

Community and Economic Impact of the Pennsylvania Wilds

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Abstract

The Pennsylvania Wilds is a place-based brand and destination region in north central Pennsylvania covering 13 entirely rural counties. It is entering its third decade since its inception as an official tourism region and conservation landscape. A comprehensive mixed-methods research study conducted in 2022 indicates that this region is an effective place-based tourism brand. Stakeholder groups of visitors, businesses, and residents recognize the PA Wilds brand attributes of environmental stewardship and economic development. Resident and business stakeholders indicated pride in belonging to the region. These overall positive impacts of the brand indicate that brand management in the PA Wilds is well executed. The PA Wilds Center is the de facto brand manager of the region, as established through an intergovernmental cooperative agreement. The study team's analysis concluded that the PA Wilds Center has multidimensionally satisfied and exceeded 15 established industry best practices for place-based tourism branding and development. Over the 10 years analyzed in this study (2011-2021), the region experienced a population decline. Increased regional economic contributions from the tourism industry paralleled this decline. In short, the population decreased in this period while the positive impacts of tourism increased. With the policy actions delineated in this report, the rural residents of this region can enjoy further positive economic and community dividends from the state's initial investment in this regional strategy.

Keywords: rural tourism, outdoor recreation, nature-based tourism, entrepreneurial ecosystems, community economic development, regional place-based branding.

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Executive Summary

The following report summarizes a comprehensive mixed-method study of the community and economic impacts of the Pennsylvania Wilds. The Pennsylvania Wilds is a place-based brand and destination region in north central Pennsylvania and is entering its third decade since inception. This region is comprised entirely of rural counties. At the center of the brand is the PA Wilds Center, whose stated organizational mission is to “*integrate conservation and economic development in a way that strengthens and inspires communities in the Pennsylvania Wilds.*”

A study team from Pennsylvania Western University examined the PA Wilds brand effectiveness and regional economic impacts over a 10-year period from 2011-2021. The study sought to assess brand effectiveness as complemented by community and economic indicators in the region.

The study used secondary economic data, a social survey, and stakeholder interviews to support its assessments. The study team concluded that the economic contributions of the tourism industry over the past 10 years have increased while the region's population overall has decreased. The PA Wilds brand demonstrates brand effectiveness through brand recall, conversion, attribute recognition, and mission-values resonance. Furthermore, resident and business stakeholders identify pride in being part of the PA Wilds, indicating a positive community impact. This effectiveness and pride are a clear result of the work of the PA Wilds Center, which in part connects the work of the Pennsylvania Department of Conservation and Natural Resources (DCNR) and the Pennsylvania Department of Community and Economic Development (DCED).

To enhance effectiveness, the study team recommends a market penetration strategy, which means the PA Wilds should work toward increasing these positive impacts using its existing tourism markets and products. This strategy will be more successful through the following policy actions implemented by the identified responsible parties in Table 1.

Table 1

Policy Category	Action	Responsible Party
Demand and Revenue Management		
Marketing and promotion		
	Public relations with local governments and regional Destination Marketing Organizations (DMOs)	Department of Community and Economic Development (DCED) Office of Marketing, Tourism, and Film
	High production value marketing assets	DCED Office of Marketing, Tourism, and Film
Information provision and network development		
	Regional Tourism Orientation and Directional Signage (TODS) sign pilot program	PA Tourism Signing Trust
	Closing the digital divide through broadband	Pennsylvania Broadband Development Authority (PBDA)
Supply and Cost Management		
Market Regulation		
	Monitoring the informal lodging sector	PA Wilds Center
Market Research and Planning		
	Provision of accurate and current tourism data	DCED Office of Marketing, Tourism, and Film
	Succession planning for leadership	PA Wilds Center Executive Leadership Team
Taxation		
	Occupancy tax transparency and study	PA Department of Revenue and DCED
Education and Training		
	Public higher education recreation and tourism programs	Pennsylvania State System of Higher Education (PASSHE)
Investment		
	Stable budget line items dedicated to the PA Wilds Center	DCED and the Department of Conservation and Natural Resources

The following report highlights the data that informed these policy considerations. Subsequently, the report provides more details and justification for each recommendation.

The Pennsylvania Wilds, a place-based regional tourism brand, has had positive community and economic impacts from 2011 to 2021. Implementing this report's policy recommendations will support continued economic growth through tourism to support improved quality of life for the rural residents of the region.

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Introduction

The research sought to determine the community and economic impacts of the Pennsylvania Wilds, a state-designated tourist region and conservation landscape in north-central Pennsylvania. The study focused on the first 10 years of the PA Wilds' existence (from 2011-2021). The research involved a mixed-methods approach using existing economic data, social survey research, stakeholder interviews, and thematic content analysis. These methods yielded project findings that included visual displays of data where appropriate. The report's final section summarizes the researchers' public policy recommendations. The researchers determined that the Pennsylvania Wilds is an exemplary place-based initiative corresponding to the region's positive community and economic impact. With the appropriate public policy attention, the Pennsylvania Wilds will continue to enhance this positive impact to benefit Pennsylvania's rural residents.

Background and Context

The Pennsylvania Wilds brand was initially established in 2003 under a Declaration of Principles for the Pennsylvania Wilds (pawildscenter.org, 2021). This declaration established the brand's mission: "*Celebrate and nurture our natural wonders by connecting people with nature.*" These actions were followed by establishing a regional tourism marketing partnership, launching the Pennsylvania Department of Conservation and Natural Resources' (DCNR) Conservation Landscape Program, with the Wilds as a model, and becoming one of Pennsylvania's 11 official state tourism regions. Therefore, several local, state, and national organizations share the planning, development, and administration of cultural and natural assets in the Wilds, creating a complex policy landscape.

Nature-based tourism destinations face the problem of balancing often-competing goals. These regions face the constraint of "*the fluctuating nature of policy orientations between an emphasis either on economic development or on nature protection.*" (Heslinga, 2020, p. 4). By design, this challenge is faced by having the state's economic and natural resource entities as regional partners through a cooperative agreement established in 2006. The Pennsylvania Department of Community and Economic Development (DCED) and DCNR share the primary state government roles with the PA Wilds and its Planning Team as a stewardship-focused hub. DCNR is the land management entity. DCED provides business development and local planning assistance, in addition to serving as a promotional entity. In this sense, DCNR is the policy entity that cares for the nature-based tourism product, and DCED markets that product. The PA Wilds Center is the functional brand manager and the named primary non-government partner joining the state entities in these efforts. A central problem faced by the region is leveraging this overlap between state entities in a way that can promote tourism to benefit economic development for its citizens.

The Pennsylvania Wilds has a complex policy structure. The Wilds consists of one of eight DCNR conservation landscapes and one of 11 tourism regions in Pennsylvania (See Figure 1). The Wilds also shares boundaries with the Lumber Heritage Region, one of DCNR's 12 Heritage Areas, and four counties in the Wilds are also part of the Route 6 Heritage Area. It is comprised of the 13 regional counties of Warren, McKean, Potter, Tioga, Lycoming, Clinton, Elk, Cameron, Forest, Clearfield, Clarion, Jefferson, and northern Centre. This nature-and-heritage-based tourism region is represented visually by a licensed place-based logo (See Figure 1).

Figure 1



A logo is only one visual component of the multi-faceted workings of a place brand. For example, the Pennsylvania Wilds encompasses developed town centers and natural, rural, and agricultural areas. It contains extensive natural and cultural tourism assets with a unique regional character across six distinct sub-landscapes and eight structured journeys. The PA Wilds extends beyond a destination marketing effort into a dynamic entrepreneurial landscape and ecosystem, including a value chain network, commerce platform, lifestyle marketing, professional development, capital sources, and stewardship administered by the PA Wilds Center for Entrepreneurship (Pawildscenter.org, 2021). Therefore, the research considered the totality of features the brand represents and not simply its logo. The researchers placed this consideration within the complex policy context of the region to evaluate community and economic impacts attributable to or coincident with the brand.

Review of relevant literature

Sense of place is the culmination of one's thoughts, feelings, and expectations about a region or destination. When these thoughts, feelings, and expectations about a place's identity are strategically cultivated and expressed, they become a place brand, partly expressed visually through color palettes, logos, and tag lines (Morgan et al., 2011). Tourism is a product that is produced and consumed simultaneously at the point of the destination (Fletcher et al., 2018). Therefore, the prospective customer cannot "try before they buy." An effective place-based brand must

reach potential visitors where they make travel decisions, and where they live and work

(e.g., their *usual environment*) (Fletcher et al., 2018). The perception of the brand extends after their experience has ended.

“The place is the key creator of this experience, which begins well before the travel-to and ends well after the travel-back.” (Foroudi, 2021, p. i)

This reach makes branding a critical potential generator of tourism demand linking place brands to economic development (Gunn, 2010, Hall 2008, Pike, 2020).

The success of a place brand is measured by the recognition of existing and potential visitors, visitor conversion, penetration, awareness, stakeholder satisfaction, and economic indicators attached to tourism development, such as job creation and other economic indicators (Gunn, 2010; Fletcher et al., 2018). Place branding is a long-term effort; therefore, its impact should be regularly and objectively measured (Hall, 2008). This measurement must acknowledge that local and regional governments often use tourism development, with place branding, as a cure-all for larger issues of failing economies and outmigration (Gunn 2010). A brand itself is not tourism development but is part of a greater process (Foroudi, 2021). When brand recognition is widespread, new visitors are attracted, and existing ones return because the brand delivers on its message and has reached satisfactory effectiveness (Foroudi, 2021). The demand-supply development hierarchy stimulates new tourism businesses, which drives new demand, and the cycle continues positively for all involved (Gunn, 2010).

Two widely known success stories of place branding are the tourism destinations of Las Vegas and New York. While urban destinations, these are apt examples, given how recognizable they are. “*What Happens Here Stays Here*” has been integrated into the global vernacular. The official destination marketing organization (DMO) of Las Vegas, the Las Vegas Convention and Visitors Authority, created this tagline (LVCA, 2021). Another example is the classic graphic design of Milton Glaser's “I ♥ NY.” The state Department of Economic Development expressly commissioned this 1979 registered trademark to help the city attract tourism when the city was deemed unfriendly and unsafe (NYDED, 2021). It is now a world-recognized trademark that serves its original purpose and generates millions for the state annually in licensing revenue. Effective place branding is a proven driver of tourism demand and a known alternative revenue generation asset (Pike, 2021).

The researchers synthesized regional tourism planning and development literature, both academic and practitioner, to build a conceptual framework of effective place-based tourism development and brand management activities and best practices. This process resulted in a list of actions and activities that are attributed to successful regional tourism place-based branding. This synthesis created a list of 15 main themes drawn from researchers and trusted practitioner leaders such as the Organization for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO). Through this literature synthesis, the researchers developed 15 actions or activities that are widely accepted as necessary best practices that apply to place-based branding and regional tourism development. The brand manager should:

- Apply for external funding.
- Catalog and manage knowledge.
- Communicate goals, objectives, and actions constantly and transparently.
- Create community engagement.
- Facilitate an organizational framework, including leadership and decision-making structures.
- Encourage entrepreneurship.
- Establish quality standards and controls.
- Focus on natural and cultural asset stewardship.
- Implement and apply brand standards.
- Inventory tourism assets
- Promote tourism assets.
- Role model innovation.
- Support innovation.
- Support private enterprise.
- Support the celebration of place.

(Cleave, 2016; Fletcher et al., 2018; Foroudi, 2021, Gunn, 2010; Kotler et al., 2008, Kotler, 2017, Morgan et al., 2011, OECD, 2020; OIA, 2017, Pike, 2020, Restrepo, 2019; Sullivan 2014).

These themes were used as a theoretical construct for the qualitative analysis components of the research to determine the brand's and its management's effectiveness.

One goal of the research was to make a data-driven development opportunity recommendation for the PA Wilds. The development opportunities of a destination can be subdivided by making changes or staying the same on either the product or market side of the destination. The tourism market is comprised of those who visit from outside the local area (i.e., the tourists) (Fletcher et al., 2018). The tourism product includes all the things the visitor consumes, generally subdivided into attractions, accommodations, and other services supporting visitors. As the world's largest industry and supersector, tourism is easily approached by this fundamental dichotomy of tourism product and market or tourism supply and demand (Fletcher et al., 2018). From this dichotomous view, there are four simplified development opportunities available to destinations (See Figure 2):

- Penetration
 - Keep current markets and products.
- Market development
 - Change the target market (i.e., the visitors to the destination).
- Product development
 - Change the product (i.e., what the visitors see and do at the destination).

- Diversification
 - Change the market and product.

The matrix provides a simplified framework that distills the complexity of a tourism system, where tourism is a supersector of the economy, into four distinct options. This matrix was used as a theoretical construct to guide the analysis, which then informed policy recommendations.

Figure 2 (Public domain and Canva.com)



The dichotomy of the tourism system was also the analytical construct used to extract concrete policy actions from the merged data sets. Therefore, an additional theoretical underpinning of the study was the organization of policy instruments and subsequent recommendations against the backdrop of this dichotomy.

According to Fletcher et al., 2018, *“There are primarily five policy instruments used by governments to manage demand:*

- marketing and promotion;
- information provision and network development;
- pricing;
- controlling access; and
- security and safety.

The methods that are frequently used by governments to influence the supply side of the tourism industry are:

- land-use planning and environmental control;
- building regulations;
- market regulation;
- market research and planning;
- taxation;
- ownership;

- education and training; and
- investment incentives (p. 224).

