years ago when this rich region in north central Pennsylvania began its recovery. That's when insightful leaders decided to protect and restore the natural resources that were once so plentiful. Today, these once-exploited natural resources offer bountiful recreation, sustainable forestry and unparalleled beauty, opening new and different opportunities for tourism and economic growth."[3]

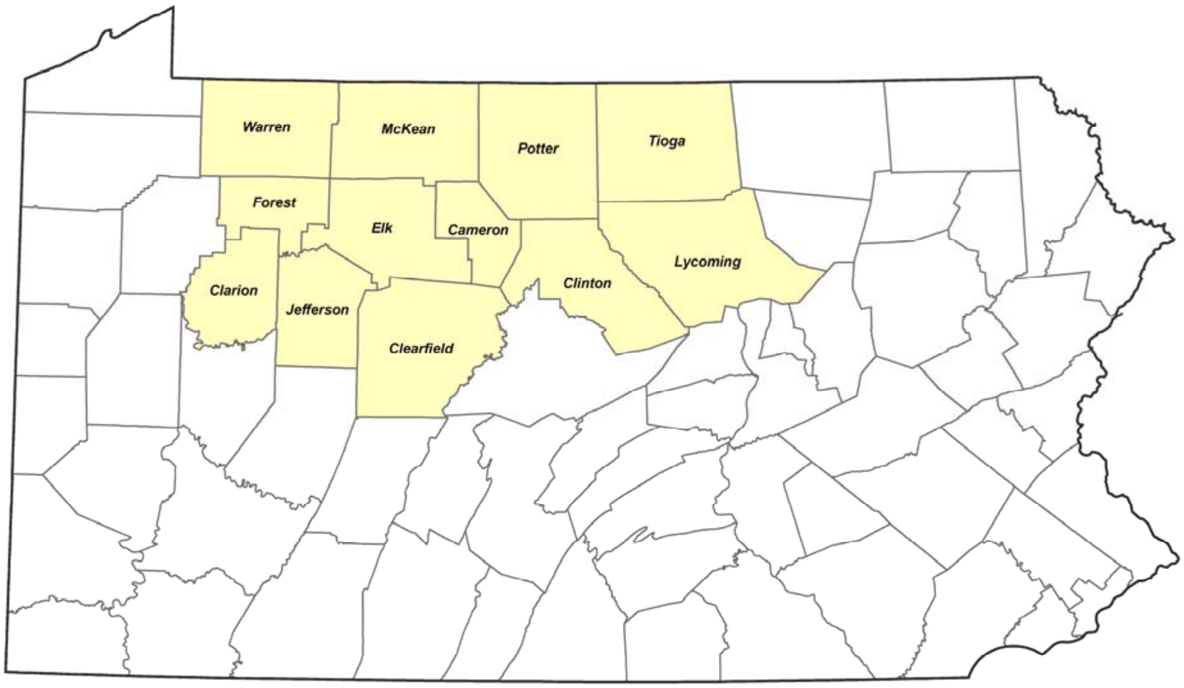
The Pennsylvania Wilds region is a vast and largely rural section of the Commonwealth that is home to some of the best opportunities for outdoor recreation and wilderness adventure experiences in the eastern US. It represents some 23 percent of the Commonwealth's land area, includes over 1.6 million acres of state forest and game lands, 29 state parks, and the 513,000-acre Allegheny National Forest (see Figure 1.1 and Figure 1.2). About half of the Commonwealth's public land and Class A native trout streams, and two-thirds of state and federal natural and wild areas, are located within the Pennsylvania Wilds region.[4]

[2] See Appendix A for a brief summary of each of the 12 counties of the Pennsylvania Wilds region.

[3] "Progress through Partnerships: A Three-Year Report on the Pennsylvania Wilds," Commonwealth of Pennsylvania (January 2007).

[4] Throughout the report, a distinction is made between the Pennsylvania Wilds region, which represents the physical section of the Commonwealth that is being studied, with the Pennsylvania Wilds initiative, which represents the policy actions undertaken by the Commonwealth to benefit the Pennsylvania Wilds region.

Figure 1.1 – The 12 Counties of the Pennsylvania Wilds Region




*Source: Wharton GeoSpatial Initiative (2009)*

Figure 1.2 – Major Recreational and Natural Assets of the Pennsylvania Wilds region

- 29 State Parks and 8 State Forests
- 300,000 Acres in 50 State Gamelands
- 513,000-acre Allegheny National Forest
- 16,000+ Miles of Streams and Waterways, including 2,000+ Miles of Designated Trout Streams
- 150,000 Acres of Designated Wild and Natural Areas
- Largest Free-Roaming Elk Herd in the Northeast
- 2,000+ Miles of Hiking, Bicycling, Equestrian, and Snowmobiling/ATV/Cross-Country Trails
- Darkest skies for night sky viewing in the northeastern US, and home to the second international Dark Sky Park in the nation

*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2008)*

An important objective of the Pennsylvania Wilds initiative is to brand the Pennsylvania Wilds region as a distinct entity and world class destination for outdoor recreation experiences, thus attracting tourists, creating jobs, and sustaining communities. A hallmark of the Pennsylvania Wilds initiative has been the simultaneous pursuit of conservation and tourism. Far from being mutually exclusive, nature and commerce can and in fact must be mutually reinforcing: nature creates tourism and other commercial activities that are unique to this area, while commerce generates the financial and organizational resources to safeguard environmental treasures for today and tomorrow.

Indeed, in the case of the Pennsylvania Wilds region, it can be a powerful synergy. The area boasts many elk watching and star gazing opportunities, hundreds of miles of trails and streams, and other worthy sights and experiences (see Figure 1.3). As such, it supports a diversity of hospitality-, nature-, and artisan-oriented businesses, from inns and restaurants to sellers of recreational equipment and hand-crafted woodwork, which provide economic opportunities while enhancing rather than endangering the region's environmental resources.

Figure 1.3 – Elk Spotted near Ridgway, Elk County

*Source: Greg Scruggs (2009)*

Such an effort necessarily involves the coordinated work of numerous entities at multiple levels of government, as well as the engagement of a variety of private sector stakeholder groups. Indeed, a second hallmark of the Pennsylvania Wilds initiative is its ability to bring together disparate entities toward the shared end of stimulating economic growth through the sustainable use of natural resources for outdoor recreation and heritage based tourism.

Formally and informally, the Commonwealth, through the Pennsylvania Wilds initiative, has effectively brought together a diversity of groups for the benefit of the Pennsylvania Wilds region (see Figure 1.4). The Governor's Task Force on the Pennsylvania Wilds, the Pennsylvania Wilds Planning Team, and the Pennsylvania Wilds Tourism Marketing Corporation represent three formal collaborative bodies with regular gatherings and institutional linkages across entities. These umbrella entities have fostered numerous impactful partnerships throughout the Commonwealth, from coordination of lending efforts between the Commonwealth's Department of Community and Economic Development (DCED) and private banks, to joint sponsorships of nature initiatives such as Prowl the Sproul (the Commonwealth's Department of Conservation and Natural Resources (DCNR) and Keystone Trails Association) and Adventure Camps (DCNR's Bureau of State Parks and municipal parks and recreation departments).

Figure 1.4 – A Selected List of Entities or Stakeholders Formally and Informally Involved in the PA Wilds Initiative: The Pennsylvania Wilds Initiative Has Successfully Brought Together a Diversity of Public and Private Sector Entities towards a Common Goal

| State Agencies | Other Government Entities/Representatives | Tourism and Business Promotion Groups | Other Non-Profit or Quasi-Government Entities | Private Sector Entities |
|---|---|---|---|---|
| • Department of Conservation and Natural Resources<br>• Department of Community and Economic Development<br>• Department of Environmental Protection<br>• Department of General Services<br>• Department of Transportation<br>• Game Commission<br>• Fish and Boat Commission<br>• Historical and Museum Commission | • County planning offices<br>• US Congressional representatives<br>• State legislators<br>• County commissioners<br>• Municipal officials<br>• Allegheny National Forest<br>• US Army Corps of Engineers | • Tourism promotion agencies<br>• Convention and visitors bureaus<br>• Lumber Heritage Region<br>• PA Route 6 Association<br>• Chambers of Commerce | • University-based technical assistance providers (Small Business Development Centers, Penn State University's Cooperative Extension System)<br>• Regional planning commissions<br>• Councils of government<br>• Associations of municipal officials<br>• Recreation associations<br>• Artisan groups | • Accommodations businesses<br>• Restaurants<br>• Artisans<br>• Recreation businesses<br>• Timber Industry |

*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2008), Econsult Corporation (2009)*

## 1.2 The Importance and Timeliness of Data Collection and Performance Evaluation Efforts

In 2007, the Commonwealth published a report entitled, "Progress through Partnerships: A Three-Year Report on the Pennsylvania Wilds."[5] The report was intended to highlight the many partnerships that make the Pennsylvania Wilds initiative work, articulate its main goals, and highlight key investments that have been made to increase tourism, improve communities, and brand the region. It did not, however, seek to comment on the Pennsylvania Wilds region from an economic standpoint, nor did it provide data or analysis associated with the activities and effects of the Pennsylvania Wilds initiative.

In 2009, the Commonwealth commissioned Econsult Corporation and Wharton GeoSpatial Initiative to provide a more quantitative analysis of the Pennsylvania Wilds region and of the Pennsylvania Wilds initiative. Thus, a main purpose of the Econsult report is to assess the extent to which the Pennsylvania Wilds initiative has had an economic impact on the Pennsylvania Wilds region, and to identify improvements in data collection and performance measurement that can improve similar evaluation efforts in the future.

It is important to mention the consequence on such an endeavor of the relative lack of data available and the relative dearth of data collection mechanisms in place. Rural areas are, by definition, more spread out in terms of economic activity, and in addition to numbers being smaller, oftentimes data is sparser. Even within the short span of the past five years, data collection techniques have improved markedly, thus further complicating the ability to properly interpret trends during this time period. Furthermore, many of the important indicators of success within the Pennsylvania Wilds region and of the Pennsylvania Wilds initiative do not easily lend themselves to economic quantification: conservation, environmental purity, quality of life. Finally, precise cause-and-effect relationships remain unavailable at this early stage: much of the Pennsylvania Wilds initiative's successes will require a long-term perspective to properly identify and analyze, and thus correlation, let alone causation, cannot be proven at this juncture.

This does not argue for a less analytical approach; on the contrary, it makes rigorous data collection and performance evaluation efforts all the more necessary, in light of the relative dearth of source material from which to derive interpretations. Nevertheless, impacts must also be expressed in anecdotal terms, and future performance measurement efforts considered, as part of the overall data collection and performance evaluation effort.

Now that it has been about five years since the Pennsylvania Wilds initiatives' inception, it is an apt time for such an effort. And, given the performance measurement orientation of the Governor and the Commonwealth,[6] focusing on quantitative measures is also appropriate. Of course, the conclusion of the Rendell Administration in late 2010 and the present economic recession and resulting budget crisis add particular urgency to the need to best understand what is working and what is not, how to

[5] "Progress through Partnerships: A Three-Year Report on the Pennsylvania Wilds," Commonwealth of Pennsylvania (January 2007).

[6] See, for example, the "2007-2008 Governor's Report on State Performance," Commonwealth of Pennsylvania (December 2008).

institutionalize programmatic and evaluative efforts, and how to generate the best return on investment of public resources to citizens of and visitors to the Commonwealth.

Finally, the Commonwealth's Department of Conservation and Natural Resources (DCNR), the main agency tasked with the stewardship of the Pennsylvania Wilds initiative, is, at the time of this writing, in the midst of a broader and strategic evaluation of its Conservation Landscape Initiatives. This effort, which is being spearheaded by the OMG Center for Collaborative Learning, will include an extensive case study on the Pennsylvania Wilds initiative. Thus, the Econsult report benefited from, and in turn has benefited, that parallel effort.[7]

## 1.3 Report Methodology and Outline

The purpose of this report was to evaluate the Pennsylvania Wilds initiative from an economic standpoint, and to advance recommendations to inform future programmatic, data collection, and performance measurement efforts. As with any such evaluative undertaking, fundamental to this process was the determination of the characteristics and inputs of the program (in this case, the Pennsylvania Wilds initiative), and their effect on outputs and outcomes within the area in which the program was intended to improve (in this case, the Pennsylvania Wilds region). Therefore, the report is organized as follows:

- A demographic and economic overview of the Pennsylvania Wilds region, to establish the context in which the Pennsylvania Wilds initiative has operated and to help identify relevant trends across time and county (Section 2). This is necessary to develop a baseline economic profile, so as to better isolate what incremental effect the Pennsylvania Wilds initiative has had, and therefore requires an elaboration of historical trends associated with key demographic and economic indicators such as population, age distribution, unemployment rates, and business establishments.

- A description of the intended components of the Pennsylvania Wilds initiative, and of the actual efforts that were undertaken within those categories, to quantify the inputs contributed by the initiative towards its stated objectives (Section 3). This delineates the composition and scale of effort put forth by the Commonwealth for the benefit of the Pennsylvania Wilds region: what the Pennsylvania Wilds initiative intended to do from the outset, and what was actually done in the past five years.

- Multiple aspects of economic and fiscal impact on the Pennsylvania Wilds region resulting from the Pennsylvania Wilds initiative, to demonstrate whether and where the initiative has achieved its objectives (Section 4). Having established an economic baseline for the Pennsylvania Wilds region, and articulated what efforts were undertaken through the Pennsylvania Wilds initiative, these indicators attempt to highlight whether and where a discernible change resulted.

[7] This report is expected to be completed by the end of 2009.

- **Recommendations for future programming, data collection, and performance measurement efforts**, to increase the efficiency and effectiveness of the initiative in meeting future objectives (Section 5). At this juncture in the evolution of the Pennsylvania Wilds initiative, it is useful to consider programmatic improvements, resource reprioritizations, and strategic partnerships that can be made. Furthermore, since data is scarce and causality is difficult to measure at this early stage, recommendations also focus on data collection and performance measurement undertakings that can aid future inquiries concerning the effect of the Pennsylvania Wilds initiative on the overall economic health of the Pennsylvania Wilds region.

This report was produced as a result of an iterative process involving three major sets of information:[8]

- **Publicly available data sets**, mostly depicting broader, macro-economic information, with some availability of data points at a finer detail in terms of geography and/or industry.[9] This demographic and economic data is necessary to help describe current conditions, identify trends, and interpret whether and where impacts have occurred.

- **Interviews with over 40 key stakeholders**,[10] which yielded diverse perspectives and roles, supporting anecdotes, and, in some cases, private and otherwise unavailable data sets that were useful in helping interpret, fill out, or validate conclusions drawn from the larger, publicly available data sets. This primary research was fundamental to understanding what the Pennsylvania Wilds initiative was composed of, in terms of objectives, initiatives, and inputs, and what effect it had on the Pennsylvania Wilds region at a human level.

- **The knowledge base of the team members from Econsult Corporation and Wharton GeoSpatial Initiative** who worked on this report, particularly as it relates to the application of data, economics, and spatial analysis to public policy efforts such as the Pennsylvania Wilds initiative. In completing this report, team members brought their collective experiences to bear, resulting in a wide range of relevant analytical methodologies, data familiarity, and economic development strategies from which to draw insight and interpretation.[11]

As noted above, because of the largely rural and low-density nature of the Pennsylvania Wilds region, data was relatively scarce, and even the more comprehensive sources often had gaps on account of having to suppress information for the sake of confidentiality. The relatively recent introduction of the Pennsylvania Wilds initiative and the long-term nature of its efforts also make **cause and effect relationships more challenging to identify**. These were major challenges of this assignment, which increased the importance

[8] In addition, some review of relevant national and regional literature was performed. See Appendix B.1 for a full bibliography of sources.

[9] See Appendix B.2 for a list of secondary research sources used.

[10] See Appendix C.1 for a list of interviews conducted and Appendix C.2 for a list of meetings attended. See Appendix D for the introductory letter sent to prospective stakeholder interviewees and Appendix E for a master list of interview questions. Interview notes were transcribed but are not available in order to preserve the confidentiality of interviewees.

[11] Curricula vitae and relevant project experience for key members of the Econsult/Wharton team are available upon request.

of connecting with local stakeholders, correctly interpreting what data was available, supplementing quantitative results with anecdotal evidence, and making sound recommendations to improve data collection efforts for future inquiries. It also necessarily limited most depictions of data to geographically larger regions, usually counties, and to broader industry designations rather than finer levels of detail.

Ultimately, data collection and analytical interpretation was an iterative process. Initial public data collection and depiction yielded some potential insights and some potential inconsistencies, both of which needed qualitative elaboration, which could be provided by speaking to a local stakeholder to verify or explain something that appeared unusual or noteworthy in the data. In turn, insights made by interviewees enabled a more educated exploration into the data sets, so as to find and bring out specific data points that were of particular relevance to our overall inquiry.

Thus, this report was the end result of mining data sets, interviewing stakeholders, returning to the data, and pursuing follow-up conversations with selected interviewees. And, this combination of primary and secondary research, of hard numbers and anecdotal accounts, is intended to adequately evaluate the Pennsylvania Wilds initiative and its effect on the Pennsylvania Wilds region, and to properly guide programmatic and evaluative recommendations for future action.

# 2.0 Demographic and Economic Overview of the Pennsylvania Wilds Region

In order to determine the effectiveness of any economic development initiative, it is important to establish the demographic and economic context in which the initiative is being implemented. In the case of the Pennsylvania Wilds initiative, the base demographic and economic profile of the 12-county region it is intended to stimulate is that of a very rural region within the Commonwealth of Pennsylvania, and one that has particularly struggled in response to shifts in the global economy away from the manufacturing sector and to disadvantages associated with relative geographic isolation.

## 2.1 Rural Character

The Pennsylvania Wilds is a 12-county area in the north central part of the Commonwealth.[12] It is overwhelmingly rural,[13] representing 23 percent of the Commonwealth's land area but only 4 percent of its population (see Figure 2.1). Unlike all other sections of the Commonwealth,[14] the Pennsylvania Wilds region lacks a major population center, as it only has one city with a population of over 15,000 and only five others with populations of over 7,000.[15]

[12] Centre County is sometimes considered part of the Pennsylvania Wilds, or at least the portion of Centre County that is north of Interstate 80. Since Centre County also includes the main campus of Penn State University, it would not make sense to include it in this section, which is intended to depict the characteristics of the Pennsylvania Wilds region as a whole. However, the next section, which discusses interventions and actions taken by the Commonwealth to promote the Pennsylvania Wilds region, does include investments that take place in the portion of Centre County that is north of Interstate 80, to account for the intended effect of these investments on the Pennsylvania Wilds region as a whole.

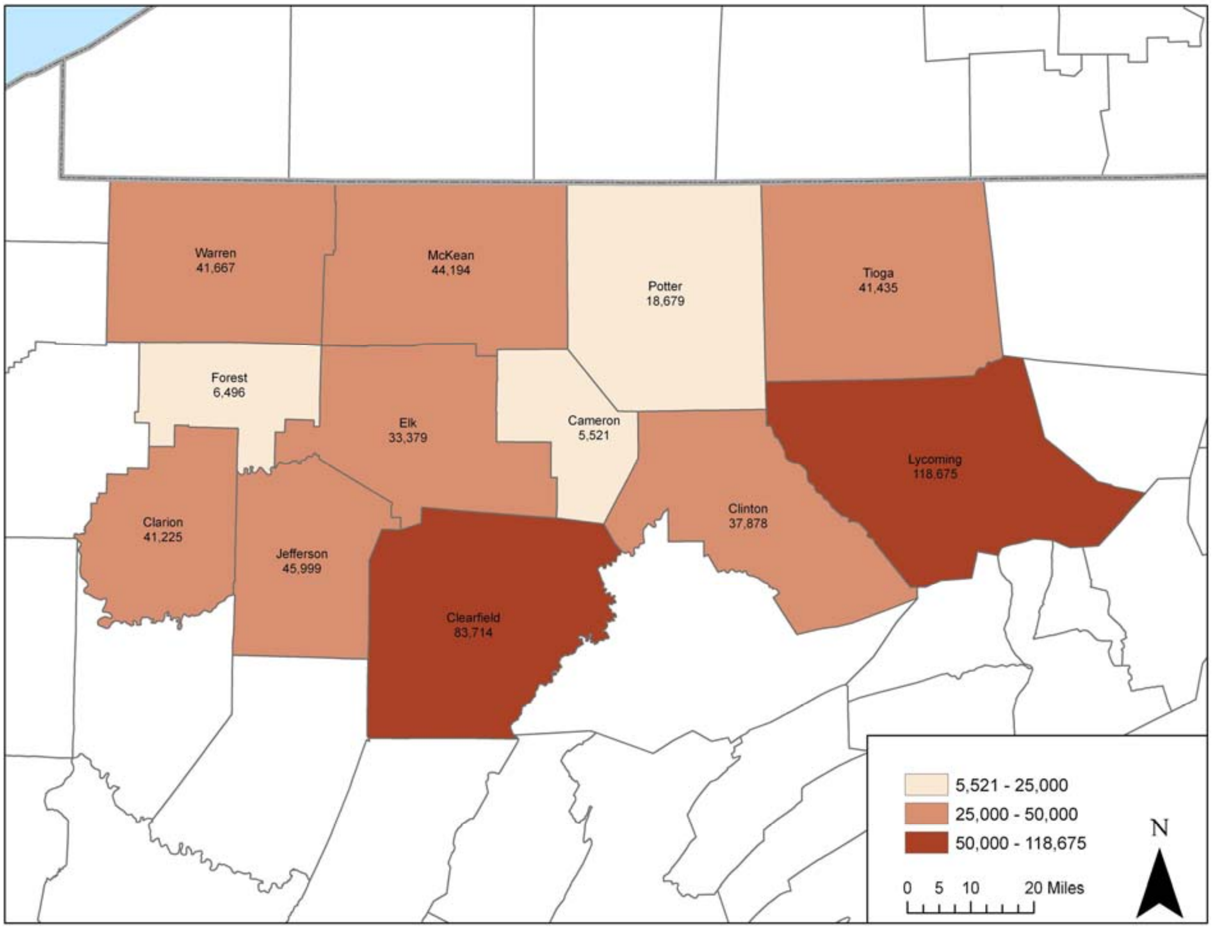
[13] For analysis purposes, ESRI, a provider of business, consumer spending, and demographic data, divides people into "Community Tapestry Segments," which are based on demographic characteristics and consumption patterns. The four most common classifications in the Pennsylvania Wilds – "Salt of the Earth," "Rooted Rural," "Heartland Communities," and "Rustbelt Retirees," all represent rural archetypes. See Appendix F for the top five Community Tapestry Segments for the Pennsylvania Wilds region and for the Commonwealth, and for Community Tapestry Segments by county, and for more detail on selected Community Tapestry Segments.

[14] Northwest - Erie, Southwest - Pittsburgh, Central - Harrisburg, Southeast - Philadelphia, Northeast – Scranton and Allentown.

[15] As of the 2000 census, the most populous city in the Pennsylvania Wilds region was Williamsport, with 30,706 residents, followed by St. Mary's (14,502), Warren (10,259), Bradford (9,175), Lock Haven (9,149), and DuBois (8,123). No other cities besides these six had populations over 7,000.

In fact, Cameron County as a whole has a population of about 5,500, spread out over almost 400 square miles; in contrast, there is a single Census tract in Center City Philadelphia that contains over 8,000 people within less than a 1/6 of a square mile, and that thus has a population density that is almost 4,000 times that of Cameron County.

Figure 2.1 – PA Wilds 2008 Population by County: PA Wilds Represents 23 Percent of the Commonwealth's Land Area But Only 4 Percent of its Population



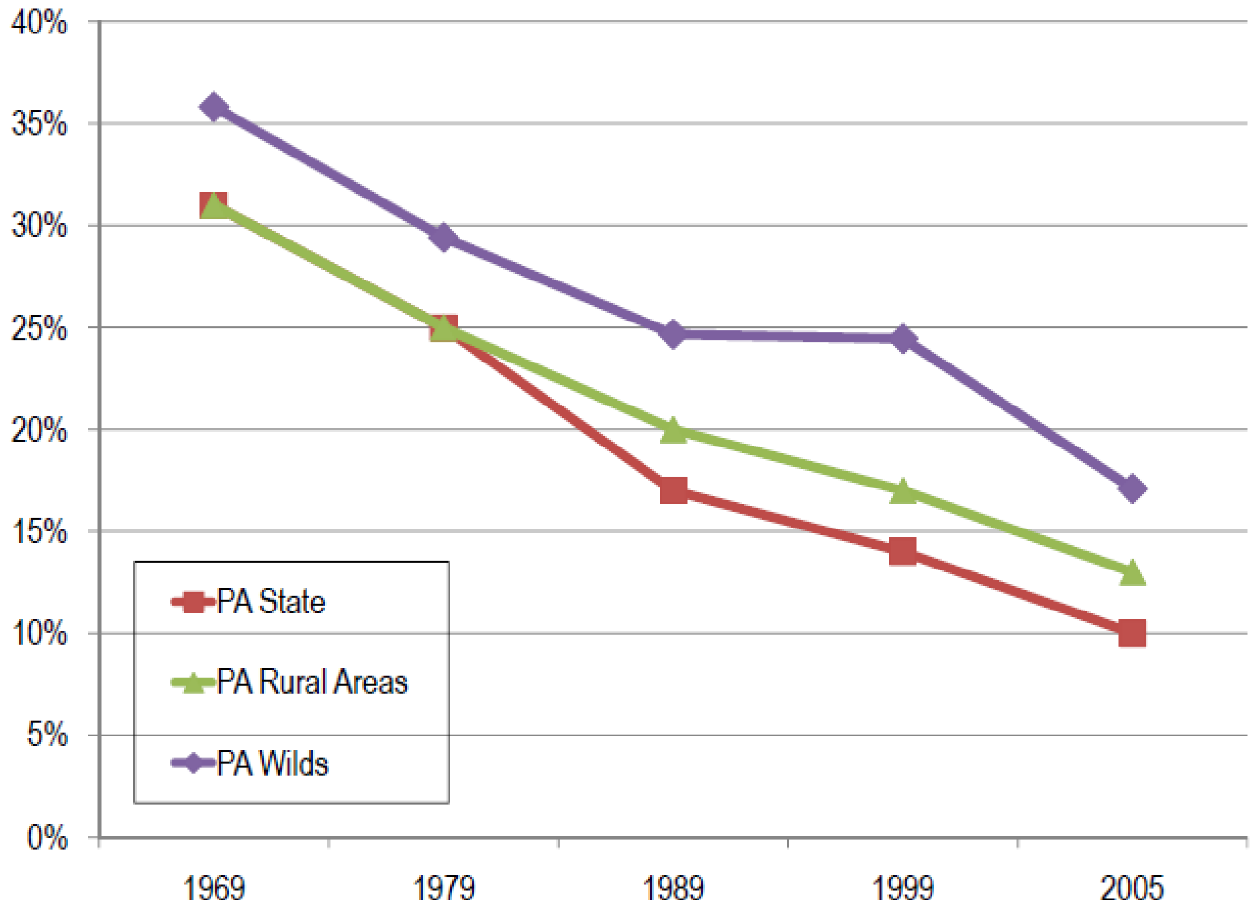

*Source: ESRI (2008), Wharton GeoSpatial Initiative (2009)*

## 2.2 The Challenges of Geographic Isolation

Like many Rust Belt states, the Commonwealth as a whole has had to make a long, challenging, and in some cases painful transition over the past few decades from a manufacturing-heavy economy to a more modernized, knowledge-based economy. During this time, communities and regions that were viable in an age in which a large proportion of jobs nationally were in the manufacturing sector have had to reinvent themselves or else face decline and even extinction: in a state in which three out of every ten jobs was in the manufacturing sector in 1969, by 2005 that ratio was only one in ten (see Figure 2.2).[16]

[16] See also Appendix G for more detail on demographic and economic characteristics.

Figure 2.2 – Manufacturing Employment as a Share of Total Employment: Proportions Have Fallen From Approximately One-Third in 1969 to Approximately One-Sixth by 2005




*Source: US Department of Commerce – Bureau of Economic Analysis (2008), Keystone Research Center (2009)*

Relatively isolated rural areas have particularly struggled. According to a report by the Keystone Research Center, rural Pennsylvania is no longer declining relative to urban Pennsylvania, but nonetheless has significant **structural challenges to overcome in its modernization from a largely manufacturing-dominant economy.**[17] Though it was once widely believed that technology would ultimately bridge the geographic divide, it has become apparent that knowledge-based economies have actually made location more relevant.

**Geographic isolation is increasingly becoming a competitive disadvantage in a globalized, knowledge-based, and mechanized economy.** To provide a sense of the relative economic disadvantage of rural areas versus urban areas, consider that **the Pennsylvania Wilds region accounts**

[17] "The State of Rural Pennsylvania," Keystone Research Center (May 2008).

for 23 percent of the Commonwealth's land mass but only 4 percent of its population and 2.4 percent of its income, and contributes less than 0.2 percent to Gross State Product.[18] Even within the Pennsylvania Wilds region, differences in economic conditions are readily apparent between counties further removed from metropolitan regions and those closer to such population centers.

Relative geographic isolation also renders the Pennsylvania Wilds region susceptible to increases in transportation costs. For example, many local merchants in such industries as accommodations and tourism, who depend on outsiders for high proportions of their business, noted that declines in their business levels in 2007 could be directly attributable to overall reductions in the number of visitors willing and able to make it out to destinations within the Pennsylvania Wilds region due to higher gas prices: the increased cost of traveling long distances via the car caused some potential visitors to stay home and others to stay closer to home, enjoying similar recreational and outdoor experiences at locations closer to major metropolitan areas.

The Pennsylvania Wilds region is particularly feeling the impacts of the current economic slowdown. Counties lack sufficient representation in their local economies in more recession-proof sectors such as health care and higher education. Reduced global production has exacerbated a decades-long decline in manufacturing activity and employment within the Pennsylvania Wilds region, with producers of automobile parts particularly struggling on account of challenges faced by auto manufacturers. In short, for a variety of reasons, the Pennsylvania Wilds region faces an uphill climb in terms of economic vitality and job creation, as is reflected in the following snapshots of demographic trends and business activity.

## 2.3 Overall Demographic, Economic, and Housing Characteristics

Compared to the Commonwealth as a whole, the Pennsylvania Wilds region enjoys less ethnic diversity (2.7 percent black and Hispanic for the Pennsylvania Wilds region versus 14.6 percent for the Commonwealth), lower incomes (per capita income is 24 percent lower and household income is 22 percent lower), and lower median home values (22 percent lower, plus 50 percent higher proportion of houses under $100,000 and 70 percent lower proportion of houses over $500,000) (see Figure 2.3).[19]

[18] To be sure, Gross State Product is an incomplete indicator of the value enjoyed and generated by a geographic area. While places like the Pennsylvania Wilds region may have fewer economic opportunities, they are also rich in recreational and social opportunities. Furthermore, many of the activities people can enjoy in the Pennsylvania Wilds region do not have any direct financial impact: a family of four that goes hiking in the Pennsylvania Wilds region, they may derive just as much enjoyment from that outing as if they had attended a performance at the Kimmel Center, even if they will spend far less and thus inject far fewer dollars into the Commonwealth's economy. Thus, the point is not to render the Pennsylvania Wilds region as less valuable than other regions, but rather to note the disparity in its contribution to the Commonwealth's economy as measured by one economic indicator.

[19] See also Appendix G for more detail on demographic and economic characteristics and Appendix H for more detail on residential real estate markets.

Figure 2.3 – 2003, 2008 Key Demographic Indicators by County, PA Wilds vs. PA State: PA Wilds is Less Ethnically Diverse and Enjoys Lower Income Levels, Higher Unemployment Rates, and Lower Median House Prices Than the Commonwealth

| | 2008 | | 2003 | | 2003 – 2008 CAGR%[20] | |
|---|---|---|---|---|---|---|
| | PA Wilds | PA State | PA Wilds | PA State | PA Wilds | PA State |
| Total Population | 518,862 | 12,631,267 | 526,807 | 12,380,576 | -0.30% | 0.40% |
| Black Population % | 2.0% | 10.6% | 2.1% | 10.2% | -0.93% | 0.76% |
| Hispanic Population % | 0.7% | 4.0% | 0.6% | 3.6% | 3.60% | 2.05% |
| | | | | | | |
| Per Capita Income | $21,062 | $27,722 | $19,316 | $24,819 | 1.75% | 2.24% |
| Median HH Income | $41,473 | $53,220 | $36,697 | $46,158 | 2.48% | 2.89% |
| % HH's >$100K | 7.1% | 16.6% | 7.1% | 15.0% | -0.21% | 2.05% |
| | | | | | | |
| Unemployment Rate | 7.4% | 6.6% | 6.9% | 6.1% | 1.41% | 1.59% |
| | | | | | | |
| Median Home Value | $131,498 | $167,832 | $83,022 | $116,904 | 9.63% | 7.50% |
| % <$100K | 32.5% | 21.5% | 62.9% | 39.0% | -12.36% | -11.17% |
| % >$500K | 1.6% | 5.4% | 0.6% | 1.9% | 23.14% | 22.44% |

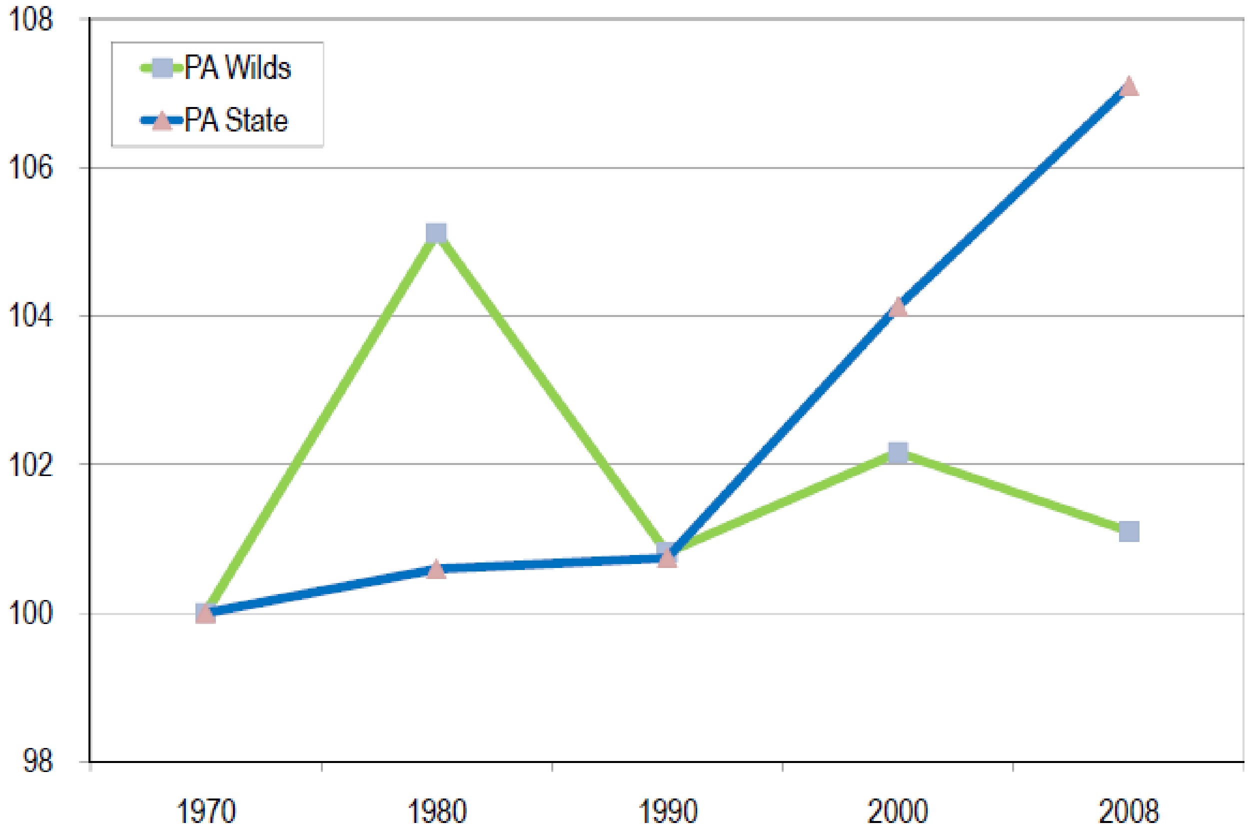
*Source: ESRI (2003, 2008), Econsult Corporation (2009)*

## 2.4 Population Losses and Weak Income Growth

The Pennsylvania Wilds region has experienced **population stagnation for decades**, commensurate with its disadvantaged position relative to other parts of the Commonwealth, as the global economy has tended to favor more densely populated places. Even the Commonwealth, which was one of the slower-growing states in the US (compounded annual growth rate, or CAGR, of 0.18 percent), had a population growth rate over six times that of the Pennsylvania Wilds region from 1970 to 2008 (CAGR of 0.03 percent) (see Figure 2.4).

[20] CAGR = compounded annual growth rate. Throughout the report, CAGRs are used to demonstrate trends over time. They do not presume that upward or downward rates are smooth throughout the study periods; in fact, in the case of the Pennsylvania Wilds region, there is considerable volatility through the study periods.

Figure 2.4 – Population, PA Wilds vs. PA State (Indexed: 1970 = 100): PA State Population Growth Was Over Six Times Higher Than PA Wilds Population Growth

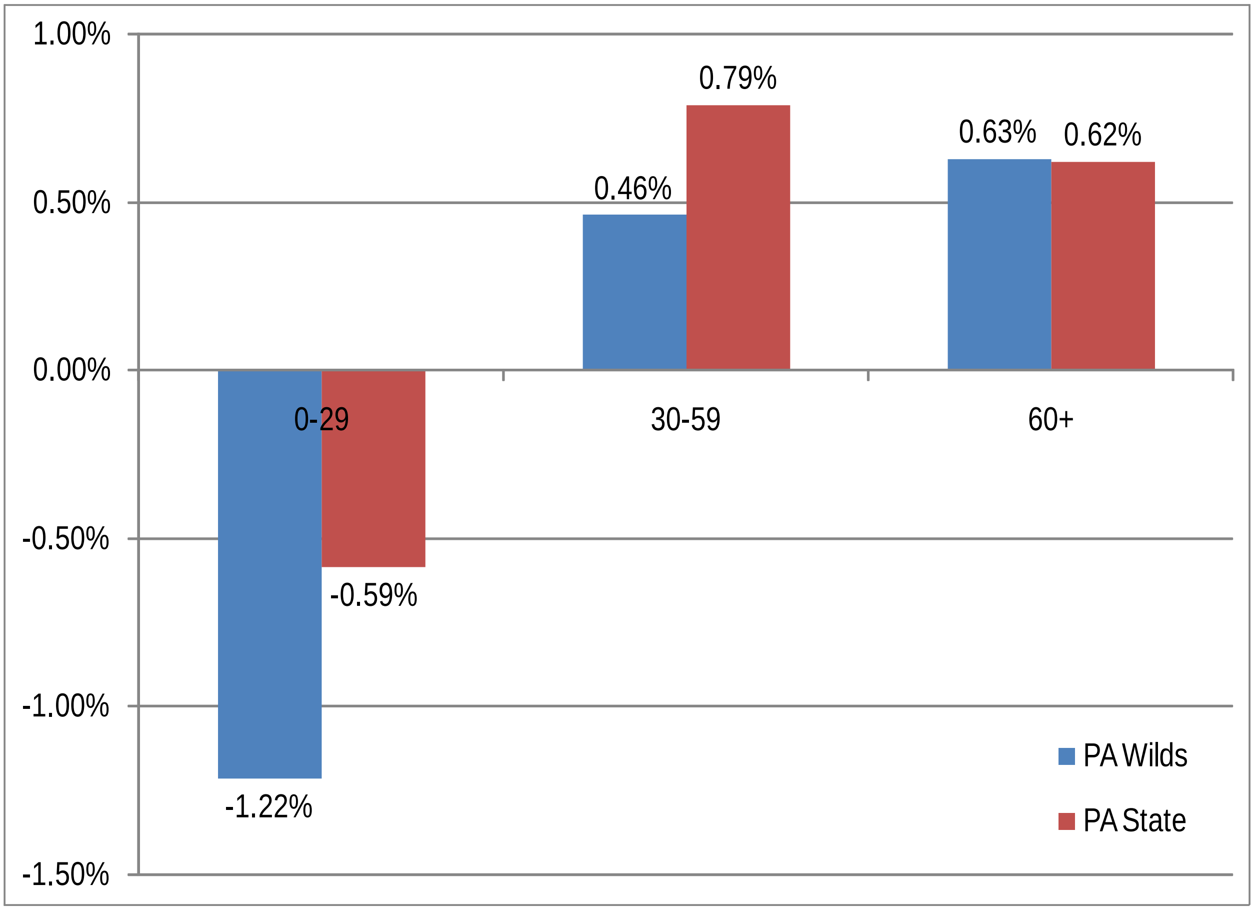



*Source: US Census Bureau (2009)*

These declines have seemed to accelerate in recent years. The Pennsylvania Wilds region actually had almost 8,000 fewer residents in 2008 than in 2003. While population grew in the Commonwealth at a CAGR of 0.4 percent, it shrank in the Pennsylvania Wilds region by 0.3 percent per year. In fact, only one of the 12 counties experienced positive population growth: Potter County, which added 265 people for a CAGR of +0.26 percent.

Furthermore, the future does not appear to hold any promise for a reversal of trend. The Pennsylvania Wilds region has experienced particular declines among younger populations: from 1980 to 2008, it had over 25,000 fewer people ages 0 to 9, over 31,000 fewer people ages 10 to 19, and over 18,000 fewer people ages 20 to 29, resulting in a population decline rate for people under 30 that is over twice that of the Commonwealth as a whole (a CAGR of -1.22 percent for the Pennsylvania Wilds region, versus a CAGR of -0.59 percent for the Commonwealth as a whole) (see Figure 2.5).

Figure 2.5 – 1980-2008 Population CAGR by Age, PA Wilds vs. PA State: PA Wilds Population Decline Rate for Ages 0-29 Is Over Double That of PA State




*Source: US Census Bureau (2009)*

Meanwhile, from 2003 to 2008, per capita incomes within the Pennsylvania Wilds region grew more slowly than within the Commonwealth as a whole: +1.75 percent per year versus +2.24 percent per year. In fact, only one of 12 counties experienced a per capita income CAGR higher than that of the Commonwealth: Forest County, which had a per capita income CAGR of +3.06 percent.[21]

## 2.5 Business and Job Losses

[21] See also Appendix G for more detail on demographic and economic characteristics.

Population losses and weak income growth within the Pennsylvania Wilds region were both cause and effect for business and job losses. From 2002 to 2006, while the Commonwealth had net increases of about 6,800 businesses and 143,500 jobs, the Pennsylvania Wilds region actually had **net decreases of about 250 businesses and 1,400 jobs** (see Figure 2.6). Declines were particularly pronounced in the manufacturing (minus 40 businesses), retail trade (minus 101 businesses), and agricultural (minus 25 businesses) industries. Total payrolls and average wages also grew more slowly within the Pennsylvania Wilds region than within the Commonwealth as a whole, such that the Pennsylvania Wilds region, which represents 23 percent of the Commonwealth's land area and 4 percent of its population, only generates 2.4 percent of its wages.[22]

Figure 2.6 – 2002-2006 Key Business Indicators by County, PA Wilds vs. PA State: PA Wilds Actually Lost 250+ Businesses and 1,400 Jobs

| # Establishments | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|
| 2002 | 12,410 | 297,257 | 4.20% |
| 2006 | 12,157 | 304,058 | 4.00% |
| CAGR% | -0.50% | 0.60% | |

| # Jobs | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|
| 2002 | 171,580 | 5,046,442 | 3.40% |
| 2006 | 170,180 | 5,189,949 | 3.30% |
| CAGR% | -0.20% | 0.70% | |

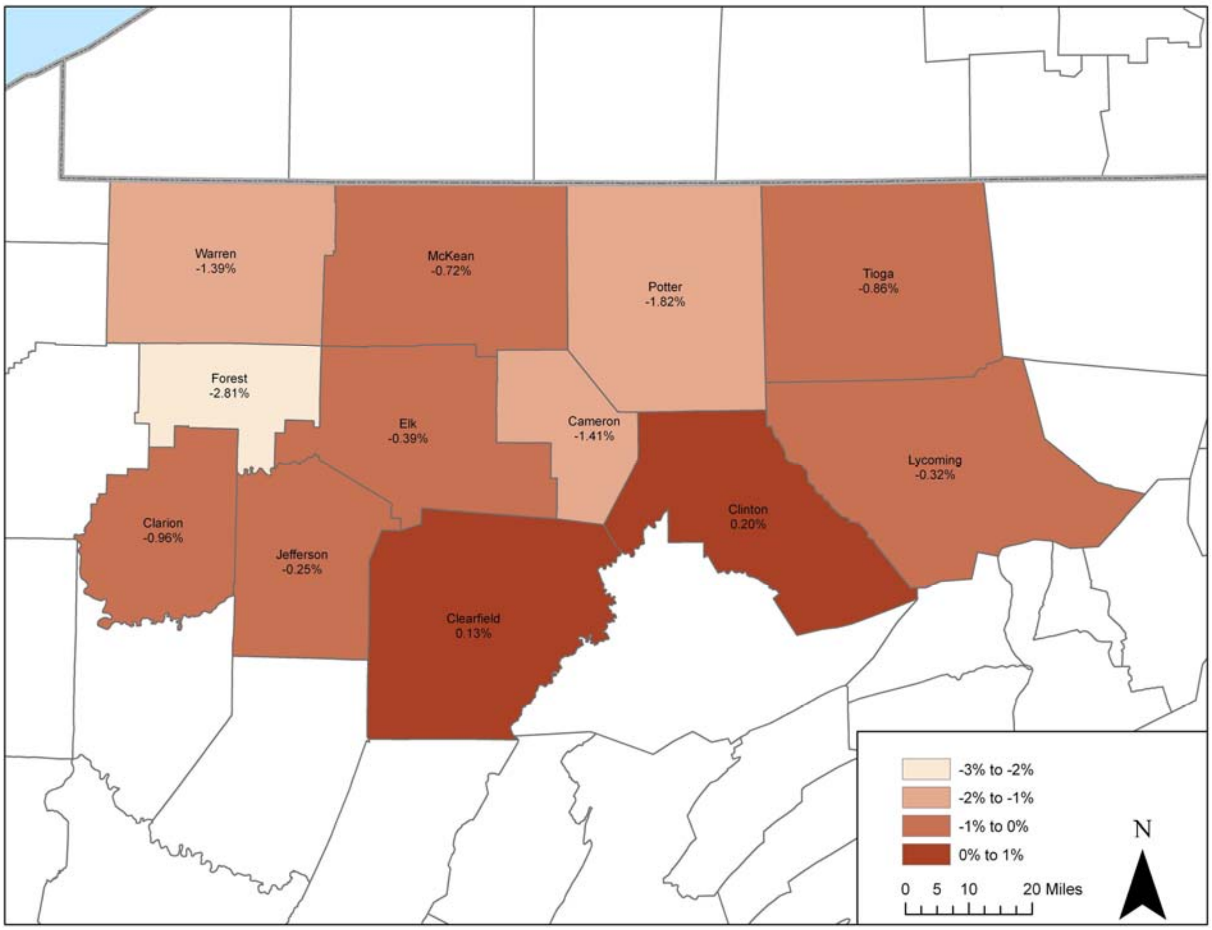
*Source: US Census Bureau - County Business Patterns (2002, 2006), Econsult Corporation (2009)*

While the Commonwealth as a whole enjoyed a CAGR of +0.6 percent in business establishments from 2002 to 2006, the Pennsylvania Wilds region experienced a CAGR of -0.5 percent, and only two of 12 counties experienced a net increase in business establishments. Meanwhile, while the Commonwealth as a whole enjoyed a CAGR of +0.7 percent in jobs from 2002 to 2006, the Pennsylvania Wilds region experienced a CAGR of -0.2 percent, and seven of 12 counties experienced a net decrease in jobs. In

[22] See also Appendix I for more detail on business indicators, including key indicators by industry by county. Throughout the report, beginning and ending years for trend analysis were selected based on data availability (i.e. the years closest to the start year of the Pennsylvania Wilds initiative and to the present that had reasonably comprehensive data).

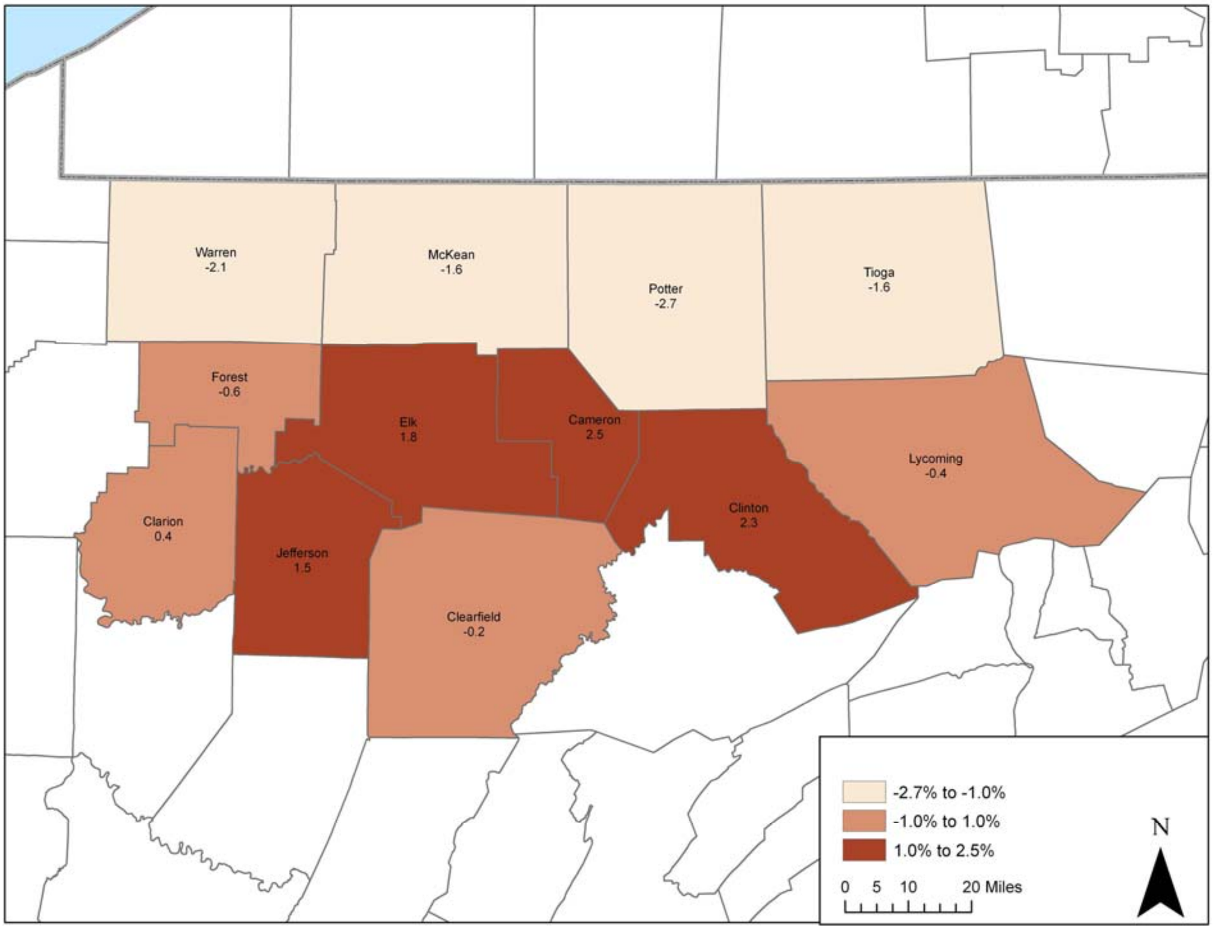
terms of both businesses and jobs, the spatial distribution clearly indicates lower CAGRs in the more geographically remote northern counties, further supporting the notion that geographic isolation has created a great economic challenge for the Pennsylvania Wilds region (see Figure 2.7 and Figure 2.8).

Figure 2.7 – PA Wilds 2002-2006 Business Establishments CAGR by County: PA Wilds Actually Had Fewer Businesses in 2008 than in 2003, with a CAGR of -0.5 Percent, vs. +0.6 Percent for the Commonwealth




*Source: US Census Bureau - County Business Patterns (2002, 2006), Wharton GeoSpatial Initiative (2009)*

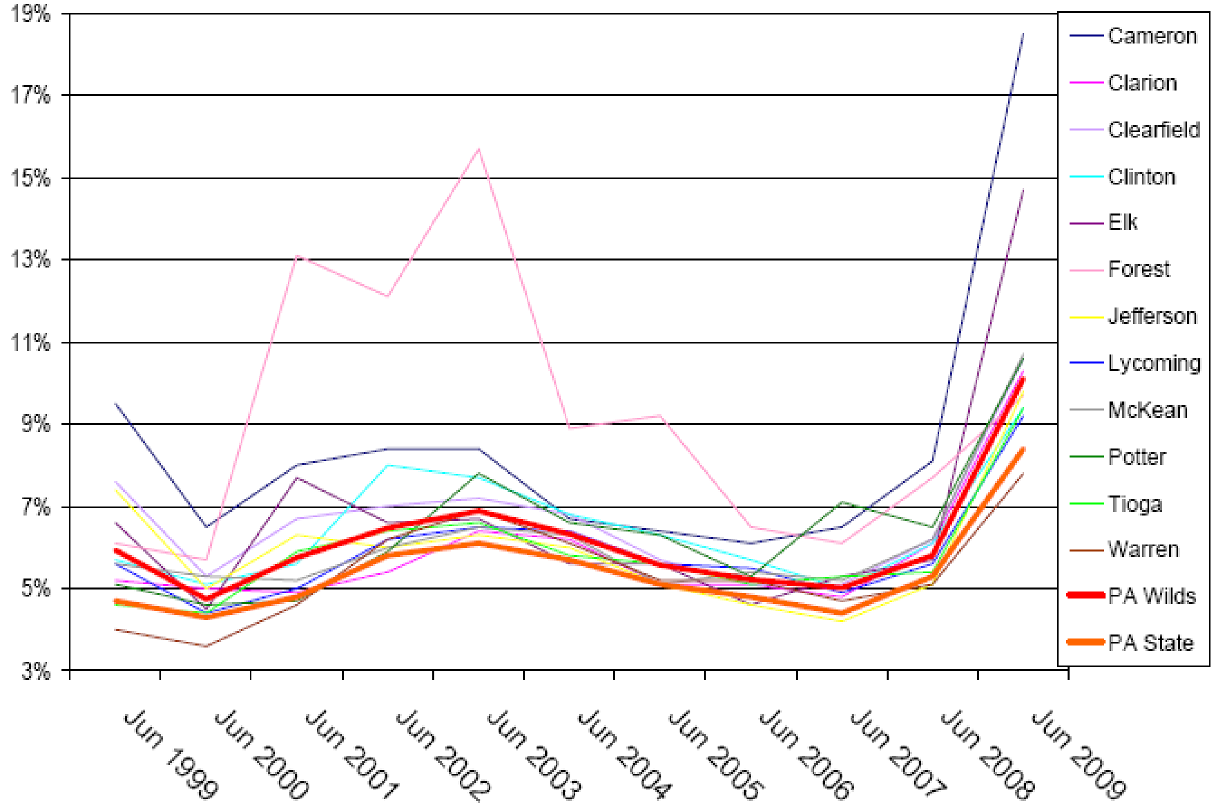
Figure 2.8 – PA Wilds Initiative 2002-2006 Employment CAGR by County: PA Wilds Actually Had Fewer Jobs in 2008 than in 2003, with a CAGR of -0.2 Percent, vs. +0.7 Percent for the Commonwealth




*Source: US Census Bureau - County Business Patterns (2002, 2006), Wharton GeoSpatial Initiative (2009)*

Over the last decade, unemployment rates within the Pennsylvania Wilds region have been consistently a percentage point or two higher than those within the Commonwealth as a whole. During the current recession, unemployment rates within the Pennsylvania Wilds as a whole spiked up to 10 percent, with Cameron County and Forest County particularly feeling both the short-term effects of the current recessions and the long-term disadvantages of manufacturing losses, registering unemployment rates near or above 15 percent (see Figure 2.9).

Figure 2.9 – PA Wilds Unemployment Rate by County: PA Wilds Levels are Consistently Higher Than the Commonwealth



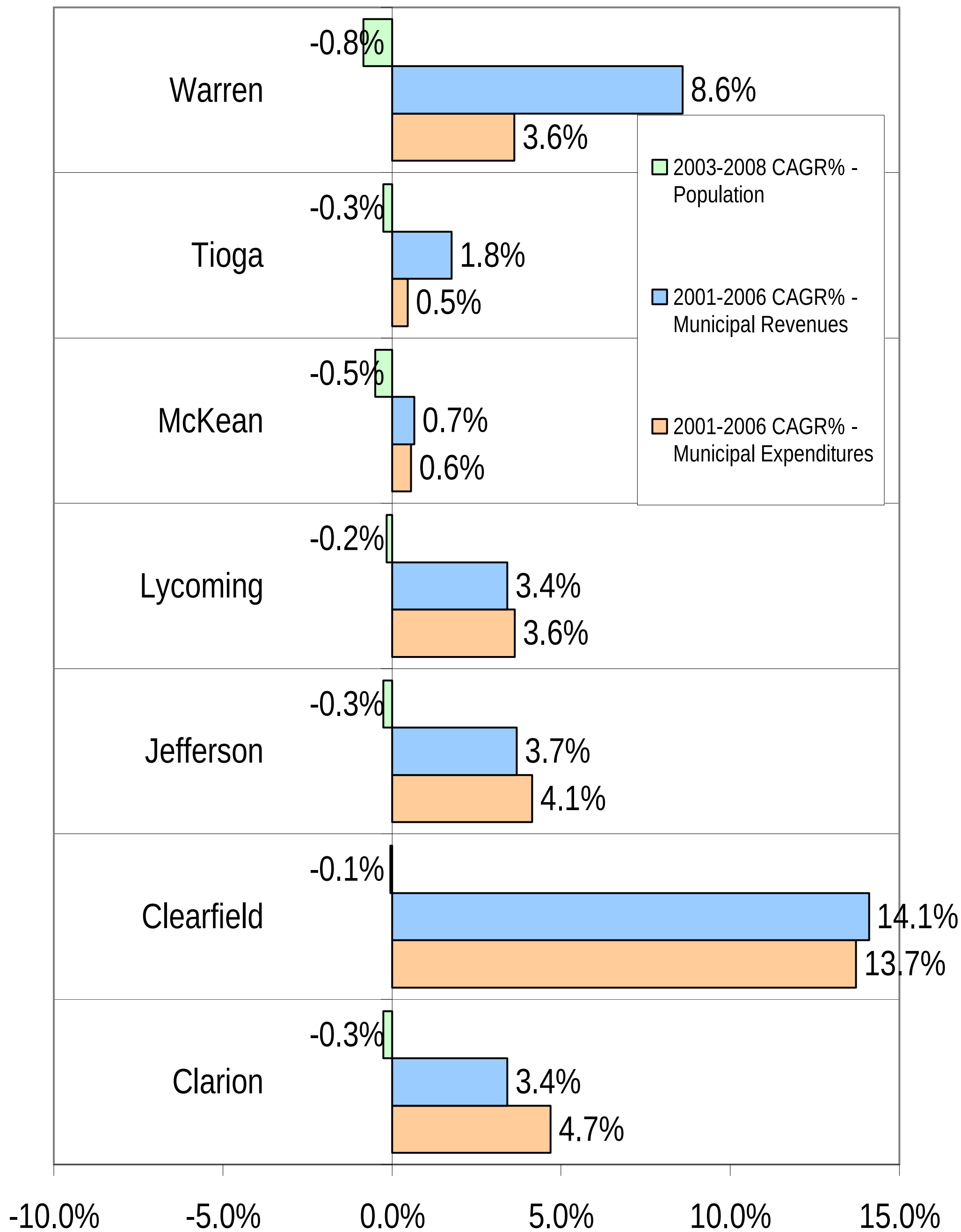

*Source: US Department of Labor - Bureau of Labor Statistics (2009), Econsult Corporation (2009)*

## 2.6 Fiscal Distress

The recent fiscal story for municipalities within the Pennsylvania Wilds region is a familiar one for all too many rural parts of the Commonwealth: stagnant populations, heavy losses from such previously stalwart industries as manufacturing and mining, and yet rising municipal budgets due in large part to rising health care costs.[23] In the majority of counties within the Pennsylvania Wilds region, municipal budgets have increased even as populations have decreased, straining local public sector efforts to stimulate economic development (see Figure 2.10).

[23] "The Looming Municipal Retiree Benefits Crisis," The Kapoor Company (August 27, 2009); "The State of Working Pennsylvania 2005," Keystone Research Center (September 1, 2005).

Figure 2.10 – PA Wilds Population and Municipal Budget CAGR, Selected Counties: Populations Declining, Budgets Rising[24]




*Source: ESRI (2008), Commonwealth of Pennsylvania – Department of Community and Economic Development (2002, 2007), Econsult Corporation (2009)*

[24] Municipal budgets only; i.e. not including school district, county, or other local jurisdictions.

# 3.0 Intended Objectives and Actual Actions of the Pennsylvania Wilds Initiative

In part in response to the economic stagnation and commercial challenges of the Pennsylvania Wilds region, the Commonwealth of Pennsylvania conceived the Pennsylvania Wilds initiative as a way to **build from a rich legacy of conservation and connect those principles to objectives concerning economic development, tourism promotion, and job creation.** In order to measure the effectiveness of these efforts, it is important to consider how conservation and economic development can work in concert, articulate some of the categories of activities proposed by the Commonwealth and their intended outcomes, and then quantify the specific actions undertaken within the initiative.

## 3.1 Conservation and Economic Development

One geographic asset working in favor of the Pennsylvania Wilds region is its abundant natural resources. From an economic development standpoint, it is important for any region, particularly one as rural and remote as the Pennsylvania Wilds region, to leverage its unique resources for the purposes of tourism and export. Economies can really only grow to the extent that they stimulate activities that either export goods for purchase by people and entities outside the region, and/or import people and entities that purchase and consume goods within the region. Anything else is simply an internal shuffling of pre-existing resources or, even worse, a leakage of resources from within the region to outside the region.

It is therefore paramount for the Commonwealth and for the communities located within the Pennsylvania Wilds region to determine how to safeguard natural amenities and make them available in sustainable ways to be enjoyed by visitors, whose spending can help sustain jobs and commerce. Too often, however, in rustic and idyllic settings like the Pennsylvania Wilds region, **nature and commerce are pitted against each other: preservation versus development, or solitude versus congestion.** In some cases, those differences are very real and very contemporary, particularly as it relates to competing interests associated with the extractive industries or with the proposed development of previously pristine parts of the Commonwealth.

But far from being mutually exclusive, **nature and commerce can be mutually reinforcing.** Nature can support robust activity in such industries as sustainable timber harvesting and recreation, while tourism can provide the financial and organizational resources to help enhance the experience of nature by current generations and safeguard that opportunity for future generations (see Figure 3.1).

Figure 3.1 – Wild Asaph Outfitters in Wellsboro, Tioga County

*Source: Greg Scruggs (2009)*

Accordingly, the mission of the Commonwealth's Department of Conservation and Natural Resources (DCNR), and the purpose of the Pennsylvania Wilds initiative, is about both conservation and sustainable economic activity. The wisdom of many interviewees suggested that this is not a particularly new concept within the Pennsylvania Wilds region, and is in fact deeply engrained within the members of its communities: individuals and businesses must function in ways that are authentic to, respectful of, and reinforcing of the unique character of the small towns and rural settings in which they are located, and natural resources must be safeguarded and not recklessly exploited, lest future opportunities to enjoy them become impaired or even lost. One member of the Pennsylvania Wilds Planning Team put it like this:

> "[Our overall objective is] wise stewardship of the natural resources and community character of the small towns, villages, and hamlets in order to protect the special character of the area and continue to maintain the outdoor recreation opportunities and perhaps enhance them so that it will be a very attractive eco-tourism destination."

In fact, many local entrepreneurs have developed innovative enterprises that leverage nearby natural recreational amenities as a means of generating commercial activity and that do so in ways that are environmentally sustainable and appropriately respectful of the natural resources on which they depend. For example, a local resident of Ridgway, who had helped to develop the Clarion-Little Toby Rail Trail, decided to start an inn based on the assumption that the trail would attract out-of-town visitors. The historic downtown was suffering greatly from degradation and vacancies, and it became apparent that the inn could only be as successful as the town center. As a result, the resident started a downtown community redevelopment non-profit organization, charged with the task of helping this community recreate itself around the concepts of nature and recreation (see Figure 3.2). The organization now has a fruitful relationship with DCNR and the PA Wilds initiative, and is a good example of the many efforts by local jurisdictions to promote heritage-based and environment-based tourism as a way to increase commercial activity.

Figure 3.2 – Ridgway Historic District, Elk County


*Source: Greg Scruggs (2009)*

## 3.2 Facets of the Pennsylvania Wilds Initiative

Conservation thus takes on even greater importance for places like Ridgway, not only in sustaining the integrity of their natural resources, but now also in sustaining new economic activities supported by those natural resources. This dual agenda of conservation and economic development guides the Pennsylvania Wilds initiative's efforts to contribute to the well-being of the communities located within the Pennsylvania Wilds region. This section describes the intended objectives and actual actions of the Pennsylvania Wilds initiative in four key areas:

- **Investments in recreational facilities** such as lodging options, trailheads, and visitor centers

- **Technical and financial assistance** to help businesses and communities better capitalize on commercial opportunities

- **Branding, advertising, and promotion efforts** designed to increase awareness and attach certain perceptions to peoples' understanding of the Pennsylvania Wilds region

- **Inter-organizational coordination** between state and other entities to accomplish shared objectives across organizational lines

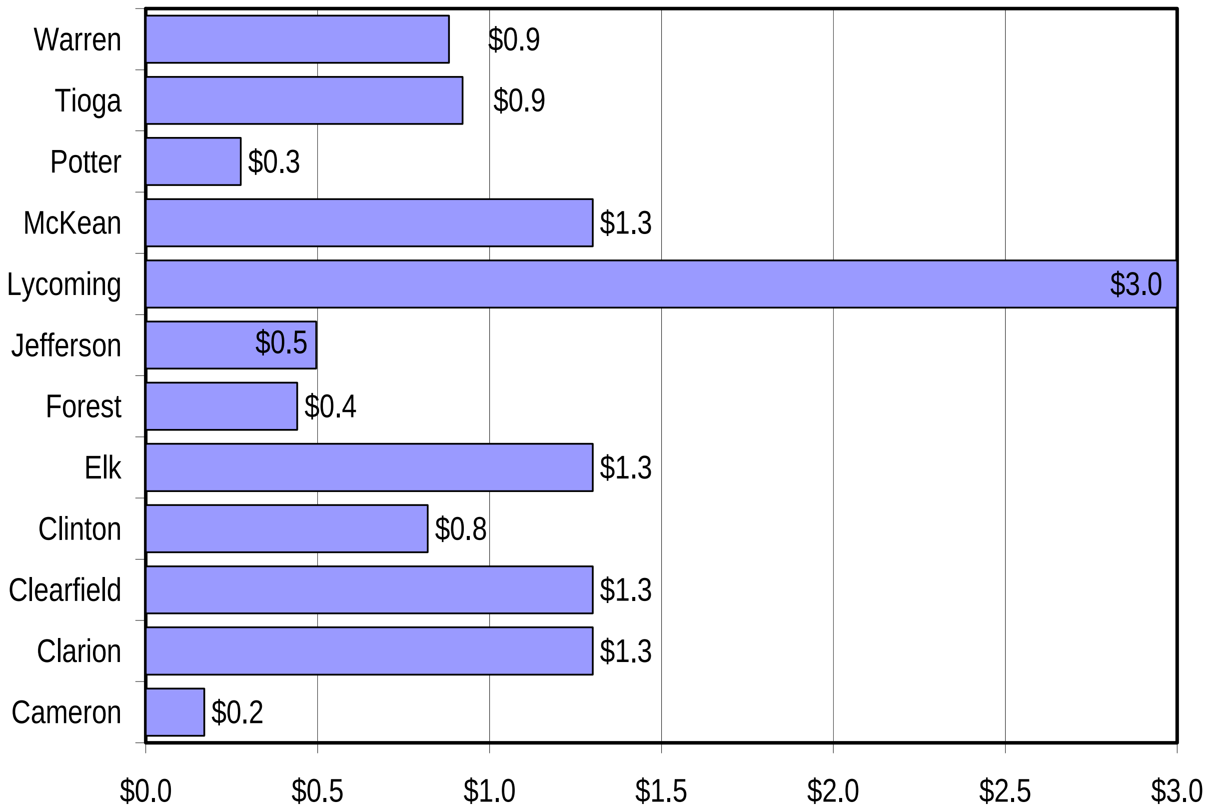
## 3.3 Investments in Recreational Facilities and Supportive Infrastructure

The Pennsylvania Wilds initiative was intended to **focus and funnel programmatic dollars in support of strategic investments in recreational facilities**, so as to encourage use by visitors in ways that strengthen local economies. These investments represent more than simply refreshments of existing recreational options, but major enhancements that align with the branding of the Pennsylvania Wilds region as a destination for people and groups looking for a unique and outdoor-oriented experience.

From the beginning, this has been the intention of the Pennsylvania Wilds initiative: to make large and strategic investments in recreational amenities that would enhance the visitor experience, connect individual attractions, and increase tourism. Importantly, to the extent that they were expected to be part of a coordinated and strategic effort, these investments were also intended to reap an exponential benefit for the system as a whole. In other words, prior to the Pennsylvania Wilds initiative, individual investments in the Pennsylvania Wilds region may or may not have been able to benefit and be benefited by other investments within this vast area; but since the commencement of the Pennsylvania Wilds initiative, such investments can be seen as individual pieces of a broader strategy to make the Pennsylvania Wilds region as a whole more enjoyable for existing users and more attractive for potential users.

With these objectives in mind, **DCNR made over $13 million in direct investments in local communities in the Pennsylvania Wilds region from 2003 to 2008 in support of various recreational enhancements such as parks, trails, and conservation projects** (see Figure 3.3). These investments helped individual towns connect their unique visitor attractions and natural resources to the broader system of the Pennsylvania Wilds initiative, thus potentially increasing the attractiveness of the whole system, and of individual parts of it, among potential visitors.

Figure 3.3 – 2003-2009 Direct Investments by DCNR in Local Communities within PA Wilds by County (in $M): $13.6 Million in Total Investments in Local Communities from 2003 to 2009

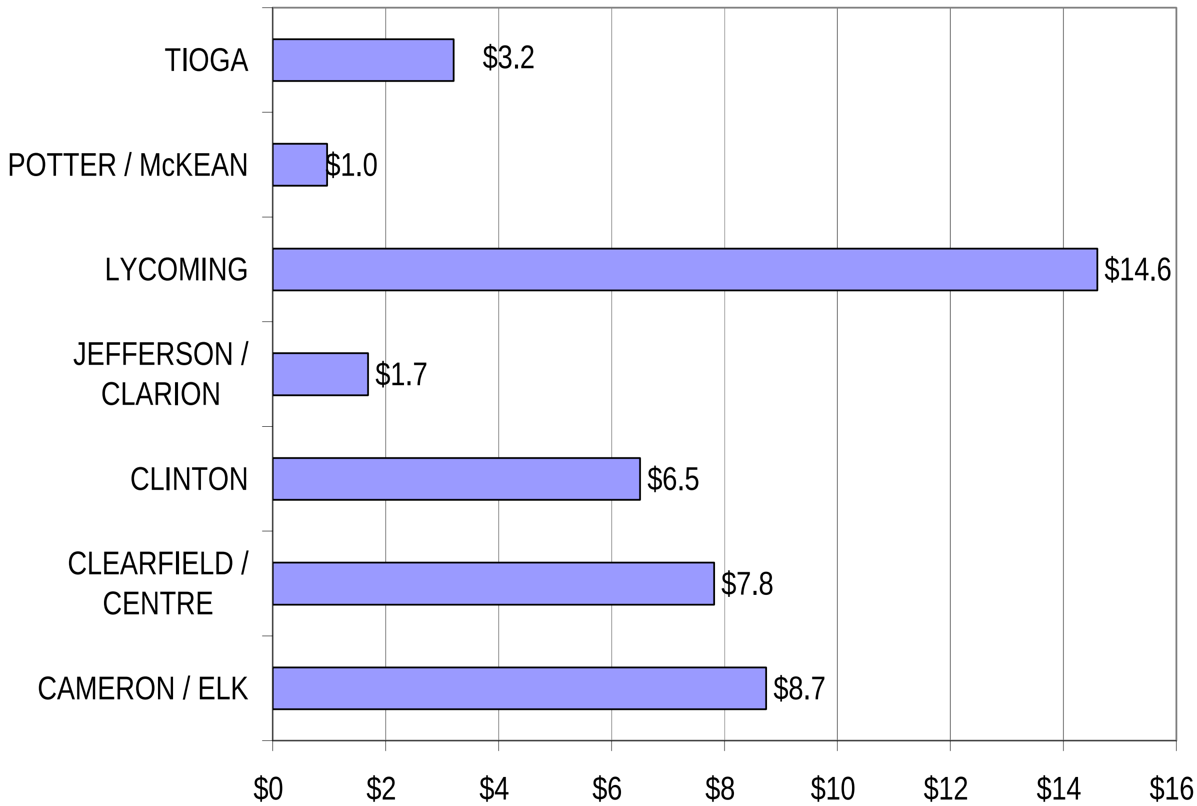



*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2009), Econsult Corporation (2009)*

From 2003 to 2008, DCNR also made $120 million in direct recreational investments in State Parks and State Forests, to create new attractions and enhance or shore up existing ones (see Figure 3.4).[25] The $120 million invested by DCNR was utilized for a variety of capital projects in every county of the Pennsylvania Wilds region, and ranged in size from a few thousand dollars for minor maintenance and repairs to several million dollars for major renovation or construction of new facilities.

[25] Many of the Pennsylvania Wilds region's signature attractions, including its ten most attended state parks, received DCNR investments, whether in the form of new construction or major renovations.

Figure 3.4 – 2002-2009 Recreational Investments in State Parks and State Forests by DCNR within PA Wilds by County (in $M): $43.5 Million in Total Investments in Recreational Facilities from 2002 to 2009




*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2009), Econsult Corporation (2009)*

## 3.4 Technical and Financial Assistance to Businesses and Communities

The Pennsylvania Wilds initiative also seeks to provide technical assistance resources to tourism and other related businesses and to the communities in which they are located, to bolster their organizational capacity to offer the kinds of products, services, and experiences to visitors that would synchronize with how external advertising and branding has depicted the Pennsylvania Wilds region. Technical assistance measures are intended to leverage existing Commonwealth resources and programming, as well as provide face-to-face and web-based resources to enhance business capacity. Resources have been deployed from a variety of channels:

- The Pennsylvania Wilds Business Assistance Task Force and the Pennsylvania Wilds Artisan Development Network represent two formal mechanisms by which entities and resources are now regularly assembled for maximum benefit to both visitors and companies. Robert

Veilleux, formerly of the Lumber Heritage Region and now with the Penn State University Penn State Cooperative Extension System, has successfully organized artisans for maximum benefit in terms of selling to customers and dispensing technical assistance on a variety of relevant topics. These groups help facilitate events and gatherings that capitalize on the mutual benefit to businesses and tourists of aggregating multiple entities together, no small task given the relatively geographic dispersion of the Pennsylvania Wilds region (see Figure 3.5).

Figure 3.5 – Cameron County Chamber of Commerce and Artisan Center, Cameron County

*Source: Greg Scruggs (2009)*

- The Pennsylvania Wilds resource website allows groups to post classified ads for free, whether entrepreneurs looking for business partners or employees, proprietors announcing tourism packages, or educational institutions marketing their degree programs. A Community Assistance section to be launched this year is intended to offer a number of resources to assist communities and their businesses in their efforts to improve upon their tourism offerings. The geographic isolation of businesses and communities within the Pennsylvania Wilds region makes the delivery of technical resources and match-making services via on-line platforms all the more essential.

- Small Business Development Centers (SBDCs), and the universities from which they draw human and other resources, are vital providers of key capacity-building resources such as support in business plan development, connection to financing resources, and execution of marketing strategies (see Figure 3.6). The existence of the Pennsylvania Wilds initiative gives SBDCs a larger brand and effort to which its clients can be connected.

Figure 3.6 – Pennsylvania Small Business Development Centers Located within the Pennsylvania Wilds Region[26]

| SBDC | Counties Served |
|---|---|
| Clarion University SBDC | Cameron, Clarion, Clearfield, Elk, Forest, Jefferson, McKean, Potter |
| Gannon University SBDC | Warren |
| Lock Haven SBDC | Clinton, Lycoming |
| Penn State SBDC | Centre |
| The University of Scranton SBDC | Tioga |

*Source: Pennsylvania Small Business Development Centers (2009)*

- Finally, PA Wilds has designated a small business ombudsman to pollinate resources and connections for entities throughout the Pennsylvania Wilds region. Though the Pennsylvania Wilds region encompasses a wide service area for this office, this ombudsman has been able to make various technical assistance resources available in a number of communities, and helps support and leverage the important work of the SBDCs that serve the Pennsylvania Wilds region (see Figure 3.7 and Figure 3.8).

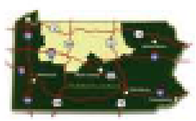
[26] The Business Resource Center at the University of Pittsburgh at Bradford, located in McKean County, is another relevant technical assistance provider.

Figure 3.7 – Excerpt from Brochure Used by PA Wilds Small Business Ombudsman to Inform Tourism Businesses of Available Technical Assistance Resources

MAKE THE PA WILDS WORK FOR YOUR TOURISM BUSINESS

pennsylvania WILDS ™

## What is the Pennsylvania Wilds?



The PA Wilds is a 12-county region that offers outdoor experiences unparalleled in the nation, with more than two million acres of public lands, 29 state parks and hundreds of miles of land and water trails. In 2003, the state recognized these natural assets and launched the namesake marketing and investment initiative. The idea was to market the area to tourists while simultaneously helping local communities capitalize on the benefits and deal with the challenges of increased visitation. Those efforts continue today.

*"Tourism is Pennsylvania's second-leading industry, and the Pennsylvania Wilds is poised to become one of the top travel destinations in the state. With its natural beauty, wildlife, parks, recreation opportunities, unique businesses, cultural events and communities, this region of north central Pennsylvania already sells itself. We're committed to building on those resources by investing in economic development to ensure even more tourist dollars – and jobs – are created."*

*- Gov. Ed Rendell from "Progress through Partnerships," a three-year report on the PA Wilds, 2007*

*Source: Commonwealth of Pennsylvania – Department of Community and Economic Development (2009)*

Figure 3.8 – Illustrative Performance "Dashboard" for PA Wilds Small Business Ombudsman, from June 1, 2008 to August 31, 2008; Informational Literature, Resource Presentations, and One-on-One Meetings are Intended to Translate into New Businesses Started and Jobs Created

| OUTPUTS | 1st Quarter (actual) | 1st Quarter (goal) |
|---|---|---|
| Produce marketing materials | 2,500 | 0 |
| Distribute marketing materials | 1,000 | 0 |
| Conduct reg. resource presentations | 0 (6 scheduled; 2 in works) | 4 |
| Start-up business contacts | 7 | 5 |
| Existing business contacts | 11 | 10 |

| OUTCOMES | 1st Quarter (actual) | 1st Quarter (goal) |
|---|---|---|
| Business expansions | 0 | 5 |
| Jobs created from expansions | 0 | 10 |
| Jobs retained from expansions | 0 | 45 |
| New businesses started | 1 | 1 |
| Jobs created from start-ups | 12 | 3 |

*Source: Commonwealth of Pennsylvania – Department of Community and Economic Development (2009), Econsult Corporation (2009)*

Through these and other mechanisms, the Pennsylvania Wilds initiative has been an effective supplier of technical assistance to businesses and communities throughout the Pennsylvania Wilds region. In addition, the Pennsylvania Wilds initiative has become a coordinating and championing entity in making other resources available to businesses and communities within the Pennsylvania Wilds region. For example, existing DCED programs such as First Industries, which was designed to support tourism businesses throughout the Commonwealth, have been successfully connected within the Pennsylvania Wilds initiative so that business financing and other capacity-building resources can be made more readily available within the Pennsylvania Wilds region. Also, through the Pennsylvania Wilds initiative, the Progress Fund has been encouraged to expand its organizational footprint to include the Pennsylvania Wilds region and to underwrite loans through DCED's First Industries program, making additional capital available to small businesses there.

While these and other efforts are relatively new, and necessarily need time to build momentum and effectiveness, it is clear that they have preliminarily translated into enhanced capacity by individual operators to respond to growing tourism demand. It will be a challenge moving forward to bring resources and networks to bear on such a geographically isolated and economically challenged part of the Commonwealth, but early indicators suggest that initial efforts have proven to generate positive impacts.

The experience of Steve and Colleen Kronenwetter of Wapiti Woods, a guest cabin rental business in Elk County, is instructive in this regard. Strategically located in the heart of elk-watching territory, Wapiti Woods came into being in 2003, just as the Pennsylvania Wilds initiative was beginning in earnest. The Kronenwetters received technical assistance through the Pennsylvania Wilds initiative to write a business plan, raise capital from the Commonwealth and other sources, and capitalize on investments made to market this part of the Pennsylvania Wilds region and to refresh recreational amenities for use by visitors.

As a result, Wapiti Woods has grown significantly in each year of its operations, and has become a preferred destination for a much broader range of tourists than could have been possible without the enhancing effects of investments in nearby recreational and other attractions. It is hopeful that additional enhancements in the future will provide foot traffic in support of other tourism-dependent businesses within the Pennsylvania Wilds region such as Wapiti Woods.

The Ridgway Chainsaw Rendezvous, which has now become an annual event that even in the dead of winter draws thousands of participants and visitors from around the world, is another such success story (see Figure 3.9). The Appalachian Arts Center, which sponsors the event, has become a worldwide center for the niche field of chainsaw carving. They received business plan assistance and a loan from the Progress Fund through the First Industries program as well as from a local bank, to purchase an old factory and turn it into a hands-on learning arts facility which opened in 2005.

Figure 3.9 – Ridgway Chainsaw Carvers Rendezvous, Elk County

*Source: Greg Scruggs (2009)*

The Pennsylvania Wilds Design Guide: A Design Guide for Community Character Stewardship, which was created to strike that fine balance between protecting communities' unique characteristics while capitalizing on tourism and other growth opportunities, is yet another form in which technical assistance to communities has been offered, giving individual communities support in combining conservation and economic development in one cohesive and executable strategy. Planning professionals from across the region are utilizing the Design Guide in order to enhance and maximize their economic potential while preserving the natural treasures which continue to characterize their localities. In Potter County, for example, local planning professionals are applying best practices from the Pennsylvania Wilds Design Guide as they construct a stormwater management plan. Overarching efforts like the Pennsylvania Wilds Design Guide are thus useful resources that have relevant application at the local level.

## 3.5 Branding, Advertising, and Promotion

The Pennsylvania Wilds initiative was also intended to market and advertise the Pennsylvania Wilds region as one cohesive unit to potential visitors. As noted by one tourism professional, "Yellowstone didn't 'exist' until someone 'named' it;" and the Pennsylvania Wilds initiative has sought to brand the Pennsylvania Wilds region in the same way that "Adirondacks," "Outer Banks," and other tourist destinations now have immediate name recognition among travelers, regardless of whether they are the actual names of geographical locations. Significantly, they are all seen as one distinct destination to consider when making vacation plans, thus greatly increasing their draw in contrast to the sum of the much smaller draw of the individual destinations contained within them.

As such, the Pennsylvania Wilds initiative seeks to create a unified Pennsylvania Wilds brand, and to then work with tourism stops within the Pennsylvania Wilds region to make visitor exposures consistent with that brand. In this sense, the Pennsylvania Wilds initiative has been a useful organizing entity through which the Pennsylvania Wilds region can be aggressively marketed through such entities as the Pennsylvania Tourism Office and the Pennsylvania Wilds Tourism Marketing Corporation. All told, approximately $5 million has been spent by the Commonwealth on branding, advertising, and promoting the Pennsylvania Wilds region (see Figure 3.10).

Figure 3.10 – Estimated Marketing, Advertising, and Public Relations Investments on PA Wilds by DCED:[27] Over $5 Million Invested in Branding the Pennsylvania Wilds Region as a Tourism Destination

| | 2005-2006 | 2007-2008 | 2009[28] | Total |
|---|---|---|---|---|
| Radio (in PA) | $77,000 | $32,000 | | $109,000 |
| Radio (out of PA) | $360,500 | $88,000 | | $448,500 |
| TV and Cable | | $215,000 | | $215,000 |
| Billboards, Bulletins, and Events[29] | $122,000 | $390,000 | | $512,000 |
| Periodicals[30] | $470,000 | $195,000 | $55,000 | $720,000 |
| Grants to PA Wilds Tourism Marketing Corporation[31] | | | | $1,532,500 |
| Public Relations via Tierney Communications[32] | | | | $1,500,000 |
| Total | $1,029,500 | $920,000 | $55,000 | $5,037,000 |

*Source: Pennsylvania Tourism Office (2009), Econsult Corporation (2009)*

It is important to note that the evolution of the Pennsylvania Wilds region from a brand awareness standpoint can and does enhance, rather than co-opt and replace, the distinctiveness of the many towns and the authentic experiences they offer therein. In fact, the Pennsylvania Wilds, as a brand, has no tangible content in and of itself except for the many individual communities and attractions that are contained within its 12 counties. Far from subsuming those unique amenities, branding them together

[27] This table reflects state only funding and does not include marketing dollars spent by private sector marketing or local TPA's.

[28] 2009 figures refer only to the first four months of 2009.

[29] These tended to focus on nearby regional markets, such as Cleveland, Delaware, New York City, South Jersey, and Washington.

[30] Ads were placed in such publications as Field & Stream, National Geographic Adventure, and Outside, and tended to focus on states in New England, the Midwest, and the Southeast.

[31] The five-year total represents aggregate grant dollars awarded to the Pennsylvania Wilds Tourism Marketing Corporation by the Pennsylvania Tourism Office from 2004 to 2008.

[32] The five-year total represents an estimate of advertising equivalency generated for the Pennsylvania Wilds region from press coverage by Tierney Communications an advertising and public relations firm deployed by the commonwealth to assist its tourism efforts. The total is a conservative extrapolation from a calculated amount in 2004 of $377,000. It does not account for any exposure created by websites such as PAWilds.com or visitPA.com.

and then promoting that brand to potential visitors brings out the best in those amenities, connecting them to a grander story and to a broader audience.

It has been this opportunity to connect smaller experiences and amenities to a larger and more cohesive brand that has engaged individual tourism industry operators:

- Ross Porter, the mayor of Smethport, has taken to co-branding his town with the Pennsylvania Wilds name, as all documents that originate from his office now say "Smethport, PA Wilds."
- Jay D. Roush, owner of The Inn on Maple Street Bed & Breakfast, has a link to the Pennsylvania Wilds website on her site, considering it a good thing for visitors to her site to know her establishment is located within the Pennsylvania Wilds region and is affiliated with the Pennsylvania Wilds initiative.
- At least one restaurant, in Lycoming County, prominently displays its affiliation with the Pennsylvania Wilds initiative (see Figure 3.11).

Figure 3.11 – Example from Brochure Produced by, PA Wilds Small Business Ombudsman, of a Business Using the PA Wilds Brand and Logo for Marketing Purposes


*Source: Commonwealth of Pennsylvania – Department of Community and Economic Development (2009)*

In other words, many business owners already understand the potential of the Pennsylvania Wilds initiative to brand the Pennsylvania Wilds region, recognize that the Pennsylvania Wilds brand is catching on, and are utilizing it to attract new customers. These efforts are starting to pay off, as campaigns designed to market the region as a whole have had positive impacts on local attractions and businesses. Chambers of commerce have noted increases in tourism as a result of PA Wilds' advertising: Clearfield County reports approximately a four percent growth rate since the Pennsylvania Wilds initiative started, and attribute much of that success to branding and advertising. Advertising of specific attractions such as the Star Gazing Parties at Cherry Springs State Park have helped to draw new visitors to the Pennsylvania Wilds region (see Figure 3.12). Such attraction-specific advertising then has spillover effects in the form of additional exposure to nearby small businesses.

Figure 3.12 – Viewing Pods at Cherry Springs State Park, Potter County

*Source: Greg Scruggs (2009)*

The significance of advertising the Pennsylvania Wilds region as a whole is not lost on individual operators in geographically isolated communities. One advocate of local artisans noted that "99.9 percent of sales are to tourists – without the Pennsylvania Wilds, we would not have a business," while a director of one of the Small Business Development Centers located within the Pennsylvania Wilds region correctly observed that "without the Pennsylvania Wilds, small businesses would potentially have to spend an unsustainable level of advertising dollars to draw customers." Instead, through the Pennsylvania Wilds initiative, businesses are promoted as part of a broader package of destinations and amenities, in a manner that is both effective and cost efficient.

## 3.6 Inter-Organizational Coordination of State and Other Entities

Finally, the Pennsylvania Wilds initiative was intended to serve as an efficient mechanism by which the Commonwealth's many relevant entities could interface with each other and with other public and private sector entities that shared the same goals for the Pennsylvania Wilds region. These kinds of collaborations – public/private, private/private, and even public agency to public agency within the Commonwealth – can be very difficult to make happen, even when there is agreement on shared objectives. Hence, they require active management, formal channels, and informal networks.