In summary, when considering the totality of the theoretical frameworks of the study's data analysis, conclusions, and resulting policy recommendations, the research can be viewed in this way:

Construct One: Best Practices

What things should be done for effective brand management? Is the PA Wilds Center (i.e., the brand manager) doing those things based on the evidence in the data?

Construct Two: Development Opportunity Matrix

Based on the quantitative and qualitative data analysis, which of the four opportunities is best for the future of the brand?

Construct Three: Typical Policy Instruments

Given the analysis using constructs one and two, what policy actions are recommended for the PA Wilds, and who is responsible for each of those actions?

Justification of project purpose and need

The PA Wilds has been the subject of numerous case studies and best practice reports from state and national organizations; it has not undergone a comprehensive impact study since 2010 and 2012. The last full case study was conducted in 2009 by OMG Center for Collaborative Learning. In 2010, the region's identity was in its relative infancy. The PA Wilds was also included in the Appalachian Regional Commission's Case Studies in Economic Resilience, focusing on McKean County instead of the 13 county region. Since its inception, DCNR and DCED have shared investment in infrastructure development, facilities upgrades, business financing, community revitalization programs, and marketing. This Center for Rural Pennsylvania-funded study was needed to comprehensively analyze the region's community and economic impacts, now in its second decade.

The PA Wilds has been featured in many state and regional studies. It has been nationally recognized as a benchmark for success by planners, policymakers, designers, and others in the professional realm of place branding, land use, regional planning, economic development, and destination marketing. For example, the region has been commended by organizations, such as the National Governor Association's Center for Best Practices, American Planning Association Pennsylvania Chapter, Appalachian Regional Council, the Outdoor Recreation Learning Network, and the Outdoor Industry Association, for successful design, collaboration, and stewardship. Professional and community organizations recognize the PA Wilds as a standard of excellence in the state, region, and nation. Given this documented success, this study did not seek to re-establish well-deserved praise. However, it sought to compare this recognition across a

larger audience, including existing and potential visitors, residents, and tourism stakeholders. Additionally, this research aimed to examine these claims within an assigned 10-year timeline and determine correspondence with community and economic impacts.

Project Goals and Objectives

The literature supports that place-based branding effectively contributes to community and economic development. Numerous studies from outside sources have revealed that the Pennsylvania Wilds is executing its place-based brand well, as detailed in this report's references section and cataloged by the PA Wilds Center via <https://www.pawildscenter.org/programs-and-services/studies-reports/>. Within these existing reports and the theoretical framework discussed above, the study had three main goals, which were satisfied by a series of subsequent objectives.

Goal One: Analyze the effect of Pennsylvania Wilds branding on county, community, and economic conditions in the Pennsylvania Wilds over the 10-year period of 2011 to 2021.

The objectives were to conduct a(n):

1. Economic impact analysis using public sources and IMPLAN data.
2. Web-based survey piped for product, market, and resident stakeholders' input.

Goal Two: Complete a case study analysis¹ of the Pennsylvania Wilds to identify if brand management is effective.

The objectives were to conduct:

1. Stakeholder interviews with primary policy stakeholders.
2. Thematic content analysis of existing and new qualitative databases.

Goal Three: Provide public policy implications and relevant recommendations.

The objectives were to:

1. Use the findings from the economic impact analysis, web-based social survey, stakeholder Interviews, and thematic content analysis² to develop informed public policy recommendations.
2. Summarize the project's methods, findings, and conclusions in a written report.

¹ Case study is used in this sense as using something from which to make generalizations. In this study, the entire region of the PA Wilds is the regional place-based branding case.

² Thematic content analysis is a method of taking unstructured textual or visual information and analyzing it for observed themes or patterns.

Methods

Given that many sources in the place-making and branding field have already recognized the performance of the PA Wilds and the PA Wilds Center as the de facto brand manager, the researchers sought to consult with an extended group of stakeholders. The researchers subdivided stakeholder groups into the following categories, which follow the analytical framework of the tourism system dichotomy established in the literature review section of this report.

PA Wilds Tourism Product Stakeholders:

- Creators, experience makers, and other entrepreneurs.
- Official destination marketing organizations (DMOs, CVBs, TPAs).³
- Nature-based, adventure, agritourism, and other rural tourism operators.⁴
- Policy influencers and makers.
- Other non-rural tourism operators.

Tourism Market Stakeholders

- Existing and potential visitors to the PA Wilds.
 - Tourists and recreationists (in-state, out-of-state, international).

Resident Stakeholders

- Residents of the counties in the PA Wilds.

Through an inductive approach,⁵ the research combined qualitative and quantitative methods to achieve the desired outcomes. Therefore, there are four elements in the scope of work:

- Economic impact analysis using IMPLAN.
- Web-based survey for stakeholder input.
- Stakeholder interviews with primary policy stakeholders.
- Thematic content analysis of existing and new qualitative data.

The researchers developed these into an action step paired with one or more of the expected research outcomes, which will be discussed in the subsequent sections of the report.

Economic Impact Analysis Using IMPLAN

Through an economic impact analysis, the researchers assessed the PA Wilds Initiative's effects on the region's economy and whether it has achieved its intended results. This multi-faceted economic impact included employment, earnings, output

³ Convention and Visitors Bureau (CVB), Tourism Promotion Agency (TPA).

⁴ This includes tourism transportation, accommodation, facilities/services, and attractions.

⁵ Induction means the researcher starts with data observations to draw conclusions, instead of beginning with a hypothesis that one tests as true or untrue.

(business revenue), and value-added measures. While output is the broadest measure of economic impact, analyzing other factors is necessary for a complete picture. Economic impacts are both direct (those created directly from the policy) and indirect (those that happen due to secondary economic activities that arise because of the direct impact). Because of these indirect factors, the economic impact can be additive over time.

Economic conditions in the Wilds over the 10-year period were assessed using Impact Analysis for Planning (IMPLAN). IMPLAN is a commercially available application and input-output data modeling system. It is the most used economic impact and contribution analysis model in the U.S. (Crompton, 2020; IMPLAN, 2019). The selected IMPLAN data pack included Pennsylvania counties, congressional districts, state totals, and U.S. totals. The IMPLAN State Explorer Package was used to compare Warren, McKean, Potter, Tioga, Lycoming, Clinton, Elk, Cameron, Forest, Clearfield, Clarion, Jefferson, and other state performance indicators back to 2011. The northern portion of Centre County was not included in the analysis since the data in ZIP Code parcels through IMPLAN was too limited.

For this project, industry contributions have been determined using the methodology of Miller and Blair (2009). This method estimates the value of an industry or group of industries in a region at their current production levels. Using the IMPLAN input-output analysis software, the researchers determined the direct contribution of an “industry scheme” or group of industries to the region regarding employment, output, income, and indirect and induced effects.

The economic impact analysis used IMPLAN Industry Schemes, which are based on the National Industry Classification System (NAICS) codes but “represent differing levels.” Federal agencies use these to classify businesses when collecting, analyzing, and publishing statistical data about the U.S. economy (IMPLAN, 2019). The impact analysis considered overall economic impact indications and delved into three broad industry classifications that characterize the PA Wilds tourism product: Accommodation, Amusements, and other Alcohol products. The report capitalizes these words because they correspond to the IMPLAN Industry Scheme as a proper noun, not the words accommodation, amusement, and alcohol as common nouns.

Within the context of the IMPLAN Industry Schemes, these three classifications were the most compatible in describing the characteristics of lodging, attractions, outdoor and commercial recreation, and other tourism assets of the destination. The study team used the Alcohol industry scheme to completely capture breweries, wineries, and distilleries as tourism products since these were not part of the Amusements category, which otherwise captured other tourism and recreation assets of the PA Wilds.

Web-based Survey for Stakeholders' Input

The study used social survey research to estimate the impact of the PA Wilds brand on 1) tourism product stakeholders, 2) visitors (tourism market stakeholders), and 3) residents. One survey with self-guided qualifying questions, question forwards, and

question pathways channeled each target audience. The survey was designed, published, and hosted using Survey Monkey Premier.

Each survey channel focused on brand awareness and, where appropriate, brand conversion (i.e., did a user "look n' book"). The survey presented the PA Wilds brand attributes and mission-vision characteristics, using the wording and phrasing of the PA Wilds Center promotional materials as part of each question. This phrasing explains the survey's question wording and categories. In short, the survey used the PA Wilds Center's language to determine mission-vision resonance. It, therefore, measures the attributes as presented by the brand manager, the PA Wilds Center. The study team sent the survey link via email invitation and social media channels (such as Facebook, Twitter, Reddit, and LinkedIn) with an embedded link to the survey form. See the methodological notes and the complete survey in Appendix 1 and Appendix 3.

The survey methodology included extensive attention to securing an appropriate sample size. This study reports on a response number and not a response rate. The sampling was a non-probability strategy since the entire population is not easily defined, and there is no readily available sampling frame. This strategy is different from a response rate. Response rates are only achievable in probability sampling, where the population is known and easily defined. This study used a non-probability sample typical of recreation and tourism studies (Veal, 2018). The study sample is not proportional to the total resident or business population of the PA Wilds. The survey responses are representative but cannot be extrapolated into other statistical measures such as confidence level or interval. Response rates are only applicable to probability sampling.

The researchers used a comprehensive email harvesting protocol and push communications to promote the survey link. The study team used this manual email harvesting process in the geo-targets of the 13-county region to target the resident stakeholder group. This technique mined the public sources with more targeting. This geo-targeting included using ESRI ArcGIS to generate a list of all municipalities in PA Wilds counties. The researchers paired these geographies with other keywords and mined, scraped, and extracted them into an email database.

In addition, the many research supporters with direct visibility and reach to the varied stakeholder groups extended survey promotion support through their contact lists, newsletters, social media, and/or other referral and promotion techniques (see Appendix 2 for a list of participants.) This study also benefited from organic survey recruitment and referral from re-posts, re-tweets, and email forwards across the recruitment and referral campaign.

The survey had screening questions, influencing the question types in each stream of survey questions. For this reason, the survey exit page allowed the user to return to the survey form as a secondary group. The survey was not password protected. It also used limited question forcing (meaning the question must be answered to continue). This question-forcing strategy is why there will be differences in the response number on

some questions due to question skipping. Across such a large population, this was the best approach for usable responses and prevented high rates of respondent attrition.

The project's survey was drafted in collaboration with DCNR, the Center for Rural Pennsylvania, and the PA Wilds Center teams. The promotional materials of the PA Wilds were assessed to determine the brand attributes and mission-vision qualities. Using these key brand themes, the researchers underwent a vision-building process, which included working the flow of the survey respondent options based on the brand's characteristics that would face that stakeholder respondent. Subsequently, the survey presented the brand attributes of the PA Wilds, using its promotional images and phrasing as part of each question. This presentation of words and images explains question wording and categories. The California University of Pennsylvania Institutional Review Board (Cal U became Penn West University on July 1, 2022.) approved the subsequent survey instrument. After approval, the study team conducted a two-week pilot process and a soft launch via Survey Monkey Premium on June 1, 2022. All collectors were closed on December 1, 2022.

The survey ran coincidentally with the invitation recruitment and referral program. After the collectors were closed, the data were exported to IBM Statistical Packages for the Social Sciences (SPSS) for data cleaning. The researchers discarded non-useable or invalid surveys from the response database. The project used Survey Monkey Pro, SPSS, and Microsoft Excel for the final descriptive statistical analysis.

Stakeholder Interviews with Primary Policy Stakeholders

The research also had several qualitative components. Policy recommendations considered the complex geographical scales (i.e., local, county, state, national) of policy stakeholders across 13 counties, one national forest, eight state forests, two nationally designated scenic rivers, a national scenic trail, 29 state parks, seven official destination marketing organizations, 13 county governments, and 326 municipal entities. The PA Wilds has a complex overlap of Pennsylvania public departments, commissions, and councils. However, its most relevant policy stakeholders are DCNR and DCED. Therefore, these entities were the focal point for the stakeholder interviews.

This portion of the study included three stakeholder interviews with key informants. The interview participants and order conducted were (the interview order was random and based on the subject's schedule):

- Interview one: DCNR
 - Meredith Hill, Director, DCNR Conservation Landscape Program and PA Wilds Conservation Landscape
- Interview two: Pennsylvania Wilds Center
 - Ta Enos, PA Wilds Founder and CEO
 - Abbi Peters, PA Wilds COO
- Interview three: DCED
 - Mandy Book, Executive Director, DCED Commonwealth Financing Authority

Each interview lasted approximately one hour in a semi-structured format. With the respondent's informed consent, the researcher recorded the interviews using Zoom and MyMedia Site extension to create the audio transcript, which is produced as a text file. Transcripts were exported to QSR NVivo with NCapture for qualitative database management and analysis.

Thematic Content Analysis of Existing and New Qualitative Databases

The project merged three sources of textual data: interview transcripts, answers to the open-ended questions from the web survey, and web content (i.e., social media posts, web page text, and other indexed content on the internet). The researchers used NVivo with NCapture to create, manage, and analyze this large qualitative database. NCapture is a text search extension used within a web browser like Google Chrome. It allows content to be captured into an NVivo project file. The search engine Google was used to search for the keywords "PA Wilds," "Pennsylvania Wilds," and related hashtags, including online mentions on TripAdvisor, Facebook, and Twitter (as NCapture is designed to work with these platforms). The dates of focus were the years covered by the study (e.g., 2011-2021). The result was a combination of non-numerical and unstructured text data combined across these search engine hits to add to the database. Combined across these three sources, interview transcripts, open-ended answers from the web survey, and NCaptured web content created a large file of unstructured text. To help the reader visualize this tool, imagine a large stack of papers related to the same subject from many different sources. In this case, the unifying subject is the PA Wilds, and the "stack" existed digitally.