Several interviewees remarked at the impressive breadth and depth of stakeholders that had been assembled toward the common goal of marketing the Pennsylvania Wilds initiative and improving the Pennsylvania Wilds region. These constituents recognized that, no matter how logical such inter-entity gatherings and partnerships are in theory, in practice they are logistically and institutionally difficult to actually make happen, and they expressed their thoughts accordingly (see Figure 3.13):

Figure 3.13 – Quotes from Selected Public and Private Sector Representatives within the Pennsylvania Wilds Region Concerning the Importance of Inter-Entity Collaboration as Part of the Pennsylvania Wilds Initiative

- "The level of intergovernmental collaboration is quite remarkable, given that you are talking about 12 counties and eight tourism promotion agencies." – Bob Veilleux, Penn State University

- "The Pennsylvania Wilds initiative has been an outstanding, coordinated effort, especially between the Department of Conservation and Natural Resources (DCNR) and the Department of Community and Economic Development (DCED)." – Scott Dunkelberger, Department of Community and Economic Development's Center for Business Financing

- "The PA Wilds is one of the best things that have happened in our part of PA in a long time, and I think DCNR and DCED have done a fantastic job. It certainly would never have happened without their partnerships at the grassroots level. The identification with the PA Wilds has grown substantially within the local and regional planning organizations, Tourism Promotion Agencies, chambers, and downtown redevelopment groups." – innkeeper in Elk County

- "The partnership is strong because of the 12-county inter-governmental operation agreement that was enacted by ordinance by the governing boards of each county, but also because of the cross-agency collaborations that are fostered by this arrangement. You have county governments getting together monthly to address real needs and problems that are common to each of them. Even if they are different from one county to the next, they are looking at the whole area rather than just their individual piece of territory." – a county planning commission member

*Source: stakeholder interviews (2009)*

Two entities formed as a part of the Pennsylvania Wilds initiative deserve further elaboration. First, the Pennsylvania Wilds Tourism Marketing Corporation (PWTMC) is responsible for much of the branding, advertising, and promotion activity described previously. The primary goal of PWTMC is to establish a strong coalition of public and private partners with the goal of branding the Pennsylvania Wilds region as the premier destination for outdoor experiences in the eastern US. They work to this end through the conception and delivery of radio, television, and print advertising, as well as other promotional efforts.

To coordinate ground-level efforts towards a common aim of promoting the Pennsylvania Wilds initiative, officials from the eight tourism promotion agencies (TPAs) serving the Pennsylvania Wilds region meet monthly. They co-produce the Pennsylvania Wilds Regional Visitors Guide, Fishing Guide, Outdoor Discovery Maps, Scenic Byways Brochure, and Artisan Trail Guide, which, importantly, are available through a variety of avenues and help reinforce the image that is being created around the Pennsylvania Wilds region. They are also in charge of the pawilds.com website, and represent the Pennsylvania Wilds region on travel shows and at special events.

Second, the Pennsylvania Wilds Planning Team was established to develop and implement strategies to encourage tourism growth in the Pennsylvania Wilds region while yet protecting and conserving both the region's treasured natural resources and its rural community character. This entity meets monthly and is made up of county planners, regional economic development and heritage organizations, and local and state government officials.

One noteworthy and tangible outcome of this collaboration was the Pennsylvania Wilds Design Guide. Subtitled "A Design Guide for Community Character Stewardship," this document is helping county planning offices coordinate development efforts based on area-wide standards. As the Pennsylvania Wilds region wrestles with balancing quality of life and the creation of sustainable economic growth, design guidelines will play an important role in managing those trade-offs and ensuring aesthetic consistency and authenticity. And, as the Pennsylvania Wilds initiative seeks to present a unified image that yet consists of countless distinctive communities, attractions, and assets, design standards will inform the way forward; several county planning professionals expressed the sentiment that the Pennsylvania Wilds initiative was useful in this regard, in providing guidance to individual efforts and helping those individual pieces connect to a larger, unified effort.

Two other facilitative examples warrant mentioning here. First, nature does not always fit neatly into governmental jurisdictions; trails, for example, may meander through land owned by a mix of public and private entities. The Pine Creek Rail Trail in Tioga County is an example of a major recreational asset that has involved the coordinative efforts of Pennsylvania Wilds Planning Team members in working with various parties across jurisdictions and boundaries throughout the planning, construction, marketing, and maintenance processes (see Figure 3.14).

Figure 3.14 – Pine Creek Gorge, Tioga County

*Source: Greg Scruggs (2009)*

Pennsylvania Wilds Planning Team members have also coordinated area-wide marketing efforts by creating new literature and encouraging the cross-stocking of more localized information. But for this geographically broader marketing effort, individual entities might only offer information on immediately adjacent attractions; now, visitors are more likely to be made aware of a larger radius of opportunities for recreation, thus strengthening the Pennsylvania Wilds region as a whole as a destination of choice and increasingly the prospects of enhanced spending that is captured.

All too often, the overall impact of government programming intended to add value to various aspects of a jurisdiction's economy and its individual players ends up being less than the sum of its parts, to the extent that lack of coordination leads to duplication of efforts, missed opportunities for synergies, and a bureaucratic siloing of initiatives and resources. Efforts to work across agencies, as well as to reach out to local governments, public agencies, and the private sector therefore represent an opportunity to squeeze more efficiency out of existing initiatives and resources, and bring to bear additional, strengthened initiatives and resources as multiple entities work together.

Many more partnerships and efficiencies remain to be actualized, to be sure. However, as evidenced by positive feedback from a variety of stakeholders, so far, such efforts have already borne some fruit in the form of entities working across organizational lines to achieve more for themselves and for the Pennsylvania Wilds region.

# 4.0 Economic and Fiscal Impacts on the Pennsylvania Wilds Region

The previous section described the Pennsylvania Wilds initiative's work in making recreational investments, providing technical assistance to businesses and communities, branding the Pennsylvania Wilds region, and coordinating the Commonwealth of Pennsylvania and other public and private sector entities in these efforts. This section examines the extent to which these actions led to their intended results: an enhancement of local economies in ways that are environmentally sustainable, authentic to the unique character of the Pennsylvania Wilds region, and supportive of a variety of industries and occupations.

Specifically, this section considers what effect the Pennsylvania Wilds initiative has had on the Pennsylvania Wilds region since its inception in 2003, in the following categories of indicators:

- The **overall economic health** of the Pennsylvania Wilds region
- **Recreational activity** at major attractions with the Pennsylvania Wilds region
- **Tourism spending** within the Pennsylvania Wilds region
- **Tax revenue generation** for the Commonwealth and for counties within the Pennsylvania Wilds region
- **Additional private investment** within the Pennsylvania Wilds region

To be sure, as noted previously it is a challenge to offer a definitive quantitative conclusion concerning the effect of the Pennsylvania Wilds initiative on the economy of the Pennsylvania Wilds region: the Pennsylvania Wilds initiative is relatively new, the effect of long-term investments may not be observed in the short run, and data is scarce. Furthermore, the challenges faced by the Pennsylvania Wilds region are decades in the making; and, in general, the scale of structural disadvantages usually tend to dwarf even the most expansive of public sector interventions. These caveats do not negate the importance of quantitatively determining whether an economic development program has had a discernible impact, but they do provide a necessary framework by which results can be interpreted.

## 4.1 Overall Economic Health

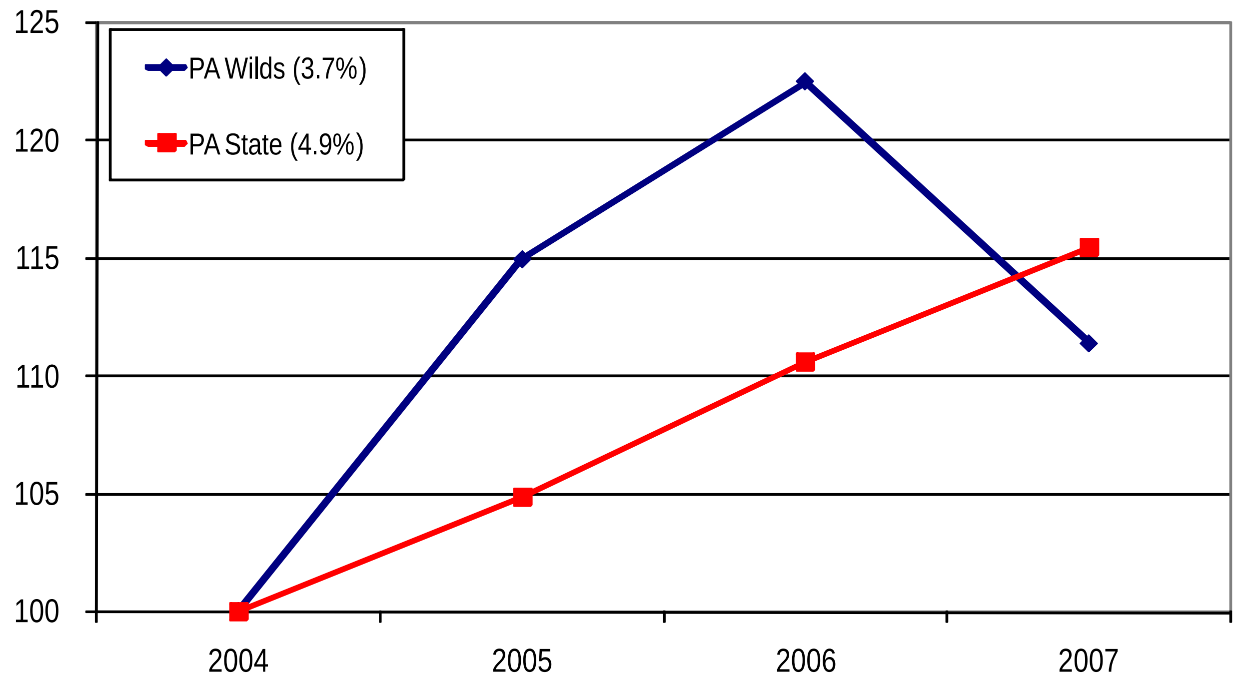
Despite the relatively dismal economic characteristics presented in Section 2, the Pennsylvania Wilds region enjoyed overall economic growth, as evidenced by growth in annual Gross Domestic Product (GDP)[33], which demonstrates a healthy increase in the added value, produced within the 12 counties of the Pennsylvania Wilds region. The Pennsylvania Wilds region experienced healthy GDP growth, even

[33] All Gross Domestic Product figures are estimates.

outpacing the Commonwealth as a whole in terms of growth rate from 2004 to 2006 before pulling back in 2007, due in part to slowdowns in key manufacturing sectors (see Figure 4.1).

**The estimated +3.7 percent compounded annual growth rate (CAGR) in GDP (approximately +$130 million from 2002 to 2007) suggests that the Pennsylvania Wilds initiative has played a role in helping stimulate an otherwise economically challenged sector of the Commonwealth.** Importantly, all counties performed at or near that level; in fact, with the exception of one notable outlier,[34] all counties were within a half-percentage point of the aggregate compounded annual GDP growth rate. In other words, there were no laggards among the 12 counties, and relatively little difference in growth patterns between the smaller counties and the larger ones.[35]

Figure 4.1 – Estimated GDP, PA Wilds vs. PA State (Indexed: 2004 = 100): A 3.7 Percent CAGR in GDP for PA Wilds[36]




*Source: Global Insight / DK Shifflet & Associates (2008), US Bureau of Economic Analysis (2008), Econsult Corporation (2009)*

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[34] Cameron County recorded a dramatic one-time increase in GDP in 2007 as a result of activity associated with a toxic spill and resulting litigation and clean-up. See Appendix J for more detail on this chemical spill.

[35] See Appendix K for more detail on overall economic health indicators within the Pennsylvania Wilds region.

[36] CAGR = compounded annual growth rate. Throughout the report, CAGRs are used to demonstrate trends over time. They do not presume that upward or downward rates are smooth throughout the study periods; in fact, in the case of the Pennsylvania Wilds region, there is considerable volatility through the study periods. Also, beginning and ending years for trend analysis were selected based on data availability (i.e. the years closest to the start year of the Pennsylvania Wilds initiative and to the present that had reasonably comprehensive data).

## 4.2 Recreational Activity

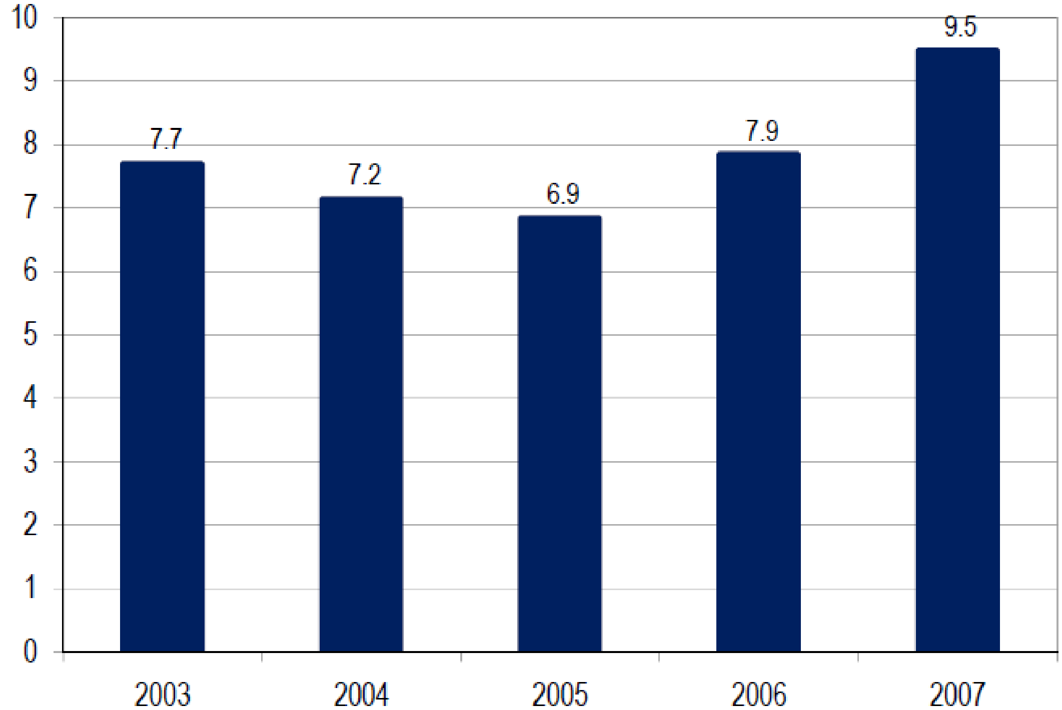
Since the Pennsylvania Wilds initiative is largely about branding the Pennsylvania Wilds region as a destination of choice for travelers, recreational activity is an important success metric to track. Given the Pennsylvania Wilds region's heavy concentration of state parks and other outdoor attractions, an important contextual trend to note is that, due to demographic factors and an increase in alternative recreational options, total attendance at national parks is down 0.5 percent from its 2000 peak and relatively flat since 2004. In spite of this national trend, and **despite the fact that state park attendance throughout the Commonwealth has declined slightly in recent years, attendance at state parks within the Pennsylvania Wilds region is up since the inception of the Pennsylvania Wilds initiative**, increasing 3.3 percent per year from 2004 to 2008.[37]

The efficacy of the Pennsylvania Wilds initiative in marketing the Pennsylvania Wilds region as a destination of choice is best proven by gains in both overnight leisure travel and lengths of stays. From 2003 to 2007, the Pennsylvania Wilds region enjoyed a sharp increase in overnight leisure travel of +5.3 percent per year, compared to +1.9 percent per year for the Commonwealth as a whole (see Figure 4.2).[38]

[37] Attendance in state parks within the Pennsylvania Wilds region grew from 2.7 million visitors in 2004 to 3.1 million visitors in 2008. State park attendance throughout the Commonwealth, generally stable during the past 10 years, experienced a decline from 36.3 million in 2005 to 34.1 million in 2008, in part due to facility closures at certain locations that were necessary for renovations and repairs. See Appendix L for more detail on recreational use within the Pennsylvania Wilds region.

[38] Tourism data for the Commonwealth as a whole was provided by the Pennsylvania Tourism Office.

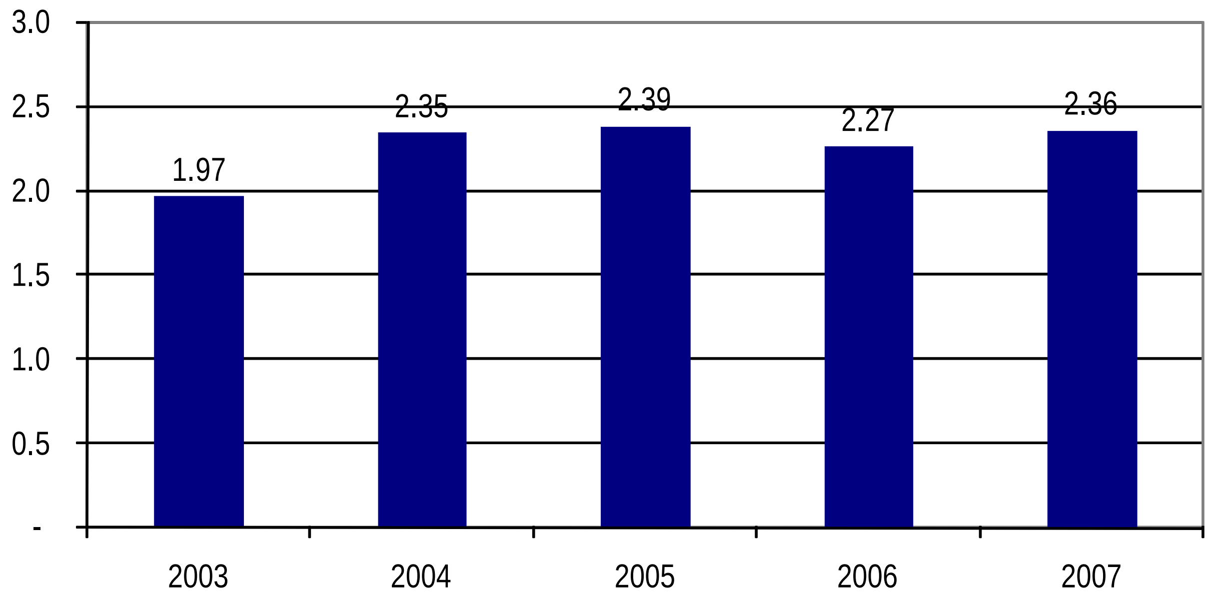
Figure 4.2 – Estimated Overnight Leisure Visitor Volume to PA Wilds (in Millions of Person-Days): 1.8 Million More Person-Days from 2003 to 2007




*Source: DK Shifflet & Associates (2008), Econsult Corporation (2009)*

From 2003 to 2007, the Pennsylvania Wilds region enjoyed a CAGR in leisure overnight trip length of +4.6 percent, from 1.97 days in 2003 to 2.36 days in 2007, versus no growth in leisure overnight trip lengths for the Commonwealth as a whole. Notably, the biggest year-over-year increase was between 2003 and 2004, the first year of the Pennsylvania Wilds initiative, suggesting that initiative's immediate positive contribution to trip lengths (see Figure 4.3).

Figure 4.3 – Estimated Average Length of Stay in PA Wilds for Overnight Leisure Trips: Trip Lengths Up 4.6% Annually From 2003 to 2007[39]




*Source: DK Shifflet & Associates (2008), Econsult Corporation (2009)*

At a more local level, key destinations and events within the Pennsylvania Wilds region have reported significant increases in attendance, even in the midst of the present economic slowdown (see Figure 4.4 and Figure 4.5).[40] These increases validate the efforts of the Pennsylvania Wilds initiative in showcasing particular attractions and destinations in its promotional efforts.

[39] DK Shifflet & Associates collects data on overnight leisure trips through a survey mail panel that is stratified to match the US Census Bureau's methodology. The returned sample is then rebalanced demographically.

[40] "The PA Wilds is Working," Lumber Heritage Region (April 2009).

Figure 4.4 – Attendance Growth at Selected Destinations and Events within PA Wilds: Impressive Recent Gains Throughout the Pennsylvania Wilds

| Destination/Event | County | Attendance Growth |
|---|---|---|
| Cameron County Canoe and Kayak Classic | Cameron County | From approx. 125 boats in 2008 to approx. 200 boats in 2009 |
| Hyner Run Challenge | Clinton County | From 620 runners in 2008 to over 770 runners in 2009 |
| Chain Saw Carving Rendezvous | Elk County | From 500 attendees in 1999 to 5000 in 2003 to 20,150 in 2009 |
| Kinzua Outdoor Show | McKean County | From 4,800 attendees in 2008 to over 6,000 in 2009 |
| Art in the Wilds | McKean County | 3,000 attendees in 2007 and 3,500 in 2008 |
| Chapman State Park Winterfest | Warren County | From 10,800 attendees in 2008 to 12,800 attendees in 2009 |
| Warren County Fair | Warren County | 9% increase in attendees from 2003 to 2008 |

*Source: stakeholder interviews (2009), Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2009)*

Figure 4.5 – Quotes from Selected Tourism Professionals within the Pennsylvania Wilds Region Concerning the Efficacy of Advertising Efforts by the Pennsylvania Wilds Initiative

- "We've noticed a distinct impact of PA Wilds marketing bringing visitors in from places like DC and Philadelphia, which we did not get before." – inn operator in Elk County

- "Tourism has been steadily up; it must be because of PA Wilds' advertising efforts." – chamber of commerce representative in Elk County

- "Promoting the region as a whole really helps the small businesses, which would otherwise have to spend lots of money to get customers." – Small Business Development Center representative in Clarion County

- "PA Wilds markets the big events, which then bring customers to us." – bed and breakfast owner in Potter County
- "Without the PA Wilds, we would not have a business, since 99.9 percent of our sales are to tourists." – art studio proprietor in Elk County
- "It's brought me new customers and is helping me grow my business." – recreational equipment business owner in Clinton County

*Source: stakeholder interviews (2009)*

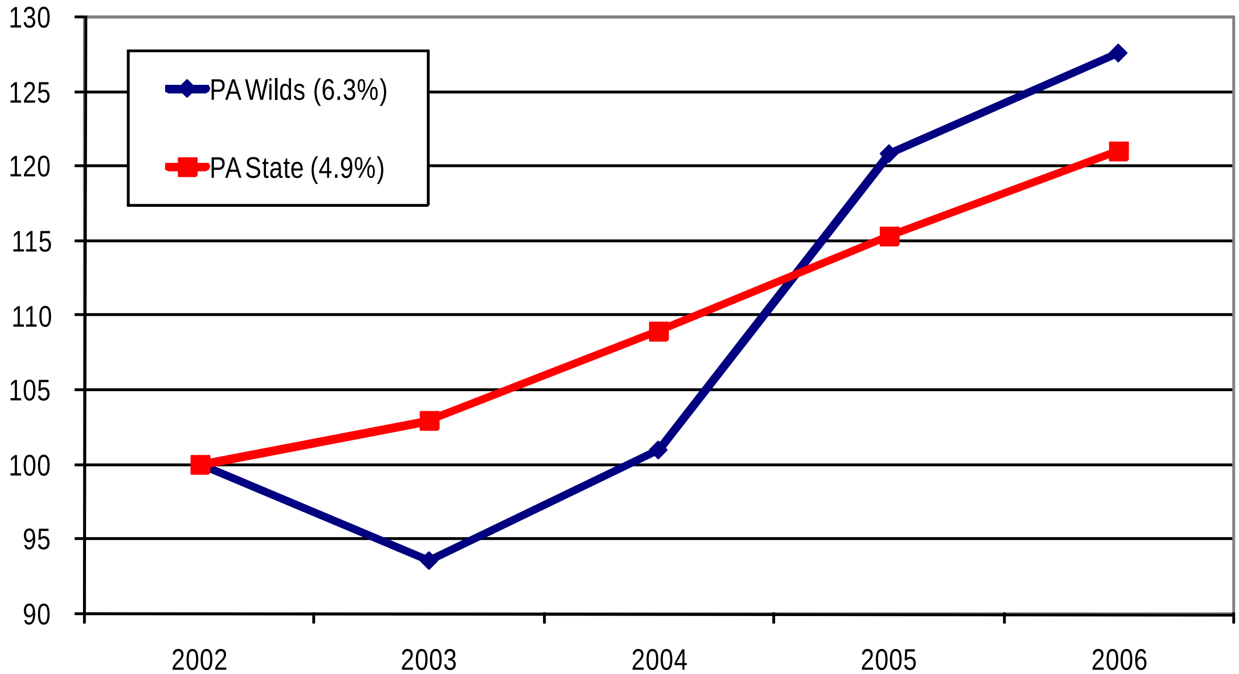
## 4.3 Tourism Spending

Recreational activity must translate into tourism spending in order for a region to reap the financial benefit of the importing of that commercial activity. The Pennsylvania Wilds region has enjoyed increases in tourism spending since the inception of the Pennsylvania Wilds initiative. During a period of otherwise mundane economic performances, tourism indicators for the Pennsylvania Wilds region were largely positive: visits and visit lengths were up, visitor spending was up, and the tourism industry experienced increases in employment and earnings.

From 2002 to 2006, visitor spending within the Pennsylvania Wilds region grew faster than within the Commonwealth as a whole: a CAGR of +6.3 percent for the Pennsylvania Wilds region (approximately +$220 million from 2002 to 2006) versus a CAGR of +4.9 percent for the Commonwealth. Particularly high growth rates from 2003 to 2005 coincided with the implementation of the Pennsylvania Wilds initiative, suggesting that initiative's positive contribution to tourism activity (see Figure 4.6).[41]

[41] Visitor spending includes the following categories: transportation, food & b everage, lodging, shopping, entertainment, and other. See Appendix M for more detail on visitor spending.

Figure 4.6 – Estimated Visitor Spending, PA Wilds vs. PA State (Indexed: 2002 = 100; CAGRs in Parentheses): PA Wilds Exceeds PA State Visitor Spending Growth Rate




*Source: Global Insight / DK Shifflet & Associates (2008), US Travel Association (2009), Econsult Corporation (2009)*

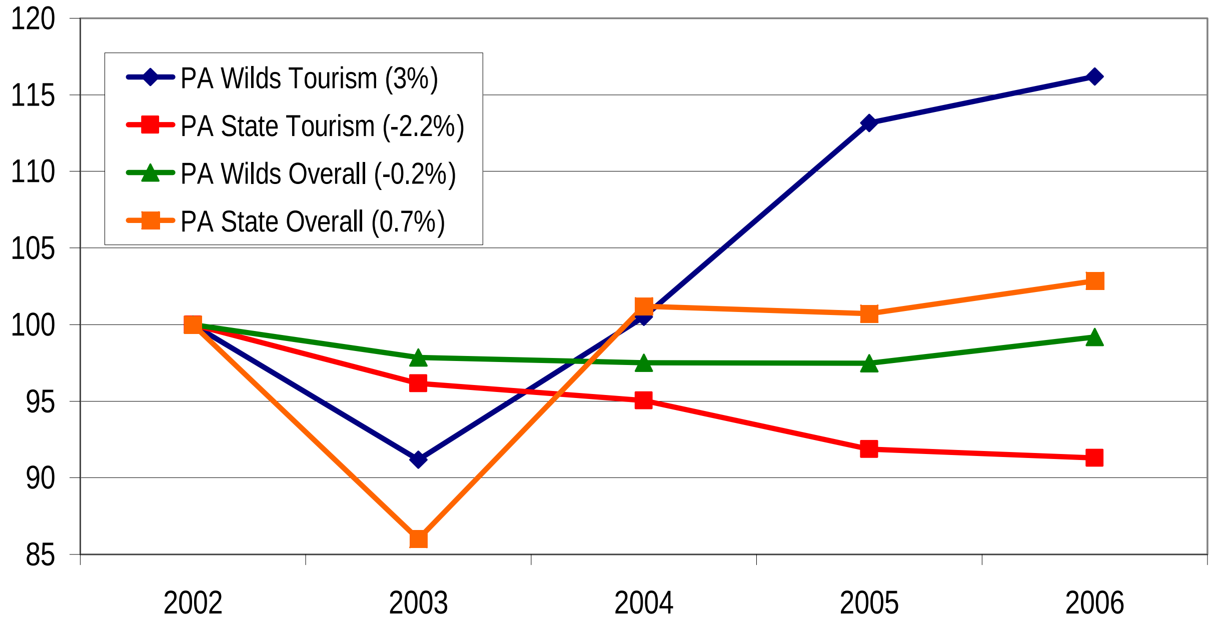
Furthermore, from 2002 to 2007, with the exception of one notable outlier,[42] county CAGRs ranged between +2.5 percent and +3.8 percent, suggesting that there were no laggards among the 12 counties, and relatively little difference in growth patterns between the smaller counties and the larger ones. This is a promising result for a region that has otherwise experienced uneven economic performance.

Significantly for local communities, **this tourism-fueled increase in activity has led to gains in employment and earnings.**[43] While employment growth within the Pennsylvania Wilds region lagged behind employment growth within the Commonwealth as a whole from 2002 to 2006 (-0.2 percent versus +0.7 percent), tourism employment within the Pennsylvania Wilds region exceeded tourism employment within the Commonwealth as a whole (+3.0 percent, or over 2,000 more jobs in 2006 than in 2002, versus -2.2 percent). Particularly high growth rates from 2003 to 2005 coincided with the implementation of the Pennsylvania Wilds initiative, suggesting that initiative's positive contribution to tourism employment (see Figure 4.7).

[42] Cameron County's unusually high CAGR in visitor spending resulted from a one-time increase in 2007 as a result of activity associated with a toxic spill and resulting litigation and clean-up.

[43] See Appendix N for more detail on tourism employment and earnings.

Figure 4.7 – Estimated Direct Employment, PA Wilds vs. PA State (Indexed: 2002 = 100; County CAGRs in Parentheses):[44] PA Wilds Tourism Exceeded the PA State Tourism Growth Rate, While PA Wilds Overall Lagged PA State Overall Growth Rate

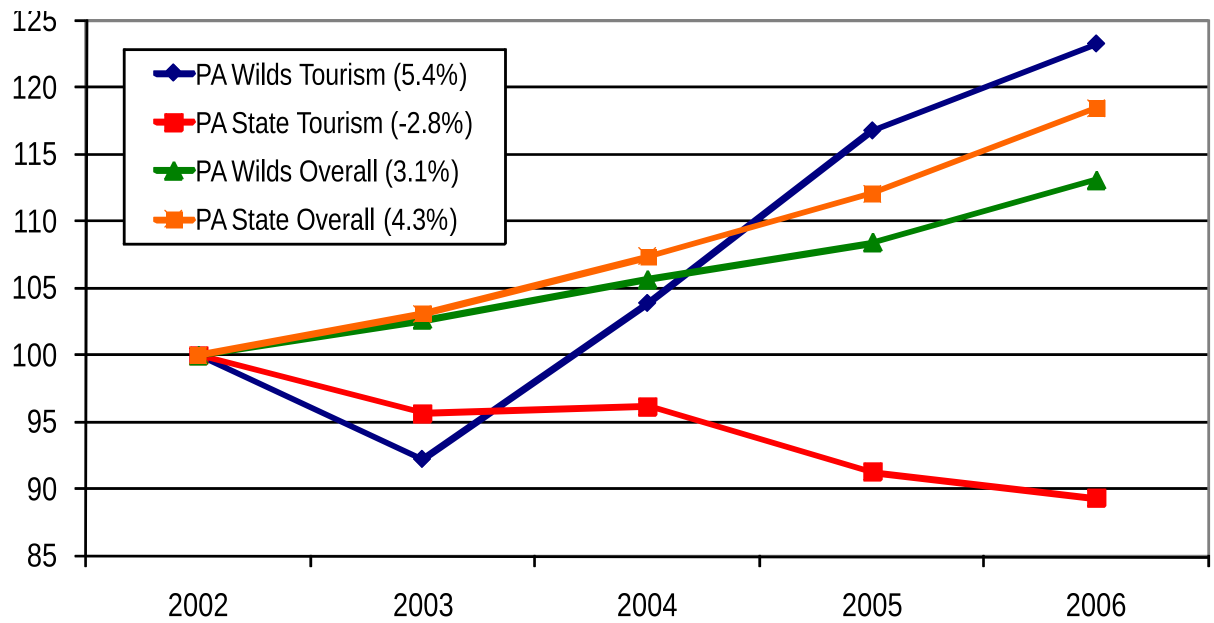



*Source: Global Insight / DK Shifflet & Associates (2008), US Census Bureau (2008), Econsult Corporation (2009), US Travel Association (2009)*

While earnings growth within the Pennsylvania Wilds region lagged behind earnings growth within the Commonwealth as a whole from 2002 to 2006 (+3.1 percent versus +4.3 percent), tourism earnings within the Pennsylvania Wilds region exceeded tourism earnings within the Commonwealth as a whole (+5.4 percent, or almost $75 million more in wages in 2006 than in 2002, versus -2.8 percent). Particularly high growth rates from 2003 to 2005 coincided with the implementation of the Pennsylvania Wilds initiative, suggesting that initiative's positive contribution to tourism earnings (See Figure 4.8).

[44] Tourism employment includes the following categories: transportation, food and beverage, lodging, shopping, entertainment, and other.

Figure 4.8 – Estimated Direct Earnings, PA Wilds vs. PA State (Indexed: 2002 = 100; County CAGRs in Parentheses)[45]: PA Wilds Tourism Exceeded the PA State Tourism Growth Rate, While PA Wilds Overall Lagged PA State Overall Growth Rate




*Source: Global Insight / DK Shifflet & Associates (2008), US Census Bureau (2008), Econsult Corporation (2009) , US Travel Association (2009)*

Notably, from 2002 to 2007, all counties within the Pennsylvania Wilds region experienced positive tourism employment growth. With the exception of one notable outlier,[46] county CAGRs for tourism employment ranged between +0.0 percent and +1.2 percent, and county CAGRs for tourism earnings ranged from +1.8 percent and +3.1 percent, suggesting that there were no laggards among the 12 counties, and relatively little difference in growth patterns between the smaller counties and the larger ones.

In short, amidst a decades-long economic decline, the Pennsylvania Wilds region has enjoyed recent success in key tourism indicators: visits and visit lengths were up, visitor spending was up, and tourism employment and earnings have increased. It is difficult to definitely conclude that these positive signs are a direct result of the Pennsylvania Wilds initiative, but it is clear that the outcomes are what were hoped for upon its commencement.

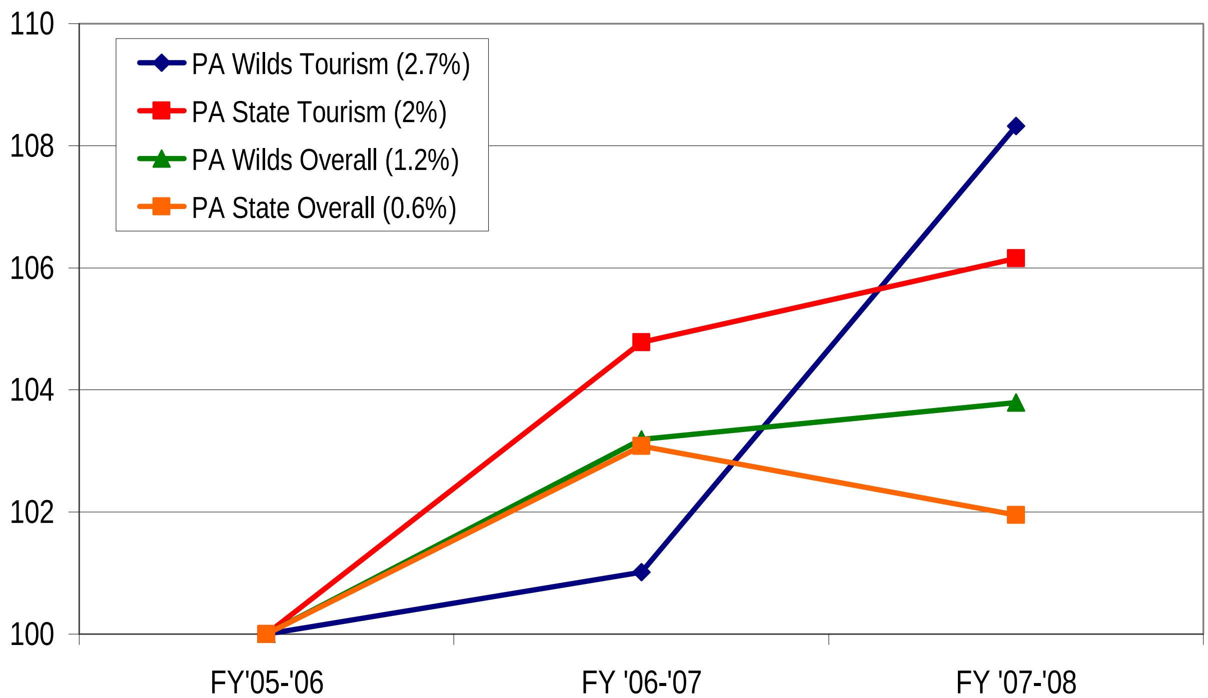
[45] Tourism earnings include the following categories: transportation, food & beverage, lodging, shopping, entertainment, and other.

[46] Cameron County's unusually high CAGR in tourism employment and earnings resulted from a one-time increase in 2007 as a result of activity associated with a toxic spill and resulting litigation and clean-up. See Appendix J for more detail on this chemical spill.

## 4.4 Tax Revenue Generation

**Increases in tourism activity were also reflected in higher tax revenues.** State sales tax revenue growth for tourism categories within the Pennsylvania Wilds region exceeded total state sales tax revenue growth within the Commonwealth as a whole (+2.7 percent, or almost $3 million more in FY '07-'08 than in FY '05-'06, versus +0.6 percent). It also exceeded state sales tax revenue growth for tourism categories within the Commonwealth as a whole (+2.0 percent) and total state sales tax revenue growth within the Pennsylvania Wilds region (1.2 percent). Thus, increased activity after the Pennsylvania Wilds initiative was implemented has translated into higher tax revenue growth within the Pennsylvania Wilds region (see Figure 4.9).[47]

Figure 4.9 – Estimated State Sales Tax Revenues, PA Wilds vs. PA State (Indexed: 2005 = 100; County CAGRs in Parentheses): PA Wilds Exceeds PA State in Growth Rate of Sales Tax Revenues from Tourism[48]



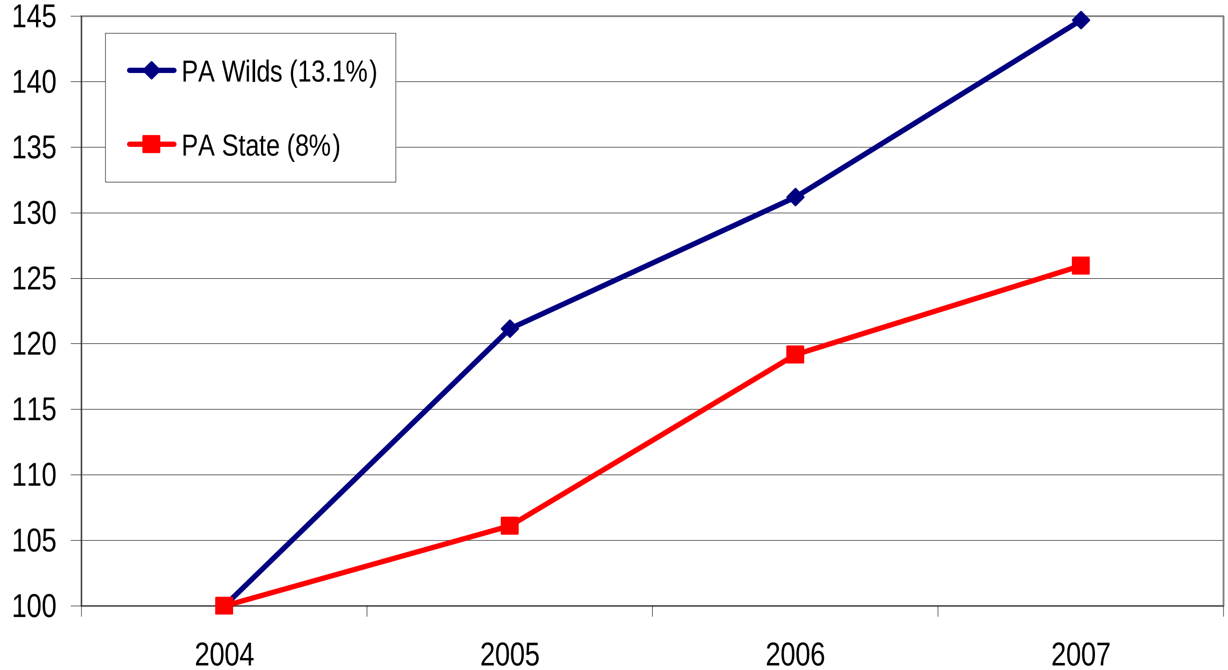

*Source: Pennsylvania Department of Revenue (2008), Econsult Corporation (2009)*

[47] According to a recent press release, hotel rooms sold in the Pennsylvania Wilds region were up 6.5 percent from 2007 to 2008, and hotel tax revenues were up 12 percent during that time. "The PA Wilds is Working," Lumber Heritage Region (April 2009). See also Appendix O for more detail on sales tax revenues and hotel tax revenues.

[48] Cameron County sales tax revenues are extrapolated from other data due to lack of direct data.

In addition, hotel room tax revenue growth within the Pennsylvania Wilds region outpaced state sales tax revenue growth from accommodations within the Commonwealth as a whole (13.1 percent, or over $600,000 more in 2007 than in 2004, versus 8.0 percent). A particularly high growth rate from 2004 to 2005 (20+ percent) coincided with the implementation of the Pennsylvania Wilds initiative, suggesting that initiative's immediate positive contribution to tourism tax revenues (see Figure 4.10).

Figure 4.10 – Estimated PA Wilds Hotel Room Tax Revenues vs. PA State Sales Tax Revenues from Accommodations (Indexed: 2004 = 100; County CAGRs in Parentheses): PA Wilds Exceeds PA State in Growth Rate of Hotel Room Tax Revenues[49]




*Source: Pennsylvania Tourism Office / Pennsylvania Department of Revenue (2008), Econsult Corporation (2009)*

## 4.5 Private Sector Investment

The disinvestment taking place in rural parts of the US over the past generation can become a vicious cycle of sorts: as agglomerations of people and activity become self-reinforcing, so do population and employment loss make it even more difficult to compete for investment. Therefore, the relative ability of the

[49] Hotel taxes are only assessed on eligible accommodations facilities and therefore these figures do not include all accommodations options (such as campground facilities, for example). There was no rate increase during this time period.

Pennsylvania Wilds region to **receive private sector investment** can be attributed in part to the efforts of the Pennsylvania Wilds initiative in improving the area to the point of attracting and inducing investment.[50]

An important and promising tourism-related indicator in gauging the effect of the Pennsylvania Wilds initiative is the net change in chain hotels, to the extent that private investment by hotel chains is a useful proxy for a region's desirability and profit potential, at least from a hospitality standpoint[51]. From 2003 to 2008, **the Pennsylvania Wilds region experienced a net change in chain hotel establishments of +12**, or an almost 40 percent increase, and no county suffered net losses in chain hotels (see Figure 4.11).[52]

Unfortunately, the Pennsylvania Wilds region boasts few other prominent successes, in terms of attracting private sector investment. As noted, the Commonwealth is in the midst of a generations-long transition from a manufacturing-dependent economy to a more modernized, knowledge-based economy, and rural areas have been largely disinvested in during this transition. With the exception of the aforementioned net positive gain in chain hotels, the only other major private sector investments have been related to renewable energy projects;[53] the tourism-focused efforts of the Pennsylvania Wilds initiative simply have not created enough traction within the Pennsylvania Wilds region to attract interest or investment from larger companies in other, high-growth industries.

[50] To be sure, this is a somewhat incomplete characterization: regions can grow both by attracting outside investment or by growing existing firms and industries to scale. The point of offering private sector investment is not to over-elevate the importance of outside resources, but rather to acknowledge that one characteristic of healthy economic regions is their ability to justify large-scale private investment.

[51] This metric likely speaks to the success of the Pennsylvania Wilds initiative in enhancing the attractiveness of the Pennsylvania Wilds region as a visitor destination, since chain hotels only site locations where they interpret there to be sufficient demand for overnight stays. However, as will be further elaborated in the next section, it also speaks to the relative dearth of available modern accommodations within the Pennsylvania Wilds region.

[52] Between 2003 and 2007, chain hotels saw a net increase of 12 units; however, bed and breakfasts and non-chain hotels experienced decreases of 17 and 10 units, respectively. Over this same time period, there was an increase among camp sites of 21. We are unable to determine how these changes affected total lodging capacity in the Pennsylvania Wilds, due to a lack of data on number of beds per lodging unit. While it is likely that chain hotels may have partially although not fully displaced other lodging types such as non-chain hotels, inns, or bed and breakfasts, without data on number of beds we are unable to draw definitive conclusions about net capacity. See also Appendix P for more detail on lodging.

[53] See, for example, "Company Specializing in Renewable Energy Has First Installation in Clinton County," The Express (August 29, 2009), and "Smethport Moves Closer to Biomass-Fueled CHP Facility," Biomass Magazine (August 10, 2009).

Figure 4.11 – 2003-2007 Net Change in Chain Hotel Establishments in PA Wilds by County
PA Wilds Had 39% More Chains, and No Counties Suffered Net Losses

| County | 2003 | 2007 | Change |
|---|---|---|---|
| Cameron | 0 | 1 | 1 |
| Clarion | 4 | 6 | 2 |
| Clearfield | 9 | 12 | 3 |
| Clinton | 2 | 3 | 1 |
| Elk | 2 | 2 | 0 |
| Forest | 1 | 2 | 1 |
| Jefferson | 4 | 4 | 0 |
| Lycoming | 5 | 8 | 3 |
| McKean | 1 | 2 | 1 |
| Potter | 0 | 0 | 0 |
| Tioga | 1 | 1 | 0 |
| Warren | 2 | 2 | 0 |
| Total | 31 | 43 | 12 |

*Source: Info USA (2008), Wharton GeoSpatial Initiative (2009), Econsult Corporation (2009)*

## 4.6 Summary of Impact

In spite of its relative infancy, the Pennsylvania Wilds initiative has had a positive effect on the Pennsylvania Wilds region. In the midst of a long decline in many parts of rural Pennsylvania, key economic indicators, particularly those influenced by tourism, are largely positive, contributing to some promising, albeit limited economic and fiscal successes.