This large database is the *content* part of the *content analysis* method. This content exists digitally as an NVivo project file. Nvivo works in analytical groupings called nodes. The reader can visualize these nodes as buckets of like ideas. The information in each node can be sorted further using folders, highlighting, and tagging to sort groupings of information. Each node for the project was organized by policy theme and stakeholder group. A secondary grouping of figurative buckets in the project file was the synthesized list of recommended activities or best practices established in the literature review to determine if these were met or unmet. This sorting is the *thematic analysis* part of thematic *content analysis* and is called coding. This thematic content analysis complemented the quantitative descriptive statistical analysis from the social survey to provide a more robust dimension to understanding the assigned research problem and the goal of developing subsequent policy recommendations.

The researchers used these qualitative techniques to inform the research conclusions. However, the results from the qualitative portions of the database, especially the interviews, are limited since they can compromise the identity of the interview participants, which the researchers are obligated to protect under the Institutional Review Board requirements. The reader must appreciate that qualitative data were taken from open-ended questions in the social survey, stakeholder interviews, and the

web content for themed content analysis. Therefore, the reader should not take any findings as originating from one or any of the interview participants.

Results

The mixed methods research used secondary and primary techniques. The study results are presented in this order: economic impacts analysis from secondary sourced data (IMPLAN), the project stakeholder groups results from the primary social survey, and then the thematic analysis.

Economic Impact Analysis

Comparison of the Wilds to Pennsylvania

The economic impact analysis captured 12 counties of the PA Wilds but did not include north Centre County due to the limitations of IMPLAN's available geographies. While the Pennsylvania Wilds region encompasses nearly 23 percent of the state's land area, it accounts for less than 4 percent of its population. With an average population density of only 48 people per square mile, the Wilds are less than half as densely populated as the United States (and six times less densely populated than Pennsylvania). This low density of people is one of the prime factors that make the Wilds the nature-tourism destination that it is.

Table 2 ⁶

Population, Employment, and GDP in Pennsylvania Wilds and Pennsylvania, 2011 to 2022						
Year	Wilds - Population	Wilds - Employment	Wilds - GDP (\$100,000s)	PA - Population	PA - Employment	PA - GDP (\$100,000s)
2011	511,274	264,761	\$183,089	12,742,886	7,240,566	\$6,198,198
2012	510,862	269,339	\$190,526	12,763,536	7,324,066	\$6,403,228
2013	509,823	266,123	\$197,846	12,773,801	7,378,798	\$6,658,162
2014	507,157	266,493	\$218,179	12,787,209	7,461,322	\$6,948,992
2015	505,203	263,291	\$205,440	12,802,503	7,540,992	\$7,170,439
2016	500,401	259,962	\$198,787	12,784,227	7,622,521	\$7,317,544
2017	495,456	259,017	\$207,761	12,805,537	7,707,650	\$7,517,162
2018	493,947	263,632	\$220,962	12,807,060	7,783,241	\$7,971,629
2019	491,586	259,002	\$221,022	12,801,989	7,882,864	\$8,193,159
2020	491,083	243,814	\$199,807	12,859,498	7,453,283	\$7,787,469
2021	489,959	239,356	\$226,155	12,964,056	7,461,883	\$8,568,391

Over the past decade, the population of the Wilds has decreased by 4.1 percent, while the population of Pennsylvania has increased slightly (See Table 2 and Figure 3).

⁶ All monetary values in this report are in 2023 dollars. Data come from the IMPLAN database, which combines a variety of government and other data sources. IMPLAN Database draws from the BEA, BLS, Census Bureau, and USDA.

Employment in the Wilds has followed a similar, yet more extreme, pattern, with Wilds employment falling 9.5 percent between 2011 and 2021, while Pennsylvania employment rose 3 percent in that time (See Figures 4 and 5).

Figure 3 ⁷⁸ Comparison of Population in the PA Wilds to the Population in Pennsylvania, 2011 to 2021

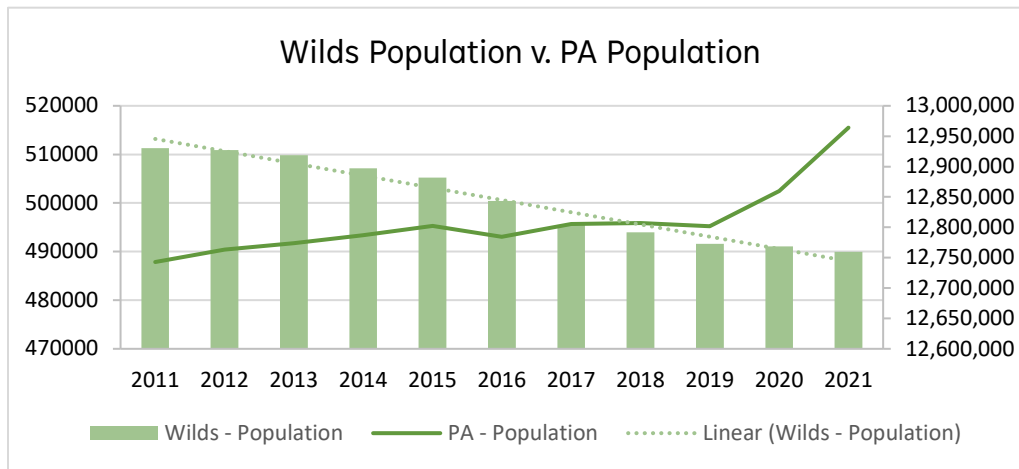
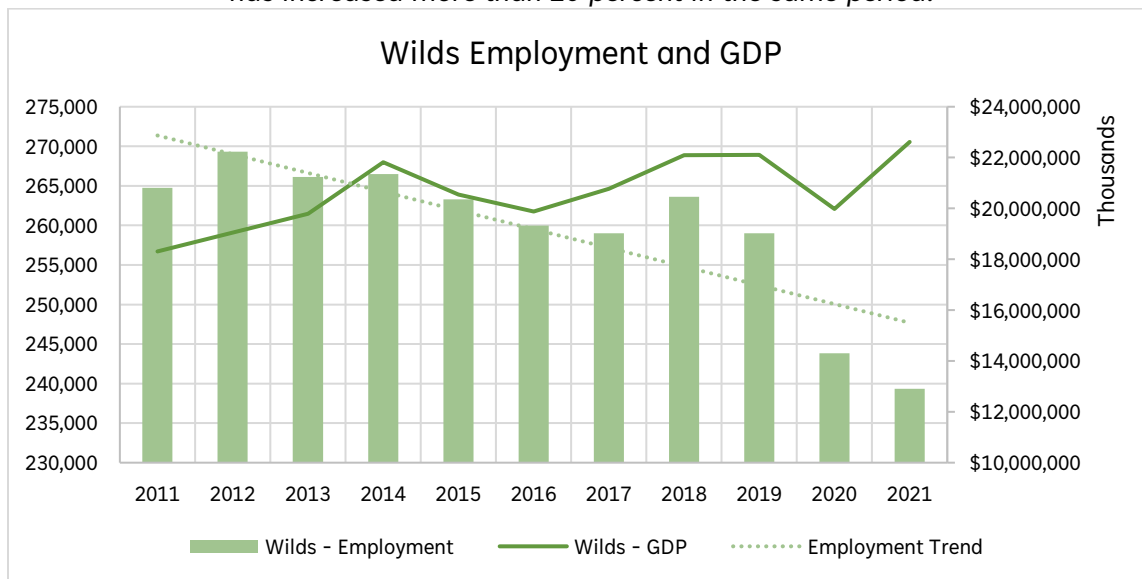


Figure 4 Employment and Gross Domestic Product in the Pennsylvania Wilds Region, 2011 to 2022

Employment in the Wilds decreased nearly 10 percent between 2011 and 2021, while output (GDP) has increased more than 20 percent in the same period.

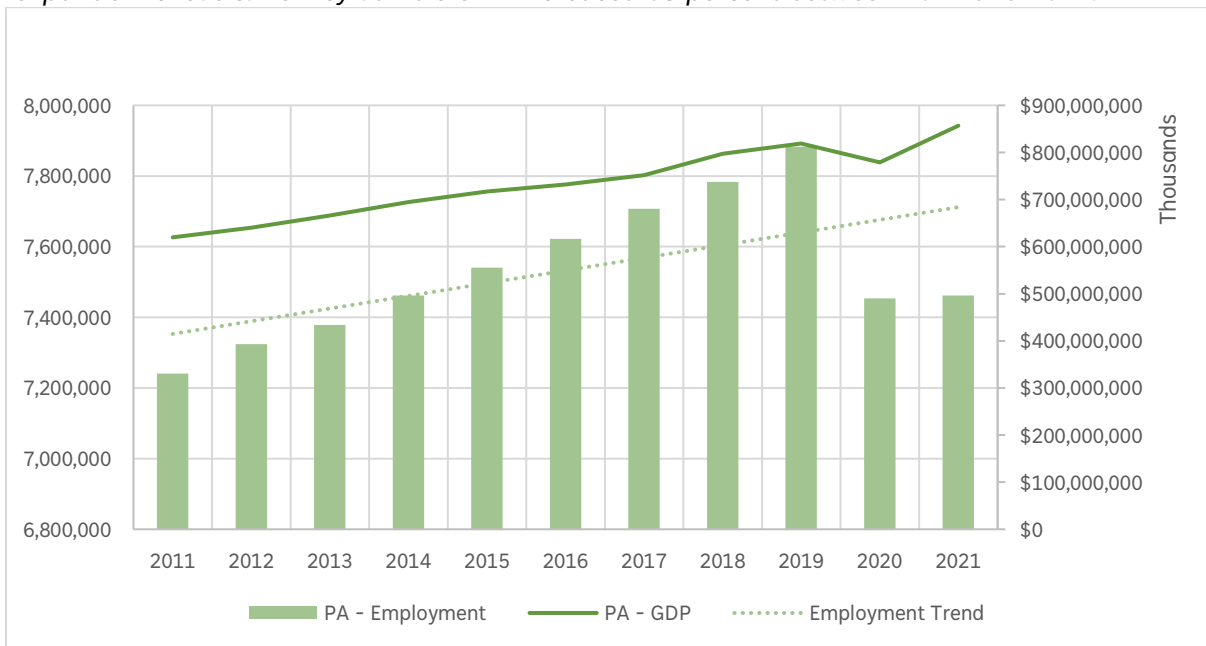


⁷ The dotted line is the linear trend. The vertical scale in the graph does not start at 0 so that the change is more visible.

⁸ IMPLAN population data are from a variety of sources, not solely the US Census.

Figure 5 Employment and Gross Domestic Product in Pennsylvania (entire state), 2011 to 2021.

Pennsylvania employment rose steadily until the COVID-19 pandemic and has yet to recover to pre-pandemic levels. Pennsylvania's GDP increased 38 percent between 2011 and 2021.



The economic impact analysis also considered labor data for the region over the assigned 10-year time frame. The labor force has similarly declined in the Wilds (about 10.5 percent); the labor force participation rate has also declined but at a slower rate than employment. The unemployment rate in the Wilds tends to be slightly higher than that in the state overall. (For example, unemployment in the Wilds was 4.8 percent versus 3.4 percent in Pennsylvania overall in January 2023). Although fewer people are working, gross domestic product (GDP), a measure of the value of output (and thus income), rose more than 20 percent in the Wilds between 2011 and 2021. Nevertheless, it lagged behind output growth in Pennsylvania (where GDP grew more than 33 percent in that time).

The analysis also considered industry contributions. Table 3 presents the top 10 industries in the PA Wilds region by employment. Table 4 presents the top 10 industries by output. Hospitals, education, and real estate appear on both lists. Six of the top 10 industries by employment are in the top 10 industries in the state, indicating that the employment mix in the Wilds is not that different from the state as a whole. The employment mix in the Wilds has not changed dramatically in the past decade. (For Tables 3 and 4, industries have been classified using the IMPLAN 546 Industry Scheme from IMPLAN Group, LLC, which is based on the Bureau of Economic Analysis Benchmark Input-Output Accounts).