Even more encouragingly, **these positive effects are likely to continue as efforts gain further traction and momentum**:

- **Coordinated recreational investments** will continue to accrue exponential benefits to users through increased connectivity and enhancement of such infrastructure as trails, visitor centers, and special destinations. With each addition, existing participants gain a more valuable system of amenities, and potential participants have yet one more reason to make the decision to choose the Pennsylvania Wilds region for their leisure travel.[54]

- Repeated investments in **capacity building via technical assistance resources** for tourism businesses within the Pennsylvania Wilds region will continue to pay off in the form of more and better companies available to meet the demand for various tourism products and services. Many interviewees spoke highly of technical assistance resources that have been made available through the Pennsylvania Wilds initiative. Further traction in these efforts will only reinforce the business community's ability to more effectively respond to tourists.

- The Pennsylvania Wilds region has been known for over a century as a unique and compelling destination for outdoor and other leisure travel; however, it has only been branded as "the Pennsylvania Wilds" since 2003. Therefore, **repeated exposure to this name and brand** through marketing of the region as a whole, as well as through branding efforts surrounding authentic products and artisan wares, should lead to increased awareness over time. Also, since the area is somewhat geographically isolated and is therefore not often a place people frequent unless they are intentionally choosing to, word of mouth advertising should increase as the first wave of people drawn by advertising and promotional efforts specifically tied to the Pennsylvania Wilds brand speak of their positive experiences, thus pollinating the Pennsylvania Wilds brand to others.

- **Inter-entity collaborations** can certainly have an accelerating effect over time, as representatives of different agencies become more familiar with each other and with the nature of the Pennsylvania Wilds initiative and the ways in which it can lead to win-win efforts. The ability to maintain and build from momentum gained to date in this area is admittedly constrained by current fiscal and economic challenges, which is cause for concern; inter-agency initiatives can all too easily be deemed expendable or else more easily shrunk temporarily or permanently. However, it is to be hoped that despite such limitations, the Commonwealth can continue to find points of leverage where a little bit of coordination can go a long way to effective continuance of the Pennsylvania Wilds initiative for the benefit of the Pennsylvania Wilds region.

In short, at a time and place in which demographics and economics would seem to suggest stagnation, **tourism-driven economic growth in the Pennsylvania Wilds region has been a bright spot.** Specific categories of action items have shown to have, in aggregate, an effect on the Pennsylvania Wilds region, which hopefully encourages policy makers to continue this positive momentum and welcomes additional public and private sector leaders to join in on the collaboration, for the benefit of the Pennsylvania Wilds region as well as the Commonwealth as a whole.

[54] In fact, a 2008 survey conducted by Penn State University found that the top four state park management practices that should be prioritized speak to the importance of investments in recreational resources: building connective trails (74 percent of respondents for intra-park connections, 58 percent for park-to-community connections), increasing the number of facilities that provide more active use of the parks (67 percent), and improving visitor and environmental interpretation centers (54 percent). "2008 Pennsylvania State Parks Visitor Study," Penn State University Department of Recreation, Park, and Tourism Management (December 5, 2008).

## 5.0 Programmatic and Evaluative Recommendations

As evidenced by changes in key economic indicators, the Pennsylvania Wilds initiative has had a positive effect on the Pennsylvania Wilds region, and those positive effects are likely to continue as efforts gain further traction, whether the effect of coordinated recreational investments, technical assistance to businesses and communities, branding, advertising, and promotional campaigns, or facilitations of inter-entity collaboration. Nevertheless, there are still many areas of concern and of need for improvement; and, there are still many ways in which data collection and interpretation can be improved so as to enable better performance measurement over time.

No matter how effective a state-level program designed to inject energy into a unique set of tourism assets and experiences is, it cannot be expected to reverse a generations-long shift away from rural and manufacturing-reliant areas towards metropolitan areas and knowledge-based activities. Therefore, from an economic development standpoint, other efforts will need to be undertaken which similarly trade on the unique assets and characteristics of the Pennsylvania Wilds region, and that, together with tourism and other outdoor-oriented industries, create more diversified, knowledge-based, and competitive local economies.

From a performance management standpoint, this evaluative effort confirms the need for more feedback loops to assist future quantitative evaluation efforts. The Commonwealth of Pennsylvania and the Governor have a commendable track record for measuring and monitoring success, and such approaches continue to be needed for an initiative as important and as inter-disciplinary as the Pennsylvania Wilds. To be sure, broader economic data should continue to be collected and monitored to update this report's depiction of the Pennsylvania Wilds region as a whole. However, specific inquiries should be made in relation to key efforts undertaken through the Pennsylvania Wilds initiative.

It can be tempting, especially during fiscally challenging times, to skimp on performance measurement initiatives, particularly if scarce resources imperil programmatic budgets. Nevertheless, it is important to collect and analyze program data, so that those scarce resources can be best spent for maximum impact. Programmatic and measurement enhancements thus form the scope of this section, which considers what adjustments can be made to the Pennsylvania Wilds initiative and to the four sets of efforts it undertakes to improve the Pennsylvania Wilds region: 1) investments in recreational facilities, 2) technical and financial assistance to businesses and communities, 3) branding, advertising, and promotion efforts, and 4) inter-organizational coordination between state and other entities.

## 5.1 Investments in Recreational Facilities and Supportive Infrastructure

As noted previously, as each recreational investment adds to the existing network of recreational amenities, there is an exponential increase in that network.[55] Similarly, there is a greater-than-arithmetic advantage gained by adding to an existing network of recreational resources within new or enhanced assets: existing users derive greater enjoyment and/or stay longer and/or spend more time and money, and potential users are all the more convinced of this location as a destination of choice.

New investments in recreational amenities build from previous investments, therefore further enhancing and tying together the many individual destinations within the Pennsylvania Wilds region and increasing the possibility that tourist visits will increase in volume and in length. This is the reasoning, for example, behind the Catawba Lands Conservancy's effort to connect a number of disparate trails across 15 counties into something that will be known as the Carolina Thread Trail, entailing a $100 million investment in infrastructure along the completed trail's 500-mile length. In addition to encouraging healthier lifestyles and enhancing air and water quality, it is predicted that this coordinated amenity will increase tourism activity, property values, and tax revenues.[56]

A particular need for investment in accommodations and related amenities was an oft repeated theme amongst interviewees. As one Cameron County business leader noted, "The infrastructure is not there to have 100,000 people come to southern Cameron County. There are no major hotel chains." In addition to a lack of lodging, several interviewees expressed a need for related infrastructural amenities such as cell phone coverage, high-speed Internet, a conference center, and updated wastewater treatment facilities. If the Pennsylvania Wilds region is seeking to become a destination of choice for a larger universe of visitors, it must offer a broader range of accommodations options, including those that feature amenities that travelers used to a certain standard of comfort and resources will accept.

According to David Sariano of DCNR's Bureau of State Parks, modern park cabins fill up as soon as reservations can be taken, which can be a year before they actually open, demonstrating the pent up demand for this caliber of accommodation. A lack of preferred facilities becomes particularly problematic to the extent that many counties and destinations are aggressively coordinating large-scale events as a way to draw high numbers of visitors to the Pennsylvania Wilds region.

But questions remain concerning the specifics on how to acquire these investments. One chamber of commerce official posed the question this way: "Do you bring the tourists here first to prove to the businesses that it's worth investing, or do you sucker the businesses into putting up a hotel and then hope you are going attract the tourists?" Others are concerned that investments in new development and information technology would lead to infrastructural additions that will undermine the very character of the Pennsylvania Wilds region that the initiative is attempting to preserve and promote. A McKean County innkeeper expressed this tension aptly when he said, "Cell towers – for one group of visitors, we absolutely need coverage. For the other half, it's 'Thank God there's no cell phone coverage.'"

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[55] This is known in telecommunications parlance as "Metcalfe's Law," that the value of a network is proportional to the square of the users on the network.

[56] "The Potential Economic Impacts of the Proposed Carolina Thread Trail," Econsult Corporation (March 2007).

In addition to the question of sufficient accommodations, numerous interviewees brought up the need for more and better signage and more visitor centers so that tourists can find their way to and around the Pennsylvania Wilds region with greater ease. There are still very few indicators on the major highways and arteries leading into and surrounding the Pennsylvania Wilds region. Many trails located within the Pennsylvania Wilds region lack proper signage as well. Convenience is increasingly becoming a primary factor in peoples' leisure choices, leading many tourism operators to conclude that without investment in infrastructure such as proper signage or strategically located visitor centers, the initiative may not be able to sustain tourism growth.

These are delicate balances to strive after: developing an area to maximize its tourism potential while simultaneously preserving its natural resources and rustic character. Nevertheless, additional recreational investments can and should be made to refresh existing resources, add new attractions and amenities, and further build on the unified image and experience of the Pennsylvania Wilds region.

In addition to making and attracting more recreational and supportive investments, mechanisms need to be put in place for the Pennsylvania Wilds initiative to monitor over time the impact of existing and proposed recreational investments. A performance "dashboard," consisting of key investment inputs and the outputs they are intended to help achieve, should be kept as part of the Pennsylvania Wilds initiative's attempt to quantify what investment efforts it is undertaking on behalf of the Pennsylvania Wilds region, and what difference it is making through those efforts. Such a consolidated place for tracking performance can serve as a useful screen for both internal planning purposes, in adjusting investment decisions, and external marketing purposes, in demonstrating impact to residents, communities, and stakeholders (see Figure 5.1).

Figure 5.1 – Recommended List of Recreational Investment "Dashboard" Indicators for the Pennsylvania Wilds Initiative to Track and Report

| Inputs | Outputs |
|---|---|
| • $ invested in recreational investments and $ invested in communities<br>• Aggregate amounts, as well as segregated by type and county<br>• Tabular and mapped representations of this input data | • Day and night attendance (system-wide and at individual sites)<br>• Visitor dollars spent<br>• Property value increases that can be econometrically associated with investments in recreational facilities and in communities<br>• Revenues generated by businesses and industries supported by the investments in recreational facilities and in communities<br>• Survey responses concerning the adequacy of supportive infrastructure (road signage, cell phone towers) |

*Source: Econsult Corporation (2009)*

The impact of recreational enhancements should be monitored over time by collecting more data and making better use of it. This can happen in at least two ways. First, at the point of investment, DCNR can pay particular attention to the extent to which increased activity results from new or enhanced facilities: attendance figures, satisfaction surveys, visitor dollars spent. If such data collection channels are not in place, they should become a prerequisite to significant investment. Where such data channels do exist, they should be more aggressively collected, aggregated, and reviewed. Individual outlets can be induced to contribute attendance and other information with the promise of access to aggregated summaries that contain previously unavailable market intelligence.[57]

Second, the extent to which these investments provide broader enhancements should also be tracked. This can be in the form of property value increases in nearby residential areas,[58] use of tax data to track

[57] Better data collection at the point of interaction with an attendee will nicely augment and be augmented by efforts by the Commonwealth to better understand its attendee pool, such as its current work with Penn State University to complete an analysis of visitor spending at the state park level.

[58] The positive and enhancing effect of neighboring amenities on property values is well-researched; see, for example, "Public Investment Strategies: How They Matter for Neighborhoods in Philadelphia," a 2006 paper written by Susan Wachter of Wharton GeoSpatial Initiative and Kevin Gillen of Econsult Corporation. In fact, one interviewee predicted this very possibility, of property

business performance by location and/or industry,[59] and/or higher activity levels at neighboring complementary locations.[60] These kinds of analytical effort take resources to complete. What it will do for the Commonwealth, though, is offer the necessary intelligence to evaluate the relative efficacy of various recreational investments, and thus inform the best use of scarce resources in the future in determining whether and where to fund additional enhancements.

## 5.2 Technical Assistance Efforts

It is a positive sign that much of what appears to be needed in the realm of technical assistance efforts is better communication of existing resources. Several interviewees expressed their vague awareness of various workshops and sessions that they would have liked to have referred others to or participated in but did not have adequate information. One director of a Small Business Development Center within the Pennsylvania Wilds region recommended email blasts and regular newsletters to develop a continuity of correspondence between the Pennsylvania Wilds initiative and individual businesses and technical assistance providers within the Pennsylvania Wilds region.

Such communication channels could also make feedback possible by giving end users a forum to express specific kinds of training topics and support resources they need. For example, one professional planner suggested the need for follow-up guidance on the implementation of principles contained within the Pennsylvania Wilds Design Guide. Many store owners surfaced their need for business financing, and their belief that in the absence of a connection to a centralized parent organization (since most retailers are not chains) or to bank contacts (since there is a relative dearth of lending institutions within the Pennsylvania Wilds region), programs offered and relationships brokered by the Commonwealth became all the more important.

values increasing as people associate a premium to land that is considered within the Pennsylvania Wilds region and near new or improved amenities made possible by the Pennsylvania Wilds initiative. This hypothesis can and should be tested, using econometric techniques to control for other, potentially explanatory variables, and in doing so to isolate the effect of investments in recreational facilities and in communities on nearby property values.

[59] For example, in "Commercial Corridors: A Strategic Investment Framework," a three-year study completed by Econsult Corporation in 2009. City of Philadelphia Revenue Department data was used to estimate retail sales by retail cluster by year, yielding an unprecedented understanding of retail performance over time and space. Similar analyses using Revenue Department data from the Commonwealth would enable a tracking of sales levels over time, and could be incorporated into a more sophisticated regression model to determine which interventions had the biggest impact on sales, controlling for other potentially explanatory variables. Such results can be used internally to prioritize investment types that are proven to lead to positive commercial activity in related businesses and industries, as well as externally to demonstrate the efficacy of these investments in stimulating additional economic impact.

[60] For example, a simple regression model can be constructed to determine, controlling for other factors, what effect the enhancement of a particular facility has on attendance at nearby facilities. This essentially tests the hypothesis that as additional investments are made in the system of amenities and destinations, each investment becomes incrementally more effective, as locations become even more compelling places for people to visit, given the higher number and variety of activities to choose from.

The need to disseminate information and resources to geographically disparate communities also argues for a more robust online presence for both the Pennsylvania Wilds initiative and for businesses and communities within the Pennsylvania Wilds region. In fact, the Pennsylvania Wilds initiative is already moving in this direction by adding a number of useful online functions such as its Business Assistance and Community Assistance sections. It is also transforming its website into a portal through which potential visitors can find out about individual tourism and hospitality operators throughout the Pennsylvania Wilds region, and this effort should be accelerated to make it as frictionless as possible for a prospective tourist to choose among the many recreational options available throughout the Pennsylvania Wilds region. Individual operators should be given additional assistance, through existing Commonwealth and other programs, to strengthen their own websites, connect more seamlessly with the available functionality at pawilds.com, and integrate messaging and “look” to help build the Pennsylvania Wilds brand.

It is neither feasible nor preferred for the Commonwealth to be the provider of all these technical assistance resources. While one role of the Pennsylvania Wilds initiative is to identify and liaise to Commonwealth resources, another important set of functions is the brokering of relationships with other technical assistance providers, most notably the Small Business Development Centers that serve the Pennsylvania Wilds region, as well as the universities that house and staff them. The Business Assistance section of the Pennsylvania Wilds website offers information and links to various technical and financial assistance providers, but interviewees representing these entities did not appear to be as connected to the Pennsylvania Wilds initiative as they could be. Instead, synergistic relationships should be formed, whereby such centers can become part of the mechanism by which businesses and communities within the Pennsylvania Wilds region receive the help they need, and the Pennsylvania Wilds initiative can help support, advertise, and connect such efforts.

Technical assistance efforts could be monitored and measured more effectively through the use of a “performance dashboard,” which aggregates onto one screen key input information, such as hours of training or numbers of classes provided, as well as outputs, such as revenue growth or jobs created. To the extent that this aspect of the Pennsylvania Wilds initiative is not unlike the role of a business incubator or a small business development center, these sorts of tracking efforts, as maintained by the Pennsylvania Wilds initiative for use by entities throughout the Pennsylvania Wilds region, are appropriate, effective, and consistent with common industry practice.

For example, The Enterprise Center (TEC), a minority business accelerator in Philadelphia that serves entrepreneurs across the Commonwealth, tracks such “scoreboard” statistics as contracts it helps its clients secure, jobs its clients create, and networking and training events it hosts. As the Minority Business Enterprise Center for the Commonwealth, through its contractual arrangement with the US Department of Commerce’s Minority Business Development Agency (MBDA), TEC is obligated to track such performance metrics for monthly submission, and has used this framework to develop other measures for other aspects of its operations. In one key performance measurement indicator, business contracts it assisted its clients in securing, TEC had the highest dollar amount of all such centers in the US in 2008.

Similarly, the Pennsylvania Wilds initiative needs this kind of data collection, synthesis, and feedback mechanism in place, so that it can monitor its technical assistance efforts within the Pennsylvania Wilds region. One aspect of the “theory of change” being proposed by the Commonwealth is that by investing in businesses and communities within the Pennsylvania Wilds region, capacity will be built and visitors will have at their disposal a greater quality and quantity of tourism products and services to enjoy. Determining whether or not this theory of change plays itself out in reality requires regular monitoring of key technical assistance inputs and business development outputs.

Specifically, a quarterly performance report can be created and distributed, which shows at a glance key resources provided to businesses and communities as well as key outcomes that resulted from this capacity building. This would allow decision-makers to monitor progress over time, and make adjustments as needed for the benefit of tourism businesses within the Pennsylvania Wilds region and the highest and most efficient use of Commonwealth resources (see Figure 5.2).

Figure 5.2 – Recommended List of Technical Assistance "Dashboard" Indicators for the Pennsylvania Wilds Initiative to Track and Report

| Inputs | Outputs |
|---|---|
| • # of businesses in master database<br>• # of technical assistance classes/hours provided<br>• # of one-on-one technical assistance sessions conducted<br>• # of referrals made to other technical assistance providers<br>• # of referrals made to potential contract or revenue generating opportunities<br>• # of marketing or resource materials disseminated | • # of businesses started<br>• # of jobs created<br>• # of contracts or $ of revenues generated as a result of leads and referrals<br>• Qualitative indicators collected via survey: business confidence, expansion plans, satisfaction with PA Wilds and other technical assistance resources |

*Source: Econsult Corporation (2009)*

In order to obtain these and other "dashboard" indicators, the Commonwealth will have to work with the technical assistance providers it currently collaborates with to aggregate data on resources provided and outcomes achieved. Those relationships and that shared sense of purpose in the overall objectives of the Pennsylvania Wilds initiative will be crucial to the functional efficiency of compiling a performance dashboard. Consider the multi-layered purpose of such a dashboard:

- To focus in on key success measures, and periodically produce results in these measures in order to determine whether and where progress is being made

- To motivate individual entities to make their efforts consistent with these overall success markers and to contribute to achieving mutually established goals

- To hold people and organizations accountable for results, clearly making known where progress is being made and where it is not

In other words, if coordinating the delivery of technical assistance and then measuring the efficacy of those efforts is seen as a top-down, bureaucratic endeavor, it will be met with resistance and apathy by individual providers of business support resources. If, on the other hand, the undertaking is seen as **a coordinated effort to dispense technical assistance resources and see businesses and communities succeed as a result of them**, then it will inspire and galvanize; individual contributors to the performance dashboard will understand the usefulness of centralizing this information and will themselves gain insight from the aggregated results, in terms of repositioning their own outreach and curricular actions.

It does not appear at this time that those relationships with technical assistance providers are as established and productive as they could and should be. The implementation of a performance dashboard will have to be undertaken in conjunction with the broader collaborative effort of engaging Small Business Development Centers and other business support resource providers to find common marketing and consultative objectives, determine ways to pursue mutually beneficial initiatives, and use the performance dashboard to help coordinate efforts and provide useful intelligence for decision-making both at the Commonwealth and local levels.

## 5.3 Promotion and Advertising

The initial branding, advertising, and promotional work of the Pennsylvania Wilds initiative has been largely successful and has laid the groundwork for important follow-on efforts to build on the awareness of the Pennsylvania Wilds brand and specific attractions and experiences available within the Pennsylvania Wilds region. However, many interviewees called attention to the Commonwealth's need to **shore up "the last mile,"** meaning that external advertising campaigns had enhanced outsiders' awareness of the abundant recreational opportunities to be had within Pennsylvania Wilds region, but visitors were somewhat stymied by a lack of signage directing them to specific amenities. The Pennsylvania Grand Canyon was often singled out by interviewees as a marquee destination that somehow lacked the requisite signage to aid travelers in finding it, and for which there would be benefit to enhanced co-branding with the Pennsylvania Wilds initiative.

Tourism professionals and recreational operators also suggested that broader branding campaigns about the Pennsylvania Wilds region could now give way to messaging that, while retaining a consistent imagery associated with the Pennsylvania Wilds brand, **elaborated on the many intricate aspects of the Pennsylvania Wilds region that made visiting the area so unique and special**. Aggressively supporting and marketing special events can be a potent way to enhance the branding message by highlighting a singular aspect of the Pennsylvania Wilds experience, drawing in many outsiders in the process.

Because the Pennsylvania Wilds region is relatively geographically isolated, marketing efforts must accent the exceptional nature of attractions contained within, such that potential visitors are persuaded to not settle for similar alternatives in other, more easily reachable parts of the Commonwealth or beyond. Here, the rich inventory of outdoor recreational activity throughout the Commonwealth makes for a very competitive landscape for the Pennsylvania Wilds region: as one recreation professional noted, a potential visitor from a major metropolitan area needs to be convinced that it is preferable to drive several extra hours to the Pennsylvania Wilds rather than “settling” for a similar experience in a state park closer to home. It is therefore paramount that the Pennsylvania Wilds initiative makes sure to highlight the unique sights and experiences of the Pennsylvania Wilds region to potential visitors in key advertising markets.

In addition, events and amenities with a more overt environmental sustainability component may be useful to cultivate. They draw from a growing awareness and interest in such issues, and help connect the commercial efforts of the Pennsylvania Wilds initiative to its conservation ethic and priorities. Tourism agencies in many parts of the world are compiling eco-tourism packages to trade on these trends, but what the Pennsylvania Wilds region could offer in this realm could be far more compelling: over a century of protecting the environment, a fascinating history of the sometimes complementary and sometimes competing forces of preservation and commerce, and abundant natural resources to encounter and enjoy.

Finally, local residents and merchants represent an important audience for advertising and branding outreach. After all, they are “the product” that is being sold when the Pennsylvania Wilds region is marketed. Many recalled the Commonwealth’s successful “Tell them Ed sent you” campaign from earlier this decade, when hotel operators and others were caught off guard and lamented that they were not adequately prepared to follow through on the sentiments of the advertising campaign. In the absence of direct communication, local business owners are not necessarily well positioned to help extend the Pennsylvania Wilds brand. Therefore, it may be useful to regularly distribute a briefing book that allows local businesses and communities to be aware of advertising efforts they can be better prepared to capitalize on the added attention that may result from them. Mechanisms should also be established so that branding ideas can bubble up to the Commonwealth from the local level, further filling out external messages by incorporating the input of the leaders of the communities and attractions themselves.

The Commonwealth should also set up feedback mechanisms for promotion and advertising, and, more broadly, branding, so as to monitor effectiveness over time. Admittedly, notwithstanding the evolution of keyword-based online ads, quantifying the broader effectiveness of advertising efforts is notoriously elusive. Nevertheless, there are a number of relatively simple efforts that can and should be undertaken to enhance future evaluative efforts, and that can assembled into a performance “dashboard” kept by the Pennsylvania Wilds initiative to centralize and monitor the effectiveness of advertising, branding, and promotional efforts on behalf of the Pennsylvania Wilds region (see Figure 5.3).

Figure 5.3 – Recommended List of Promotion and Advertising "Dashboard" Indicators for the Pennsylvania Wilds Initiative to Track and Report

| Inputs | Outputs |
| --- | --- |
| • $ invested in advertising, branding, and promotional efforts,<br>• Aggregate amounts, as well as segregated by type and geographic market | • Results from general brand awareness surveys<br>• Results from specific advertising campaign awareness surveys<br>• Results from focus groups convened to explore what the Pennsylvania Wilds brand means, and where there are disconnects between intended perception and actual perception |

*Source: Econsult Corporation (2009)*

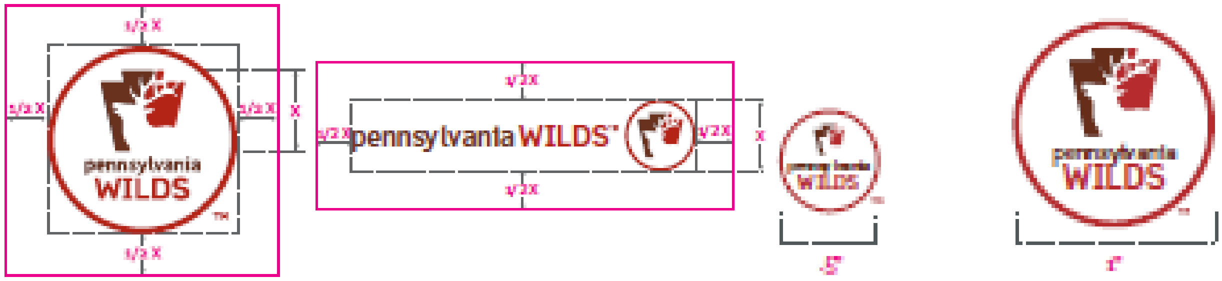
Specifically, follow-up surveying, perhaps by the Commonwealth's Department of Community and Economic Development (DCED), which typically takes the lead on measuring the effectiveness of tourism promotion efforts, can help determine the extent to which specific advertising and promotion campaigns had an effect on tourism activity. As noted by several interviewees, this can apply in both a more focused sense and in a more diffuse sense:

- Governor Rendell's personal participation in one ad campaign could be directly utilized, as visitors to hotels, inns, and visitor centers introduced themselves to locals by saying, "Ed sent me"; In the same way, promotions and discounts could be tied to specific ad campaigns, thus allowing for surveying efforts that make a specific connection between promotional efforts and tourism activity.

- Other advertising may be equally effective but in a more diffuse and covert way. By seeing the Pennsylvania Wilds region as a distinct destination, branded in the same way as "the Adirondacks" or "the Outer Banks," potential visitors may be more likely to consider it for their leisure plans. Such advertising is not as easily tracked in terms of direct effectiveness; but over time surveys could monitor the relative name recognition of the Pennsylvania Wilds region when compared to other, similar tourist destinations.

Further clarification of the Pennsylvania Wilds brand is also needed. A good start has been made in this area: a style guide and related documents are already in place to better ensure consistency in use of name and logo (see Figure 5.4 and Figure 5.5).

Figure 5.4 – Excerpts from PA Wilds Style Guide




*Source: Commonwealth of Pennsylvania – Department of Community and Economic Development (2009)*

Figure 5.5 – PA Wilds and DCNR Logos on Placard in Wellsboro, Tioga County


*Source: Greg Scruggs (2009)*

Other efforts need to be undertaken to help fill out what values, priorities, and initiatives are conjured up by these images. Even if the unique and compelling mix of conservation and tourism, and of over a century of outdoor legacy and an unknown economic future, is fully understood internally within the Commonwealth – and it is uncertain how much internal agreement there is over the relative importance of various elements of the Pennsylvania Wilds initiative – it is certainly not consistently understood within the broader universe of partners, citizens, and visitors. This is to be expected, given the newness of the initiative and the expansiveness of its vision. Nonetheless, responding to those inconsistencies represent an important next step for the Commonwealth in building from early successes to draw even more visitors from different parts of the U.S.

An important tangible manifestation of these branding efforts is the evolution of what are known as juried artisans, or those makers of products that are deemed authentic enough to warrant something of a

"Pennsylvania Wilds" seal of approval. The Vermont Wood Products Marketing Council utilizes a system of logos and hangtags, as well as its own branding manual, to further strengthen brand awareness and product quality. A similar effort on the part of the Pennsylvania Wilds initiative, which is currently underway, will go a long way towards supplementing the unique characteristics of individual communities and artisans within the Pennsylvania Wilds region with an overarching, area-wide identity that will serve to boost the visibility of the Pennsylvania Wilds as a recognizable and preferred brand.

Of course, oftentimes much of what a brand becomes known by happens organically: over time, a brand's "mythology" develops, based largely on experiences and perspectives outside the influence of the owner and keeper of the brand. Such is the challenge of any brand manager: how to intersect with millions of users and impressions in ways that honor their diversity while tying them together under a cohesive and universally understood set of principles and values.

State government cannot be expected to exert complete control over how the Pennsylvania Wilds initiative is perceived by tourists, businesses, and administrators, nor should it. What it can and should do, as noted above, is monitor these opinions over time, through awareness surveys, focus groups, and other feedback mechanisms by which efforts to further fill out the Pennsylvania Wilds brand can be adjusted and improved in response. In this way, promotional and advertising efforts can more readily lead to the outcomes for which they are initiated: increased visibility of the Pennsylvania Wilds region as a destination of choice, and increased tourism activity for the benefit of local businesses and the communities in which they are located.

## 5.4 Inter-Entity Collaborations

Inter-entity collaborations involving a government as large and complex as the Commonwealth's are expected to be challenging; and yet sharing resources and finding synergies are all the more required in light of current economic challenges. Furthermore, residents, business, and visitors expect this sort of spirit of partnership, as they do not particularly care about or appreciate the difficulties involved in working across agency lines.

Numerous interviewees appreciated what inter-entity collaborations had formed as a result of the Pennsylvania Wilds initiative, and complained only that there was not more intersection. Therefore, continued positive attention should be paid to successful linkages the Commonwealth is able to foster through the Pennsylvania Wilds initiative and on behalf of the Pennsylvania Wilds region. Also, more leadership attention should be given to sensible inter-entity collaborations that may require some upfront investment in time and thought, but that will pay off in the long run; an exercise in which potential partnerships are diagrammed and evaluated may be in order, so as to approach such a task in a more strategic and proactive manner.

An obvious one is the coordination that the Commonwealth's Department of Conservation and Natural Resources (DCNR) will need to continue to have with the Commonwealth's Department of Transportation (PennDOT). DCNR's efforts to both market and protect the Pennsylvania Wilds region will need to be coordinated with common but important considerations under PennDOT's purview, such as road signage and transportation infrastructure impacts, which can assist in wayfinding and help leave travelers with a unified impression of the Pennsylvania Wilds region as one distinct, comprehensive, and coordinated place (see Figure 5.6).

Figure 5.6 – Road Signs near Wellsboro, Tioga County


*Source: Greg Scruggs (2009)*

The commercial and tourism potential of the proposed Continental 1 Transportation Corridor, which would cross through the Pennsylvania Wilds region, is one prominent example that might necessitate enhanced partnership between DCNR and PennDOT, both to safeguard key sections of the Pennsylvania Wilds region as well as to capitalize on the potential for increased travel volume as a result of the new accessibility. Said another way, this proposed major infrastructural addition represents an opportunity for DCNR to consider with PennDOT how it can be added in ways that reinforce the objectives of the Pennsylvania Wilds initiative.

During stakeholder interviews, one outdoor recreation advocate noted the oftentimes conflicting rules, regulations, and policies that govern land use. The Pennsylvania Wilds region contains within it state parks, whose governing entities intersect with such Commonwealth agencies as the Game Commission, when it comes to hunting areas, and the Fish and Boat Commission, when it comes to rivers. Differing jurisdictions and agendas can muddy the experience of visitors, who may be unclear as to what recreational activities are allowed or who may in fact be barred from otherwise reasonable outdoor activities. Here again the tension between conservation and tourism comes into play. With multiple entities seeking positive outcomes in one or both of those areas, cooperation is needed to ensure that the Pennsylvania Wilds region, as both a product to be enjoyed and a resource to be preserved, is adequately managed.

Local development districts and metropolitan planning organizations that intersect with the Pennsylvania Wilds region will benefit from DCNR involvement in such periodic exercises as long-term land use and transportation infrastructure planning; and, additionally, DCNR should actively participate in these exercises, to the extent that it can contribute a perspective that promotes the Pennsylvania Wilds region. Finally, statewide funding sources that focus on business assistance, façade improvements, and downtown revitalizations need to be coordinated so that the individual small towns and communities that make up the Pennsylvania Wilds region can be best positioned to capitalize on their unique aesthetic and cultural character, in the form of improved pedestrian experiences, retail options, and informational exhibits.

Additional consideration of the efforts of the Pennsylvania Wilds Planning Team is also needed. As noted above, the Pennsylvania Wilds region faces fundamental trade-offs with significant design and aesthetic implications. Whether or not spotty cellular coverage areas should be shored up through additional cell phone towers, how tourist areas can accommodate increased demand for accommodation and other businesses without diminishing the Pennsylvania Wilds region's sense of place, and if and how to invest in transportation infrastructure to facilitate travel to and through key points within the region – these are policy discussions that will best be seen through with an eye towards an overall planning and design framework. The Planning Team should carefully consider its role and monitor its efforts in bringing together county planning offices, business representatives, and other stakeholders.

Other, similar partnerships and synergies are there to be formed, and DCNR should be open to exploring those that can benefit the Pennsylvania Wilds initiative. As DCNR continues to convene multiple entities representing a variety of perspectives but all organized around enhancing and preserving the Pennsylvania Wilds region, such partnerships and synergies should be identified, pursued, monitored, publicized, and replicated, with DCNR playing a coordinative and championing role throughout that process.

Importantly, overlapping objectives can be found not only within the Commonwealth and with other governmental entities, but with universities, chambers of commerce, and environmental advocacy groups, among other entities. Partnership-building efforts should not be waylaid by the realities of scarce resources, but must instead be valued as a way to combine efforts and thus make the most of scarce resources.

To be sure, inputs and outputs associated with inter-entity collaborations are inherently more difficult to quantify and monitor than, say, investments in recreational facilities, which lend themselves to boiling down to hard numbers like grant dollars or park attendance. Yet, such efforts to work across agencies and to forge public-private, public-public, and private-private linkages may go the furthest towards the future success of the Pennsylvania Wilds initiative and of the economy of the Pennsylvania Wilds region.

Thus, existing networks should be mapped, documented, and reviewed over time, while new networks should be identified, built, and monitored; for ultimately, it is these collaborations that put DCNR in the best position possible for positive progress in its goals for the Pennsylvania Wilds region.

Importantly, the tracking of activity and progress in this arena should not be primarily focused on inputs, such as how many collaborations were formed or how many meetings were called. It is not effort that is needed but rather results; and, accordingly, evaluation of the Pennsylvania Wilds initiative in terms of fostering inter-entity collaborations should focus instead on quality of partnerships: which intersections appear to be yielding fruit in the form of innovative solutions and programming emerging from joint efforts that could not be as easily accomplished with a more siloed approach (see Figure 5.7).

Figure 5.7 – Recommended List of Inter-Entity Collaboration "Dashboard" Indicators for the Pennsylvania Wilds Initiative to Track and Report

| Inputs | Outputs |
|---|---|
| • Quantity and quality of strategic partnerships with public sector and private sector entities<br>• List of key topics that warrant inter-entity collaboration<br>• Some sort of mapping of how these partnerships fit various organizations and issues together | • New partnerships pursued and formed<br>• What was produced from various strategic partnerships |

*Source: Econsult Corporation (2009)*

# 6.0 Conclusion

The Pennsylvania Wilds region and the Pennsylvania Wilds initiative both find themselves at a crossroads. The Pennsylvania Wilds region is home to natural resources, providing abundant opportunities for a unique quality of life for residents and an exceptional array of experiences for visitors. However, these characteristics also create difficult tensions between development and conservation. Compounding matters is the overall economic decline of the region as a whole, as part of a generation-long struggle faced by many geographically isolated parts of the US, and further exacerbated by particular challenges in the manufacturing sectors and by the current economic recession.

The Pennsylvania Wilds initiative finds itself similarly at a point of reflection and possibility. Its first few years have been marked by vigorous effort to invest in recreational facilities, provide technical assistance to businesses and communities, and create and propagate a Pennsylvania Wilds brand, all while fostering new and innovative collaborations between Commonwealth agencies as well as other public and private sector entities. Its relatively short life, and many data limitations, hinders a comprehensive quantitative study of its performance so far; and yet such an analysis is needed at this juncture to inform decision-makers as to what is working, what more can be done, and what effect the initiative is having on the region.

So far, the Pennsylvania Wilds initiative seems to have had a favorable impact on the Pennsylvania Wilds region, particularly in enhancing commercial activity and in laying the groundwork for even more such growth in the future. In the midst of its economic challenges and particular obstacles, the Pennsylvania Wilds region is growing economically, with particular successes in tourism spending increases, and tax revenue growth from tourism activities. In these regards, the efforts of the Pennsylvania Wilds initiative to brand the region as a destination of choice, to invest in specific recreational amenities that add to the system of attractions available within the region, and to support businesses and communities in balancing tourism and conservation have been successful.

A number of key challenges remain, however, in building off of these early successes. The extent to which those challenges are effectively addressed will have a profound impact on the Pennsylvania Wilds region, both in continuing in a storied, century-long tradition of conservation, and in utilizing those conservation efforts to help transition these communities into healthy, vibrant, and competitive economies:

- Greater analysis is needed of whether and where recreational investments are having an impact on attendance figures, sales levels, and property values. This will inform the best use of future such investments so that renovations and new construction can be done in ways that enhance the overall system of attractions and provide maximum benefit to the Pennsylvania Wilds region as a whole and to the individual communities in which they are located.

- Technical assistance providers are not as partnered with the Commonwealth as they should be in putting forth a unified effort to supporting businesses and communities in providing the "product" that is the Pennsylvania Wilds region and in doing so in ways that simultaneously pursue commercial growth and environmental stewardship. One point of collaboration that should be pursued is a performance "dashboard," whereby common objectives can be clarified, individual efforts aggregated, and regular scorecards produced and analyzed.

- Branding efforts should now be focused on articulating the many intricate elements of the overall Pennsylvania Wilds experience and should do so both to external audiences as well as businesses and communities within the Pennsylvania Wilds region, lest there be dissonance in the two messages. Also, feedback loops should be established so that specific campaigns and overall awareness-building efforts can be evaluated and adjusted.

- More inter-entity collaborations need to be explored on behalf of these efforts, to the extent that it takes multiple agencies both within the Commonwealth and across a host of public and private sector groups to make recreational investments, provide resources to businesses and communities, and effectively craft and communicate the Pennsylvania Wilds brand. These collaborations should be evaluated over time, so as to determine which linkages are generating the most productive results in terms of solutions for the Pennsylvania Wilds region.

Many challenges remain for the Pennsylvania Wilds region and the Pennsylvania Wilds initiative: geographically isolated regions must contend with a variety of macro-economic trends that do not work in their favor, and innovative efforts like the Pennsylvania Wilds initiative can be challenging to sustain over time, given the difficulties associated with collaborating across so many agencies and entities, particularly in a constrained economic and fiscal time. Nevertheless, the Pennsylvania Wilds initiative, while young, has had a successful first few years of operations, building from the Commonwealth's rich legacy of conservation and commerce in the communities of the Pennsylvania Wilds region.

Continued such efforts in the years to come will build on these successes; and establishing some evaluative frameworks will provide the data and metrics with which to analyze results over time, report successes to partners and stakeholders, and make any necessary adjustments. At stake is not only the wise use of Commonwealth resources, but also the fate of this unique region's precious environmental resources as well as the economic vitality of its communities, establishments, and individuals.

## Appendix A – Brief Summaries of the 12 Counties of the Pennsylvania Wilds Region

| County | 2000 Population | 2000 Median Household Income | 2008 Median Home Value | Largest City | Natural Resource Attractions |
|---|---|---|---|---|---|
| Cameron | 5,521 | $40,217 | $124,280 | Emporium | Sizerville State Park, Sinnemahoning State Park, Bucktail State Park and Bucktail Path, Elk Scenic Drive, Elk State Forest |
| Clarion | 41,225 | $37,988 | $136,383 | Clarion | Cook Forest State Park, Clarion River |
| Clearfield | 83,714 | $39,683 | $122,538 | DuBois | S.B. Elliott State Park, Moshannon State Forest, The Quehanna Trail, Parker Dam State Park |
| Clinton | 37,878 | $38,569 | $146,141 | Lock Haven | Hyner Run and Hyner View State Parks, Kettle Creek State Park, Sproul State Forest, West Branch Susquehanna River |
| Elk | 33,379 | $47,958 | $148,782 | St. Mary's | Bendigo State Park, Elk State Park, Allegheny National Forest, Elk Scenic Drive |
| Forest | 6,496 | $34,814 | $121,421 | Tionesta | Allegheny National Forest, Cook Forest State Park, Tionesta Lake, Allegheny River |
| Jefferson | 45,999 | $40,161 | $123,563 | Punxsutawney | Clear Creek State Park, Cook Forest State Park |
| Lycoming | 118,675 | $42,820 | $133,588 | Williamsport | Little Pine State Park, Susquehanna State Park, Pine Creek Trail |
| McKean | 44,194 | $42,564 | $113,360 | Bradford | Kinzua Bridge State Park, Allegheny National Forest |
| Potter | 18,679 | $41,319 | $139,702 | Coudersport | Cherry Springs State Park, Denton Hill State Park, Lyman Run State Park, Ole Bull State Park, Susquehannock State Forest |
| Tioga | 41,435 | $39,898 | $143,157 | Mansfield | Colton Point State Park, Hills Creek State Park, Leonard Harrison State Park, Pine Creek Trail, Tioga-Hammond Lakes |
| Warren | 41,667 | $44,724 | $127,748 | Warren | Chapman State Park, Kinzua Dam, Allegheny National Forest |

*Source: US Census Bureau (2000), ESRI (2008), Econsult Corporation (2009)*

# Appendix B – Bibliography of Secondary Research Sources

## B.1 Articles and Reports Used

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"A Recreation Plan for the State Parks and State Forests in the Pennsylvania Wilds," Fermata, Inc. (2006).

"AG Announces Prison Sentence for Former Railroad Engineer in Train Derailment and Environmental Crimes Case," Gant News (October 1, 2008).

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"Have High Gas Prices Deterred Travel within Theodore Roosevelt National Park?," National Parks Traveler (2008).

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"National Park Service Ponders Sliding Attendance at its Parks," Los Angeles Times (2007).

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"Pennsylvania Heritage Tourism Study," D.K. Shifflet & Associates, Ltd. (1999).

"Pennsylvania Lye Spill Costly for Norfolk Southern," Environmental News Services (November 15, 2007).

"Plan for Elk Watching and Nature Tourism in North Central Pennsylvania," FERMATA, Inc. (2002).

"Public Investment Strategies: How They Matter for Neighborhoods in Philadelphia," Wachter/Gillen (2006).

"Smethport Moves Closer to Biomass-Fueled CHP Facility," Biomass Magazine (August 10, 2009).

"Strengthening Rural Pennsylvania: An Integrated Approach to a Prosperous Commonwealth," The Brookings Institution (2007).

"The PA Wilds is Working," Lumber Heritage Region (April 2009).

"The Potential Economic Impacts of the Proposed Carolina Thread Trail," Econsult Corporation (March 2007).

"The State of Rural Pennsylvania," The Keystone Research Center (2008).

"The Looming Municipal Retiree Benefits Crisis," The Kapoor Company (August 27, 2009).

"The State of Working Pennsylvania 2005," Keystone Research Center (September 1, 2005).

## B.2 Data Sets Used

"Actual Local Hotel Room Tax Collections for Pennsylvania Wilds Region," Pennsylvania Tourism Office / Pennsylvania Department of Revenue (2008).

"Annual National Park Attendance," National Park Service (2008).

"Building Permits Database," US Census Bureau (2003-2007).

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"Community Source Book," ESRI (2003, 2008).

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"Current Population Survey," Bureau of Labor Statistics (2008).

"Estimated State Gross Domestic Product for Pennsylvania Wilds Region by County," Global Insight, Inc. in Partnership with D.K. Shifflet & Associates, Ltd. (2008).

"Estimated State Sales Tax Revenues," Pennsylvania Department of Revenue (2008).

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"Pennsylvania Travel Profile: Pennsylvania Wilds," D.K. Shifflet & Associates, Ltd. (2008).

"Small Business First Loans by County (Agriculture & Tourism)," Commonwealth of Pennsylvania Department of Community and Economic Development (2005-2008).