Table 3 Top 10 Industries in the Pennsylvania Wilds, by Employment, 2021

*Those marked with a * are also in the top 10 in Pennsylvania as a whole.*

Top 10 industries in the Pennsylvania Wilds, by employment, 2021			
Industry	Employment	Output⁹ (\$100,000s)	Average Employee Compensation
Local govt, education*	9,092	\$8,145	\$77,590
Hospitals*	7,302	\$13,225	\$79,647
Limited-service restaurants*	6,231	\$5,799	\$20,759
State govt, other services	5,520	\$5,022	\$79,352
Full-service restaurants*	5,516	\$3,622	\$19,744
Individual and family services*	5,290	\$2,221	\$35,901
Local govt, other services	5,208	\$3,727	\$61,793
Nursing and community care facilities	4,947	\$3,765	\$44,263
Real estate*	4,814	\$8,308	\$45,162
Retail - General merchandise stores	4,729	\$3,806	\$34,311

Table 4 Top 10 Industries in the Pennsylvania Wilds, by Industry Output, 2021

*Those marked with a * are also in the top 10 in Pennsylvania as a whole.*

Top 10 industries in the Pennsylvania Wilds, by industry output, 2021			
Industry	Employment	Output (\$100,000s)	Average Employee Compensation
Petroleum refineries	493	\$47,790	\$161,983
Sanitary paper product manufacturing	1,624	\$15,716	\$94,334
Hospitals*	7,302	\$13,225	\$79,647
Oil and gas extraction	1,071	\$11,020	\$101,750
Real estate*	4,814	\$8,308	\$45,162
Local govt, education*	9,092	\$8,145	\$77,590
Truck transportation	3,442	\$7,415	\$77,884
Iron and steel forging	2,383	\$7,411	\$66,938
Monetary authorities and depository credit intermediation*	3,094	\$7,354	\$70,770
Electric power transmission and distribution	544	\$7,013	\$158,230

Specific Industry Contributions

Using the IMPLAN input-output analysis software, the research determined the direct contribution of an industry or group of industries to the region in terms of employment, output, and income, as well as indirect and induced effects. The indirect effect is the contribution to employment or income supported by *business-to-business transactions* because of the direct economic activity of the industry. The induced effect is the

⁹ Output is defined as the contribution to GDP, the final market value of goods and services. So for a hospital, it is the market value of the services provided.

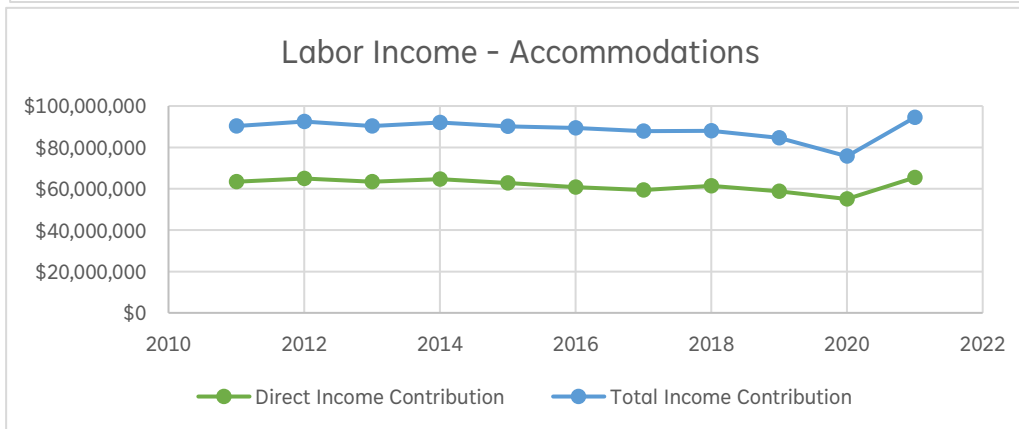
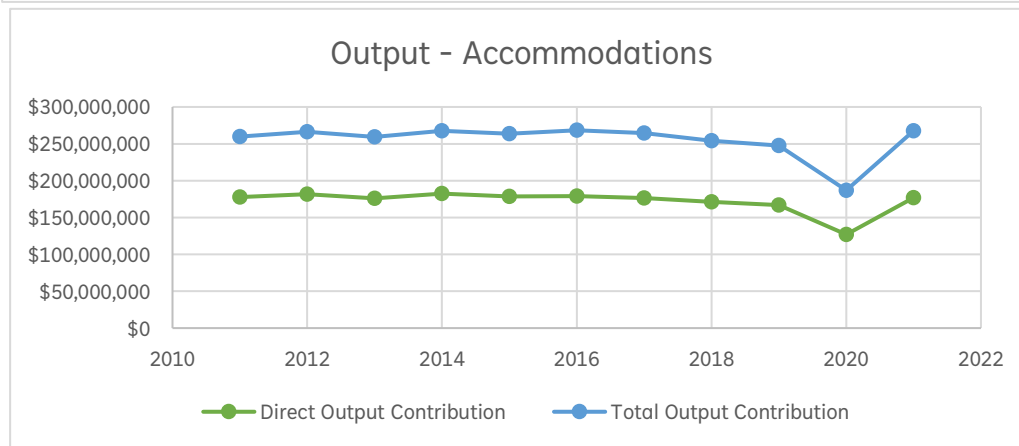
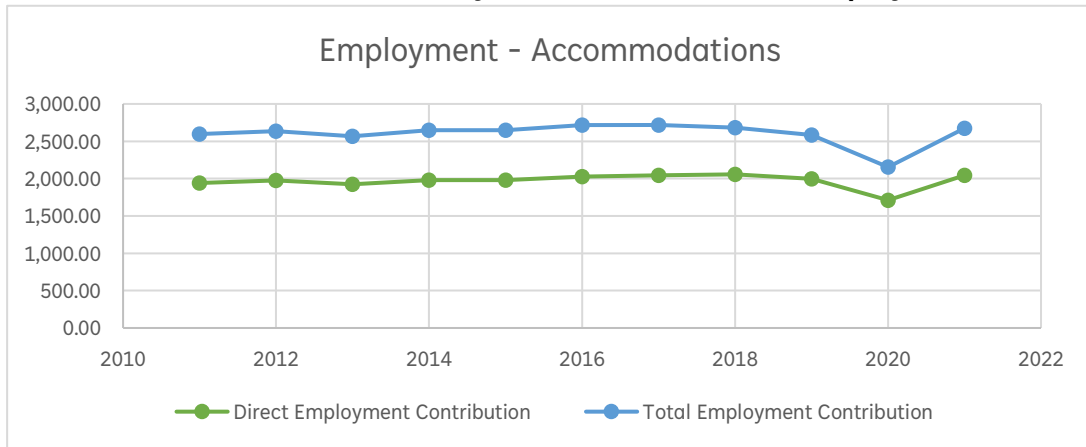
contribution to employment or income that could potentially be supported by *household spending* because of the direct economic activity generated by the industry.

The unique tourism product characteristics of the Wilds were matched to the available Industry classifications. Seven of the 546 IMPLAN industries were identified as being potentially related to the Pennsylvania Wilds destination and lifestyle marketing. These were then combined into three industry groupings for analysis: Accommodations (including IMPLAN industries 507 "Hotels and motels, including casino hotels" and 508 "Other accommodations"), Amusements (including IMPLAN industries 501 "Museums, historical sites, zoos, and parks" and 504 "Other amusements"), and Alcohol producers (including IMPLAN industries 106 "Breweries", 107 "Wineries" and 108 "Distilleries"). Again, these groupings are capitalized to reflect the technical IMPLAN Industry Scheme groupings, not the common nouns. The performance in each of these industries indicates the subsequent economic impacts of tourism.

The analysis measured contributions by industry, beginning with Accommodations. Figure 6 presents direct and total contributions to the Wilds' employment, labor income, and output from the Accommodations industry from 2011 to 2021. Direct employment in this industry rose 5.5 percent, while direct output fell 3.1 percent during this period. Looking at the total contribution of this industry (adding direct, indirect, and induced effects), employment attributed to this industry in the Wilds rose 3 percent, and output rose 3.1 percent. Considering that total Wilds employment was decreasing over this time, the share of employment and output attributed to the Accommodations industry has grown in the past decade. For comparison, direct employment in the Accommodations industry in Pennsylvania rose 9.5 percent, and output rose 6.1 percent between 2011 and 2021. Corresponding data are in Appendix 5.

Figure 6 Labor Income and Output, 2011 to 2021.
 Total Contributions include direct, indirect, and induced contributions.

Accommodations industry contribution to Wilds Employment



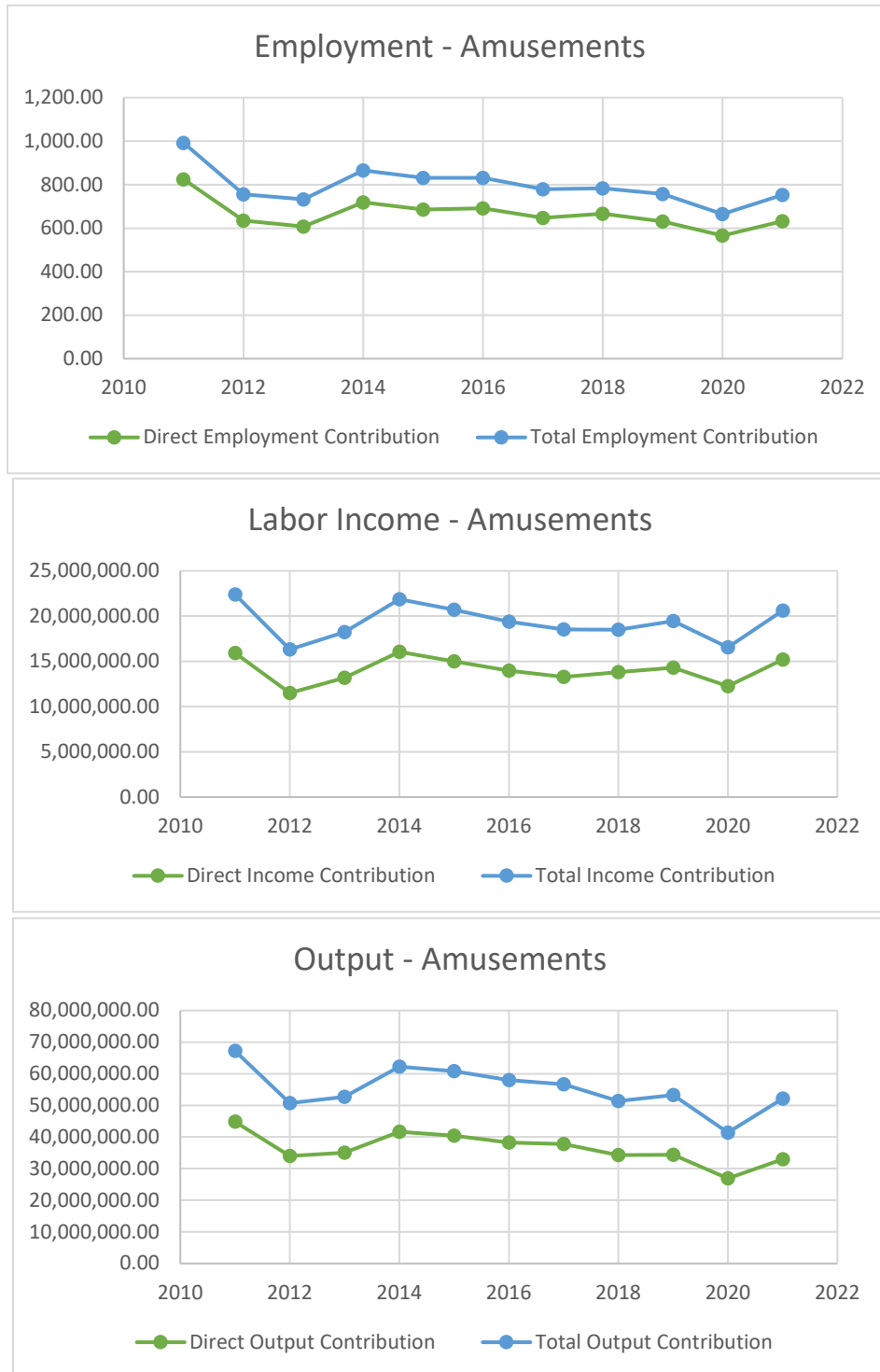
The economic impact analysis also considered the Amusements industry, which includes attractions, museums, parks, and other commercial recreation. Figure 7 presents direct and total contributions to the Wilds’ employment, labor income, and output from the Amusements industry from 2011 to 2021. Table 5 presents the corresponding data.

Direct employment in this industry decreased by 23.3 percent, while direct output fell by 26.5 percent during this period.

Looking at the total contribution of this industry (adding direct, indirect, and induced effects), employment attributed to this industry in the Wilds declined by 24.1 percent, and output decreased by 22.4 percent. Nearly all of this decline was due to a change in the first year (from 2011 to 2012) in the IMPLAN industry 504 - Other Amusements - where employment fell by 190 people. Employment was effectively unchanged between 2012 and 2021, at 634 positions in 2012 and 633 in 2021. Employment and output in this industry decreased statewide over this time, although not to the same extent as seen in the Wilds (direct employment fell 3.2 percent, and output decreased 9.3 percent statewide).

Figure 7 Amusement Industry Contribution to Wilds Employment, Labor Income and Output, 2011 to 2021

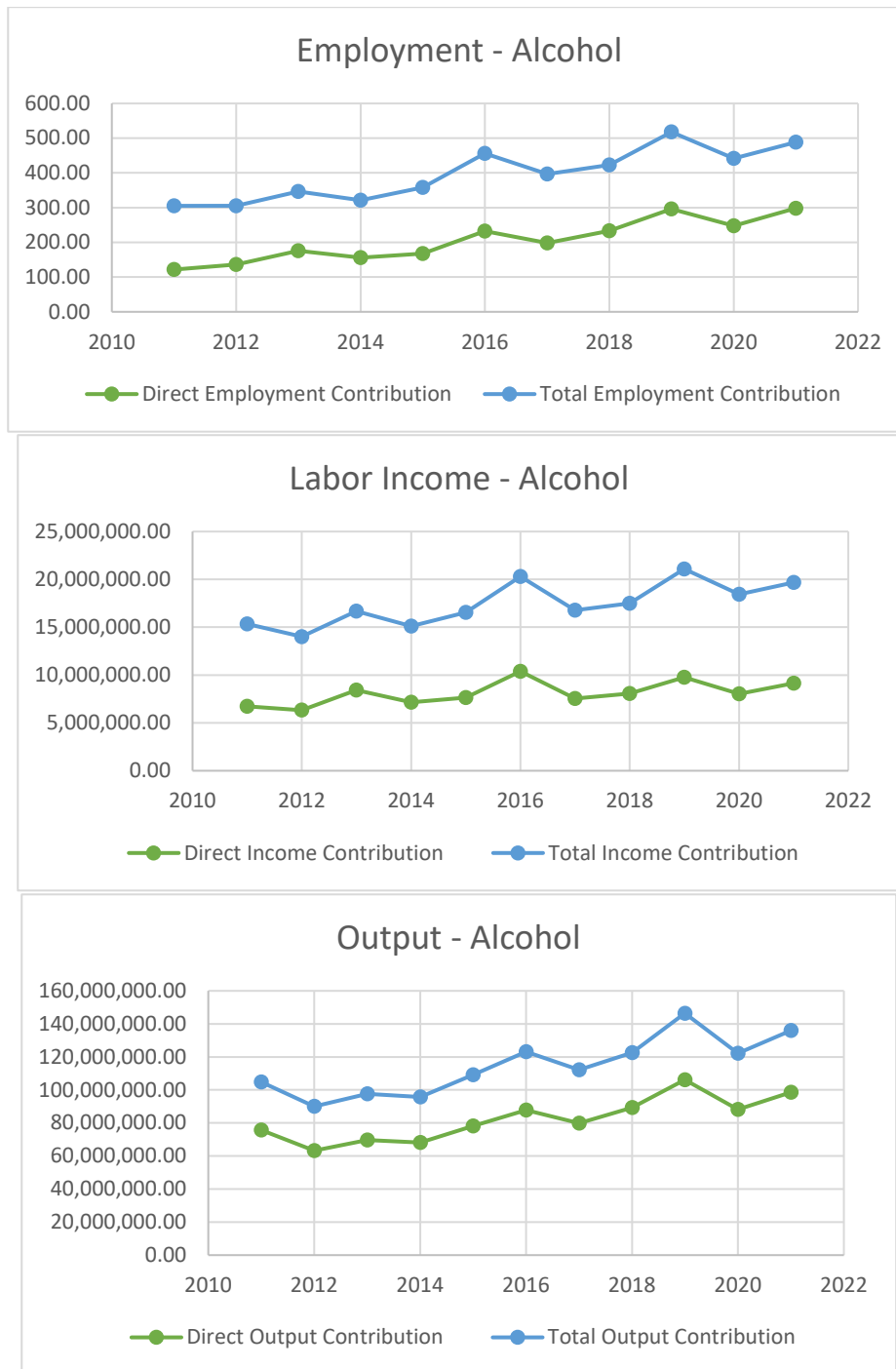
Total Contributions include direct, indirect, and induced contributions.



The third IMPLAN Industry Scheme the study used was Alcohol. Figure 8 presents direct and total contributions to PA Wilds' employment, labor income, and output from the Alcohol Production industry from 2011 to 2021. Figure 8 presents the corresponding data. Direct employment in this industry rose 145.2 percent, and direct output increased 30.4 percent during this period. Looking at the total contribution of this industry (adding direct, indirect, and induced effects), employment attributed to this industry in the PA Wilds rose 59.8 percent, and output rose 29.6 percent. Significant growth was seen in all three areas considered in the Alcohol Production industry (breweries, wineries, and distilleries). The state saw even more dramatic growth in this industry between 2011 and 2021, with direct employment rising 258.9 percent and output rising 42.8 percent.

Figure 8 Alcohol Production industry contribution to Wilds Employment, Labor Income and Output, 2011 to 2021

Total Contributions include direct, indirect, and induced contributions.



The industry contribution analysis revealed that the economic impact of tourism-related industries in the Wilds has remained stable over the past decade. The industries analyzed were responsible for nearly 3,000 direct jobs in 2021 and contributed nearly \$230 million to the region's GDP (or about 1.2 percent of the total employment and GDP). Between 2011 and 2021, employment in these industries increased by 3.8 percent, and output rose by 3.1 percent. These increases were driven by modest employment growth in the Accommodation industry (up 5.5 percent) and significant growth in the Alcohol Production industry (up 145 percent). Given that population and employment in the Wilds overall have fallen by 4.1 and 9.5 percent, respectively, during this period, two of these tourism-related industries comprise an increasingly important part of the PA Wild's economy.

Stakeholder Analysis

The research also assessed the community and economic impact of the PA Wilds using primary methodologies to complement the secondary analysis of IMPLAN data described above. This next section summarizes the mixed-method results from the social survey, stakeholder interview, and thematic content analysis. The analysis highlights are summarized below as descriptive statistics (i.e., frequency distributions and measures of central tendency).

Combined Stakeholder Profile

Each stakeholder group answered some of the same questions, which helped build an overall respondent profile. The survey form received 1,363 usable forms from across the U.S., with less than 1 percent international. There was no dedicated survey promotion internationally. However, organic recruitment and referral led to these responses. Due to question-forcing options, not every respondent answered every question in their pipe. Therefore, the reader should pay attention to the N= figure in each chart to understand the number of respondents who responded to that question.

The social survey asked all respondents a series of identical questions to build an overall demographic profile, including age, income, gender, and ZIP Code. The average age of respondents was 59 and ranged from 19 to 92 (SD 14.02). The survey form dismissed respondents under 18 through a qualifying question. Therefore, age information only represents those 18 or over. The median, or middle of the data set, was 60, with a mode or most frequent response of age 66.

Gender responses were reflective of the national demographic profile. The U.S. Census data for 2021 was 49.5 percent male and 50.47 percent female. Respondents to the survey generally reflected the U.S. population in overall income and education levels. The overall user profile indicates that the survey respondents were typical and unremarkable in this and other characteristics, such as educational achievement and income, when considered within the total U.S. population.

The researchers considered this comparison to the U.S. population since the survey received responses from across the U.S., with the highest frequency in Pennsylvania and its surrounding states of New York, New Jersey, Delaware, Maryland, West Virginia, and Ohio.

Overall brand awareness

The study measured brand awareness through name and logo recognition across stakeholder groups. Of the 1,304 responses for an initial qualifying and self-identification question, 766 of these responses, or 58.7 percent, indicated that they did not live or work in the counties included in the PA Wilds. The remaining 538 respondents, or 41.3 percent, indicated that they lived, worked, or both lived and worked in one of these counties. Therefore, when considering the total responses to this self-identification question that opened the survey channel to questions specific to each group, more non-residents than residents answered the survey.

Overall, respondents across all stakeholders had heard of the PA Wilds. When asked, "Have you heard of the Pennsylvania Wilds before this survey?" almost 70 percent indicated yes (See Figure 9). When asked about the PA Wilds logo, most respondents still indicated yes, they recognized the logo (58.82 percent) (See Figure 10).

There was, as expected, a distance decay pattern with the region brand name and logo recognition. Distance decay as a geographical concept describes when a person's usual environment (i.e., where they live, work, and recreate) is farther away from something, the less familiar they are with it, and also, for tourism purposes, the less likely they are to interact with it (McKercher, 2018). In general, the further away one's usual environment (i.e., where they live and work daily) is from a destination region, the less likely those places will generate tourism demand for that region. Therefore, those who identified a ZIP Code outside Pennsylvania and its surrounding states of New York, New Jersey, Delaware, Maryland, West Virginia, and Ohio were less likely to recognize the name or logo.

Figure 9

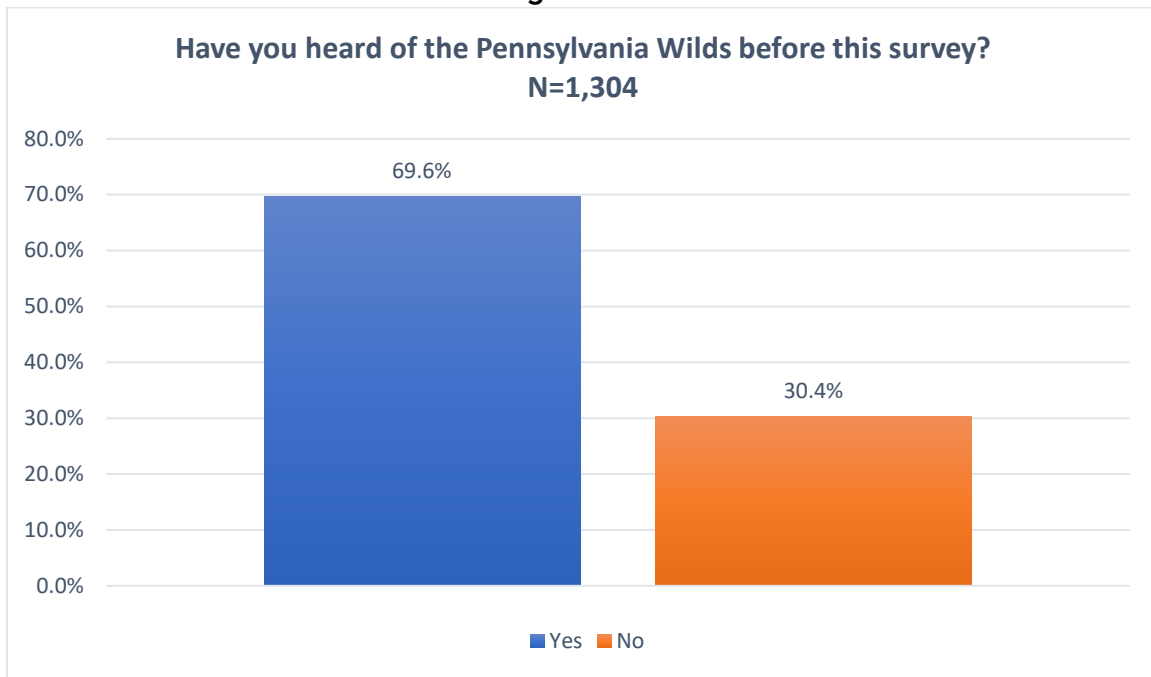
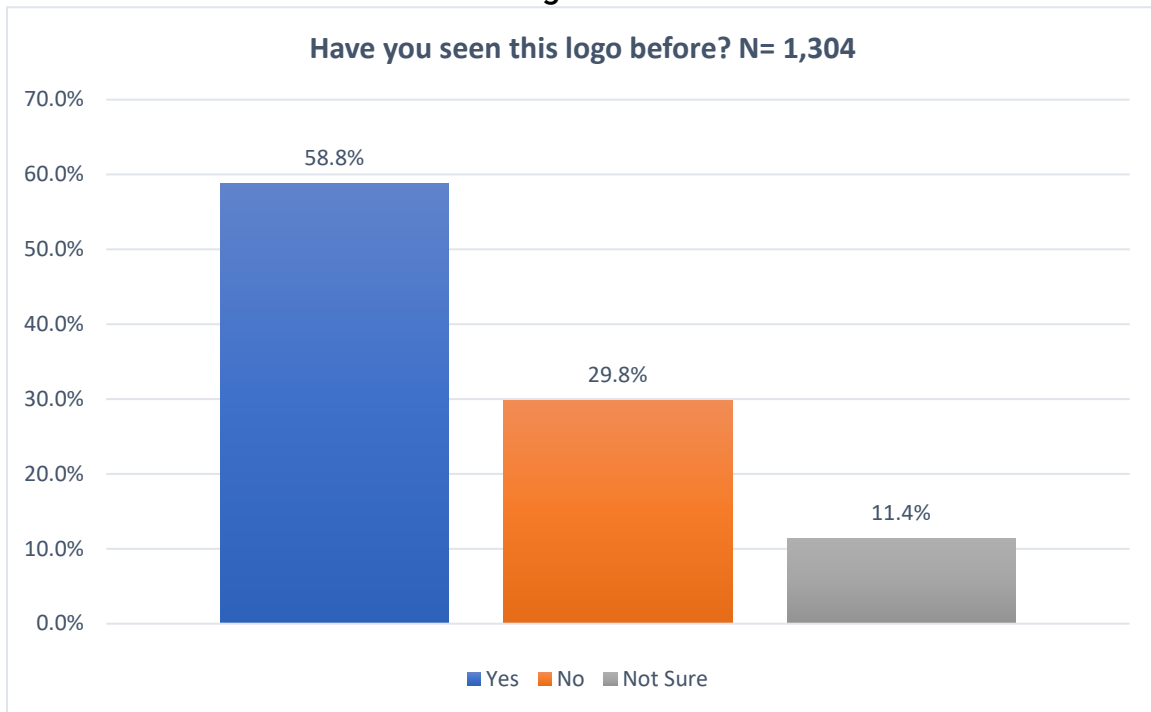


Figure 10



Tourism Market Stakeholders

Existing Visitors to the PA Wilds

This study considers both tourists and recreationists as tourism market stakeholders. A recreationist participates in recreational activities in the destination region as part of the outdoor recreation economy within their usual environment. Again, one's usual environment is the habitual geospatial space where one lives, works, plays, and/or studies.