# Appendix C – Stakeholder Interviews Conducted and Meetings Attended

## C.1 Stakeholder Interviews Conducted

- Tataboline Brant, Small Business Ombudsman – Commonwealth of Pennsylvania Department of Community and Economic Development (December 22, 2008)
- Bob Veilleux, Penn State University (January 7, 2009)
- Curt Ashenfelter, Keystone Trails Association (January 14, 2009)
- Jodi Brennan, Clearfield County Planning Office (January 14, 2009)
- Gail and Joe Ayers, Frosty Hollow Bed and Breakfast (January 14, 2009)
- Sally Wilson, St. Mary's Area Chamber of Commerce (January 14, 2009)
- Sharon Horvath, The Inn on Maple Street (January 15, 2009)
- Tina Lorsen Johns, Cameron County Artisan Center (January 15, 2009)
- Tom and Debbie Finkbiner, Wolfe's General Store (January 16, 2009)
- Shelly Speirs, Commonwealth of Pennsylvania Department of Community and Economic Development (January 16, 2009)
- Scott Dunkelberger, Center for Business Financing – Commonwealth of Pennsylvania Department of Community and Economic Development (January 20, 2009)
- Rick Henrich, Rock River and Trail Outfitters (January 21, 2009)
- Ross Porter, Smethport Borough (January 21, 2009)
- Rick and Liz Boni, Appalachian Arts Studio (January 22, 2009)
- Jill Foys, North Central Pennsylvania Regional Planning (January 22, 2009)
- Bud and Gwen Wills, Pennsylvania Equine Council (January 22, 2009)
- Charlotte Dietrich, Potter County Planning Office (January 23, 2009)
- Debbie Lunden, McKean County Planning Commission (January 23, 2009)

- Mary Worthington, Growth Resources of Wellsboro – Wellsboro Chamber of Commerce (January 23, 2009)
- Dave Love, Love's Canoes (January 26, 2009)
- Ray Werts, Western Clinton Sportsmen Association (January 27, 2009)
- Mike Wennin, Lumber Heritage Region of Pennsylvania (February 3, 2009)
- Matt Quesenberry, Elk County Planning (February 4, 2009)
- Jerry Walls, Professional Planner (February 17, 2009)
- Kathleen Reitinger, Warren Forest Counties Economic Opportunity (February 19, 2009)
- Curt Weinhold, Curt Weinhold Photography (February 20, 2009)
- Jason Fink, Lycoming County Visitors Bureau (February 23, 2009)
- Doug Firestone, Firestone Forge (February 24, 2009)
- Peter Lopes, Clinton County Economic Partnership (February 24, 2009)
- Dave Morris, Northwestern Pennsylvania Great Outdoors Visitors Bureau (February 24, 2009)
- Diane Shawley, Warren County Visitors Bureau (February 24, 2009)
- Linda Devlin, Allegheny National Forest Vacation Bureau (February 25, 2009)
- Sue Dillon, Small Business Development Center – The University of Scranton (February 25, 2009)
- Neil Fowler, Pennsylvania Department of Community and Economic Development (February 26, 2009)
- Sandy Barrett, Clearfield County Recreation and Tourism Authority (February 27, 2009)
- Dale Fox, The Towers Victorian Inn (March 2, 2009)
- Mike McMurray, Cook Riverside Cabins and the Pale Whale Canoe Fleet (March 10, 2009)
- Becky Fought, Out Towns 2010 (March 12, 2009)
- Steve Kronenwetter, Wapiti Woods (May 27, 2009)

- David Sariano, Bureau of State Parks – Commonwealth of Pennsylvania Department of Community and Economic Development (September 24, 2009)

- Elizabeth Sechoka, Pennsylvania Tourism Office (October 6, 2009)

## C.2 Meetings Attended

- Pennsylvania Wilds Evaluation Report Kickoff Meeting, Harrisburg PA (October 8, 2008).

- Pennsylvania Wilds Evaluation Report Data Meeting, Harrisburg PA (December 11, 2008).

- Department of Conservation and Natural Resources Evaluation Advisory Committee Meeting, Harrisburg PA (January 29, 2009).

- OMG Center for Collaborative Learning, Harrisburg PA (January 29, 2009).

- Conservation on a Landscape Scale: Challenges in Evaluation, Philadelphia PA (January 30, 2009).

- Pennsylvania Wilds Planning Team Annual Meeting, Dubois PA (March 25, 2009).

- Pennsylvania Wilds Evaluation Report Draft Review Meeting, Harrisburg PA (May 5, 2009).

- Pennsylvania Wilds Evaluation Report Final Draft Review Meeting, Harrisburg PA (September 2, 2009).

- Department of Conservation and Natural Resources Evaluation Advisory Committee Meeting, Harrisburg PA (October 14, 2009).

# Appendix D – Stakeholder Interview Introductory Letter

*Re: Pennsylvania Wilds – Economic Impact Study*

Dear ____________:

You were recommended to us as a key stakeholder in the Commonwealth of Pennsylvania's Pennsylvania Wilds initiative. We have been retained by the Department of Conservation and Natural Resources (DCNR) to look at the value of the initiative in terms of economic impact and determine what positive outcomes it has helped achieve so far. This effort is one component of a broader review DCNR is undertaking of the program and you should have received an introductory email message from Meredith Hill from DCNR to this effect.

We are eager to take on this assignment, and would be greatly helped in this endeavor if we could speak with you. We will hope to begin with a phone interview, and someone from our team will follow up with you shortly to coordinate a time that is convenient for you. We may from there make arrangements, pending your interest and availability, to meet you in person for a follow-up conversation.
In the meantime, would you consider giving some thought to the following questions, which are among the ones we would like to cover when we have the opportunity to speak with you:

- How would you describe PA Wilds?
- What do you see is your role in PA Wilds? How do you interface with other players within PA Wilds, in terms of resources, collaboration, and coordination?
- What do you see as the overall objective of this initiative? What are your own, narrower objectives, in terms of how this initiative intersects with your work?
- How would you say PA Wilds is doing so far in terms of overall goals as well as your own goals? How would you measure progress over time?
- Are you aware of data that might help us quantify the performance and impact of Pennsylvania Wilds in one or more of the following dimensions: tourism, economic development and job creation, and/or quality of life? What data do you use to measure the performance of your entity over time?
- To what extent have PA Wilds initiatives been useful to your business, businesses like yours, and/or businesses you work with? Are there ways PA Wilds could be even more useful?

- Is there anyone else you think we should talk to as part of this study?

Feel free to respond by phone or email with any preliminary thoughts you might have. Please know that no opinions that you share with us will be attributed to you or your agency, and that you may impose any restrictions you see fit as to what we can do with any data you provide us with. We hope we will be able to have some of your time in the near future, and thank you in advance for your time and insight.

Regards,

| | |
|---|---|
| Lee Huang | Greg Scruggs |
| Director | Research Associate |
| Econsult Corporation | Penn Institute for Urban Research |

## Appendix E – Stakeholder Interview Master Question List

- How would you describe PA Wilds?
- What do you see is your role in PA Wilds? How do you interface with other players within PA Wilds, in terms of resources, collaboration, and coordination?
- What do you see as the overall objective of this initiative? What are your own, narrower objectives, in terms of how this initiative intersects with your work?
- How would you say PA Wilds is doing so far in terms of overall goals as well as your own goals? How would you measure progress over time?
- Are you aware of data that might help us quantify the performance and impact of Pennsylvania Wilds in one or more of the following dimensions: tourism, economic development and job creation, and/or quality of life. What data do you use to measure the performance of your entity over time?
- Is there anyone else you think we should talk to as part of this study?
- For economic development contacts: "Where have there been intersections between PA Wilds initiatives and your own economic development goals? Are there ways even more positive overlap can be created?"
- For business owners: "To what extent have PA Wilds initiatives been useful to your business, businesses like yours, and/or businesses you work with? Are there ways PA Wilds could be even more useful?"
- For tourism/heritage contacts (2 separate bullets): "To what extent have you seen PA Wilds initiatives lead to an uptick in tourism activity? How have these initiatives helped? What more could be done?" "What is your take on the emergence of nature and heritage tourism as a distinct form of tourism activity? What are your thoughts about trends over time, in terms of demand at both the state and national level?"
- For recreational user groups: "To what extent have you seen PA Wilds initiatives lead to an uptick in membership and/or activity? How have these initiatives helped? What more could be done?"

- Community development contacts: "Where have there been intersections between PA Wilds initiatives and your own community development goals? Are there ways even more positive overlap can be created?"

- Government contacts (2 separate bullets): "Where have there been intersections between PA Wilds initiatives and your own public policy Are there ways even more positive overlap can be created?" "What effects have PA Wilds initiatives had on your revenues and expenditures?"

# Appendix F – Information on Community Tapestry Segments within the Commonwealth of Pennsylvania

Figure F.1 – Top 5 Community Tapestry Segments, PA Wilds vs. PA State (2008); Top 5 Segments for PA Wilds are All Rural Archetypes

| | PA Wilds | PA State |
|---|---|---|
| 1. | Salt of the Earth | Rustbelt Retirees |
| 2. | Rooted Rural | Salt of the Earth |
| 3. | Heartland Communities | Cozy and Comfortable |
| 4. | Rustbelt Retirees | Green Acres |
| 5. | Southern Satellites | Urban Rows |

*Source: ESRI (2008), Econsult Corporation (2009)*

## Figure F.2 – Community Tapestry Segments by County, PA Wilds vs. PA State (2008)

| 2008 Community Tapestry | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | Rank | PA State | Rank |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 01: Top Rung | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 20,719 | 41 |
| 02: Suburban Splendor | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 96,177 | 17 |
| 03: Connoisseurs | - | - | - | - | - | - | - | 343 | - | - | - | - | 343 | 28 | 65,523 | 24 |
| 04: Boomburbs | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 43,704 | 29 |
| 05: Wealthy Seaboard Suburbs | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 44,380 | 27 |
| 06: Sophisticated Squires | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 95,539 | 18 |
| 07: Exurbanites | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 145,737 | 12 |
| 08: Laptops and Lattes | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 9,873 | 46 |
| 09: Urban Chic | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 26,732 | 38 |
| 10: Pleasant-Ville | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 38,663 | 33 |
| 11: Pacific Heights | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 622 | 64 |
| 12: Up and Coming Families | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 38,137 | 35 |
| 13: In Style | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 136,105 | 13 |
| 14: Prosperous Empty Nesters | - | - | 759 | - | 306 | - | - | 3,417 | - | - | - | 336 | 4,818 | 12 | 181,682 | 8 |
| 15: Silver and Gold | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 4,347 | 55 |
| 16: Enterprising Professionals | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 30,557 | 37 |
| 17: Green Acres | - | - | 2,462 | - | - | - | - | 2,395 | - | - | - | - | 4,857 | 11 | 272,766 | 4 |
| 18: Cozy and Comfortable | - | - | - | - | - | - | - | 749 | - | - | - | - | 749 | 21 | 280,924 | 3 |
| 19: Milk and Cookies | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 16,980 | 42 |
| 20: City Lights | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 3,444 | 57 |
| 21: Urban Villages | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 655 | 63 |
| 22: Metropolitans | - | 352 | - | - | - | - | - | - | - | - | - | - | 352 | 27 | 58,376 | 26 |

| 2008 Community Tapestry | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | Rank | PA State | Rank |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 23: Trendsetters | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 3,264 | 58 |
| 24: Main Street, USA | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 177,123 | 9 |
| 25: Salt of the Earth | 1,012 | 4,258 | 2,242 | 5,144 | 5,690 | - | 5,082 | 11,460 | 1,193 | 710 | 3,769 | 5,320 | 45,880 | 1 | 443,502 | 2 |
| 26: Midland Crowd | - | - | - | - | - | - | - | 979 | - | - | 529 | - | 1,508 | 16 | 68,592 | 23 |
| 27: Metro Renters | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 62,647 | 25 |
| 28: Aspiring Young Families | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 21,965 | 40 |
| 29: Rustbelt Retirees | - | - | 2,398 | 1,495 | 2,718 | - | 818 | 5,247 | 3,941 | - | 524 | 1,981 | 19,122 | 4 | 472,578 | 1 |
| 30: Retirement Communities | - | - | - | 335 | - | - | - | - | - | - | - | - | 335 | 29 | 127,651 | 14 |
| 31: Rural Resort Dwellers | - | - | - | - | - | - | - | 294 | - | 1,119 | 297 | - | 1,710 | 14 | 41,628 | 31 |
| 32: Rustbelt Traditions | - | - | 615 | - | 1,696 | - | 405 | 4,109 | 950 | - | - | 1,592 | 9,367 | 6 | 217,443 | 7 |
| 33: Midlife Junction | - | - | 1,892 | 276 | 247 | - | 651 | 2,263 | 482 | 797 | 954 | - | 7,562 | 9 | 127,171 | 15 |
| 34: Family Foundations | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 38,214 | 34 |
| 35: International Marketplace | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 2,182 | 60 |
| 36: Old and Newcomers | - | 351 | - | - | - | - | - | - | - | - | 626 | - | 977 | 18 | 94,127 | 19 |
| 37: Prairie Living | - | - | - | - | - | - | - | - | - | - | 362 | - | 362 | 26 | 8,242 | 50 |
| 38: Industrious Urban Fringe | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 5,991 | 52 |
| 39: Young and Restless | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 6,062 | 51 |
| 40: Military Proximity | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 48 | 65 |
| 41: Crossroads | - | - | - | - | - | - | - | 460 | - | - | - | - | 460 | 25 | 14,407 | 43 |
| 42: Southern Satellites | - | 385 | 3,302 | 932 | 646 | - | 745 | 2,385 | 3,231 | 1,474 | 1,180 | 2,540 | 16,820 | 5 | 79,668 | 22 |
| 43: The Elders | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 2,216 | 59 |
| 44: Urban Melting Pot | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 4,505 | 53 |
| 45: City Strivers | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 9,247 | 47 |
| 46: Rooted Rural | 342 | 5,665 | 9,446 | 1,046 | 357 | 703 | 4,733 | 675 | 2,861 | 2,003 | 5,107 | 1,904 | 34,842 | 2 | 152,495 | 11 |

| 2008 Community Tapestry | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | Rank | PA State | Rank |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 47: Las Casas | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 1,072 | 61 |
| 48: Great Expectations | - | - | - | - | - | - | 389 | 4,324 | - | - | - | 665 | 5,378 | 10 | 113,433 | 16 |
| 49: Senior Sun Seekers | - | - | - | 289 | - | 317 | - | - | - | - | - | - | 606 | 22 | 8,773 | 48 |
| 50: Heartland Communities | 512 | 3,959 | 6,569 | 2,425 | 1,731 | 988 | 3,383 | 1,123 | 3,059 | 1,300 | 2,414 | 1,902 | 29,365 | 3 | 223,713 | 6 |
| 51: Metro City Edge | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 11,136 | 45 |
| 52: Inner City Tenants | - | - | - | 347 | - | - | - | 242 | - | - | - | - | 589 | 23 | 11,659 | 44 |
| 53: Home Town | - | 331 | 1,672 | 314 | - | - | 1,254 | 3,528 | 591 | - | 241 | - | 7,931 | 8 | 91,179 | 20 |
| 54: Urban Rows | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 266,182 | 5 |
| 55: College Towns | - | 753 | - | 545 | - | - | - | 466 | - | - | 454 | - | 2,218 | 13 | 42,543 | 30 |
| 56: Rural Bypasses | - | - | 565 | - | - | - | - | - | - | - | - | - | 565 | 24 | 8,429 | 49 |
| 57: Simple Living | 448 | - | 1,588 | 1,740 | 493 | - | 1,417 | 748 | 873 | - | - | 1,022 | 8,329 | 7 | 171,051 | 10 |
| 58: NeWest Residents | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 3,490 | 56 |
| 59: Southwestern Families | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 4,425 | 54 |
| 60: City Dimensions | - | - | - | - | - | - | - | 1,278 | 274 | - | - | - | 1,552 | 15 | 80,533 | 21 |
| 61: High Rise Renters | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 702 | 62 |
| 62: Modest Income Homes | - | - | - | 331 | - | - | - | 555 | 223 | - | - | - | 1,109 | 17 | 39,809 | 32 |
| 63: Dorms to Diplomas | - | 539 | - | - | - | - | - | 213 | - | - | - | - | 752 | 20 | 22,219 | 39 |
| 64: City Commons | - | - | - | - | - | - | - | - | - | - | - | - | - | N/A | 36,605 | 36 |
| 65: Social Security Set | - | - | - | - | - | - | - | 876 | - | - | - | - | 876 | 19 | 44,037 | 28 |

*Source: ESRI (2008), Econsult Corporation (2009)*

Figure F.3 – Definitions for Selected Community Tapestry Segment (Top Ten in Either Pennsylvania Wilds or Pennsylvania State)

**14. Prosperous Empty Nesters**

Prosperous Empty Nesters neighborhoods are well established, located throughout the United States; approximately one-third are on the eastern seaboard. The median age is 48.7 years. More than half of the householders are aged 55 or older. Forty percent of household types are married couples with no children living at home. Educated and experienced, residents are enjoying the life stage transition from child rearing to retirement. The median household income is $70,623. Residents place a high value on their physical and financial well-being and take an active interest in their homes and communities. They travel extensively, both at home and abroad. Leisure activities include refinishing furniture, playing golf, attending sports events, and reading mysteries. Civic participation includes joining civic clubs, engaging in fund-raising, and working as volunteers.

**17. Green Acres**

A "little bit country", Green Acres residents live in pastoral settings of developing suburban fringe areas, mainly in the Midwest and South. The median age is 40.7 years. Married couples with and without children comprise most of the households, which are primarily in single-family dwellings. This upscale market has a median household income of $65,074 and a median home value of $197,519. These do-it-yourselfers maintain and remodel their homes, painting, installing carpet, or adding a deck, and own all the necessary tools to accomplish these tasks. They also take care of their lawn and gardens, again, with the right tools. Vehicles of choice are motorcycles and full-sized pickup trucks. For exercise, residents ride their bikes and go water skiing, canoeing, and kayaking. Other activities include bird-watching, power boating, target shooting, hunting, and attending auto races.

**18. Cozy and Comfortable**

Cozy and Comfortable residents are settled, married, and still working. Many couples are still living in the pre-1970s, single-family homes in which they raised their children. Households are located primarily in suburban areas of the Midwest, Northeast, and South. The median age is 42.1 years, and the median home value is $174,687. Home improvement and remodeling are important to Cozy and Comfortable residents. Although some work is contracted, homeowners take an active part in many projects, especially painting and lawn care. They play softball and golf, attend ice hockey games, watch science fiction films on DVD, and gamble at casinos. Television is significant; many households have four or more sets. Preferred cable stations include QVC, Home & Garden Television, and The History Channel.

**24. Main Street, USA**
Main Street, USA neighborhoods are a mix of single family homes and multiunit dwellings found in the suburbs of smaller metropolitan cities, mainly in the Northeast, West, and Midwest. This market is similar to the United States when comparing household type, age, educational attainment, housing type, occupation, industry, and household income type distributions. The median age of 36.8 years matches that of the U.S. median. The median household income is a comfortable $56,882. Homeownership is at 65 percent, and the median home value is $205,391. Active members of the community, residents participate in local civic issues and work as volunteers. They take care of their lawns and gardens, and work on small home projects. They enjoy going to the beach and visiting theme parks as well as playing chess, going bowling or ice skating, and participating in aerobic exercise.

**25. Salt of the Earth**
A rural or small-town lifestyle best describes the Salt of the Earth market. The median age is 41.4 years. Labor force participation is higher than the U.S. level, and unemployment is lower. Above-average numbers of employed residents work in the manufacturing, construction, mining, and agricultural industries. The median household income is $50,913. Households are dominated by married-couple families who live in single-family dwellings, with homeownership at 85 percent. Twenty-eight percent of the households own three or more vehicles. Most homes own a truck; many own a motorcycle. Residents are settled, hardworking, and self-reliant, taking on small home projects as well as vehicle maintenance. Families often own two or more pets, usually dogs or cats. Residents enjoy fishing, hunting, and target shooting, attending country music concerts and auto races, and flying kites.

**29. Rustbelt Retirees**
Most Rustbelt Retirees neighborhoods can be found in older, industrial cities in the Northeast and Midwest, especially in Pennsylvania and other states surrounding the Great Lakes. Households are mainly occupied by married couples with no children and singles who live alone. The median age is 45 years. Although many residents are still working, labor force participation is below average. More than 40 percent of the households receive Social Security benefits. Most residents live in owned, single-family homes, with a median value of $129,157. Unlike many retirees, these residents are not inclined to move. They are proud of their homes and gardens and participate in community

activities. Some are members of veterans' clubs. Leisure activities include playing bingo, gambling in Atlantic City, going to the horse races, working crossword puzzles, and playing golf.

**32. Rustbelt Traditions**
Rustbelt Traditions neighborhoods are the backbone of older, industrial cities in states bordering the Great Lakes. Most employed residents work in the service, manufacturing, and retail trade industries. Most residents own and live in modest single-family homes that have a median value of $102,391. Households are primarily a mix of married-couple families, single parent families, and singles who live alone. The median age is 36.1 years; the median household income is $51,436. Residents prefer to use a credit union and invest in certificates of deposit. They use coupons regularly, especially at Sam's Club, work on home remodeling or improvement projects, and buy domestic vehicles. Favorite leisure activities include hunting, bowling, fishing, and attending auto races, country music shows, and ice hockey games (in addition to listening to games on the radio).

**33. Midlife Junction**
Midlife Junction communities are found in suburbs across the country. Residents are phasing out of their child-rearing years. Approximately half of the households are composed of married-couple families; 31 percent are singles who live alone. The median age is 41.2 years; the median household income is $49,031. One-third of the households receive Social Security benefits. Nearly two-thirds of the households are single-family structures; most of the remaining dwellings are apartments in multiunit buildings. These residents live quiet, settled lives. They spend their money prudently and do not succumb to fads. They prefer to shop by mail or phone from catalogs such as J.C. Penney, L.L. Bean, and Lands' End. They enjoy yoga, attending country music concerts and auto races, refinishing furniture, and reading romance novels.

**42. Southern Satellites**
Southern Satellites neighborhoods are rural settlements found primarily in the South, with employment chiefly in the manufacturing and service industries. Married-couple families dominate this market. The median age is 37.7 years, and the median household income is $39,758. Most housing is newer, single-family dwellings or mobile homes with a median value of $90,801, occupied by owners. Residents enjoy country living. They listen to gospel and country music on the radio and attend country music concerts. They participate in fishing, hunting, and auto racing. Favorite TV stations are CMT and Outdoor Life Network. Satellite dishes are popular in these rural locations. Households own older,

domestic vehicles, particularly trucks and two-door sedans. Residents invest time in vegetable gardening, and households are likely to own riding mowers, garden tractors, and tillers.

**46. Rooted Rural**
Rooted Rural neighborhoods are located in rural areas throughout the country; however, more than three-fifths of the households are located in the South. Households are dominated by married-couple families. One-third of the households receive Social Security benefits. The median age is 42.2 years. Housing is predominantly single-family dwellings, with a strong presence of mobile homes and some seasonal housing. The median home value is $101,198. Stable and settled, residents tend to move infrequently. They are do-it-yourselfers, constantly working on their homes, gardens, and vehicles. Many families have pets. Residents enjoy hunting, fishing, and target shooting, boating, attending country music concerts, and listening to country music on the radio. Many households have a satellite dish; favorite stations include Outdoor Life Network and CMT.

**48. Great Expectations**
Great Expectations neighborhoods are located throughout the country, with higher proportions found in the Midwest and South. Young singles and married-couple families dominate. The median age is 33.2 years. Labor force participation is high. Manufacturing, retail, and service industries are the primary employers. Approximately half of the households are owners living in single-family dwellings with a median value of $110,922; the other half are renters, mainly living in apartments in low-rise or mid-rise buildings. Most of the housing units in these older, suburban neighborhoods were built before 1960. Residents enjoy a young and active lifestyle. They go out to dinner, to the movies, to bars, and to nightclubs. They enjoy roller skating; using Rollerblades; playing Frisbee, chess, and pool; and attending auto races. They read music magazines and listen to rock music on the radio.

**50. Heartland Communities**
Heartland Communities neighborhoods are preferred by approximately six million people. These neighborhoods can be found primarily in small towns in the Midwest and South. More than 75 percent of the households are single-family dwellings with a median home value of $82,080. Most homes are older, built before 1960. The median age is 42.0 years; nearly one-third of the householders are aged 65 years or older. The distinctly country lifestyle of these residents is reflected in their interest in hunting, fishing, woodworking, playing bingo, and listening to country music. In addition to working on home

improvement projects, they are avid gardeners and read gardening magazines. They participate in civic activities and take an interest in local politics. Residents order items from catalogs, QVC, and Avon sales representatives.

**53. Home Town**
These low-density, settled neighborhoods, located chiefly in the Midwest and South, rarely change. Home Town residents stay close to their home base. Although they may move from one house to another, they rarely cross the county line. Household types are a mix of singles and families. The median age is 34.0 years. Single-family homes predominate in this market. Homeownership is at 59 percent, and the median home value is $66,885. The manufacturing, retail trade, and service industries are the primary sources of employment. Residents enjoy fishing and playing baseball, bingo, backgammon, and video games. Favorite cable TV stations include CMT, Nick-at-Nite, Game Show Network, and TV Land. Belk and Wal-Mart are favorite shopping destinations stops; residents also purchase items from Avon sales representatives.

**54. Urban Rows**
With 1.1 million people, Urban Rows is the smallest Community Tapestry segment. Row houses are characteristic of these neighborhoods found primarily in large, northeastern cities, with much smaller concentrations in the South. Two-thirds of the households are in Pennsylvania; one-fifth are in Maryland. Homeownership is at 61 percent, and the median home value is $92,746. Most housing was built before 1950. Households are a mix of family types. Nearly half of the households do not own a vehicle. The median age is 33.3 years. These residents rarely eat out. They prefer BJ's Wholesale Club for general shopping; preferred grocery stores are Acme, Pathmark, and Giant. Residents enjoy roller skating; playing baseball; attending basketball games; listening to urban, variety, and jazz radio programs; and watching sitcoms and sports on TV. Many households do not subscribe to cable TV.

**57. Simple Living**
Simple Living neighborhoods are found in urban outskirts or suburban areas throughout the United States. Half of the households are singles who live alone or share housing, and 32 percent consist of married-couple families. The median age is 40.7 years. Approximately one-third of householders are aged 65 years or older; 19 percent are aged 75 years or older. Housing is a mix of single-family dwellings and multiunit buildings of varying stories. Some seniors live in congregate housing (assisted living). Fifty-six percent of households are occupied by renters. Forty percent of households receive Social Security benefits. Younger

> residents enjoy going out dancing, whereas seniors prefer going to bingo night. To stay fit, residents play softball and volleyball. Many households do not own a computer, cell phone, or DVD player. Residents watch hours of TV a day, especially sitcoms and science fiction shows.

*Source: ESRI (2008)*

# Appendix G – Additional Demographic and Economic Data

Figure G.1 – Key Demographic and Economic Indicators by County, PA Wilds vs. PA State (2008)

| | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Population | 5,521 | 41,225 | 83,714 | 37,878 | 33,379 | 6,496 | 45,999 | 118,675 | 44,194 | 18,679 | 41,435 | 41,667 | 518,862 | 12,631,267 | 4.1% |
| Black Population % | 0.4% | 0.9% | 1.8% | 0.6% | 0.2% | 2.6% | 0.1% | 5.5% | 2.2% | 0.3% | 0.7% | 0.2% | 2.0% | 10.6% | 18.8% |
| Hispanic Population % | 0.8% | 0.5% | 0.7% | 0.5% | 0.5% | 1.6% | 0.4% | 0.9% | 1.4% | 0.8% | 0.5% | 0.5% | 0.7% | 4.0% | 18.3% |
| | | | | | | | | | | | | | | | |
| Per Capita Income | $20,031 | $19,715 | $20,207 | $20,097 | $22,732 | $17,612 | $20,399 | $22,127 | $21,684 | $20,588 | $19,971 | $22,668 | $21,062 | $27,722 | 76.0% |
| Median HH Income | $40,217 | $37,988 | $39,683 | $38,569 | $47,958 | $34,814 | $40,161 | $42,820 | $42,564 | $41,319 | $39,893 | $44,724 | $41,473 | $53,220 | 77.9% |
| % HH's <$50K | 61.7% | 62.9% | 61.5% | 62.9% | 51.9% | 65.3% | 63.2% | 57.8% | 57.6% | 59.9% | 60.9% | 55.6% | 59.5% | 42.4% | 140.2% |
| % HH's $50K-$100K | 33.3% | 30.8% | 32.2% | 30.5% | 40.6% | 29.9% | 30.6% | 33.9% | 35.1% | 33.6% | 32.6% | 36.7% | 33.5% | 36.6% | 91.5% |
| % HH's >$100K | 5.0% | 6.4% | 6.3% | 6.6% | 7.4% | 4.8% | 6.2% | 8.4% | 7.3% | 6.5% | 6.5% | 7.7% | 7.1% | 16.6% | 42.5% |
| | | | | | | | | | | | | | | | |
| # Employed Population | 2,338 | 18,550 | 38,620 | 17,235 | 16,473 | 2,015 | 21,335 | 55,706 | 20,566 | 7,563 | 18,650 | 19,552 | 238,603 | 6,050,199 | 3.9% |
| Unemployment Rate | 7.1 | 7.4 | 7.8 | 7.0 | 7.4 | 7.3 | 7.5 | 7.2 | 7.6 | 8.4 | 7.6 | 7.0 | 7.4 | 6.6 | 112.1% |
| | | | | | | | | | | | | | | | |
| Median Home Value | $124,280 | $136,383 | $122,538 | $146,141 | $148,782 | $121,421 | $123,563 | $133,588 | $113,360 | $139,702 | $143,157 | $127,748 | $131,498 | $167,832 | 78.4% |
| % <$100K | 36.2% | 32.0% | 38.0% | 26.3% | 25.9% | 37.9% | 37.0% | 26.2% | 42.6% | 32.5% | 29.6% | 35.6% | 32.5% | 21.5% | 151.0% |
| % >$500K | 1.2% | 1.6% | 1.4% | 2.2% | 1.3% | 1.6% | 1.4% | 1.5% | 1.0% | 3.0% | 2.5% | 1.5% | 1.6% | 5.4% | 29.8% |

*Source: ESRI (2008), Econsult Corporation (2009)*

## Figure G.2 – Key Demographic and Economic Indicators by County, PA Wilds vs. PA State (2003)

| | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Population | 5,887 | 41,753 | 83,932 | 38,148 | 34,719 | 6,962 | 46,599 | 119,640 | 45,302 | 18,414 | 41,980 | 43,471 | 526,807 | 12,380,576 | 4.3% |
| Black Population % | 0.4% | 0.8% | 1.8% | 0.6% | 0.2% | 18.9% | 0.1% | 5.1% | 2.2% | 0.3% | 0.6% | 0.2% | 2.1% | 10.2% | 20.4% |
| Hispanic Population % | 0.6% | 0.4% | 0.6% | 0.6% | 0.6% | 1.2% | 0.5% | 0.7% | 1.0% | 0.6% | 0.6% | 0.4% | 0.6% | 3.6% | 17.0% |
| | | | | | | | | | | | | | | | |
| Per Capita Income | $18,110 | $17,990 | $18,627 | $18,676 | $21,108 | $15,148 | $18,757 | $20,240 | $19,648 | $18,828 | $18,305 | $20,778 | $19,316 | $24,819 | 77.8% |
| Median HH Income | $35,735 | $33,981 | $35,087 | $34,530 | $42,408 | $30,348 | $35,013 | $37,878 | $36,849 | $36,305 | $35,549 | $40,050 | $36,697 | $46,158 | 79.5% |
| % HH's <$50K | 68.2% | 68.9% | 68.9% | 68.6% | 58.9% | 74.5% | 69.2% | 64.7% | 66.0% | 66.4% | 67.6% | 62.5% | 66.3% | 53.9% | 123.0% |
| % HH's $50K-$100K | 26.8% | 24.7% | 24.7% | 24.3% | 34.5% | 20.9% | 24.4% | 26.5% | 27.3% | 27.1% | 25.8% | 29.8% | 26.5% | 31.0% | 85.5% |
| % HH's >$100K | 5.0% | 6.4% | 6.5% | 7.0% | 6.6% | 4.6% | 6.4% | 8.8% | 6.7% | 6.5% | 6.6% | 7.8% | 7.1% | 15.0% | 47.5% |
| | | | | | | | | | | | | | | | |
| # Employed Population | 2,274 | 18,841 | 36,131 | 16,237 | 15,921 | 1,974 | 20,106 | 56,055 | 19,821 | 8,263 | 18,451 | 21,504 | 235,578 | 5,769,777 | 4.1% |
| Unemployment Rate | 5.1 | 5.1 | 7.6 | 8.4 | 5.0 | 9.4 | 7.0 | 6.8 | 7.3 | 6.9 | 7.3 | 6.5 | 6.9 | 6.1 | 113.1% |
| | | | | | | | | | | | | | | | |
| Median Home Value | $70,250 | $83,344 | $71,155 | $89,866 | $91,992 | $70,316 | $70,781 | $103,034 | $63,076 | $88,065 | $88,894 | $73,383 | $83,022 | $116,904 | 71.0% |
| % <$100K | 75.4% | 62.4% | 70.3% | 60.5% | 57.4% | 75.6% | 72.1% | 47.6% | 78.0% | 57.4% | 58.3% | 70.8% | 62.9% | 39.0% | 161.5% |
| % >$500K | 1.5% | 0.6% | 0.3% | 0.9% | 0.4% | 0.2% | 0.4% | 0.7% | 0.3% | 0.9% | 0.6% | 0.8% | 0.6% | 1.9% | 28.9% |

*Source: ESRI (2003), Econsult Corporation (2009)*

## Figure G.3 – Key Demographic Indicators by County, PA Wilds vs. PA State (2003-2008 CAGR[61])

| | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Population | -1.28% | -0.25% | -0.05% | -0.14% | -0.78% | -1.38% | -0.26% | -0.16% | -0.49% | 0.29% | -0.26% | -0.84% | -0.30% | 0.40% |
| Black Population % | 3.15% | 3.69% | -0.14% | 0.05% | -3.21% | -32.59% | 2.57% | 1.62% | -0.19% | -0.29% | 1.63% | 2.30% | -0.93% | 0.76% |
| Hispanic Population % | 5.66% | 5.57% | 3.21% | -3.26% | -1.26% | 5.57% | -1.90% | 6.45% | 5.76% | 4.98% | -1.07% | 5.65% | 3.60% | 2.05% |
| Per Capita Income | 2.04% | 1.85% | 1.64% | 1.48% | 1.49% | 3.06% | 1.69% | 1.80% | 1.99% | 1.80% | 1.76% | 1.76% | 1.75% | 2.24% |
| Median HH Income | 2.39% | 2.25% | 2.49% | 2.24% | 2.49% | 2.78% | 2.78% | 2.48% | 2.93% | 2.62% | 2.33% | 2.23% | 2.48% | 2.89% |
| % HH's <$50K | -1.99% | -1.83% | -2.23% | -1.74% | -2.50% | -2.61% | -1.80% | -2.25% | -2.68% | -2.06% | -2.07% | -2.29% | -2.16% | -4.68% |
| % HH's $50K-$100K | 4.42% | 4.53% | 5.49% | 4.62% | 3.32% | 7.41% | 4.60% | 5.06% | 5.12% | 4.43% | 4.78% | 4.26% | 4.75% | 3.33% |
| % HH's >$100K | 0.22% | -0.10% | -0.63% | -1.16% | 2.49% | 1.01% | -0.41% | -1.06% | 1.81% | 0.07% | -0.28% | -0.17% | -0.21% | 2.05% |
| # Employed Population | 0.56% | -0.31% | 1.34% | 1.20% | 0.68% | 0.41% | 1.19% | -0.12% | 0.74% | -1.75% | 0.21% | -1.89% | 0.26% | 0.95% |
| Unemployment Rate | 6.84% | 7.73% | 0.52% | -3.58% | 8.16% | -4.93% | 1.39% | 1.15% | 0.81% | 4.01% | 0.81% | 1.49% | 1.41% | 1.59% |
| Median Home Value | 12.09% | 10.35% | 11.48% | 10.21% | 10.09% | 11.54% | 11.79% | 5.33% | 12.44% | 9.67% | 10.00% | 11.73% | 9.63% | 7.50% |
| % <$100K | -13.67% | -12.52% | -11.61% | -15.35% | -14.74% | -12.89% | -12.49% | -11.26% | -11.41% | -10.76% | -12.70% | -12.87% | -12.36% | -11.17% |
| % >$500K | -4.45% | 23.05% | 37.23% | 20.12% | 24.44% | 54.48% | 26.71% | 16.72% | 23.85% | 27.41% | 32.45% | 14.00% | 23.14% | 22.44% |

*Source: ESRI (2003, 2008), Econsult Corporation (2009)*

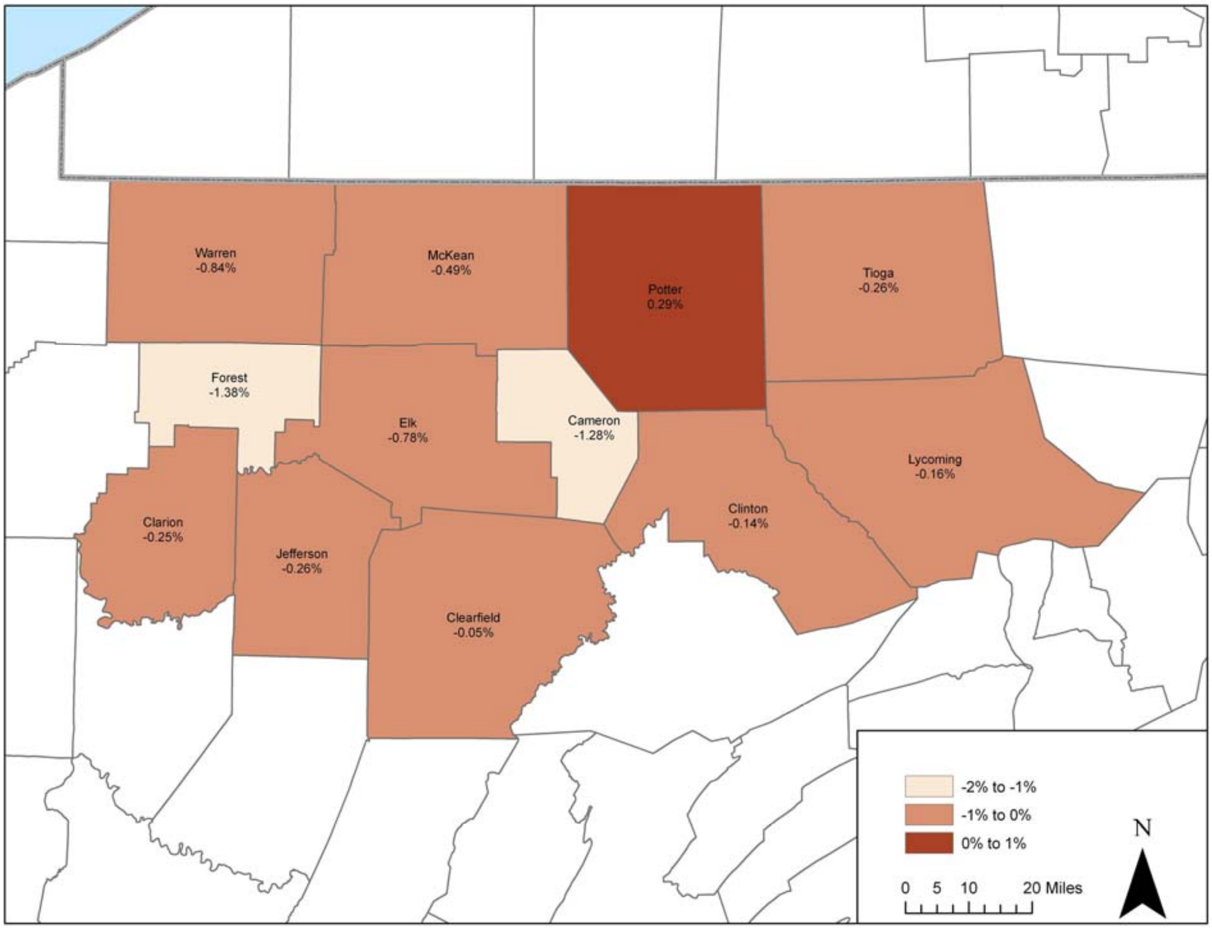
[61] CAGR = Compounded Annual Growth Rate

Figure G.4 – Population by County, PA Wilds vs. PA State

| | 1970 | 1980 | 1990 | 2000 | 2008 |
|---|---|---|---|---|---|
| Cameron | 7,096 | 6,674 | 5,913 | 5,974 | 5,521 |
| Clarion | 38,414 | 43,362 | 41,699 | 41,765 | 41,225 |
| Clearfield | 74,619 | 83,578 | 78,097 | 83,382 | 83,714 |
| Clinton | 37,721 | 38,971 | 37,182 | 37,914 | 37,878 |
| Elk | 37,770 | 38,338 | 34,878 | 35,112 | 33,379 |
| Forest | 4,926 | 5,072 | 4,802 | 4,946 | 6,496 |
| Jefferson | 43,695 | 48,303 | 46,083 | 45,932 | 45,999 |
| Lycoming | 113,296 | 118,416 | 118,710 | 120,044 | 118,675 |
| McKean | 51,915 | 50,635 | 47,131 | 45,936 | 44,194 |
| Potter | 16,395 | 17,726 | 16,717 | 18,080 | 18,679 |
| Tioga | 39,691 | 40,973 | 41,126 | 41,373 | 41,435 |
| Warren | 47,682 | 47,449 | 45,050 | 43,863 | 41,667 |
| PA Wilds | 513,220 | 539,497 | 517,388 | 524,321 | 518,862 |
| PA State | 11,793,909 | 11,863,895 | 11,881,643 | 12,281,054 | 12,631,267 |

*Source: US Census Bureau (1970, 1980, 1990, 2000), ESRI (2008), Econsult Corporation (2009)*

Figure G.5 – PA Wilds 2003-2008 Population CAGR by County: PA Wilds Actually Lost Population from 2003 to 2008, with a CAGR of -0.3 Percent, vs. +0.4 Percent for the Commonwealth




*Source: ESRI (2003, 2008), Wharton GeoSpatial Initiative (2009)*

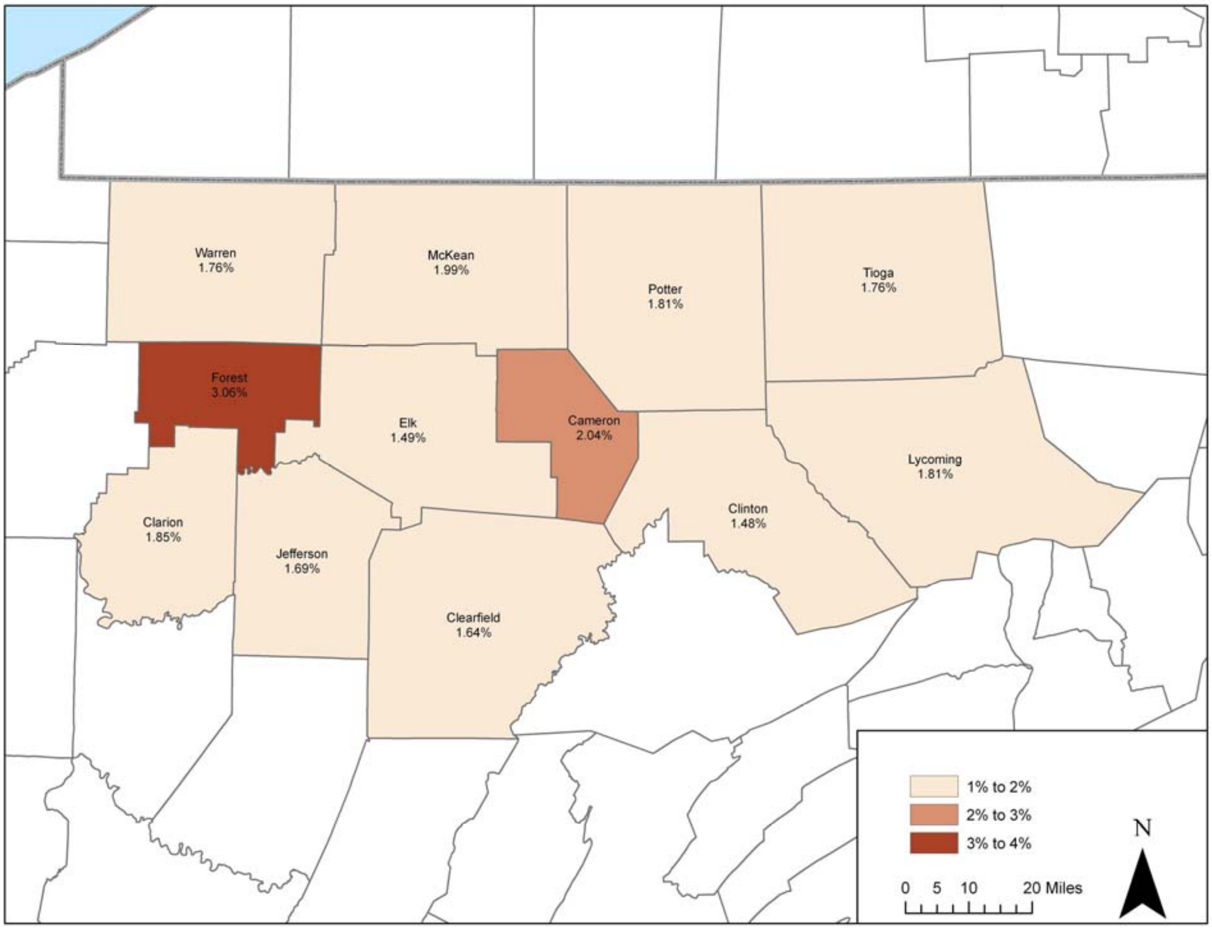
Figure G.6 – Index Growth, PA Wilds vs. PA State (Indexed 1970 = 100)

| PA State | 1980 | 1990 | 2000 | 2008 | CAGR '70-'08 | Net '70-'08 |
|---|---|---|---|---|---|---|
| Under 9 years | 1,547,726 | 1,585,359 | 1,555,749 | 1,470,584 | -0.18% | -77,142 |
| 10 to 19 years | 2,016,121 | 1,573,219 | 1,714,835 | 1,666,033 | -0.68% | -350,088 |
| 20 to 29 years | 2,001,573 | 1,783,224 | 1,478,787 | 1,583,192 | -0.83% | -418,381 |
| 30 to 39 years | 1,535,175 | 1,915,257 | 1,779,185 | 1,521,247 | -0.03% | -13,928 |
| 40 to 49 years | 1,189,553 | 1,477,932 | 1,905,326 | 1,856,675 | 1.60% | 667,122 |
| 50 to 59 years | 1,408,379 | 1,110,140 | 1,416,351 | 1,773,859 | 0.83% | 365,480 |
| 60 to 69 years | 1,172,952 | 1,197,963 | 992,312 | 1,177,596 | 0.01% | 4,644 |
| 70 to 79 years | 692,453 | 840,770 | 910,927 | 777,142 | 0.41% | 84,689 |
| 80 years and over | 299,963 | 397,779 | 527,582 | 621,951 | 2.64% | 321,988 |

| PA Wilds | 1980 | 1990 | 2000 | 2008 | CAGR '70-'08 | Net '70-'08 |
|---|---|---|---|---|---|---|
| Under 9 years | 78,709 | 70,490 | 62,379 | 53,363 | -1.38% | -25,346 |
| 10 to 19 years | 96,278 | 75,855 | 75,850 | 64,709 | -1.41% | -31,569 |
| 20 to 29 years | 85,903 | 70,976 | 61,299 | 67,164 | -0.88% | -18,739 |
| 30 to 39 years | 67,087 | 78,503 | 71,726 | 59,564 | -0.42% | -7,523 |
| 40 to 49 years | 52,842 | 62,499 | 79,635 | 72,619 | 1.14% | 19,777 |
| 50 to 59 years | 60,297 | 50,123 | 61,683 | 72,930 | 0.68% | 12,633 |
| 60 to 69 years | 51,528 | 52,827 | 47,182 | 52,139 | 0.04% | 611 |
| 70 to 79 years | 32,239 | 37,427 | 41,030 | 37,073 | 0.50% | 4,834 |
| 80 years and over | 14,606 | 18,688 | 23,537 | 28,055 | 2.36% | 13,449 |