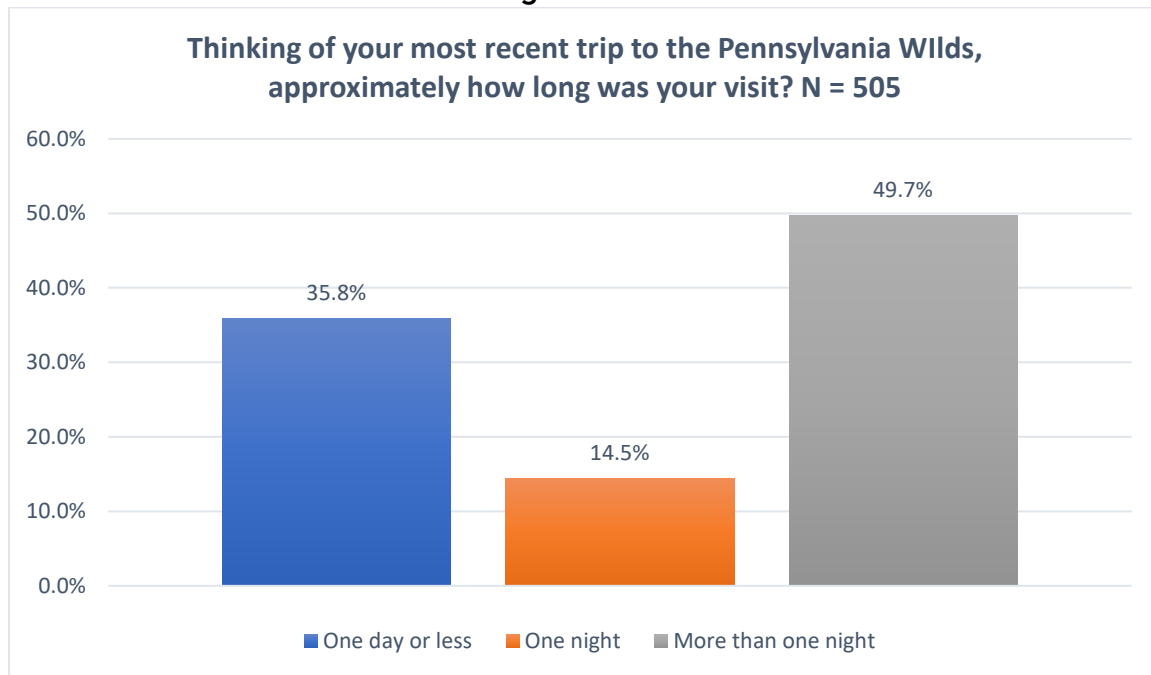
According to industry standardization sources, such as the World Tourism Organization and U.S. Travel Association, recreational status has a loose spatial threshold for economic development considerations approximately 50 miles outside of one's usual environment. This movement outside one's usual environment is when one ceases to be a recreationist and becomes a tourist. While engaging in the same activities as recreationists, the economic impact potential is more significant between local recreation and tourism because there are more significant commercial expenditures on things like dining, lodging, retail, and other services. Regardless, both generate economic impact on the destination region and are market stakeholders and generators of recreation and tourism demand.

The survey allowed respondents to indicate if they had visited the PA Wilds in the past 10 years. With the reminder that respondents can maintain multiple roles in this complex multi-dimensional survey, the number of respondents to this survey channel was 763. This group is further subdivided into existing visitors to the PA Wilds, with 541 responses, or 70.90 percent, and 222, or 29.10 percent, as potential visitors to the PA Wilds. More existing visitors (i.e., those that had visited the PA Wilds in the past 10 years) answered the survey than potential visitors (i.e., those that had not visited the PA Wilds in the past 10 years).

Visitors did indicate some repeat visitation. Repeat visitors are beneficial to positive economic impact since the visitor is already converted, and further marketing investment is not necessary to attract them like a new visitor. Most indicated they visited annually (25 percent) or once every few years (34 percent).

The survey also queried the length of stay. This variable, like repeat visitation, is an economic impact consideration as the positive consequences of spending are higher the longer the visitors stay in the destination. This positive impact increases significantly when the visitor is converted from a day visitor to at least one night or more (Fletcher et al., 2018). Of the 505 respondents who answered this question, most (64 percent) indicated staying one night or more (See Figure 11). Of those staying more than one night, the length of stay ranged from two to 23 nights, with a mean of 3.6 nights (SD 2.54). The most frequent length of stay for those staying one night or more was two nights. Therefore, those visiting the Pennsylvania Wilds stay one night or more, with the most typical stay duration as two nights.

Figure 11



Visitors to the PA Wilds over the last 10 years also were prompted about their general spending. This question asked, “Thinking of your most recent trip to the PA Wilds, what is your best estimate of the total amount you spent in US dollars? This is just a best estimate. We understand you didn't keep all your receipts.” Therefore, this relies on respondent recall and should be taken as a high-level indicator of visitor activity. The data were also highly variable, with a standard deviation of \$455.25 (See Table 5). Furthermore, the data were not centrally tended, which means the data did not fit a neatly symmetrical pattern. They indicated a right-skewed distribution, which means there are unusual numbers in the higher ranges of the reported spending.

Table 5

Estimated Spending	
N	486
Mean	\$282.05
Median	\$177.50
Mode	\$200
Std. Deviation	\$455.251
Range	\$5000
Minimum	0
Maximum	\$5000

Respondents answered questions about their party or traveler group composition. These configurations are important for considering market profiles (i.e., what the typical

visitor looks like). It is important to note that the volume of visitors does not equate to higher destination performance or economic impact. In a rural nature-based destination, balancing volume, such as using group size, with the potential for social and environmental consequences is critical. To clarify this statement, the reader should consider this oversimplified example. A destination could host one visitor that spends \$100 or 100 visitors that spend \$1 each. The economic impact is the same, \$100. However, those extra 99 visitors create more negative impact potential. It is an essential quality over quantity perspective that is essential in nature-based destinations since the tourism setting is more sensitive to an increased amount of visitation. Therefore, the number of visitors alone should not be used in isolation as a metric of regional tourism performance, and large group sizes as an extension of volume = performance models are not always compatible or desirable for each destination. Tourism consumes the resources it relies upon to continue to produce economically. Therefore, a higher volume of visitors equates to more product use, which damages its long-term productivity.

Instead of a volume-based framework of destination performance, creating an appropriate product and market match in regional tourism planning is more appropriate. Destinations, especially the PA Wilds, should not constantly seek increased visitor volume as a metric for success. With this in mind, the PA Wilds typical traveler is in a group of approximately two people. Those visitors traveling with children typically have one child with them (See Table 6). This party composition is compatible with the nature-based tourism product of the PA Wilds. In both party composition questions, right skew was present. This skew indicates there were outliers (i.e., numbers that did not fit the pattern in the data) toward the larger group sizes. This skew suggests that while there is some group travel in the PA Wilds, it is less typical than in groups of 10 or fewer.

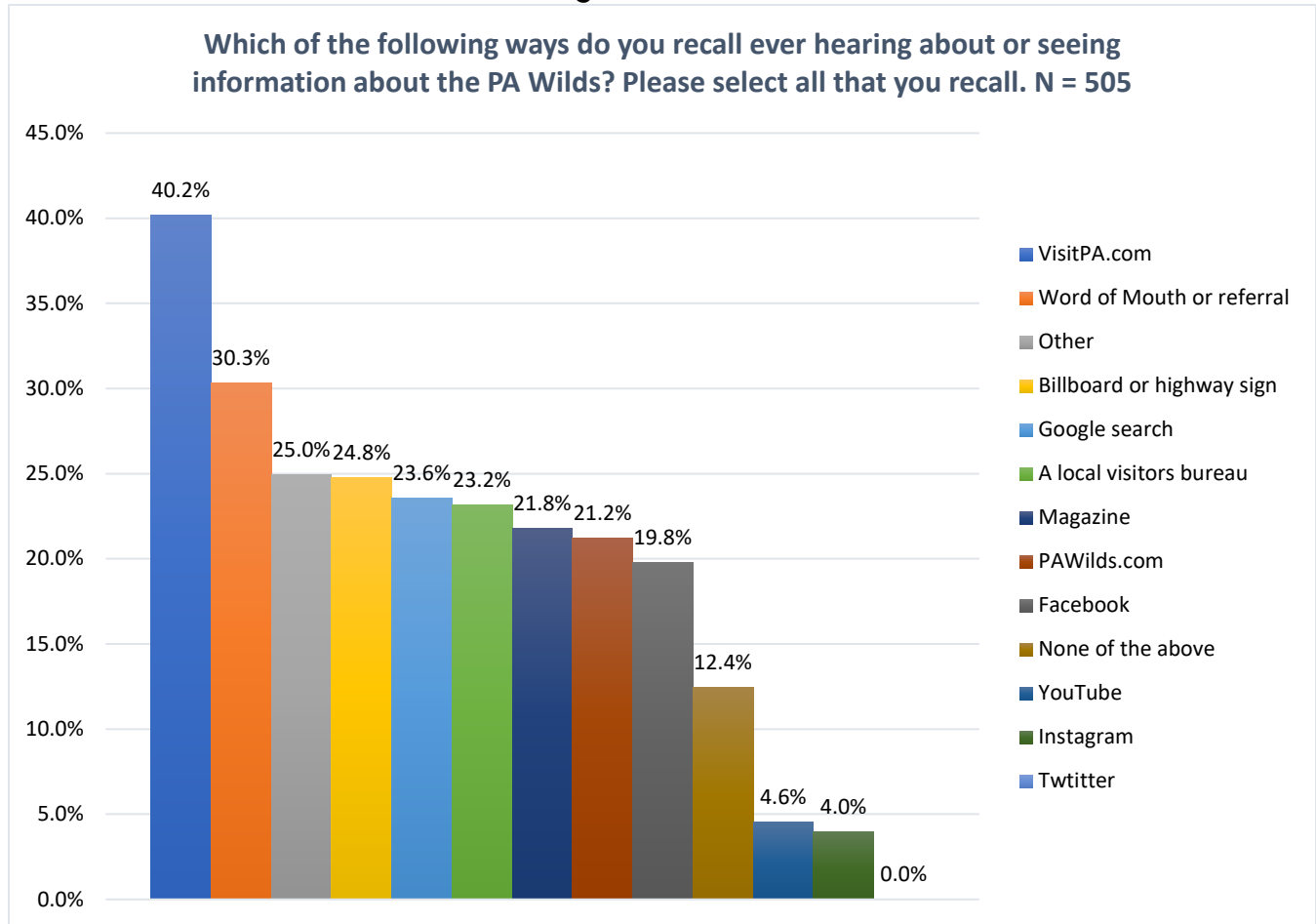
Table 6

Party Composition	Approximately how many people (adults and children), including yourself	How many were aged 18 or under? If none, please enter 0.
N Valid	502	492
Mean	2.92	.50
Median	2.00	.00
Mode	2	0
Std. Deviation	3.306	1.398
Range	39	16
Minimum	1	0
Maximum	40	16

The survey asked respondents which ways they recall ever hearing or seeing information about the PA Wilds. The most frequent response was VisitPA.com followed by billboards or highway signs. There was a smattering of other/specify responses (30 percent) (See Figure 12). There were two dominant themes in this *other specify* category, including the respondent indicating general knowledge from living or working in the region previously or having a connection there through work or extended family. The

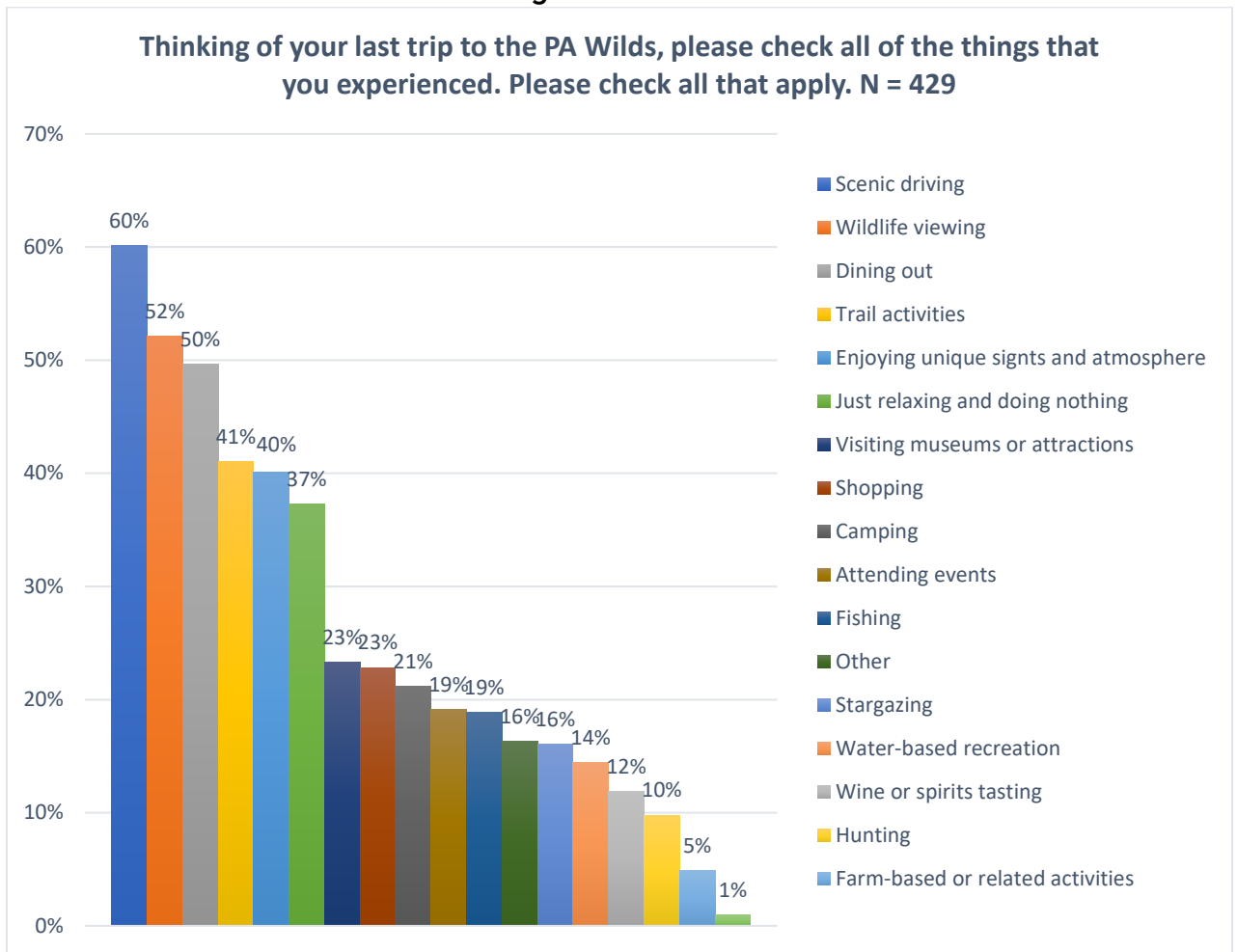
second central *other specify* theme was that respondents had heard of the PA Wilds from various map sources, such as trail maps. Since VisitPA.com is a service of DCED's Office of Marketing, Tourism, and Film, this relationship between visitors' use of marketing resources indicates the critical role of state government in tourism promotion. It also reveals that consistent, accurate, quality delivery and forward-facing promotional assets are essential to the PA Wilds. The survey findings also denote the underuse of social media as a marketing resource.