*Source: US Census Bureau (1970 – 2000), ESRI (2008), Econsult Corporation (2009)*

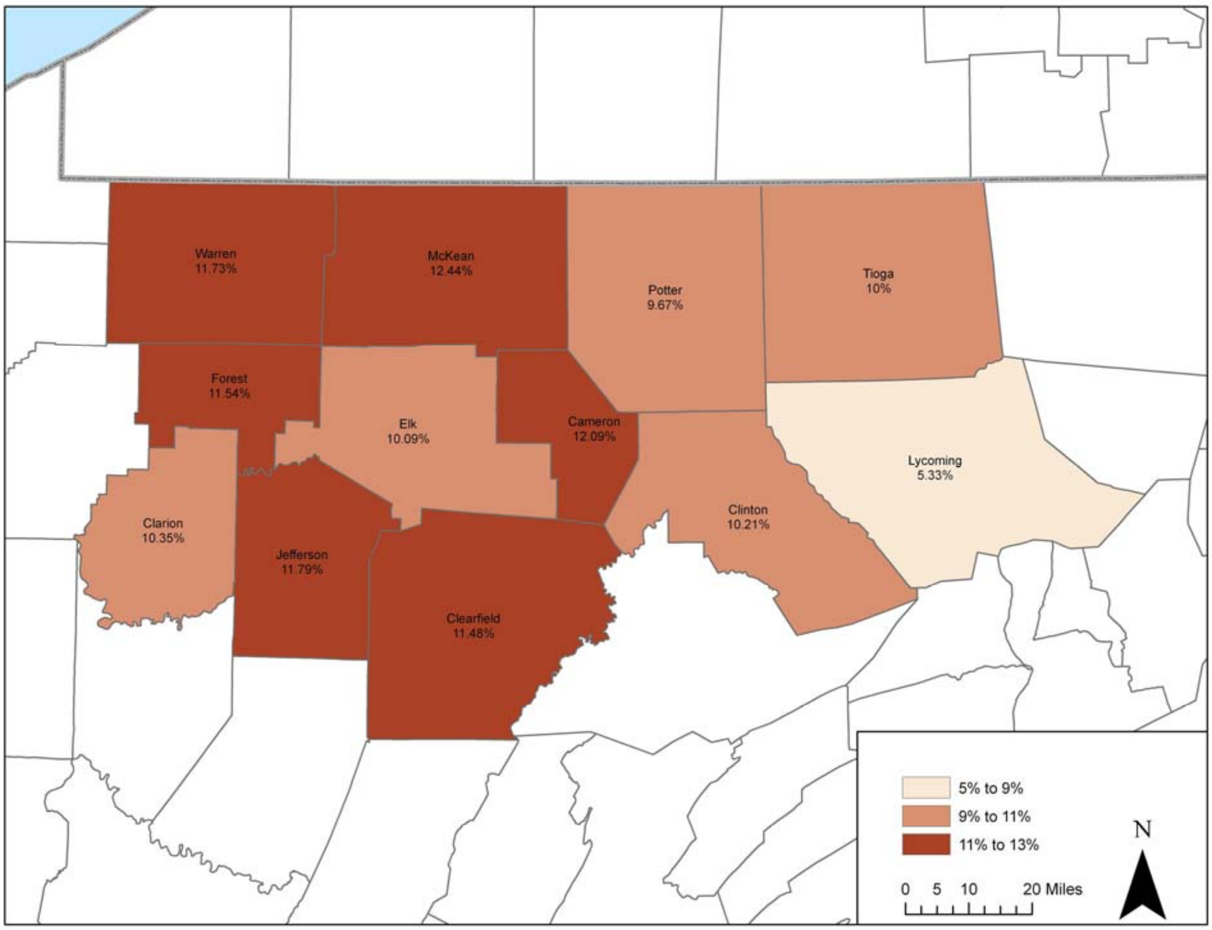
Figure G.7 – PA Wilds 2003-2008 per Capita Income CAGR by County: PA Wilds per Capita Income Grew More Slowly Than the Commonwealth, with a CAGR of +1.75 Percent vs. +2.24 Percent




*Source: ESRI (2003, 2008), Wharton GeoSpatial Initiative (2009)*

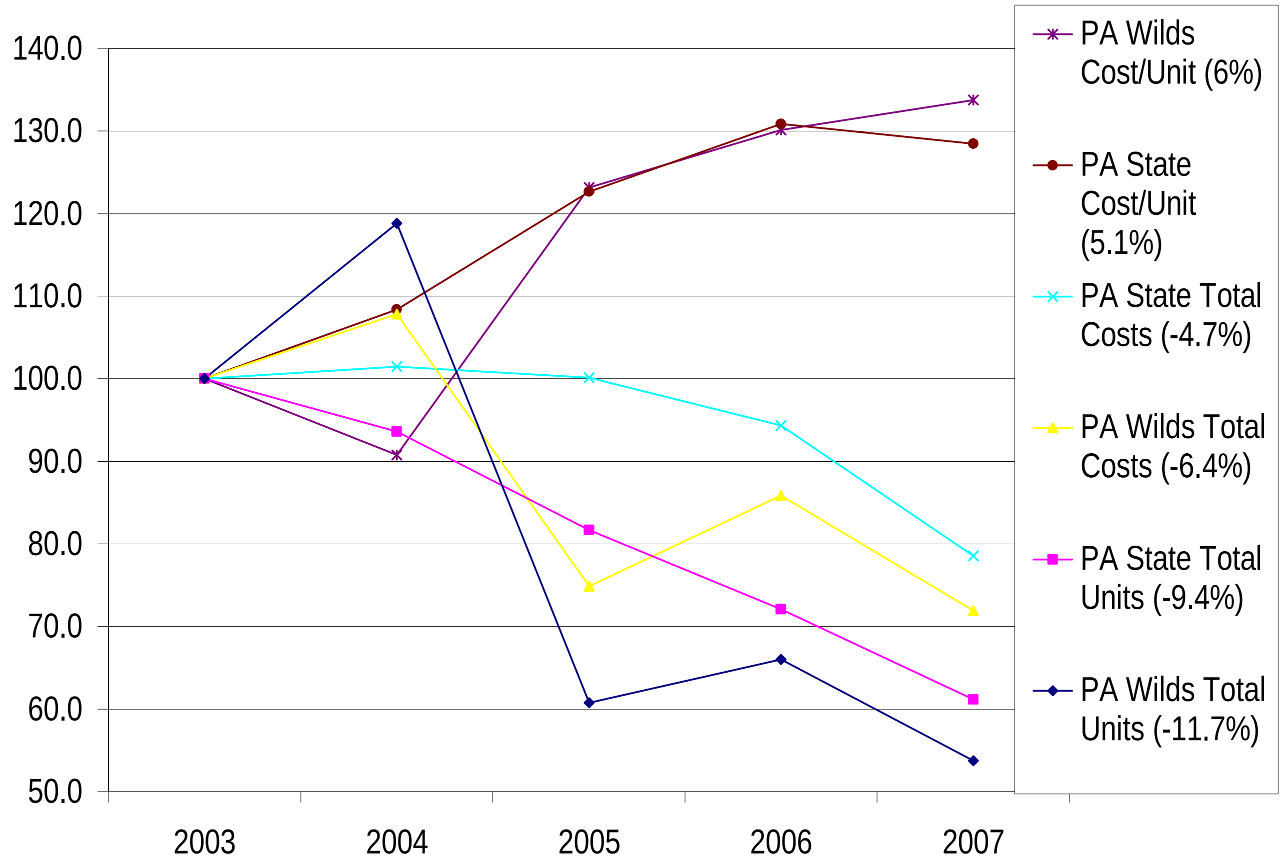
# Appendix H – Additional Residential Real Estate Market Data Within the Pennsylvania Wilds Region

Figure H.1 – PA Wilds 2003-2008 Median Home Value CAGR by County: PA Wilds Median House Prices Rose Faster Than the Commonwealth, with a CAGR of +9.6 Percent vs. +7.5 Percent




*Source: ESRI (2008), Wharton GeoSpatial Initiative (2009)*

Figure H.2 – Residential Construction Indicators, PA Wilds vs. PA State (Indexed: 2003 = 100): PA Wilds Experienced Higher Costs and Lower Volume than PA State (CAGRs in Parentheses)




*Source: U.S. Census Bureau - Building Permits Database (2003-2007), Econsult Corporation (2009)*

## Figure H.3 – Key Residential Construction Indicators by County, PA Wilds vs. PA State

| # Units | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2003 | 10 | 118 | 225 | 159 | 55 | 31 | 139 | 289 | 63 | 101 | 160 | 73 | 1,423 | 47,341 | 3.0% |
| 2004 | 11 | 169 | 294 | 88 | 88 | 14 | 284 | 281 | 58 | 125 | 117 | 162 | 1,691 | 44,322 | 3.8% |
| 2005 | 4 | 48 | 151 | 34 | 42 | 1 | 107 | 242 | 37 | 49 | 90 | 60 | 865 | 38,661 | 2.2% |
| 2006 | 5 | 65 | 155 | 40 | 72 | 3 | 100 | 268 | 49 | 29 | 94 | 59 | 939 | 34,128 | 2.8% |
| 2007 | 1 | 41 | 112 | 71 | 55 | 2 | 116 | 198 | 30 | 13 | 96 | 30 | 765 | 28,957 | 2.6% |
| CAGR% | -36.9% | -19.1% | -13.0% | -14.9% | 0.0% | -42.2% | -3.6% | -7.3% | -13.8% | -33.6% | -9.7% | -16.3% | -11.7% | -9.4% | |

| # Buildings | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2003 | 10 | 112 | 221 | 151 | 55 | 31 | 116 | 288 | 63 | 101 | 147 | 73 | 1,368 | 39,763 | 3.4% |
| 2004 | 11 | 161 | 241 | 85 | 88 | 10 | 283 | 208 | 58 | 125 | 117 | 132 | 1,519 | 37,743 | 4.0% |
| 2005 | 4 | 48 | 151 | 34 | 42 | 1 | 107 | 208 | 37 | 49 | 90 | 37 | 808 | 33,120 | 2.4% |
| 2006 | 5 | 65 | 141 | 40 | 49 | 3 | 98 | 261 | 49 | 29 | 90 | 59 | 889 | 29,554 | 3.0% |
| 2007 | 1 | 40 | 110 | 67 | 55 | 2 | 103 | 192 | 30 | 13 | 96 | 30 | 739 | 24,228 | 3.1% |
| CAGR% | -36.9% | -18.6% | -13.0% | -15.0% | 0.0% | -42.2% | -2.3% | -7.8% | -13.8% | -33.6% | -8.2% | -16.3% | -11.6% | -9.4% | |

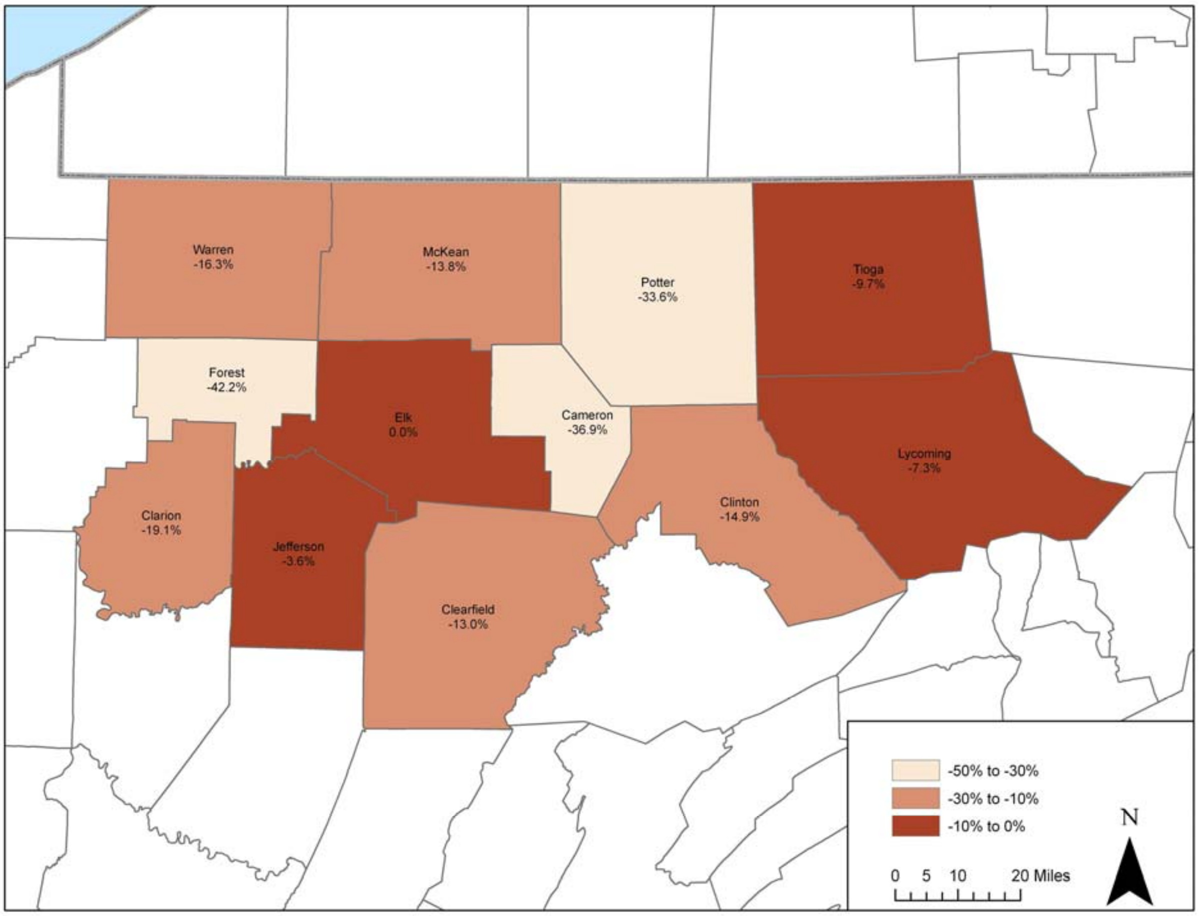
| Costs ($M) | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2003 | $0.6 | $10.7 | $22.6 | $16.0 | $5.7 | $2.5 | $10.3 | $36.2 | $5.2 | $6.6 | $13.4 | $6.3 | $136 | $6,050 | 2.2% |
| 2004 | $0.6 | $13.8 | $25.6 | $6.8 | $11.3 | $0.8 | $22.0 | $36.3 | $5.5 | $4.6 | $9.1 | $10.2 | $147 | $6,137 | 2.4% |

| | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2005 | $0.3 | $4.5 | $19.4 | $3.3 | $6.1 | $0.1 | $10.5 | $35.0 | $4.0 | $2.6 | $9.4 | $6.6 | $102 | $6,059 | 1.7% |
| 2006 | $0.4 | $7.1 | $19.5 | $3.7 | $6.3 | $0.4 | $10.9 | $41.4 | $4.3 | $3.2 | $10.7 | $9.0 | $117 | $5,706 | 2.0% |
| 2007 | $0.0 | $4.2 | $14.9 | $8.6 | $5.9 | $0.1 | $12.6 | $30.8 | $4.0 | $1.8 | $11.2 | $3.6 | $98 | $4,754 | 2.1% |
| CAGR% | -48.0% | -17.0% | -8.0% | -11.6% | 0.8% | -46.7% | 4.1% | -3.2% | -5.2% | -22.6% | -3.5% | -10.4% | -6.4% | -4.7% | |

| Cost/Unit ($K) | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2003 | $63 | $90 | $100 | $101 | $104 | $79 | $74 | $125 | $82 | $66 | $84 | $86 | $96 | $128 | 74.8% |
| 2004 | $58 | $82 | $87 | $78 | $128 | $61 | $77 | $129 | $95 | $37 | $78 | $63 | $87 | $138 | 62.7% |
| 2005 | $76 | $93 | $128 | $97 | $146 | $50 | $98 | $145 | $109 | $53 | $105 | $110 | $118 | $157 | 75.1% |
| 2006 | $87 | $109 | $126 | $92 | $88 | $117 | $109 | $154 | $87 | $112 | $114 | $153 | $124 | $167 | 74.4% |
| 2007 | $24 | $102 | $133 | $121 | $108 | $53 | $108 | $156 | $132 | $142 | $117 | $121 | $128 | $164 | 77.9% |
| CAGR% | -17.6% | 2.5% | 5.8% | 3.8% | 0.8% | -7.9% | 8.0% | 4.4% | 9.9% | 16.7% | 6.9% | 7.0% | 6.0% | 5.1% | |

*Source: U.S. Census Bureau - Building Permits Database (2003-2007), Econsult Corporation (2009)*

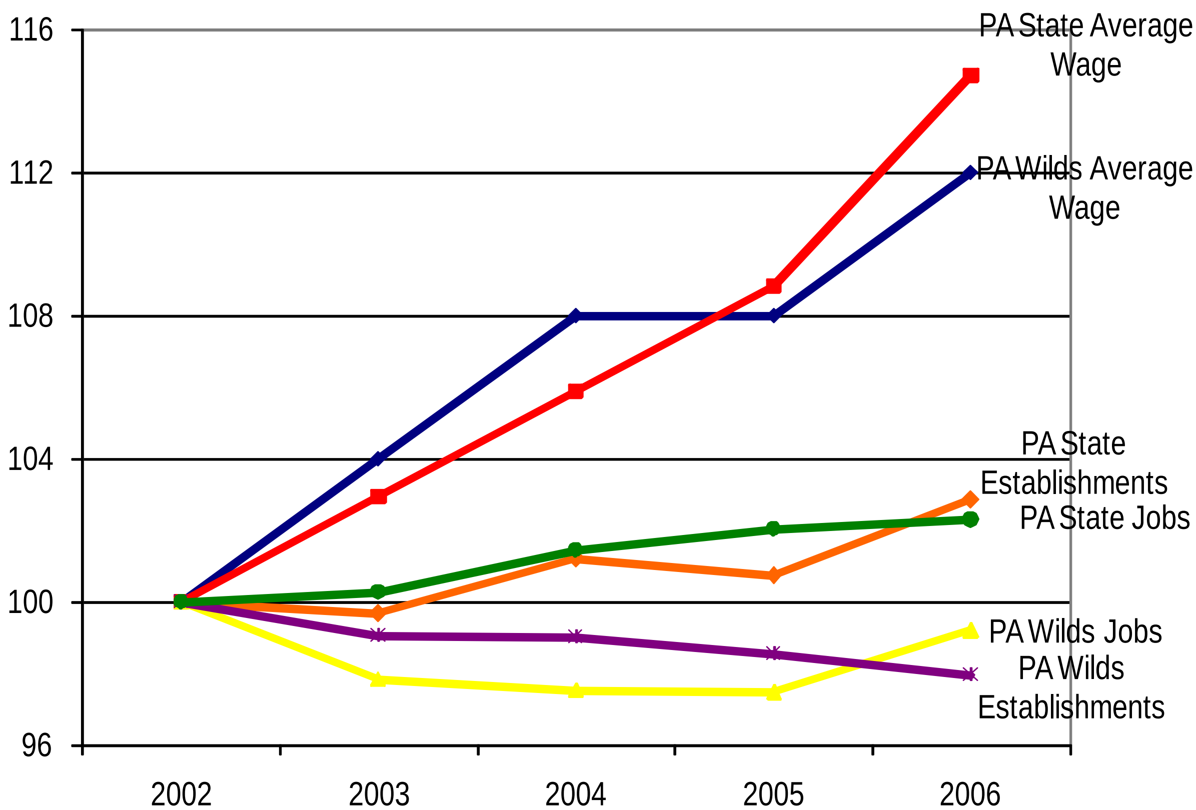
Figure H.4 – 2003-2007 Average Annual Increase in New Privately – Owned Residential Building Unit Permits within PA Wilds by County: None of the 12 Counties Saw Increases from 2003 to 2007




*Source: U.S. Census Bureau - Building Permits Database (2003-2007), Wharton GeoSpatial Initiative (2009)*

# Appendix I – Additional Business Indicators Data Within the Pennsylvania Wilds Region

Figure I.1 – Key Business Indicators, PA Wilds vs. PA State (Indexed: 2002 = 100)
PA Wilds Lags PA State in Average Wage, Establishments, and Jobs (CAGRs in Parentheses)




*Source: US Census Bureau – County Business Patterns (2006), Econsult Corporation (2009)*

## Figure I.2 – Key Business Indicators by County, PA Wilds vs. PA State

| # Establishments | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2002 | 145 | 1,030 | 1,949 | 748 | 972 | 130 | 1,182 | 2,849 | 1,130 | 423 | 881 | 971 | 12,410 | 297,257 | 4.2% |
| 2003 | 141 | 1,036 | 1,954 | 743 | 961 | 134 | 1,175 | 2,798 | 1,121 | 392 | 860 | 976 | 12,291 | 298,081 | 4.1% |
| 2004 | 148 | 1,016 | 1,959 | 758 | 974 | 128 | 1,170 | 2,810 | 1,116 | 411 | 856 | 942 | 12,288 | 301,557 | 4.1% |
| 2005 | 141 | 1,015 | 1,988 | 759 | 962 | 120 | 1,153 | 2,803 | 1,122 | 402 | 853 | 912 | 12,230 | 303,333 | 4.0% |
| 2006 | 137 | 991 | 1,959 | 754 | 957 | 116 | 1,170 | 2,813 | 1,098 | 393 | 851 | 918 | 12,157 | 304,058 | 4.0% |
| CAGR% | -1.4% | -1.0% | 0.1% | 0.2% | -0.4% | -2.8% | -0.3% | -0.3% | -0.7% | -1.8% | -0.9% | -1.4% | -0.5% | 0.6% | |

| # Jobs | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2002 | 2,028 | 11,661 | 26,035 | 9,834 | 13,685 | 1,156 | 12,915 | 46,941 | 15,539 | 6,693 | 10,595 | 14,498 | 171,580 | 5,046,442 | 3.4% |
| 2003 | 1,881 | 11,477 | 25,207 | 9,665 | 13,446 | 1,251 | 13,373 | 46,410 | 15,191 | 5,372 | 10,056 | 14,537 | 167,866 | 5,029,324 | 3.3% |
| 2004 | 1,922 | 11,614 | 25,368 | 9,662 | 13,886 | 1,228 | 13,706 | 46,158 | 14,581 | 5,292 | 10,078 | 13,823 | 167,318 | 5,107,044 | 3.3% |
| 2005 | 1,780 | 11,932 | 25,237 | 10,454 | 14,230 | 1,143 | 13,716 | 45,757 | 13,967 | 5,497 | 10,032 | 13,490 | 167,235 | 5,082,630 | 3.3% |
| 2006 | 2,237 | 11,831 | 25,791 | 10,757 | 14,723 | 1,128 | 13,714 | 46,213 | 14,548 | 6,003 | 9,921 | 13,314 | 170,180 | 5,189,949 | 3.3% |
| CAGR% | 2.5% | 0.4% | -0.2% | 2.3% | 1.8% | -0.6% | 1.5% | -0.4% | -1.6% | -2.7% | -1.6% | -2.1% | -0.2% | 0.7% | |

| Payroll ($M) | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2002 | $50 | $268 | $607 | $205 | $369 | $25 | $315 | $1,207 | $386 | $159 | $235 | $402 | $4,228 | $169,236 | 2.5% |
| 2003 | $46 | $272 | $611 | $226 | $397 | $26 | $327 | $1,237 | $400 | $150 | $232 | $416 | $4,340 | $174,513 | 2.5% |
| 2004 | $47 | $285 | $641 | $237 | $414 | $31 | $347 | $1,272 | $393 | $150 | $245 | $406 | $4,468 | $181,784 | 2.5% |
| 2005 | $45 | $292 | $672 | $259 | $428 | $31 | $355 | $1,278 | $405 | $160 | $244 | $415 | $4,584 | $189,692 | 2.4% |
| 2006 | $62 | $301 | $692 | $286 | $450 | $34 | $370 | $1,312 | $428 | $173 | $253 | $421 | $4,782 | $200,537 | 2.4% |
| CAGR% | 5.7% | 2.9% | 3.3% | 8.7% | 5.1% | 7.4% | 4.1% | 2.1% | 2.6% | 2.2% | 1.9% | 1.2% | 3.1% | 4.3% | |

| Avg Wage ($K) | Cameron | Clarion | Clearfield | Clinton | Elk | Forest | Jefferson | Lycoming | McKean | Potter | Tioga | Warren | PA Wilds | PA State | Wilds to PA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2002 | $25 | $23 | $23 | $21 | $27 | $22 | $24 | $26 | $25 | $24 | $22 | $28 | $25 | $34 | 73.5% |
| 2003 | $25 | $24 | $24 | $23 | $30 | $21 | $24 | $27 | $26 | $28 | $23 | $29 | $26 | $35 | 74.5% |
| 2004 | $24 | $25 | $25 | $25 | $30 | $25 | $25 | $28 | $27 | $28 | $24 | $29 | $27 | $36 | 75.0% |
| 2005 | $25 | $24 | $27 | $25 | $30 | $27 | $26 | $28 | $29 | $29 | $24 | $31 | $27 | $37 | 73.4% |
| 2006 | $28 | $25 | $27 | $27 | $31 | $30 | $27 | $28 | $29 | $29 | $25 | $32 | $28 | $39 | 72.7% |
| CAGR% | 3.1% | 2.5% | 3.6% | 6.3% | 3.2% | 8.0% | 2.6% | 2.5% | 4.3% | 5.0% | 3.6% | 3.4% | 3.3% | 3.6% | |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.3 – Key Business Indicators by Industry, PA Wilds vs. PA State

| | PA Wilds | | | PA State | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2006 # Establishments | 2003 # Establishments | 2003-2006 Estab CAGR% | 2003-2006 Estab CAGR% | 2006 # Establishments | 2006 # Jobs | 2006 $ Payroll ($K) | 2003 # Establishments | 2003 # Jobs | 2003 $ Payroll ($K) |
| 11: Agriculture, Forestry, Fishing and Hunting | 121 | 146 | -6.1% | -5.3% | 526 | 2,679 | $71,408 | 619 | 3,127 | $77,968 |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 425 | 407 | 1.5% | 1.6% | 945 | 18,290 | $1,035,487 | 900 | 18,007 | $924,663 |
| 22: Utilities | 259 | 289 | -3.6% | -3.5% | 679 | 31,475 | $2,721,187 | 756 | 34,708 | $2,548,468 |
| 23: Construction | 927 | 945 | -0.6% | 1.2% | 29,701 | 257,300 | $12,214,188 | 28,648 | 233,583 | $9,985,069 |
| 31-33: Manufacturing | 1,188 | 1,228 | -1.1% | -1.6% | 15,430 | 663,812 | $29,913,140 | 16,185 | 682,547 | $27,205,038 |
| 42: Wholesale Trade | 399 | 402 | -0.2% | -0.1% | 15,805 | 241,755 | $12,600,159 | 15,848 | 242,422 | $11,281,914 |
| 44-45: Retail Trade | 1,691 | 1,792 | -1.9% | -0.7% | 46,660 | 679,188 | $14,873,208 | 47,589 | 659,804 | $13,376,874 |
| 48-49: Transportation and Warehousing | 686 | 695 | -0.4% | 2.0% | 7,958 | 208,113 | $6,899,238 | 7,503 | 184,118 | $5,974,645 |
| 51: Information | 275 | 249 | 3.4% | 1.0% | 5,396 | 129,718 | $7,242,318 | 5,244 | 140,551 | $6,862,246 |
| 52: Finance and Insurance | 627 | 628 | -0.1% | 1.2% | 19,551 | 306,427 | $18,997,048 | 18,852 | 311,556 | $15,948,942 |
| 53: Real Estate and Rental and Leasing | 203 | 206 | -0.5% | 2.2% | 9,867 | 69,069 | $2,596,404 | 9,237 | 66,835 | $2,134,870 |
| 54: Professional, Scientific, and Technical Services | 589 | 593 | -0.2% | 1.4% | 29,942 | 316,047 | $19,624,584 | 28,741 | 305,644 | $17,169,141 |
| 55: Management of Companies and Enterprises | 51 | 47 | 2.8% | 2.2% | 2,069 | 129,545 | $12,246,576 | 1,939 | 135,457 | $10,222,317 |
| 56: Administrative and Support | 569 | 536 | 2.0% | 2.0% | 14,346 | 306,181 | $8,205,328 | 13,523 | 287,896 | $7,197,889 |

| | PA Wilds | | | PA State | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2006 # Establishments | 2003 # Establishments | 2003-2006 Estab CAGR% | 2003-2006 Estab CAGR% | 2006 # Establishments | 2006 # Jobs | 2006 $ Payroll ($K) | 2003 # Establishments | 2003 # Jobs | 2003 $ Payroll ($K) |
| and Waste Management and Remediation Services | | | | | | | | | | |
| 61: Educational Services | 96 | 96 | 0.0% | 2.4% | 3,268 | 231,686 | $7,106,606 | 3,047 | 204,266 | $5,717,359 |
| 62: Health Care and Social Assistance | 1,372 | 1,334 | 0.9% | 1.8% | 34,707 | 860,829 | $31,205,707 | 32,864 | 800,789 | $26,368,057 |
| 71: Arts, Entertainment, and Recreation | 512 | 499 | 0.9% | 1.6% | 4,678 | 77,828 | $2,042,618 | 4,460 | 76,292 | $1,876,813 |
| 72: Accommodation and Food Services | 887 | 868 | 0.7% | 1.1% | 26,218 | 411,031 | $5,419,937 | 25,343 | 396,187 | $4,700,045 |
| 81: Other Services (except Public Administration) | 1,231 | 1,255 | -0.6% | -0.1% | 35,801 | 248,483 | $5,511,081 | 35,884 | 244,509 | $4,924,166 |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

Figure I.4 – Selected Industries as a Percent of All Establishments, PA Wilds vs. PA State: PA Wilds Enjoys a Higher Concentration of Arts, Entertainment, and Recreation Establishments Than the Commonwealth as a Whole

| | Industry | 2006 as a % of all Establishments | 2003 as a % of all Establishments |
|---|---|---|---|
| PA Wilds | Retail Trade | 14.0% | 14.7% |
| | Arts, Entertainment and Recreation | 4.2% | 4.1% |
| | Accommodation and Food Service | 7.3% | 7.1% |
| PA State | Retail Trade | 15.4% | 16.0% |
| | Arts, Entertainment and Recreation | 1.5% | 1.5% |
| | Accommodation and Food Service | 8.6% | 8.5% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.5 – Key Business Indicators by Industry, Cameron County[62]

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 6 | b | D | - | 7 | c | $0 | - | -5.0% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | | | | - | | | | - | - | - | - | - |
| 22: Utilities | 1 | a | D | - | 1 | a | $0 | - | 0.0% | - | - | - |
| 23: Construction | 9 | b | D | - | 9 | b | $0 | - | 0.0% | - | - | - |
| 31-33: Manufacturing | 26 | 1,386 | $47,718 | $34,429 | 21 | 989 | $31,315 | $31,663 | 7.4% | 11.9% | 15.1% | 2.8% |
| 42: Wholesale Trade | 2 | a | D | - | 2 | a | $0 | - | 0.0% | - | - | - |
| 44-45: Retail Trade | 19 | 260 | $3,195 | $12,288 | 25 | 294 | $3,971 | $13,507 | -8.7% | -4.0% | -7.0% | -3.1% |
| 48-49: Transportation and Warehousing | 7 | b | D | - | 9 | b | $0 | - | -8.0% | - | - | - |
| 51: Information | 3 | a | D | - | 3 | a | $0 | - | 0.0% | - | - | - |
| 52: Finance and Insurance | 4 | a | D | - | 3 | b | $0 | - | 10.1% | - | - | - |
| 53: Real Estate and Rental and Leasing | | | | - | 7 | a | $0 | - | - | - | - | - |
| 54: Professional, Scientific, and Technical Services | 6 | 18 | $398 | $22,111 | | | | - | - | - | - | - |
| 55: Management of Companies and Enterprises | | | | - | | | | - | - | - | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | | | | - | 1 | a | $0 | - | - | - | - | - |
| 61: Educational Services | | | | - | | | | - | - | - | - | - |
| 62: Health Care and Social Assistance | 19 | 187 | $4,279 | $22,882 | 21 | c | $0 | - | -3.3% | - | - | - |
| 71: Arts, Entertainment, and Recreation | 2 | a | D | - | 2 | a | $0 | - | 0.0% | - | - | - |
| 72: Accommodation and Food Services | 15 | c | D | - | 13 | 79 | $522 | $6,608 | 4.9% | - | - | - |
| 81: Other Services (except Public Administration) | 17 | 76 | $764 | $10,053 | 15 | 66 | $611 | $9,258 | 4.3% | 4.8% | 7.7% | 2.8% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

[62] For this and the following figures, some data is not available or else only ranges are known, because it must be suppressed to maintain confidentiality. The key used is as follows: a = 0 to 19 employees, b = 20 to 99 employees, c = 100 to 249 employees, d = 250 to 999 employees, e = 1,000 to 2,499 employees, D = payroll information withheld.