Figure 12



Using the activities promoted for recreation and tourism by the PA Wilds, the survey questioned their activity participation. The most frequent response was scenic driving, followed by trail activities and visiting museums and attractions (See Figure 13). This finding corresponds with the IMPLAN Amusements Industry Scheme discussed in the economic impact section of this report.

Figure 13



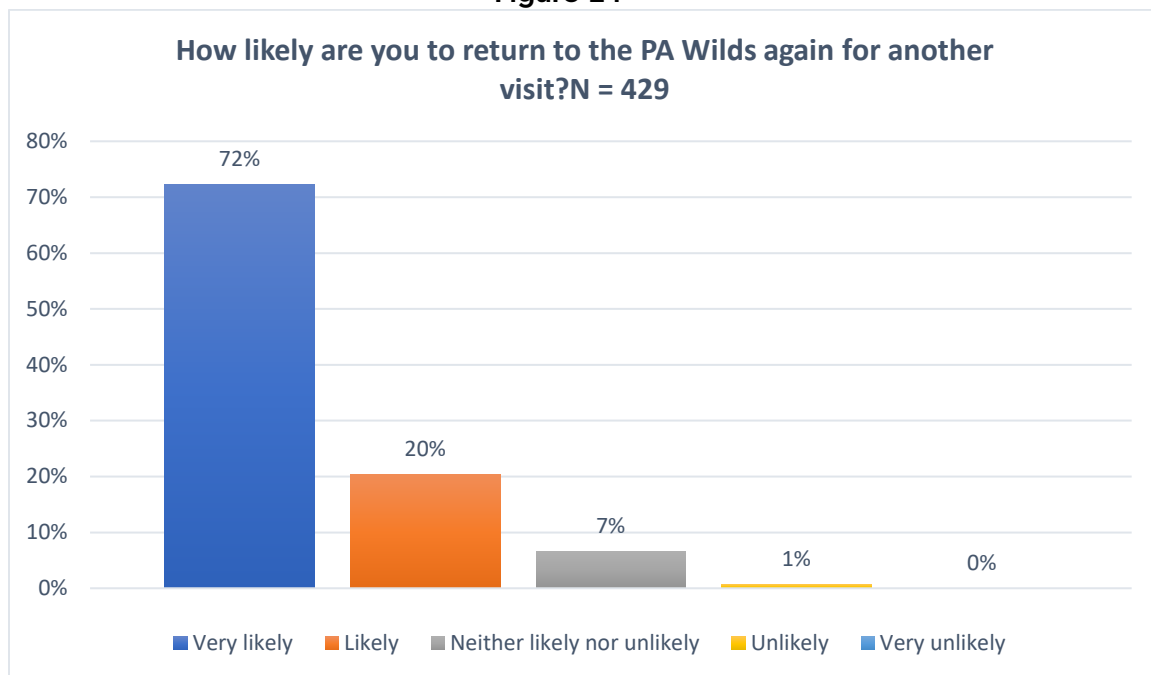
Within the *other specify* category, photography and visiting friends and family were the only dominant themes not already covered in this multiple-select question.

The survey probed for levels of satisfaction. When asked to rate their most recent experience on a scale from 0 to 100, the average number was 86 (See Table 7). A left skew was present in this data, indicating that the mean is less than the median. This skew is sometimes called negative skew. It indicates that some unusually low values are pulling down the mean rating. As such, the median is the more stable indicator of central tendency.

Table 7

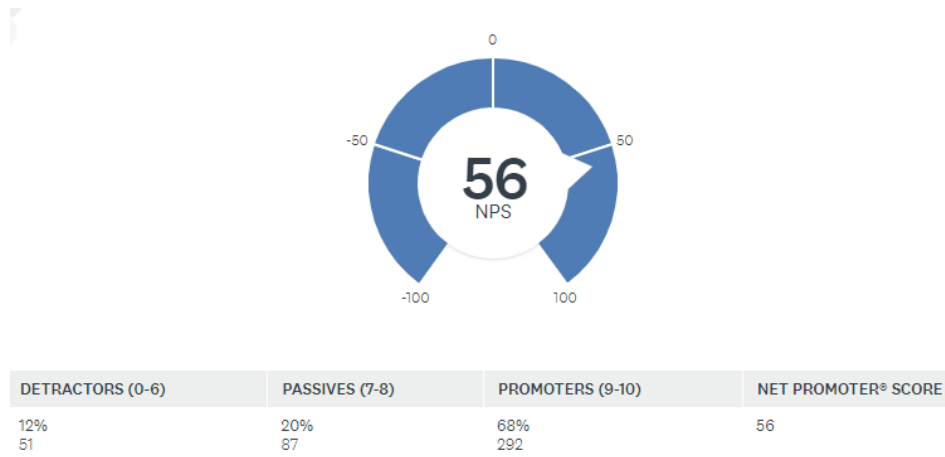
Thinking of your last trip to the PA Wilds, how would you rate your experience?	
N Valid	423
Mean	85.84
Median	90.00
Mode	100
Std. Deviation	15.855
Range	100
Minimum	0
Maximum	100

Propensity to return provides another dimension to gauge visitor satisfaction with a destination. The respondents overwhelmingly indicated they were very likely to return, with 92.54 percent of visitors showing they were likely or very likely to return (See Figure 14). These responses indicate high visitor satisfaction.

Figure 14

As a further measure of visitor experience, the survey included a Net Promoter Score or NPS. The NPS is popular in web-based social surveys as a measure of loyalty. The score is presented to the respondent from one to 10 and then scored using Net Promoter Score methodology from -100 to +100 to measure loyalty. These are subdivided into detractors, passives, and promoters. Detractors are not loyal, passives are indifferent, and promoters are brand loyal and will advocate for the brand. The PA Wilds demonstrated an NPS score of 56, with the majority in the promoters category. This score indicates high brand satisfaction and loyalty (See Figure 15).

Figure 15
How likely is it that you would recommend the PA Wilds to a friend or colleague?



Considering visitors' satisfaction and loyalty multidimensionally through overall experience rating, a propensity to return, and NPS, the research indicates strong levels of visitor satisfaction and a positive experience with the destination. The PA Wilds delivers on its brand promises with high visitor satisfaction.

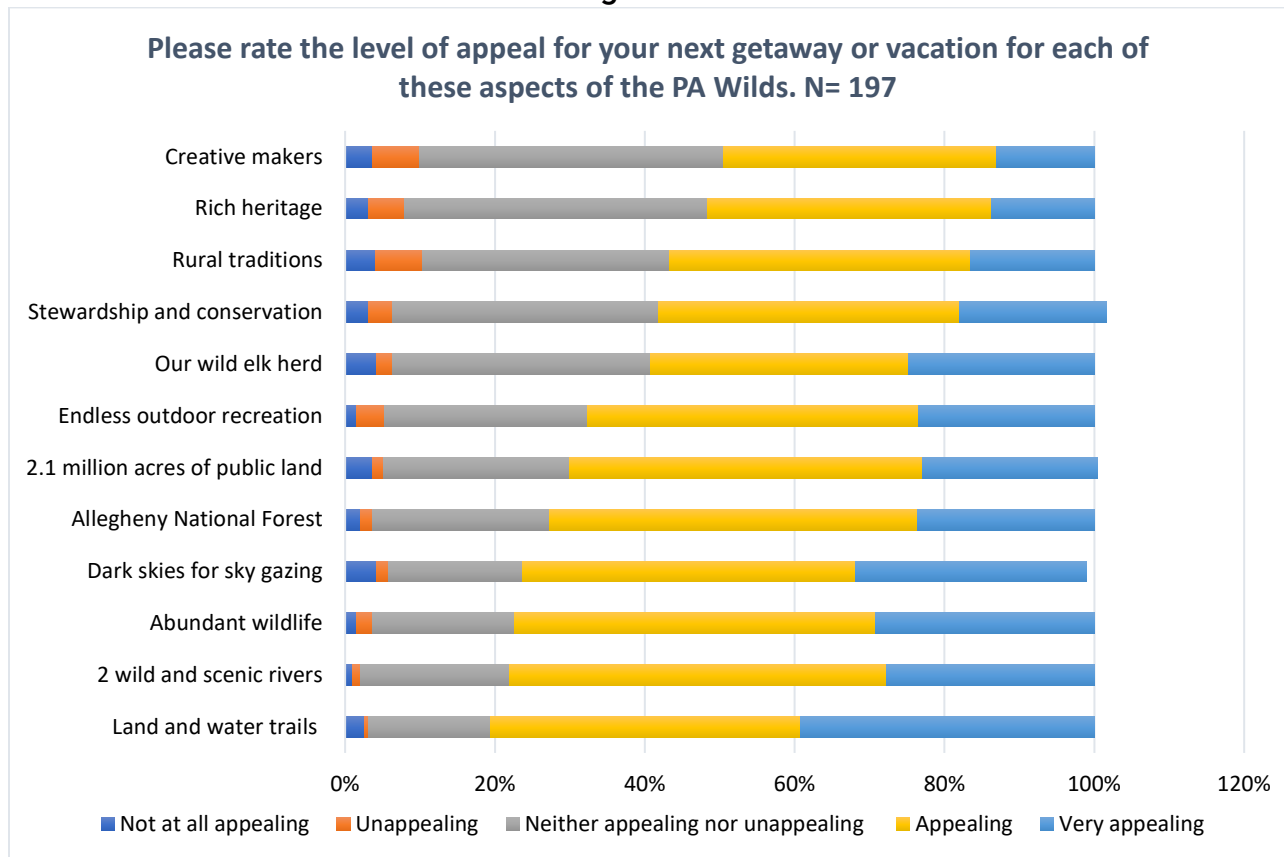
Potential Visitors to the PA Wilds

Among the respondents, there were visitors classified as potential tourists and recreationists, meaning they did not self-identify as visiting the PA Wilds in the past 10 years. The survey introduced respondents to the broad catalog of experiences as presented by the PA Wilds brand, using their language and imagery, including:

- 2 national wild and scenic rivers
- 2.1 million acres of public lands
- Abundant wildlife
- Allegheny National Forest
- Creative makers
- Dark skies for stargazing
- Endless outdoor recreation
- Land and water trails
- Wild elk herd
- Rich heritage
- Rural traditions
- Stewardship and conservation

The survey asked visitors to rate the level of appeal of each of these opportunities (See Figure 16).