## Figure I.6 – Key Business Indicators by Industry, Clarion County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 8 | 0-19 | D | - | 9 | 20-99 | D | - | -3.9% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 18 | 203 | $13,558 | $66,788 | 18 | 170 | $7,057 | $41,512 | 0.0% | 6.1% | 24.3% | 17.2% |
| 22: Utilities | 11 | 163 | $9,431 | $57,859 | 13 | 167 | $11,997 | $71,838 | -5.4% | -0.8% | -7.7% | -7.0% |
| 23: Construction | 100 | 463 | $17,720 | $38,272 | 97 | 317 | $10,945 | $34,527 | 1.0% | 13.5% | 17.4% | 3.5% |
| 31-33: Manufacturing | 47 | 2,604 | $84,475 | $32,440 | 53 | 2,785 | $87,296 | $31,345 | -3.9% | -2.2% | -1.1% | 1.2% |
| 42: Wholesale Trade | 31 | 359 | $12,540 | $34,930 | 36 | 374 | $11,167 | $29,858 | -4.9% | -1.4% | 3.9% | 5.4% |
| 44-45: Retail Trade | 205 | 2,230 | $41,848 | $18,766 | 222 | 2,311 | $40,276 | $17,428 | -2.6% | -1.2% | 1.3% | 2.5% |
| 48-49: Transportation and Warehousing | 48 | 308 | $7,519 | $24,412 | 50 | 287 | $5,444 | $18,969 | -1.4% | 2.4% | 11.4% | 8.8% |
| 51: Information | 19 | 138 | $3,318 | $24,043 | 16 | 128 | $2,739 | $21,398 | 5.9% | 2.5% | 6.6% | 4.0% |
| 52: Finance and Insurance | 40 | 342 | $10,769 | $31,488 | 47 | 319 | $9,330 | $29,248 | -5.2% | 2.3% | 4.9% | 2.5% |
| 53: Real Estate and Rental and Leasing | 15 | 59 | $1,536 | $26,034 | 13 | 20-99 | D | - | 4.9% | - | - | - |
| 54: Professional, Scientific, and Technical Services | 42 | 253 | $8,589 | $33,949 | 45 | 266 | $8,343 | $31,365 | -2.3% | -1.7% | 1.0% | 2.7% |
| 55: Management of Companies and Enterprises | 1 | 20-99 | D | - | 1 | 20-99 | D | - | 0.0% | - | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | 24 | 251 | $5,442 | $21,681 | 31 | 170 | $4,214 | $24,788 | -8.2% | 13.9% | 8.9% | -4.4% |
| 61: Educational Services | 9 | 141 | $1,780 | $12,624 | 9 | 148 | $1,618 | $10,932 | 0.0% | -1.6% | 3.2% | 4.9% |
| 62: Health Care and Social Assistance | 125 | 2,406 | $59,030 | $24,534 | 112 | 2,013 | $48,698 | $24,192 | 3.7% | 6.1% | 6.6% | 0.5% |
| 71: Arts, Entertainment, and Recreation | 14 | 20-99 | D | - | 16 | 20-99 | D | - | -4.4% | - | - | - |
| 72: Accommodation and Food Services | 95 | 1,278 | $13,064 | $10,222 | 99 | 1,266 | $11,982 | $9,464 | -1.4% | 0.3% | 2.9% | 2.6% |
| 81: Other Services (except Public Administration) | 134 | 543 | $8,057 | $14,838 | 142 | 608 | $7,155 | $11,768 | -1.9% | -3.7% | 4.0% | 8.0% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.7 – Key Business Indicators by Industry, Clearfield County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 11 | 20-99 | D | - | 14 | 36 | $702 | $19,500 | -7.7% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 37 | 593 | $25,336 | $42,725 | 40 | 677 | $26,171 | $38,657 | -2.6% | -4.3% | -1.1% | 3.4% |
| 22: Utilities | 18 | 280 | $17,461 | $62,361 | 18 | 205 | $9,265 | $45,195 | 0.0% | 11.0% | 23.5% | 11.3% |
| 23: Construction | 177 | 897 | $29,232 | $32,589 | 170 | 734 | $22,568 | $30,747 | 1.4% | 6.9% | 9.0% | 2.0% |
| 31-33: Manufacturing | 109 | 3,233 | $101,136 | $31,282 | 116 | 3,524 | $96,970 | $27,517 | -2.1% | -2.8% | 1.4% | 4.4% |
| 42: Wholesale Trade | 73 | 637 | $22,113 | $34,714 | 73 | 621 | $19,905 | $32,053 | 0.0% | 0.9% | 3.6% | 2.7% |
| 44-45: Retail Trade | 354 | 4,355 | $80,221 | $18,420 | 366 | 4,366 | $77,080 | $17,655 | -1.1% | -0.1% | 1.3% | 1.4% |
| 48-49: Transportation and Warehousing | 144 | 3,210 | $114,894 | $35,793 | 150 | 3,348 | $105,138 | $31,403 | -1.4% | -1.4% | 3.0% | 4.5% |
| 51: Information | 30 | 356 | $9,121 | $25,621 | 30 | 454 | $10,435 | $22,985 | 0.0% | -7.8% | -4.4% | 3.7% |
| 52: Finance and Insurance | 95 | 730 | $22,574 | $30,923 | 98 | 746 | $21,249 | $28,484 | -1.0% | -0.7% | 2.0% | 2.8% |
| 53: Real Estate and Rental and Leasing | 40 | 198 | $5,075 | $25,631 | 35 | 180 | $4,793 | $26,628 | 4.6% | 3.2% | 1.9% | -1.3% |
| 54: Professional, Scientific, and Technical Services | 99 | 678 | $19,712 | $29,074 | 105 | 566 | $13,425 | $23,719 | -1.9% | 6.2% | 13.7% | 7.0% |
| 55: Management of Companies and Enterprises | 10 | 215 | $9,143 | $42,526 | 10 | 180 | $8,010 | $44,500 | 0.0% | 6.1% | 4.5% | -1.5% |
| 56: Administrative and Support and Waste Management and Remediation Services | 69 | 930 | $12,826 | $13,791 | 60 | 751 | $9,924 | $13,214 | 4.8% | 7.4% | 8.9% | 1.4% |
| 61: Educational Services | 10 | 185 | $4,439 | $23,995 | 9 | 195 | $3,651 | $18,723 | 3.6% | -1.7% | 6.7% | 8.6% |
| 62: Health Care and Social Assistance | 215 | 5,316 | $168,954 | $31,782 | 215 | 4,898 | $137,887 | $28,152 | 0.0% | 2.8% | 7.0% | 4.1% |
| 71: Arts, Entertainment, and Recreation | 26 | 100-249 | D | - | 20 | 107 | $1,937 | $18,103 | 9.1% | - | - | - |
| 72: Accommodation and Food Services | 177 | 2,465 | $23,299 | $9,452 | 163 | 2,204 | $20,013 | $9,080 | 2.8% | 3.8% | 5.2% | 1.3% |
| 81: Other Services (except Public Administration) | 258 | 1,374 | $23,731 | $17,271 | 256 | 1,412 | $21,577 | $15,281 | 0.3% | -0.9% | 3.2% | 4.2% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.8 – Key Business Indicators by Industry, Clinton County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 6 | 20-99 | D | - | 7 | 40 | $798 | $19,950 | -5.0% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 2 | 0-19 | D | - | 2 | 0-19 | $0 | - | 0.0% | - | - | - |
| 22: Utilities | 6 | 20-99 | D | - | 6 | 100-249 | $0 | - | 0.0% | - | - | - |
| 23: Construction | 77 | 396 | $13,546 | $34,207 | 81 | 348 | $10,573 | $30,382 | -1.7% | 4.4% | 8.6% | 4.0% |
| 31-33: Manufacturing | 47 | 2,814 | $105,778 | $37,590 | 38 | 2,359 | $77,994 | $33,062 | 7.3% | 6.1% | 10.7% | 4.4% |
| 42: Wholesale Trade | 21 | 211 | $8,940 | $42,370 | 21 | 279 | $8,079 | $28,957 | 0.0% | -8.9% | 3.4% | 13.5% |
| 44-45: Retail Trade | 142 | 1,789 | $34,359 | $19,206 | 152 | 2,001 | $34,833 | $17,408 | -2.2% | -3.7% | -0.5% | 3.3% |
| 48-49: Transportation and Warehousing | 22 | 476 | $12,764 | $26,815 | 25 | 416 | $11,121 | $26,733 | -4.2% | 4.6% | 4.7% | 0.1% |
| 51: Information | 16 | 118 | $3,808 | $32,271 | 14 | 115 | $2,985 | $25,957 | 4.6% | 0.9% | 8.5% | 7.5% |
| 52: Finance and Insurance | 39 | 309 | $12,506 | $40,472 | 36 | 209 | $6,085 | $29,115 | 2.7% | 13.9% | 27.1% | 11.6% |
| 53: Real Estate and Rental and Leasing | 23 | 125 | $2,272 | $18,176 | 22 | 99 | $1,910 | $19,293 | 1.5% | 8.1% | 6.0% | -2.0% |
| 54: Professional, Scientific, and Technical Services | 41 | 158 | $4,108 | $26,000 | 39 | 149 | $3,888 | $26,094 | 1.7% | 2.0% | 1.9% | -0.1% |
| 55: Management of Companies and Enterprises | 5 | 100-249 | D | - | 6 | 181 | $7,978 | $44,077 | -5.9% | - | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | 37 | 861 | $21,033 | $24,429 | 26 | 483 | $9,747 | $20,180 | 12.5% | 21.3% | 29.2% | 6.6% |
| 61: Educational Services | 3 | 20-99 | D | - | 5 | 62 | $1,179 | $19,016 | -15.7% | - | - | - |
| 62: Health Care and Social Assistance | 78 | 1,217 | $33,072 | $27,175 | 71 | 1,141 | $28,352 | $24,848 | 3.2% | 2.2% | 5.3% | 3.0% |
| 71: Arts, Entertainment, and Recreation | 10 | 20-99 | D | - | 11 | 56 | $896 | $16,000 | -3.1% | - | - | - |
| 72: Accommodation and Food Services | 77 | 1,196 | $11,193 | $9,359 | 77 | 1,037 | $9,423 | $9,087 | 0.0% | 4.9% | 5.9% | 1.0% |
| 81: Other Services (except Public Administration) | 102 | 625 | $6,863 | $10,981 | 101 | 563 | $6,277 | $11,149 | 0.3% | 3.5% | 3.0% | -0.5% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.9 – Key Business Indicators by Industry, Elk County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 26 | 46 | $1,150 | $25,000 | 27 | 20-99 | D | - | -1.3% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 2 | 20-99 | D | - | 1 | 0-19 | D | - | 26.0% | - | - | - |
| 22: Utilities | 4 | 20-99 | D | - | 5 | 20-99 | D | - | -7.2% | - | - | - |
| 23: Construction | 89 | 456 | $15,583 | $34,173 | 92 | 353 | $12,467 | $35,317 | -1.1% | 8.9% | 7.7% | -1.1% |
| 31-33: Manufacturing | 136 | 6,992 | $275,366 | $39,383 | 142 | 6,429 | $249,164 | $38,756 | -1.4% | 2.8% | 3.4% | 0.5% |
| 42: Wholesale Trade | 38 | 279 | $10,288 | $36,875 | 39 | 243 | $7,843 | $32,276 | -0.9% | 4.7% | 9.5% | 4.5% |
| 44-45: Retail Trade | 143 | 1,604 | $25,499 | $15,897 | 140 | 1,476 | $22,025 | $14,922 | 0.7% | 2.8% | 5.0% | 2.1% |
| 48-49: Transportation and Warehousing | 33 | 471 | $11,482 | $24,378 | 25 | 345 | $7,196 | $20,858 | 9.7% | 10.9% | 16.9% | 5.3% |
| 51: Information | 18 | 165 | $3,252 | $19,709 | 17 | 183 | $3,186 | $17,410 | 1.9% | -3.4% | 0.7% | 4.2% |
| 52: Finance and Insurance | 48 | 252 | $9,387 | $37,250 | 48 | 239 | $8,458 | $35,389 | 0.0% | 1.8% | 3.5% | 1.7% |
| 53: Real Estate and Rental and Leasing | 10 | 20-99 | D | - | 13 | 20 | $312 | $15,600 | -8.4% | - | - | - |
| 54: Professional, Scientific, and Technical Services | 34 | 209 | $3,742 | $17,904 | 44 | 220 | $4,104 | $18,655 | -8.2% | -1.7% | -3.0% | -1.4% |
| 55: Management of Companies and Enterprises | 3 | 20-99 | D | - | 1 | 20-99 | D | - | 44.2% | - | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | 33 | 142 | $3,376 | $23,775 | 32 | 147 | $3,235 | $22,007 | 1.0% | -1.1% | 1.4% | 2.6% |
| 61: Educational Services | 7 | 192 | $3,818 | $19,885 | 8 | 206 | $4,008 | $19,456 | -4.4% | -2.3% | -1.6% | 0.7% |
| 62: Health Care and Social Assistance | 128 | 2,370 | $63,952 | $26,984 | 130 | 2,224 | $56,437 | $25,376 | -0.5% | 2.1% | 4.3% | 2.1% |
| 71: Arts, Entertainment, and Recreation | 12 | 100-249 | D | - | 10 | 87 | $1,185 | $13,621 | 6.3% | - | - | - |
| 72: Accommodation and Food Services | 77 | 641 | $5,287 | $8,248 | 70 | 552 | $4,570 | $8,279 | 3.2% | 5.1% | 5.0% | -0.1% |
| 81: Other Services (except Public Administration) | 116 | 567 | $6,744 | $11,894 | 111 | 530 | $5,741 | $10,832 | 1.5% | 2.3% | 5.5% | 3.2% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.10 – Key Business Indicators by Industry, Forest County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 4 | 24 | $1,236 | $51,500 | 1 | 0-19 | D | - | 58.7% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 3 | 0-19 | D | - | 4 | 50 | $1,627 | $32,540 | -9.1% | - | - | - |
| 22: Utilities | | 0 | | - | 1 | 0-19 | D | - | - | - | - | - |
| 23: Construction | 10 | 34 | $1,037 | $30,500 | 15 | 20-99 | D | - | -12.6% | - | - | - |
| 31-33: Manufacturing | 7 | 267 | $7,729 | $28,948 | 10 | 268 | $7,006 | $26,142 | -11.2% | -0.1% | 3.3% | 3.5% |
| 42: Wholesale Trade | 3 | 15 | $340 | $22,667 | | 0 | | - | - | #DIV/0! | - | - |
| 44-45: Retail Trade | 18 | 20-99 | D | - | 25 | 20-99 | D | - | -10.4% | - | - | - |
| 48-49: Transportation and Warehousing | 6 | 39 | $1,056 | $27,077 | 9 | 20-99 | D | - | -12.6% | - | - | - |
| 51: Information | 4 | 0-19 | D | - | 3 | 0-19 | D | - | 10.1% | - | - | - |
| 52: Finance and Insurance | 4 | 0-19 | D | - | 4 | 0-19 | D | - | 0.0% | - | - | - |
| 53: Real Estate and Rental and Leasing | 2 | 0-19 | D | - | 4 | 0-19 | D | - | -20.6% | - | - | - |
| 54: Professional, Scientific, and Technical Services | 4 | 9 | $332 | $36,889 | 5 | 0-19 | D | - | -7.2% | - | - | - |
| 55: Management of Companies and Enterprises | | 0 | | - | | 0 | | - | - | #DIV/0! | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | 4 | 0-19 | D | - | 3 | 0-19 | D | - | 10.1% | - | - | - |
| 61: Educational Services | 1 | 0-19 | D | - | 1 | 20-99 | D | - | 0.0% | - | - | - |
| 62: Health Care and Social Assistance | 6 | 1000-2499 | D | - | 6 | 100-249 | D | - | 0.0% | - | - | - |
| 71: Arts, Entertainment, and Recreation | 2 | 0-19 | D | - | 2 | 0-19 | D | - | 0.0% | - | - | - |
| 72: Accommodation and Food Services | 24 | 125 | $1,730 | $13,840 | 25 | 172 | $1,763 | $10,250 | -1.4% | -10.1% | -0.6% | 10.5% |
| 81: Other Services (except Public Administration) | 13 | 46 | $419 | $9,109 | 15 | 20-99 | D | - | -4.7% | - | - | - |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.11 – Key Business Indicators by Industry, Jefferson County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 7 | 0-19 | D | - | 18 | 20-99 | D | - | -27.0% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 27 | 317 | $14,274 | $45,028 | 23 | 236 | $7,935 | $33,623 | 5.5% | 10.3% | 21.6% | 10.2% |
| 22: Utilities | 10 | 20-99 | D | - | 11 | 20-99 | D | - | -3.1% | - | - | - |
| 23: Construction | 98 | 518 | $15,209 | $29,361 | 101 | 463 | $12,456 | $26,903 | -1.0% | 3.8% | 6.9% | 3.0% |
| 31-33: Manufacturing | 95 | 4,227 | $154,771 | $36,615 | 92 | 4,105 | $133,053 | $32,412 | 1.1% | 1.0% | 5.2% | 4.1% |
| 42: Wholesale Trade | 49 | 416 | $16,001 | $38,464 | 53 | 434 | $14,194 | $32,705 | -2.6% | -1.4% | 4.1% | 5.6% |
| 44-45: Retail Trade | 181 | 1,916 | $36,041 | $18,811 | 192 | 1,867 | $32,197 | $17,245 | -1.9% | 0.9% | 3.8% | 2.9% |
| 48-49: Transportation and Warehousing | 80 | 614 | $16,192 | $26,371 | 82 | 660 | $15,797 | $23,935 | -0.8% | -2.4% | 0.8% | 3.3% |
| 51: Information | 17 | 175 | $5,585 | $31,914 | 13 | 201 | $5,030 | $25,025 | 9.4% | -4.5% | 3.6% | 8.4% |
| 52: Finance and Insurance | 55 | 352 | $9,791 | $27,815 | 46 | 360 | $9,289 | $25,803 | 6.1% | -0.7% | 1.8% | 2.5% |
| 53: Real Estate and Rental and Leasing | 24 | 20-99 | D | - | 25 | 85 | $1,328 | $15,624 | -1.4% | - | - | - |
| 54: Professional, Scientific, and Technical Services | 69 | 303 | $8,300 | $27,393 | 69 | 312 | $6,286 | $20,147 | 0.0% | -1.0% | 9.7% | 10.8% |
| 55: Management of Companies and Enterprises | 4 | 79 | $3,563 | $45,101 | 4 | 112 | $3,300 | $29,464 | 0.0% | -11.0% | 2.6% | 15.2% |
| 56: Administrative and Support and Waste Management and Remediation Services | 31 | 212 | $5,791 | $27,316 | 33 | 263 | $7,405 | $28,156 | -2.1% | -6.9% | -7.9% | -1.0% |
| 61: Educational Services | 10 | 55 | $608 | $11,055 | 5 | 133 | $1,707 | $12,835 | 26.0% | -25.5% | -29.1% | -4.9% |
| 62: Health Care and Social Assistance | 149 | 2,541 | $61,821 | $24,329 | 141 | 2,263 | $54,402 | $24,040 | 1.9% | 3.9% | 4.4% | 0.4% |
| 71: Arts, Entertainment, and Recreation | 15 | 99 | $1,203 | $12,152 | 16 | 81 | $1,050 | $12,963 | -2.1% | 6.9% | 4.6% | -2.1% |
| 72: Accommodation and Food Services | 90 | 1,013 | $8,345 | $8,238 | 92 | 1,055 | $8,534 | $8,089 | -0.7% | -1.3% | -0.7% | 0.6% |
| 81: Other Services (except Public Administration) | 156 | 742 | $9,213 | $12,416 | 155 | 645 | $8,712 | $13,507 | 0.2% | 4.8% | 1.9% | -2.8% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.12 – Key Business Indicators by Industry, Lycoming County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 9 | 0-19 | D | - | 12 | 23 | $482 | $20,957 | -9.1% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 8 | 168 | $6,167 | $36,708 | 7 | 128 | $6,160 | $48,125 | 4.6% | 9.5% | 0.0% | -8.6% |
| 22: Utilities | 6 | 100-249 | D | - | 7 | 164 | $12,139 | $74,018 | -5.0% | - | - | - |
| 23: Construction | 257 | 2,085 | $76,234 | $36,563 | 250 | 1,875 | $62,870 | $33,531 | 0.9% | 3.6% | 6.6% | 2.9% |
| 31-33: Manufacturing | 179 | 10,213 | $403,886 | $39,546 | 197 | 11,757 | $397,919 | $33,845 | -3.1% | -4.6% | 0.5% | 5.3% |
| 42: Wholesale Trade | 127 | 2,334 | $72,760 | $31,174 | 134 | 2,373 | $80,847 | $34,070 | -1.8% | -0.6% | -3.5% | -2.9% |
| 44-45: Retail Trade | 519 | 7,175 | $129,087 | $17,991 | 537 | 7,200 | $124,882 | $17,345 | -1.1% | -0.1% | 1.1% | 1.2% |
| 48-49: Transportation and Warehousing | 82 | 1,305 | $41,743 | $31,987 | 80 | 985 | $31,686 | $32,169 | 0.8% | 9.8% | 9.6% | -0.2% |
| 51: Information | 49 | 953 | $33,273 | $34,914 | 48 | 1,163 | $39,172 | $33,682 | 0.7% | -6.4% | -5.3% | 1.2% |
| 52: Finance and Insurance | 196 | 1,792 | $70,361 | $39,264 | 195 | 1,763 | $63,499 | $36,018 | 0.2% | 0.5% | 3.5% | 2.9% |
| 53: Real Estate and Rental and Leasing | 89 | 411 | $10,613 | $25,822 | 83 | 381 | $8,236 | $21,617 | 2.4% | 2.6% | 8.8% | 6.1% |
| 54: Professional, Scientific, and Technical Services | 182 | 1,521 | $44,286 | $29,116 | 183 | 1,405 | $42,491 | $30,243 | -0.2% | 2.7% | 1.4% | -1.3% |
| 55: Management of Companies and Enterprises | 15 | 267 | $13,896 | $52,045 | 17 | 410 | $20,290 | $49,488 | -4.1% | -13.3% | -11.9% | 1.7% |
| 56: Administrative and Support and Waste Management and Remediation Services | 109 | 2,571 | $44,406 | $17,272 | 100 | 2,101 | $36,298 | $17,277 | 2.9% | 7.0% | 7.0% | 0.0% |
| 61: Educational Services | 16 | 899 | $14,824 | $16,489 | 15 | 877 | $14,204 | $16,196 | 2.2% | 0.8% | 1.4% | 0.6% |
| 62: Health Care and Social Assistance | 282 | 8,188 | $257,897 | $31,497 | 267 | 7,572 | $219,337 | $28,967 | 1.8% | 2.6% | 5.5% | 2.8% |
| 71: Arts, Entertainment, and Recreation | 34 | 433 | $5,745 | $13,268 | 37 | 627 | $6,696 | $10,679 | -2.8% | -11.6% | -5.0% | 7.5% |
| 72: Accommodation and Food Services | 261 | 3,385 | $36,642 | $10,825 | 252 | 3,503 | $33,980 | $9,700 | 1.2% | -1.1% | 2.5% | 3.7% |
| 81: Other Services (except Public Administration) | 387 | 2,326 | $39,136 | $16,825 | 373 | 2,099 | $35,635 | $16,977 | 1.2% | 3.5% | 3.2% | -0.3% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.13 – Key Business Indicators by Industry, McKean County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 18 | 93 | $2,825 | $30,376 | 17 | 74 | $2,147 | $29,014 | 1.9% | 7.9% | 9.6% | 1.5% |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 35 | 542 | $23,556 | $43,461 | 33 | 267 | $10,628 | $39,805 | 2.0% | 26.6% | 30.4% | 3.0% |
| 22: Utilities | 10 | 104 | $5,492 | $52,808 | 12 | 124 | $6,015 | $48,508 | -5.9% | -5.7% | -3.0% | 2.9% |
| 23: Construction | 71 | 565 | $22,828 | $40,404 | 71 | 644 | $21,802 | $33,854 | 0.0% | -4.3% | 1.5% | 6.1% |
| 31-33: Manufacturing | 61 | 4,137 | $166,461 | $40,237 | 68 | 4,639 | $168,265 | $36,272 | -3.6% | -3.7% | -0.4% | 3.5% |
| 42: Wholesale Trade | 34 | 381 | $17,169 | $45,063 | 36 | 394 | $16,010 | $40,635 | -1.9% | -1.1% | 2.4% | 3.5% |
| 44-45: Retail Trade | 182 | 1,985 | $36,416 | $18,346 | 190 | 2,177 | $36,143 | $16,602 | -1.4% | -3.0% | 0.3% | 3.4% |
| 48-49: Transportation and Warehousing | 42 | 410 | $11,446 | $27,917 | 45 | 414 | $9,613 | $23,220 | -2.3% | -0.3% | 6.0% | 6.3% |
| 51: Information | 24 | 170 | $4,239 | $24,935 | 24 | 239 | $5,839 | $24,431 | 0.0% | -10.7% | -10.1% | 0.7% |
| 52: Finance and Insurance | 53 | 300 | $8,775 | $29,250 | 61 | 319 | $8,531 | $26,743 | -4.6% | -2.0% | 0.9% | 3.0% |
| 53: Real Estate and Rental and Leasing | 25 | 20-99 | D | - | 24 | 95 | $1,748 | $18,400 | 1.4% | - | - | - |
| 54: Professional, Scientific, and Technical Services | 62 | 264 | $6,878 | $26,053 | 58 | 229 | $4,692 | $20,489 | 2.2% | 4.9% | 13.6% | 8.3% |
| 55: Management of Companies and Enterprises | 3 | 20-99 | D | - | 3 | 31 | $1,694 | $54,645 | 0.0% | - | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | 26 | 507 | $8,818 | $17,393 | 26 | 509 | $7,740 | $15,206 | 0.0% | -0.1% | 4.4% | 4.6% |
| 61: Educational Services | 8 | 388 | $12,691 | $32,709 | 8 | 394 | $11,168 | $28,345 | 0.0% | -0.5% | 4.4% | 4.9% |
| 62: Health Care and Social Assistance | 154 | 2,683 | $75,040 | $27,969 | 151 | 2,750 | $67,420 | $24,516 | 0.7% | -0.8% | 3.6% | 4.5% |
| 71: Arts, Entertainment, and Recreation | 12 | 114 | $1,423 | $12,482 | 15 | 75 | $1,377 | $18,360 | -7.2% | 15.0% | 1.1% | -12.1% |
| 72: Accommodation and Food Services | 115 | 1,081 | $11,165 | $10,328 | 111 | 1,072 | $10,213 | $9,527 | 1.2% | 0.3% | 3.0% | 2.7% |
| 81: Other Services (except Public Administration) | 161 | 716 | $8,751 | $12,222 | 158 | 739 | $8,771 | $11,869 | 0.6% | -1.0% | -0.1% | 1.0% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.14 – Key Business Indicators by Industry, Potter County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 12 | 40 | $1,110 | $27,750 | 13 | 78 | $1,851 | $23,731 | -2.6% | -20.0% | -15.7% | 5.4% |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 5 | 20-99 | D | - | 5 | 20-99 | D | - | 0.0% | - | - | - |
| 22: Utilities | 4 | 20-99 | D | - | 6 | 20-99 | D | - | -12.6% | - | - | - |
| 23: Construction | 33 | 125 | $3,954 | $31,632 | 29 | 131 | $4,023 | $30,710 | 4.4% | -1.6% | -0.6% | 1.0% |
| 31-33: Manufacturing | 24 | 865 | $27,459 | $31,745 | 24 | 846 | $21,524 | $25,442 | 0.0% | 0.7% | 8.5% | 7.7% |
| 42: Wholesale Trade | 10 | 50 | $1,200 | $24,000 | 10 | 20-99 | D | - | 0.0% | - | - | - |
| 44-45: Retail Trade | 74 | 659 | $12,270 | $18,619 | 81 | 673 | $11,500 | $17,088 | -3.0% | -0.7% | 2.2% | 2.9% |
| 48-49: Transportation and Warehousing | 24 | 211 | $7,596 | $36,000 | 22 | 173 | $5,227 | $30,214 | 2.9% | 6.8% | 13.3% | 6.0% |
| 51: Information | 14 | 2,020 | $64,340 | $31,851 | 8 | 1000-2499 | D | - | 20.5% | - | - | - |
| 52: Finance and Insurance | 17 | 99 | $3,372 | $34,061 | 17 | 100 | $2,906 | $29,060 | 0.0% | -0.3% | 5.1% | 5.4% |
| 53: Real Estate and Rental and Leasing | 7 | 20-99 | D | - | 6 | 55 | $427 | $7,764 | 5.3% | - | - | - |
| 54: Professional, Scientific, and Technical Services | 25 | 114 | $4,278 | $37,526 | 22 | 100 | $2,971 | $29,710 | 4.4% | 4.5% | 12.9% | 8.1% |
| 55: Management of Companies and Enterprises | 1 | 20-99 | D | - | 2 | 20-99 | D | - | -20.6% | - | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | 8 | 223 | $4,685 | $21,009 | 8 | 221 | $4,583 | $20,738 | 0.0% | 0.3% | 0.7% | 0.4% |
| 61: Educational Services | 3 | 0-19 | D | - | 3 | 20-99 | D | - | 0.0% | - | - | - |
| 62: Health Care and Social Assistance | 40 | 967 | $33,492 | $34,635 | 36 | 853 | $23,625 | $27,696 | 3.6% | 4.3% | 12.3% | 7.7% |
| 71: Arts, Entertainment, and Recreation | 6 | 20-99 | D | - | 5 | 20-99 | D | - | 6.3% | - | - | - |
| 72: Accommodation and Food Services | 36 | 207 | $1,964 | $9,488 | 40 | 248 | $2,188 | $8,823 | -3.5% | -5.8% | -3.5% | 2.5% |
| 81: Other Services (except Public Administration) | 47 | 208 | $2,609 | $12,543 | 53 | 208 | $2,595 | $12,476 | -3.9% | 0.0% | 0.2% | 0.2% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.15 – Key Business Indicators by Industry, Tioga County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 10 | 20-99 | D | - | 11 | 20-99 | D | - | -3.1% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 2 | 0-19 | D | - | 2 | 0-19 | D | - | 0.0% | - | - | - |
| 22: Utilities | 7 | 132 | $6,669 | $50,523 | 9 | 92 | $5,257 | $57,141 | -8.0% | 12.8% | 8.3% | -4.0% |
| 23: Construction | 71 | 245 | $6,713 | $27,400 | 77 | 249 | $6,169 | $24,775 | -2.7% | -0.5% | 2.9% | 3.4% |
| 31-33: Manufacturing | 46 | 2,594 | $84,564 | $32,600 | 47 | 2,810 | $85,067 | $30,273 | -0.7% | -2.6% | -0.2% | 2.5% |
| 42: Wholesale Trade | 25 | 249 | $7,576 | $30,426 | 25 | 221 | $6,456 | $29,213 | 0.0% | 4.1% | 5.5% | 1.4% |
| 44-45: Retail Trade | 168 | 1,925 | $35,799 | $18,597 | 185 | 1,978 | $34,191 | $17,286 | -3.2% | -0.9% | 1.5% | 2.5% |
| 48-49: Transportation and Warehousing | 48 | 370 | $9,472 | $25,600 | 47 | 352 | $10,004 | $28,420 | 0.7% | 1.7% | -1.8% | -3.4% |
| 51: Information | 21 | 191 | $3,582 | $18,754 | 19 | 150 | $3,255 | $21,700 | 3.4% | 8.4% | 3.2% | -4.7% |
| 52: Finance and Insurance | 38 | 422 | $15,041 | $35,642 | 40 | 399 | $13,501 | $33,837 | -1.7% | 1.9% | 3.7% | 1.7% |
| 53: Real Estate and Rental and Leasing | 24 | 68 | $1,549 | $22,779 | 20 | 51 | $1,193 | $23,392 | 6.3% | 10.1% | 9.1% | -0.9% |
| 54: Professional, Scientific, and Technical Services | 46 | 241 | $10,954 | $45,452 | 49 | 225 | $6,429 | $28,573 | -2.1% | 2.3% | 19.4% | 16.7% |
| 55: Management of Companies and Enterprises | 5 | 52 | $2,804 | $53,923 | 3 | 38 | $1,177 | $30,974 | 18.6% | 11.0% | 33.6% | 20.3% |
| 56: Administrative and Support and Waste Management and Remediation Services | 32 | 164 | $3,954 | $24,110 | 26 | 148 | $2,909 | $19,655 | 7.2% | 3.5% | 10.8% | 7.0% |
| 61: Educational Services | 4 | 132 | $1,774 | $13,439 | 5 | 104 | $1,479 | $14,221 | -7.2% | 8.3% | 6.2% | -1.9% |
| 62: Health Care and Social Assistance | 96 | 1,586 | $45,503 | $28,690 | 91 | 1,622 | $39,001 | $24,045 | 1.8% | -0.7% | 5.3% | 6.1% |
| 71: Arts, Entertainment, and Recreation | 13 | 20-99 | D | - | 12 | 87 | $1,619 | $18,609 | 2.7% | - | - | - |
| 72: Accommodation and Food Services | 97 | 979 | $9,310 | $9,510 | 88 | 1,073 | $9,024 | $8,410 | 3.3% | -3.0% | 1.0% | 4.2% |
| 81: Other Services (except Public Administration) | 94 | 434 | $5,381 | $12,399 | 102 | 407 | $4,593 | $11,285 | -2.7% | 2.2% | 5.4% | 3.2% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

## Figure I.16 – Key Business Indicators by Industry, Warren County

| | 2006 # Estab | 2006 # Jobs | 2006 $ Payroll ($000) | 2006 Avg Wage | 2003 # Estab | 2003 # Jobs | 2003 $ Payroll ($000) | 2003 Avg Wage | 2003-2006 Estab CAGR% | 2003-2006 Jobs CAGR% | 2003-2006 Payroll CAGR% | 2003-2006 Avg Wage CAGR % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11: Agriculture, Forestry, Fishing and Hunting | 7 | 0-19 | D | - | 15 | 20-99 | D | - | -22.4% | - | - | - |
| 21: Mining, Quarrying, and Oil and Gas Extraction | 37 | 230 | $8,667 | $37,683 | 29 | 201 | $8,803 | $43,796 | 8.5% | 4.6% | -0.5% | -4.9% |
| 22: Utilities | 9 | 138 | $9,119 | $66,080 | 10 | 186 | $8,301 | $44,629 | -3.5% | -9.5% | 3.2% | 14.0% |
| 23: Construction | 65 | 188 | $6,320 | $33,617 | 69 | 201 | $5,597 | $27,846 | -2.0% | -2.2% | 4.1% | 6.5% |
| 31-33: Manufacturing | 71 | 3,106 | $126,282 | $40,657 | 80 | 4,135 | $152,489 | $36,878 | -3.9% | -9.1% | -6.1% | 3.3% |
| 42: Wholesale Trade | 31 | 243 | $9,659 | $39,749 | 27 | 204 | $6,468 | $31,706 | 4.7% | 6.0% | 14.3% | 7.8% |
| 44-45: Retail Trade | 156 | 2,292 | $66,782 | $29,137 | 166 | 2,580 | $64,168 | $24,871 | -2.0% | -3.9% | 1.3% | 5.4% |
| 48-49: Transportation and Warehousing | 36 | 1,101 | $29,291 | $26,604 | 36 | 1,165 | $26,101 | $22,404 | 0.0% | -1.9% | 3.9% | 5.9% |
| 51: Information | 20 | 180 | $4,559 | $25,328 | 19 | 181 | $4,723 | $26,094 | 1.7% | -0.2% | -1.2% | -1.0% |
| 52: Finance and Insurance | 52 | 627 | $24,598 | $39,231 | 45 | 571 | $20,998 | $36,774 | 4.9% | 3.2% | 5.4% | 2.2% |
| 53: Real Estate and Rental and Leasing | 18 | 82 | $1,366 | $16,659 | 20 | 68 | $1,236 | $18,176 | -3.5% | 6.4% | 3.4% | -2.9% |
| 54: Professional, Scientific, and Technical Services | 52 | 261 | $8,220 | $31,494 | 57 | 249 | $6,790 | $27,269 | -3.0% | 1.6% | 6.6% | 4.9% |
| 55: Management of Companies and Enterprises | 3 | 100-249 | D | - | 2 | 100-249 | D | - | 14.5% | - | - | - |
| 56: Administrative and Support and Waste Management and Remediation Services | 23 | 95 | $2,238 | $23,558 | 23 | 20-99 | D | - | 0.0% | - | - | - |
| 61: Educational Services | 7 | 158 | $2,956 | $18,709 | 6 | 98 | $1,807 | $18,439 | 5.3% | 17.3% | 17.8% | 0.5% |
| 62: Health Care and Social Assistance | 101 | 2,826 | $99,089 | $35,063 | 108 | 2,773 | $86,523 | $31,202 | -2.2% | 0.6% | 4.6% | 4.0% |
| 71: Arts, Entertainment, and Recreation | 13 | 56 | $1,229 | $21,946 | 17 | 53 | $1,493 | $28,170 | -8.6% | 1.9% | -6.3% | -8.0% |
| 72: Accommodation and Food Services | 84 | 822 | $7,535 | $9,167 | 90 | 895 | $7,037 | $7,863 | -2.3% | -2.8% | 2.3% | 5.2% |
| 81: Other Services (except Public Administration) | 133 | 777 | $9,197 | $11,837 | 147 | 755 | $8,228 | $10,898 | -3.3% | 1.0% | 3.8% | 2.8% |

*Source: US Census Bureau – County Business Patterns (2003, 2006), Econsult Corporation (2009)*

Figure I.17 – Manufacturing Employment as a Share of Total Employment: Shares Plummeted from 1969 to 2005[63]

| County | 1969 | 1979 | 1989 | 1999 | 2005 |
|---|---|---|---|---|---|
| Pennsylvania | 31% | 25% | 17% | 14% | 10% |
| Rural | 31% | 25% | 20% | 17% | 13% |
| PA Wilds | 36% | 29% | 25% | 24% | 17% |
| Cameron | 63% | 40% | 40% | 48% | (D) |
| Clarion | 22% | 15% | 15% | 15% | 14% |
| Clearfield | 26% | 22% | 15% | 14% | 9% |
| Clinton | 44% | 40% | 28% | 22% | 18% |
| Forest | 32% | 29% | 17% | (D) | (D) |
| Elk | 55% | 50% | 43% | 42% | 35% |
| Jefferson | 32% | 30% | 25% | 24% | 20% |
| Lycoming | 39% | 32% | 26% | 21% | 17% |
| McKean | 37% | 33% | 26% | 25% | 19% |
| Potter | 25% | 17% | 20% | 14% | 9% |
| Tioga | 21% | 17% | 18% | 21% | 15% |
| Warren | 34% | 28% | 23% | 23% | 15% |

*Source: Keystone Research Center (2008), US BEA (2008), Econsult Corporation (2009)*

[63] 1969-1999 figures based on Standard Industrial Classification (SIC) Codes; 2005 figures based on North American Industry Classification System (NAICS) Codes. "(D)" denotes not shown to avoid disclosure of confidential information.

# Appendix J – Gardeau Train Wreck and Chemical Spill in Cameron County

On June 30, 2006, a southbound Norfolk Southern (NS) freight train derailed 28 cars at the steep downgrade of Keating Summit into the Portage Valley near Gardeau, McKean County, and close to the Cameron County line. The train spilled 42,000-44,000 gallons of sodium hydroxide (lye) into the Sinnemahoning Portage Creek, a tributary of the West Branch Susquehanna River, at Big Fill Run.

The Driftwood Branch bore the brunt of the spill, which raised pH levels to devastatingly high alkaline levels, killing aquatic wildlife, birds, and insects, with effects felt as far as 30 miles away from just upstream of Emporium, Cameron County to Driftwood, Cameron County. Over 100,000 fish died, completely ruining one of the Commonwealth's best trout streams. The trout are still in the early stages of recovery nearly three years later, but other fish have rebounded to near pre-spill levels.

During the accident, engineer Michael J. Seifert reached top speeds of 77 miles per hour on a stretch of track with a 15 mile per hour speed limit. According to reports related to the environmental crime charges filed against NS. "The grand jury found that Seifert appeared incoherent at times and fell asleep prior to the derailment. Several hours after the accident, morphine and benzodiazepines were detected in Seifert's bloodstream."[64] Seifert pleaded guilty in the McKean County Court of Common Pleas on September 28, 2008, and received a sentence of one to two years in prison, a $2,500 fine to the PA Solid Waste Abatement Fund, and 600 hours of community service.[65]

NS conducted an extensive cleanup effort of debris and chemicals that has since been completed. Furthermore, they committed to continued monitoring of the streams and watershed, and will report annually to the Pennsylvania Department of Environmental Protection (DEP) until a final inspection in September 2013. DEP initially levied NS $8.89 million in penalties for "unpermitted discharges and waste disposals, and releasing hazardous substances."[66]

Ultimately, a 2007 settlement agreement resulted in $7.35 million paid to the Commonwealth, absolving NS of further civil responsibility. $3.675 million went to the Pennsylvania Fish and

[64] "Pennsylvania Lye Spill Costly for Norfolk Southern," Environmental News Services (November 15, 2007).

[65] "AG Announces Prison Sentence for Former Railroad Engineer in Train Derailment and Environmental Crimes Case," Gant News (October 1, 2008).

[66] "DEP Reaches Agreement with Norfolk Southern to Complete Spill Site Cleanup in McKean County," Commonwealth of Pennsylvania Department of Environmental Protection (May 30, 2007).

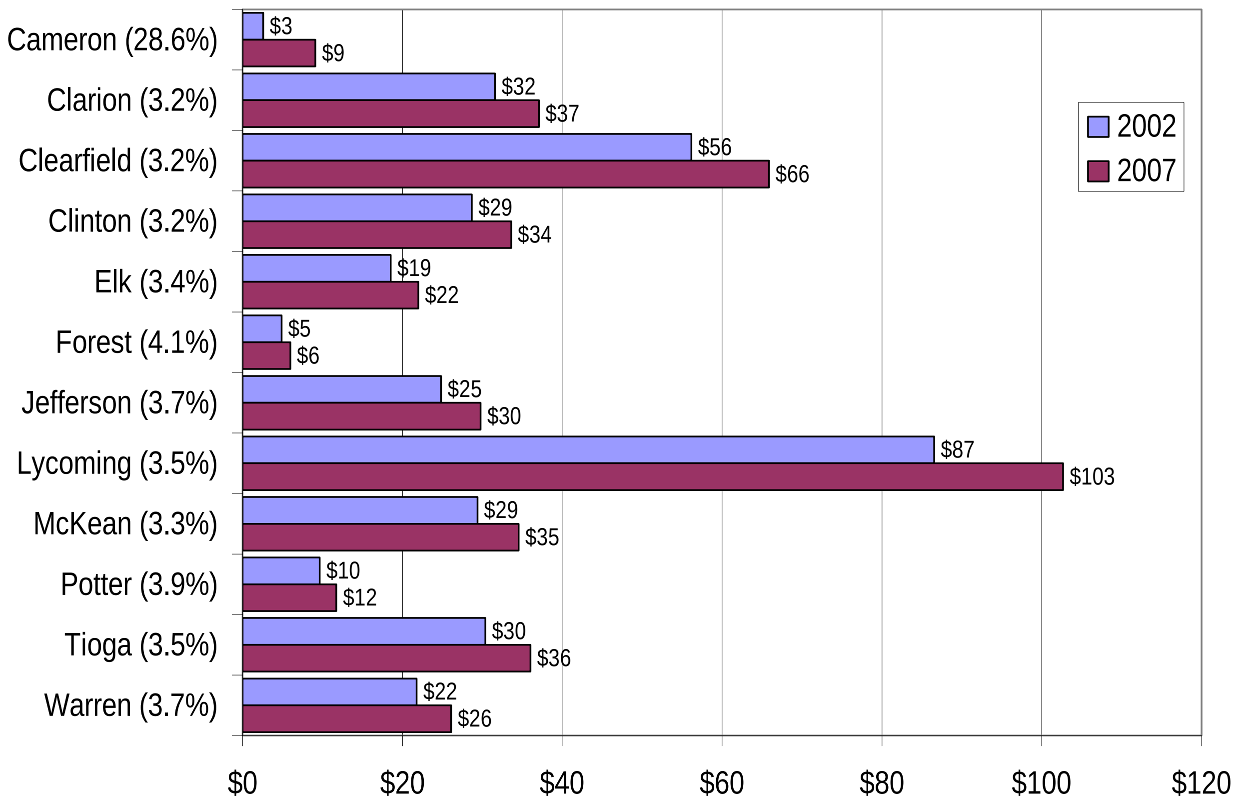
Boat Commission (PFBC) "to develop and implement projects that benefit fishing, boating and aquatic resources in Cameron, Elk, McKean or Potter Counties," including an ongoing grant program.[67] In turn, "DEP's nearly $3.2 million share will go directly to the Headwaters Resource Conservation and Development Council Inc. to support projects in the Sinnemahoning Portage Creek Watershed, and the Driftwood Branch of the Sinnemahoning Creek Watershed."[68] DEP received the remaining approximately $500,000 to cover the costs of responding to the derailment.

[67] "Grants Available to Improve Sinnemahoning Creek Watershed in Cameron, Elk, McKean and Potter Counties," Pennsylvania Fish & Boat Commission (December 5, 2008).

[68] "Pennsylvania Lye Spill Costly for Norfolk Southern," Environmental News Services (November 15, 2007).

# Appendix K – Overall Economic Health Indicators within the Pennsylvania Wilds Region

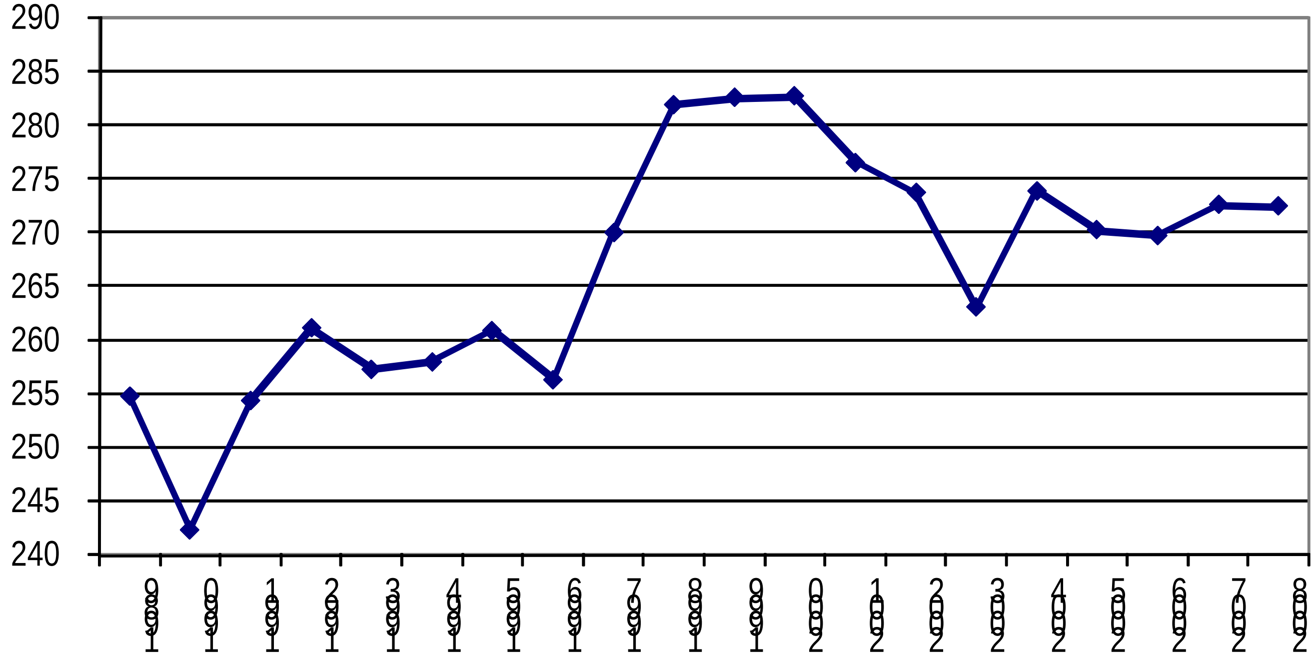
Figure K.1– PA Wilds Estimated GDP by County (in $M; County CAGRs in Parentheses)
None of the 12 Counties Lagged in GDP Growth




*Source: Global Insight / DK Shifflet & Associates (2008), Econsult Corporation (2009)*

# Appendix L – Recreational Use within the Pennsylvania Wilds

Figure L.1 – National Park System Total Attendance (in Millions of Visitors)
Attendance Relatively Flat Since 2004 and Down Since 1998-2000 Peak




*Source: US Department of Interior - National Park Service (2008), Econsult Corporation (2009)*

## Figure L.2 – 2004-2008 CAGR by Category for All State Parks in PA Wilds[69]

| | Modern Camping | Rustic Camping | Camping Cottage | Yurts | Group Tent Camping | Group Camping | Rustic Cabins | Modern Cabins | Picnicking | Driving | Beach | Free Pool | Paid Pool | Boating | Fishing | Environmental Education | Trail Use | Bicycling | Hunting | Winter Sports | Summer Sports | Special Events | Wildlife Viewing | Guests | Other | Total Visitors |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| BALD EAGLE | 1% | 4% | | 7% | | | | | -4% | -20% | -16% | | | -3% | -1% | -37% | -4% | 1% | -3% | -18% | -5% | -100% | | | | -3% |
| BENDIGO | | | | | | | | | 27% | 23% | | 10% | | | 48% | -100% | | 25% | | -100% | | -100% | | | 37% | 29% |
| BLACK MOSHANNON | -13% | | | | -21% | | -9% | -8% | -4% | -5% | -3% | | | -4% | -4% | 4% | -5% | -4% | -7% | -12% | | 14% | | | 8% | -4% |
| CHAPMAN | | -100% | | | -100% | | | | 3% | 3% | -100% | | | 18% | 10% | -100% | 5% | 3% | -1% | -100% | | -100% | | | 108% | 5% |
| CHERRY SPRINGS | | 8% | | | | | | | -6% | 7% | | | | | | 90% | | -100% | -100% | 7% | | 2% | | | 46% | 3% |

[69] Does not include attendance figures for Cook Forest State Park, which was in the midst of changes in counting methodology.

| | Modern Camping | Rustic Camping | Camping Cottage | Yurts | Group Tent Camping | Group Camping | Rustic Cabins | Modern Cabins | Picnicking | Driving | Beach | Free Pool | Paid Pool | Boating | Fishing | Environmental Education | Trail Use | Bicycling | Hunting | Winter Sports | Summer Sports | Special Events | Wildlife Viewing | Guests | Other | Total Visitors |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CLEAR CREEK | -100% | -18% | | -100% | -100% | | -21% | -100% | 109% | -2% | | -100% | -100% | 102% | 95% | -8% | 84% | 73% | 94% | 81% | | -34% | | | | 3% |
| COLTON POINT | | 21% | | | 14% | | | | -18% | -36% | | | | | | | -10% | -7% | -32% | 196% | | | | | -9% | -6% |
| ELK | | | | | | | | 4% | | | | | | | | | | | | -3% | | 62% | | | | 22% |
| HILLS CREEK | | | | | | | | | 1% | 17% | | | | -4% | 4% | | | | 68% | -100% | | -100% | | | | 7% |
| HYNER RUN | -7% | | 1% | -1% | -12% | | | -1% | 19% | 6% | -1% | | | -35% | 15% | 4% | -5% | -19% | | -25% | | -17% | | | | -2% |
| HYNER VIEW | | 3% | | | -100% | | | -3% | 6% | -19% | | -6% | | | 70% | | 48% | 17% | 39% | 50% | | -15% | | | | 5% |

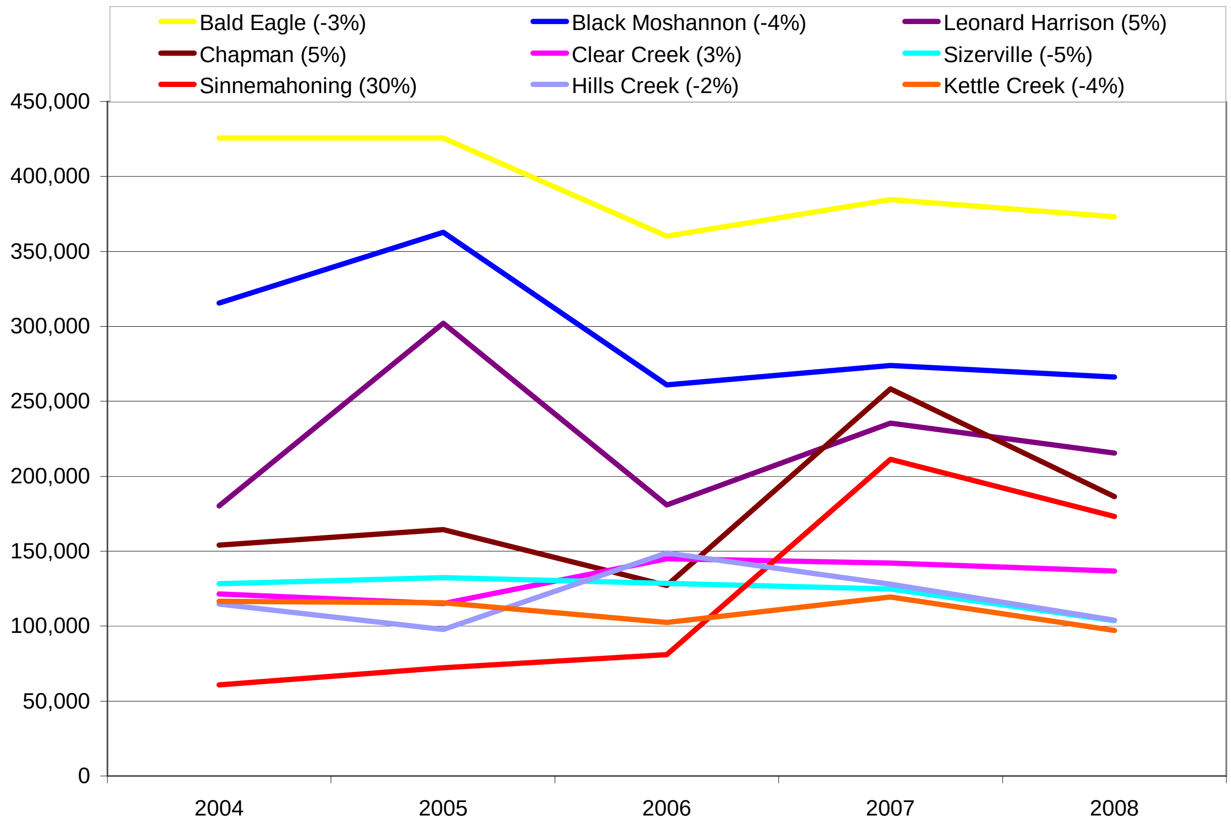
| | Modern Camping | Rustic Camping | Camping Cottage | Yurts | Group Tent Camping | Group Camping | Rustic Cabins | Modern Cabins | Picnicking | Driving | Beach | Free Pool | Paid Pool | Boating | Fishing | Environmental Education | Trail Use | Bicycling | Hunting | Winter Sports | Summer Sports | Special Events | Wildlife Viewing | Guests | Other | Total Visitors |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| KETTLE CREEK | | | | | | | | | 5% | -100% | | | | | | | 98% | 22% | | -59% | | | | | 227% | 5% |
| KINZUA BRIDGE | | -37% | | | | | | | -15% | -3% | -14% | | | -5% | -12% | -38% | -7% | -3% | -8% | 15% | -10% | | | -100% | | -4% |
| LEONARD HARRISON | | | | | -100% | | | | 12% | 31% | | | | | | -100% | | | 131% | -100% | | -100% | | | 13% | 13% |
| LITTLE PINE | | -100% | | | | | | | 3% | 2% | | | | | 55% | | 2% | 2% | -100% | 24% | | | | | 2% | 5% |
| LYMAN RUN | -11% | | -5% | | 25% | | | | 14% | -1% | 27% | | | 15% | 35% | -2% | 37% | 16% | 60% | 36% | | | | | 5% | 6% |
| OLE BULL | | | | | | | | | 29% | 7% | | | | | 0% | | 9% | 66% | 32% | -19% | | | | | -100% | 1% |

| | Modern Camping | Rustic Camping | Camping Cottage | Yurts | Group Tent Camping | Group Camping | Rustic Cabins | Modern Cabins | Picnicking | Driving | Beach | Free Pool | Paid Pool | Boating | Fishing | Environmental Education | Trail Use | Bicycling | Hunting | Winter Sports | Summer Sports | Special Events | Wildlife Viewing | Guests | Other | Total Visitors |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| PARKER DAM | 11% | -2% | | | -10% | | | 1% | 0% | 1% | | | | | 5% | -36% | 9% | 9% | -3% | -11% | | -100% | | | | 3% |
| PATTERSON | -6% | | | | -3% | | -2% | | 20% | 34% | 63% | | | | 177% | 16% | 15% | 14% | 24% | 20% | | -36% | | | 8% | 18% |
| RAVENSBURG | | -37% | | | | | | | 4% | 12% | | | | | | | 124% | | | 7% | | | | | | 8% |
| S.B. ELLIOT | -3% | | | | | | | | 7% | 10% | | | | | 11% | | 19% | | | | | | | | | 8% |
| SIZERVILLE | | -4% | | | | | -4% | | 17% | 20% | | | | | | | 16% | 17% | 20% | 15% | | -100% | | | 7% | 16% |
| DENTON HILL | -8% | | | | | | | -7% | 59% | 8% | | | | 73% | 34% | | 214% | 671% | 89% | 73% | | | 31% | | -20% | 30% |

| | Modern Camping | Rustic Camping | Camping Cottage | Yurts | Group Tent Camping | Group Camping | Rustic Cabins | Modern Cabins | Picnicking | Driving | Beach | Free Pool | Paid Pool | Boating | Fishing | Environmental Education | Trail Use | Bicycling | Hunting | Winter Sports | Summer Sports | Special Events | Wildlife Viewing | Guests | Other | Total Visitors |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| SINNEMAHONING | -17% | | | | | | | | -8% | -3% | | -12% | | | -1% | -5% | -11% | -4% | -9% | -9% | | -100% | | | -21% | -5% |
| U. PINE BOTTOM | | | | | | | | | -100% | -1% | | | | | -2% | | | | | | | | | | | -7% |
| Totals | -2% | -19% | 10% | 4% | -10% | | -7% | -4% | 3% | -3% | -5% | -7% | 2% | -1% | 11% | -3% | 5% | 12% | 12% | 1% | 33% | -5% | 31% | 122% | 3% | 3% |

*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2009) , Econsult Corporation (2009)*

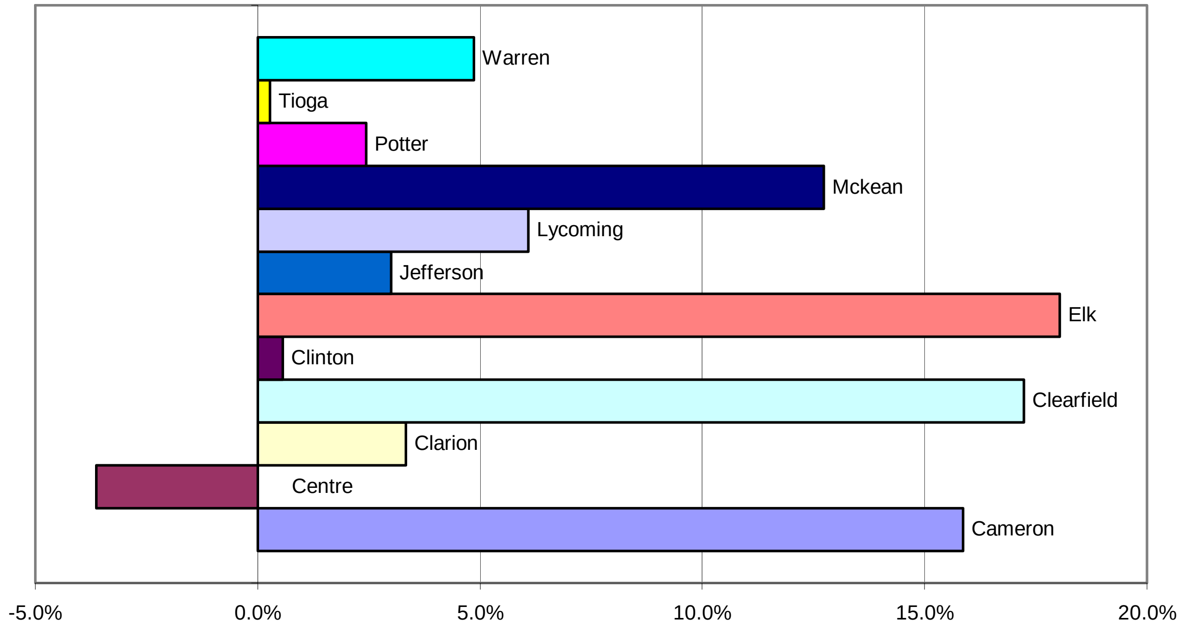
Figure L.3 – Attendance for the Top Ten State Parks within PA Wilds (CAGRs in Parentheses)[70]




*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2009), Econsult Corporation (2009)*

[70] Does not include attendance figures for Cook Forest State Park, which was in the midst of changes in counting methodology.

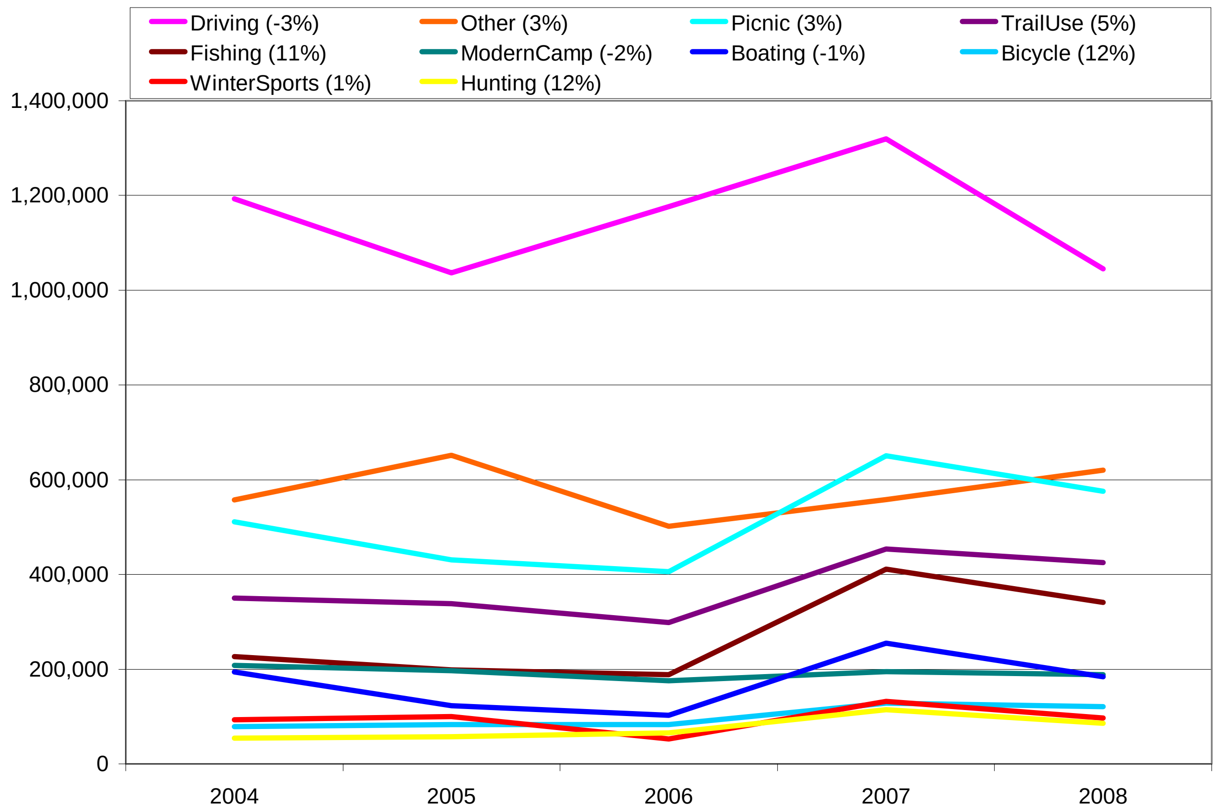
Figure L.4 – 2004-2008 State Park Attendance CAGR within PA Wilds by County
Elk County Up 18+%; Centre County Down 3+%[71]




*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2009), Econsult Corporation (2009)*

[71] Attendance numbers at state parks were assigned to the main county in which they are located, unless they straddle two or more counties, in which case attendance numbers were apportioned 50/50 or 33/33/33.

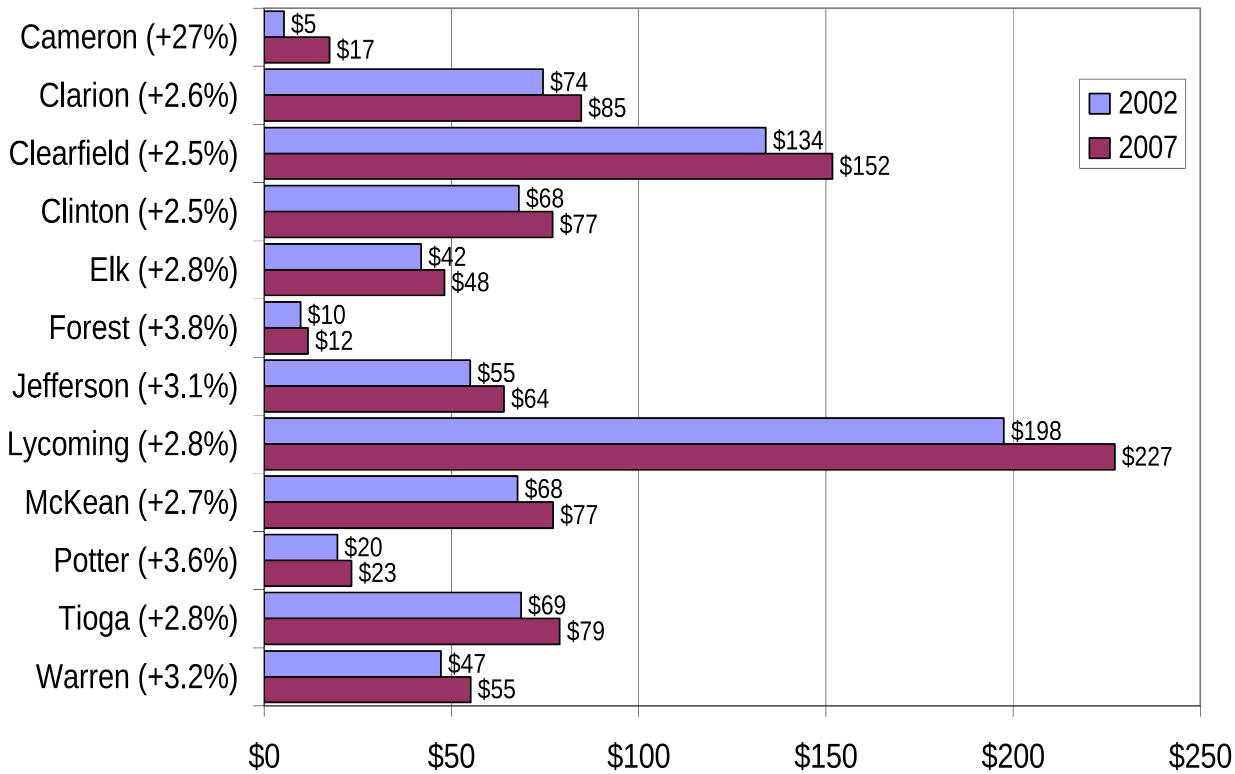
Figure L.5– Attendance for the Top Five Activities at State Parks within PA Wilds (CAGRs in Parentheses)




*Source: Commonwealth of Pennsylvania – Department of Conservation and Natural Resources (2009) , Econsult Corporation (2009)*

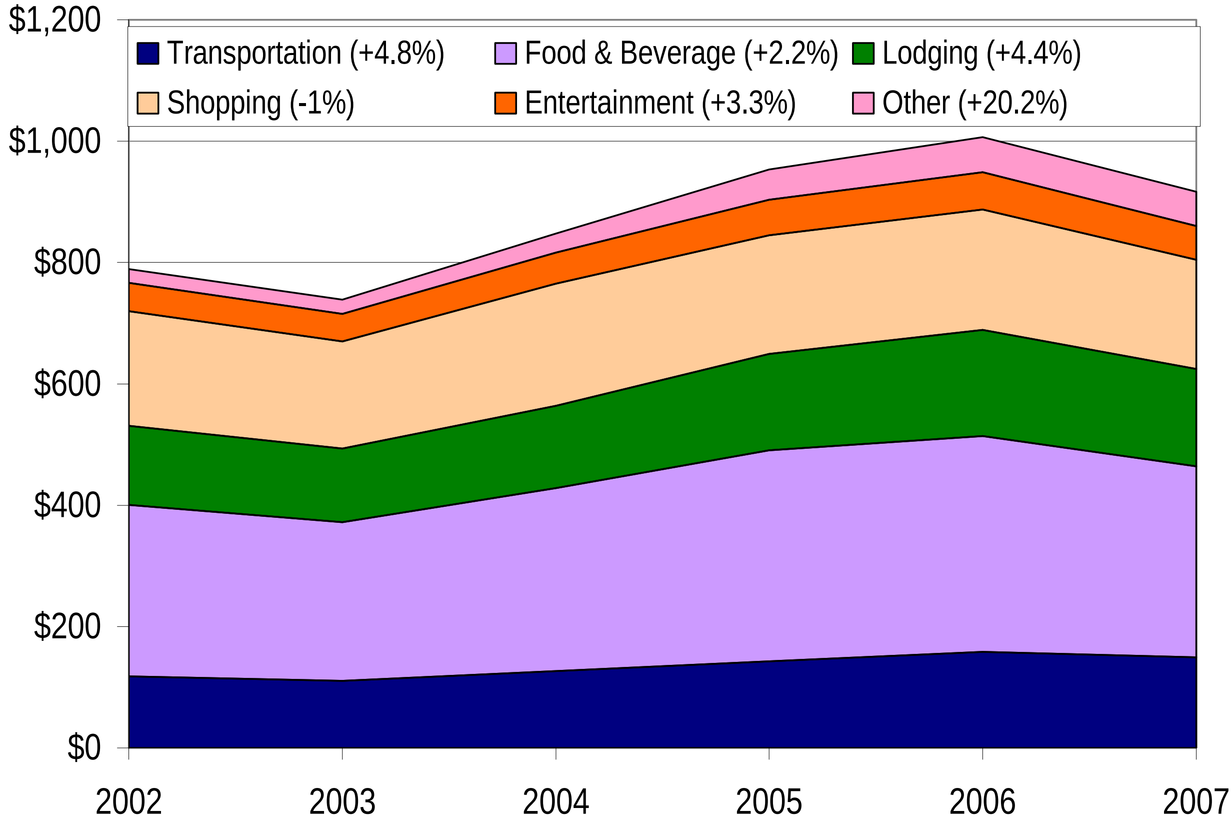
## Appendix M – Additional Visitor Spending Data

Figure M.1 – Estimated Visitor Spending in PA Wilds by County (in $M County CAGRs in Parentheses): All Counties Enjoyed Positive Growth in Visitor Spending




*Source: Global Insight / DK Shifflet & Associates (2008), Econsult Corporation (2009)*

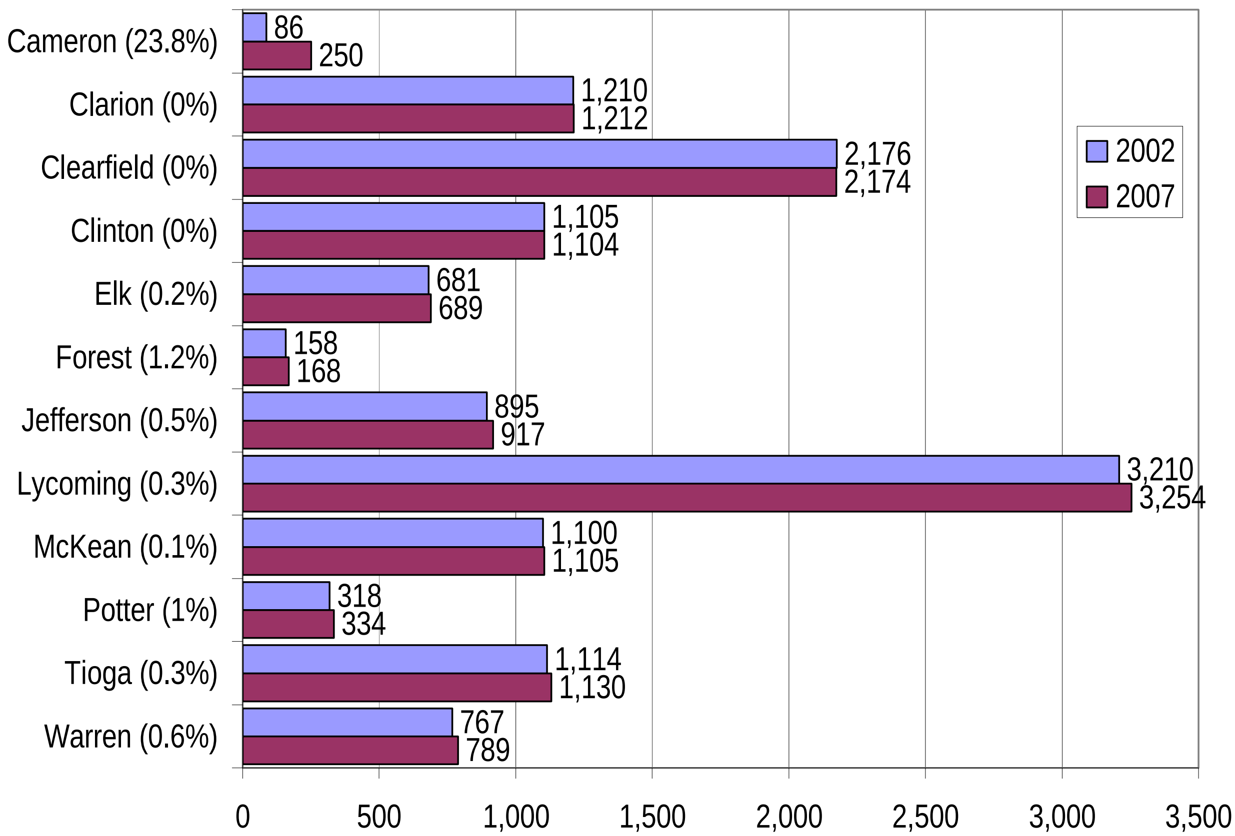
Figure M.2 – Estimated Visitor Spending in PA Wilds by Spending Category (in $M)
Overall 3.0% Average Annual Increase from 2002 to 2007 (Category CAGRs in Parentheses)




*Source: Global Insight / DK Shifflet & Associates (2008), Econsult Corporation (2009)*

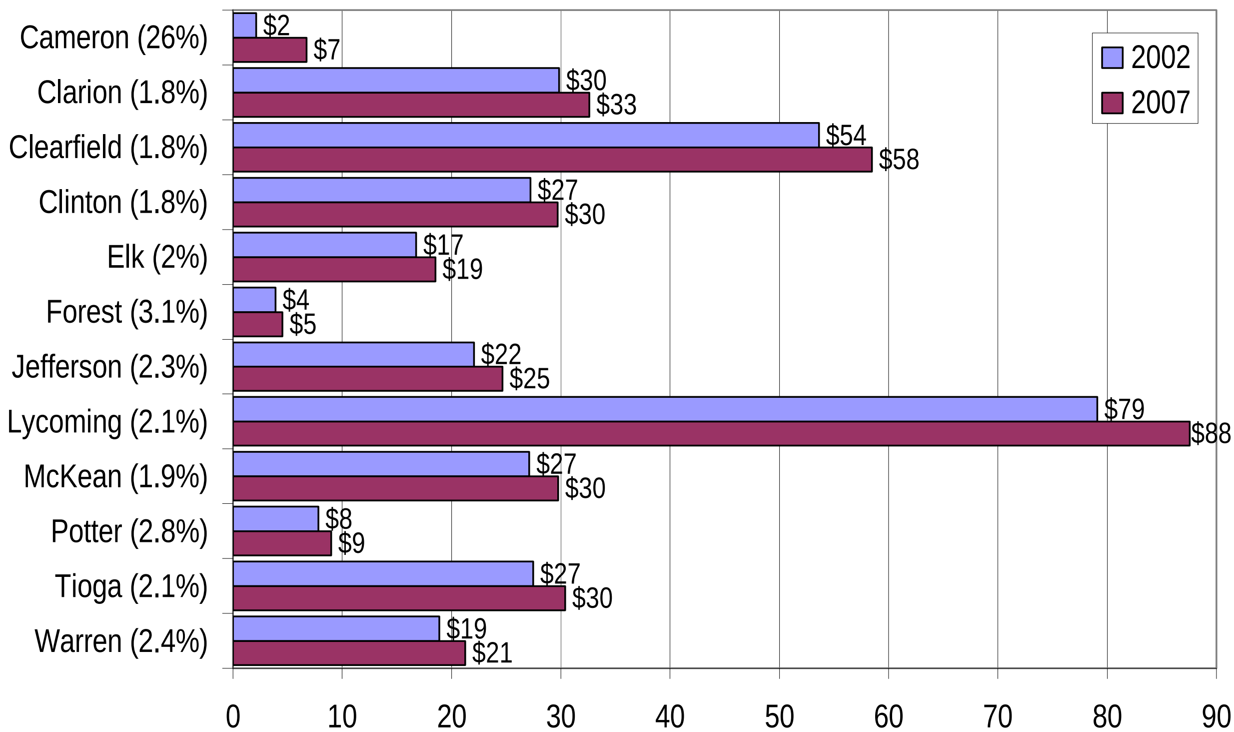
# Appendix N – Additional Tourism Employment and Earnings Data

Figure N.1 - Estimated Direct Tourism Employment in PA Wilds by County (County CAGRs in Parentheses): All Counties Enjoyed Stable to Modest Growth in Tourism Employment



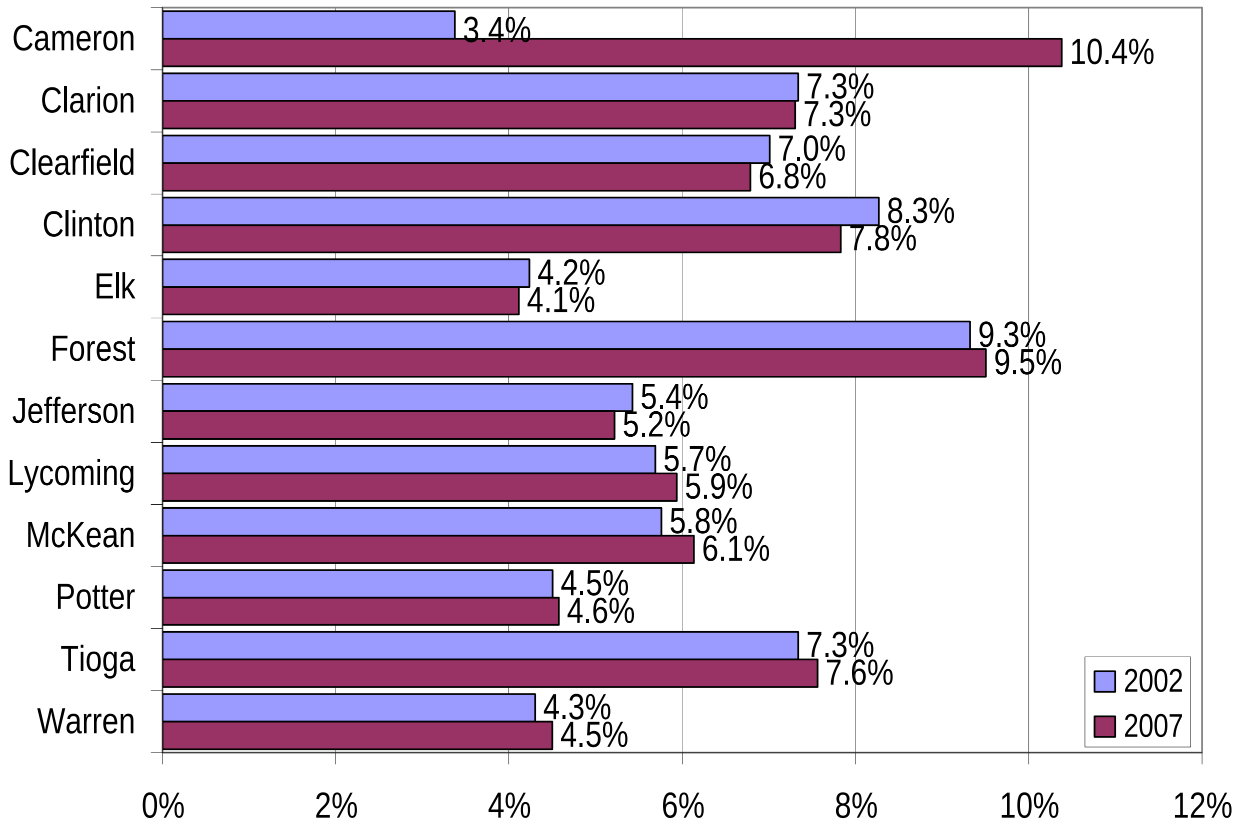

*Source: Global Insight / DK Shifflet & Associates (2008), Econsult Corporation (2009)*

Figure N.2 – Estimated Direct Tourism Earnings in PA Wilds by County (in $M; County CAGRs in Parentheses): All Counties Enjoyed Positive Growth in Tourism Earnings



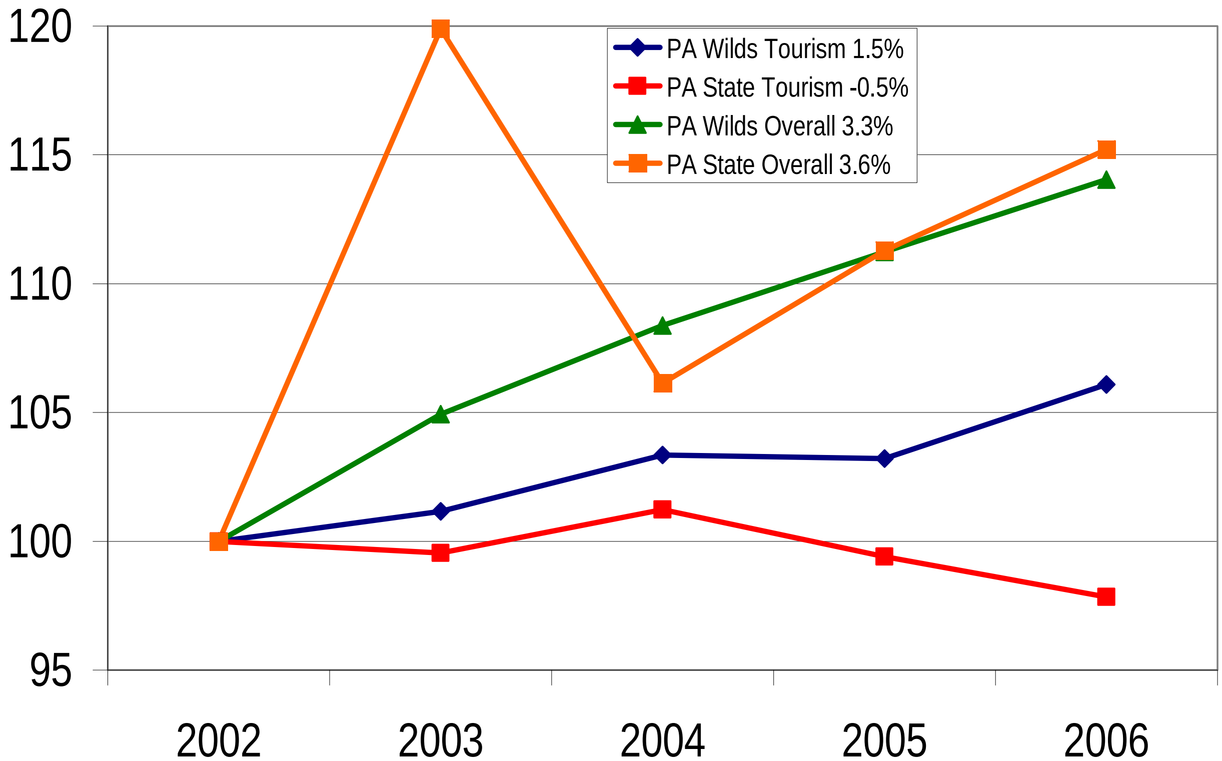

*Source: Global Insight / DK Shifflet & Associates (2008), Econsult Corporation (2009)*

Figure N.3 - Estimated Direct Tourism Employment as Share of Total Employment in PA Wilds by County: Most Counties Saw Tourism Increase as a Share of Total Employment




*Source: Global Insight / DK Shifflet & Associates (2008), Econsult Corporation (2009)*

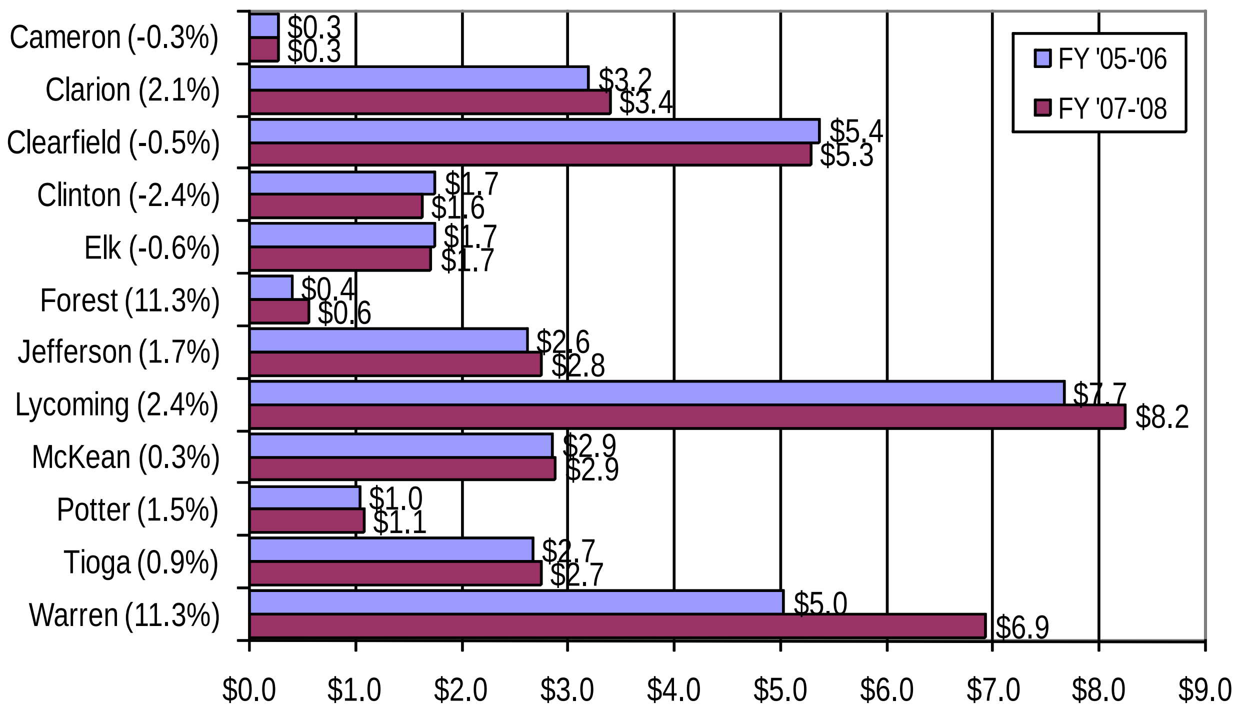
Figure N.4 – Estimated Direct Average Annual Salary, PA Wilds vs. PA State (Indexed: 2002 = 100): PA Wilds Tourism Exceeds PA State Tourism Growth Rate, PA Wilds Overall Trails PA State Overall Growth (CAGRs in Parentheses)




*Source: Global Insight / DK Shifflet & Associates (2008), US Census Bureau (2008), Econsult Corporation (2009 , US Travel Association (2009)*

## Appendix O – Additional Tourism Related Tax Revenue Data

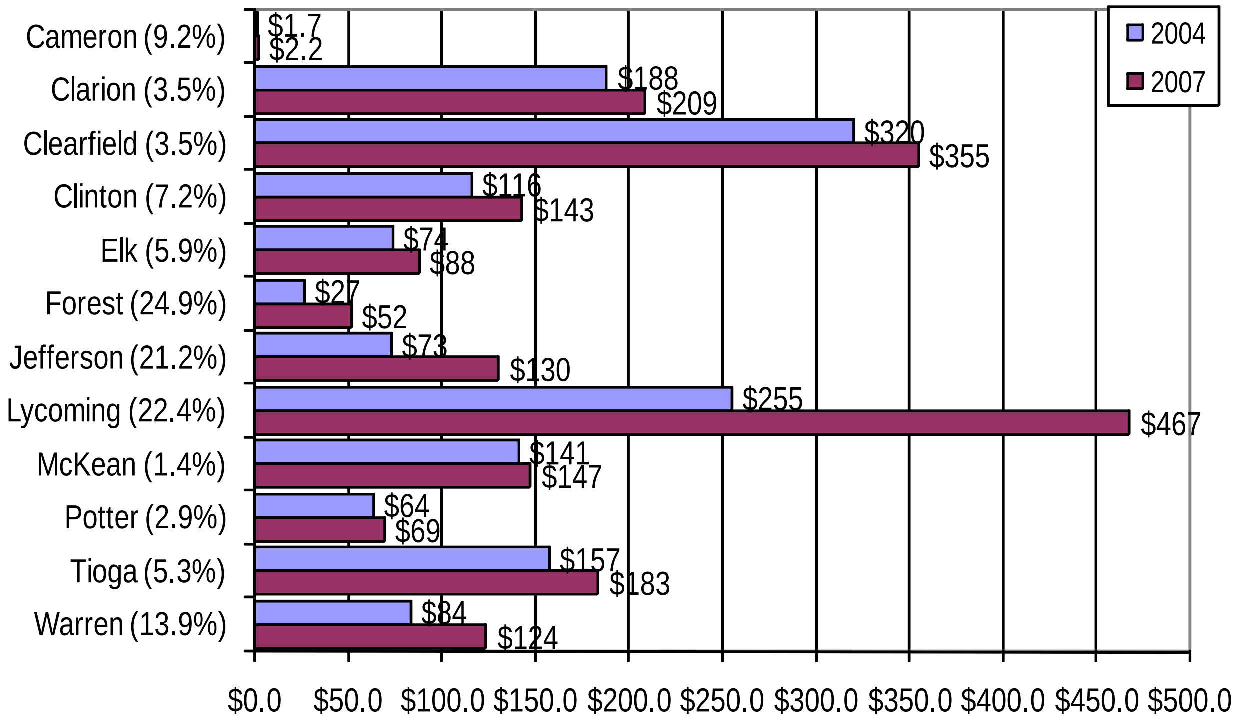
Figure O.1 – Estimated State Sales Tax Revenues for All Travel Related NAICS Codes in PA Wilds by County (in $M): Overall 2.5% Average Annual Increase from 2005 - 2006 to 2007 - 2008[72] (CAGRs in Parentheses)




*Source: Pennsylvania Department of Revenue (2008), Econsult Corporation (2009)*

72 Cameron County data is for FY '05-'06 to FY '06-'07.

Figure O.2 – Hotel Room Tax Revenues in PA Wilds by County (in $K)
Overall 9.5% Average Annual Increase from 2004 to 2007 (County CAGRs in Parentheses)




*Source: Global Insight / DK Shifflet & Associates (2008) , Econsult Corporation (2009)*

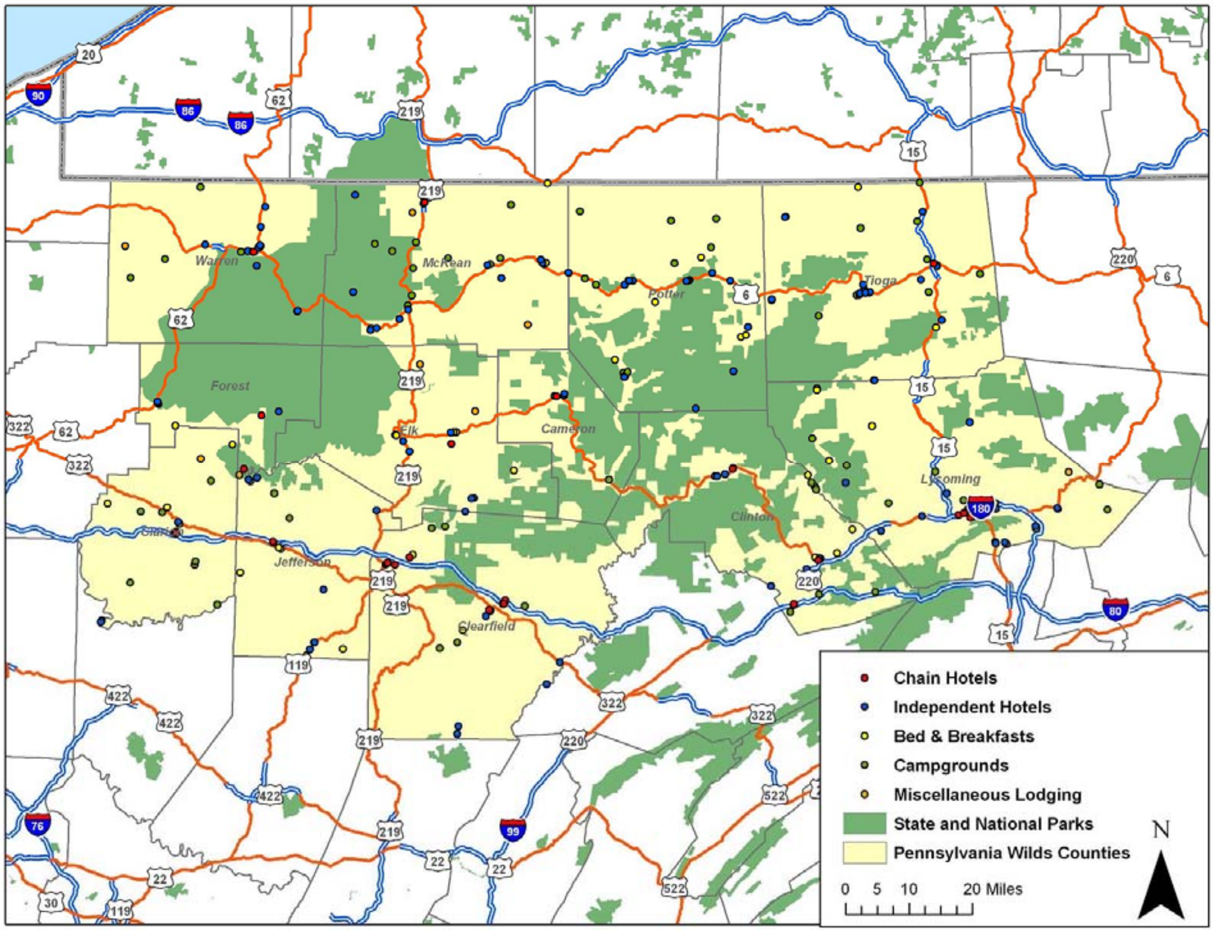
# Appendix P – Additional Lodging Data

Figure P.1 – Lodging Additions and Subtractions in PA Wilds: Big Gains in Campgrounds and Chain Hotels

| Category | # in 2003 | # in 2007 | Net change 2003-2007 | # subtracted since 2003 | # added since 2003 |
|---|---|---|---|---|---|
| B&B | 63 | 53 | -10 | 30 | 20 |
| Camp | 94 | 115 | +21 | 25 | 43 |
| Misc | 20 | 20 | 0 | 13 | 13 |
| Chain | 31 | 43 | +12 | 7 | 19 |
| Hotel | 144 | 127 | -17 | 55 | 38 |

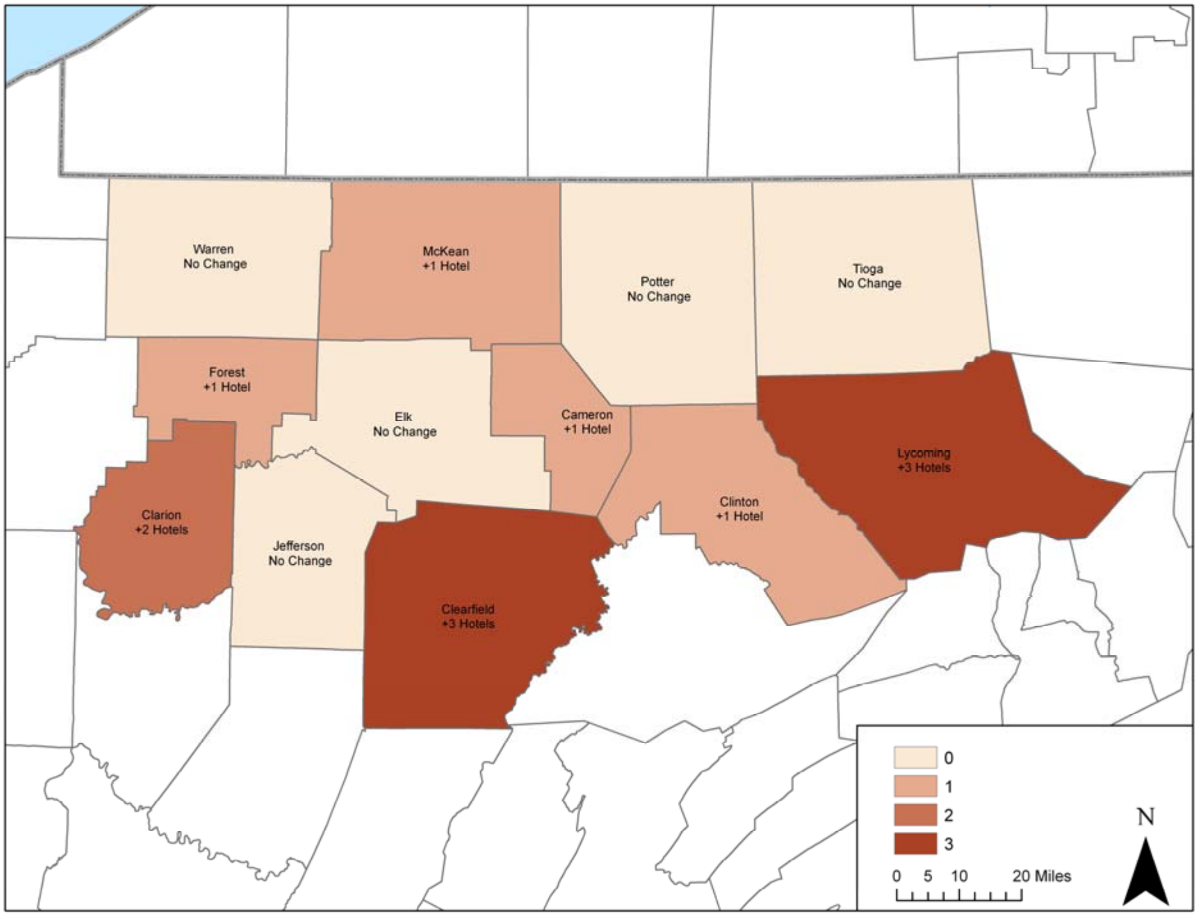
*Source: ESRI (2003, 2007), Econsult Corporation (2009)*

Figure P.2 – Lodging Establishments in PA Wilds by County in 2007
Chains Clustered Near More Densely Populated and Heavily Trafficked Areas




*Source: Info USA (2008), Wharton GeoSpatial Initiative (2009)*

Figure P.3 – PA Wilds Change in Chain Hotels 2003 to 2008




*Source: Wharton GeoSpatial Initiative (2009)*