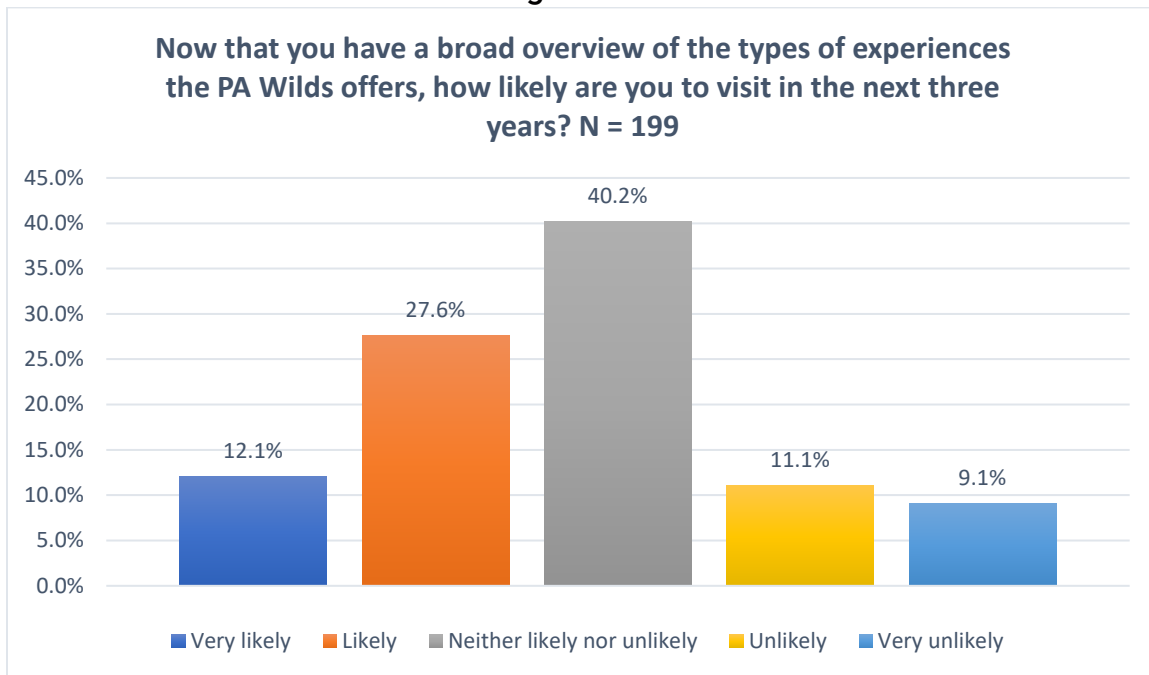
Figure 16



The survey used ranking questions to calculate the average ranking for each answer choice to determine which answer choice was most preferred overall. The answer choice with the largest average ranking is the most preferred choice. The most appealing assets were the land and water trails, wild and scenic rivers, and abundant wildlife when calculated as a weighted average (4.15, 4.03, and 4.02 weighted average, respectively). No category had a weighted average of less than three, including the least preferred creative makers, with a weighted average of 3.49. This result means there were close groupings in the experience preferences, indicating that potential visitors did not find any activities unappealing or appealing to the respondents.

The survey then queried how likely the potential visitor would visit in the next three years. The most popular response was neutral – neither likely nor unlikely (See Figure 17). Those unlikely or very unlikely to visit are directly attributed to a distance decay pattern, meaning that the PA Wilds is more likely to generate tourism demand within Pennsylvania and surrounding states than compete nationally with other rural nature-based destinations.

Figure 17

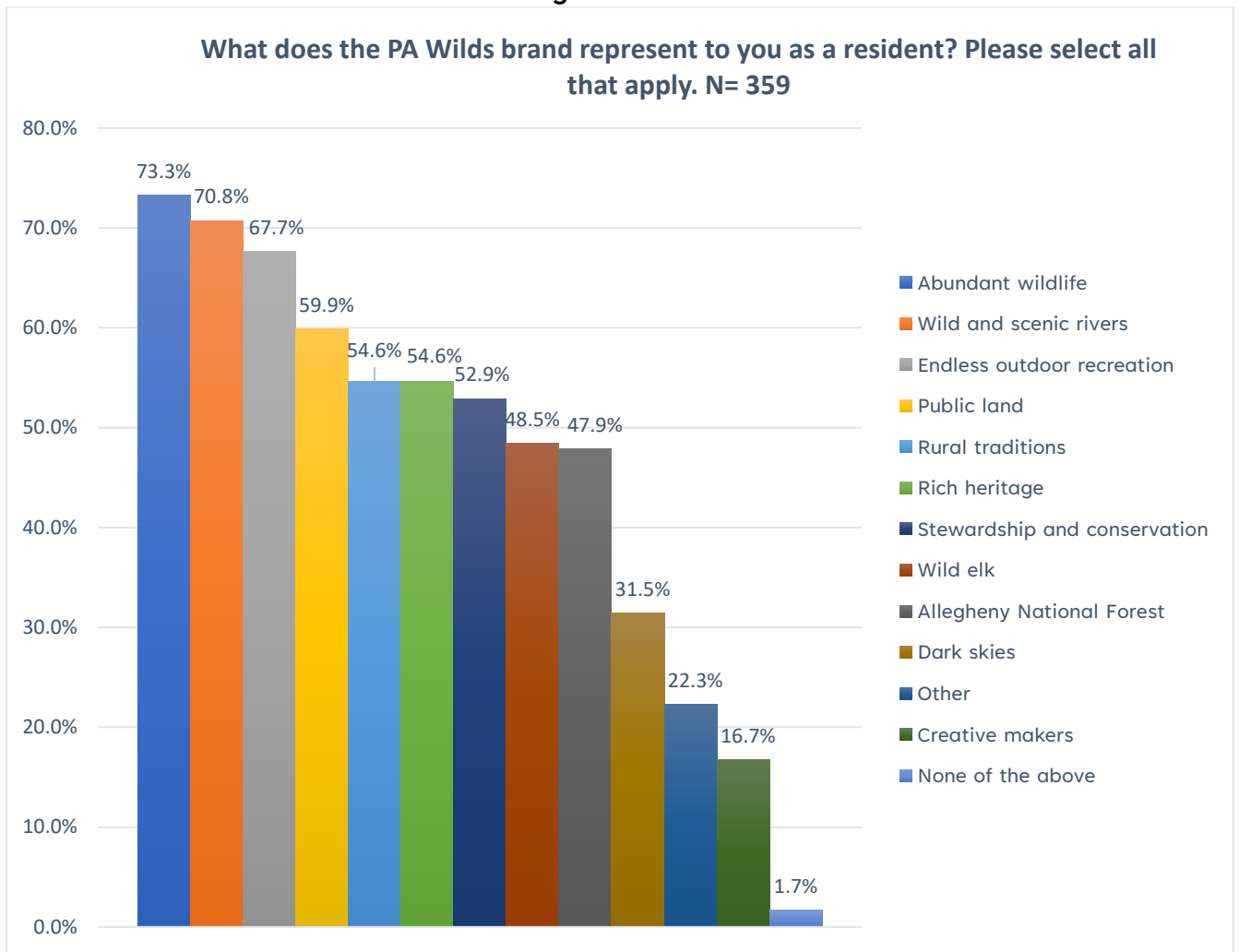


Resident stakeholders

Three hundred sixty respondents identified as members of the resident community in the Pennsylvania Wilds. The survey asked resident stakeholders to widely consider the brand attributes and their place within the destination region. The survey questioned resident stakeholders on what the Pennsylvania Wilds represented to them using the brand attributes and language of the PA Wilds brand. This question was multiple-select, meaning respondents could select all that applied. As with all brand attribute questions, the selections were taken directly from Pennsylvania Wilds' promotional materials to assess brand resonance.

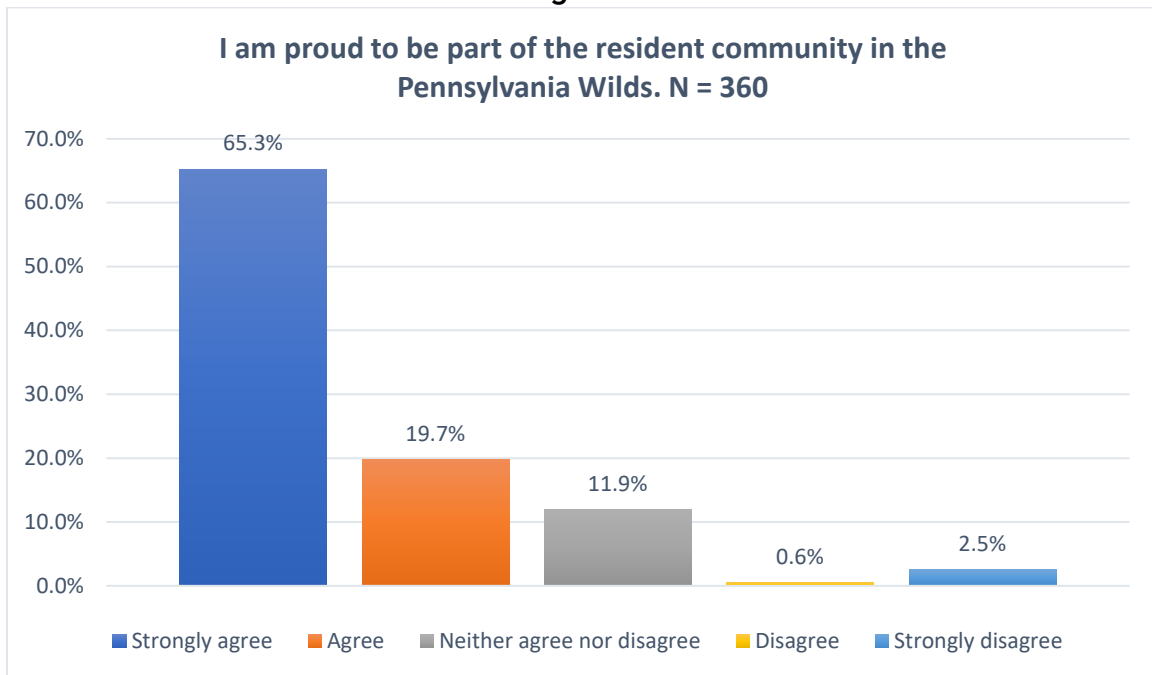
Residents identified with many of the key attributes promoted by the PA Wilds, with the attributes of abundant wildlife, public lands, and endless outdoor recreation as the most significant. Notably, less than 2 percent of respondents, 1.67 percent, selected none of the above. Overall, this indicates that resident stakeholders have strong brand resonance with the attributes that the PA Wilds promotes as a tourism region and conservation landscape (See Figure 18).

Figure 18



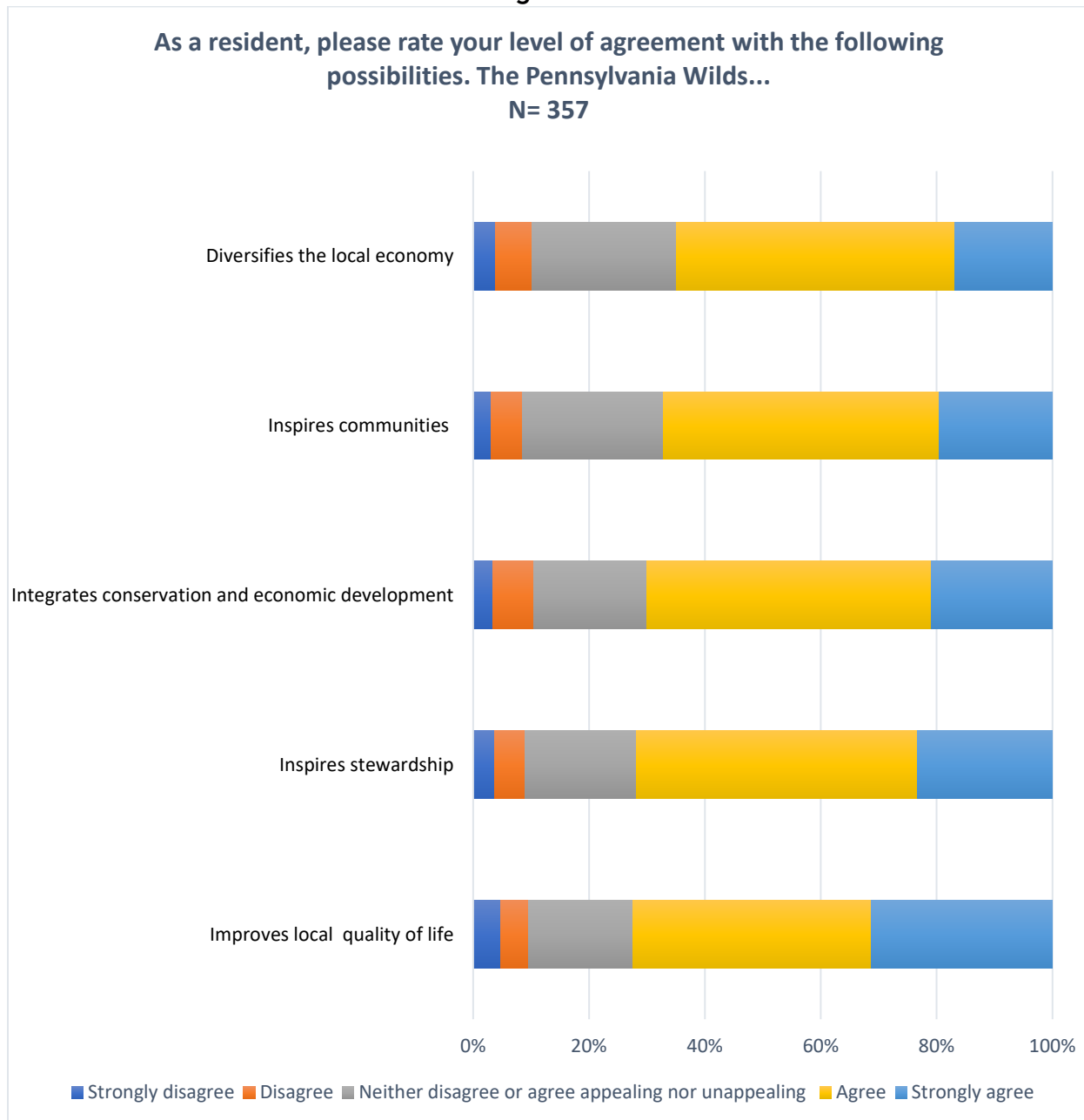
The survey also asked resident stakeholders if they were proud to be part of the resident community of the Pennsylvania Wilds. Eighty-five percent of respondents agreed or strongly agreed with the statement, *"I am proud to be part of the resident community in the Pennsylvania Wilds."* This finding indicates that 15 percent were neutral, disagreed, or strongly disagreed with this statement (See Figure 19). The overwhelming majority of residents of the PA Wilds are proud to be part of its resident community.

Figure 19



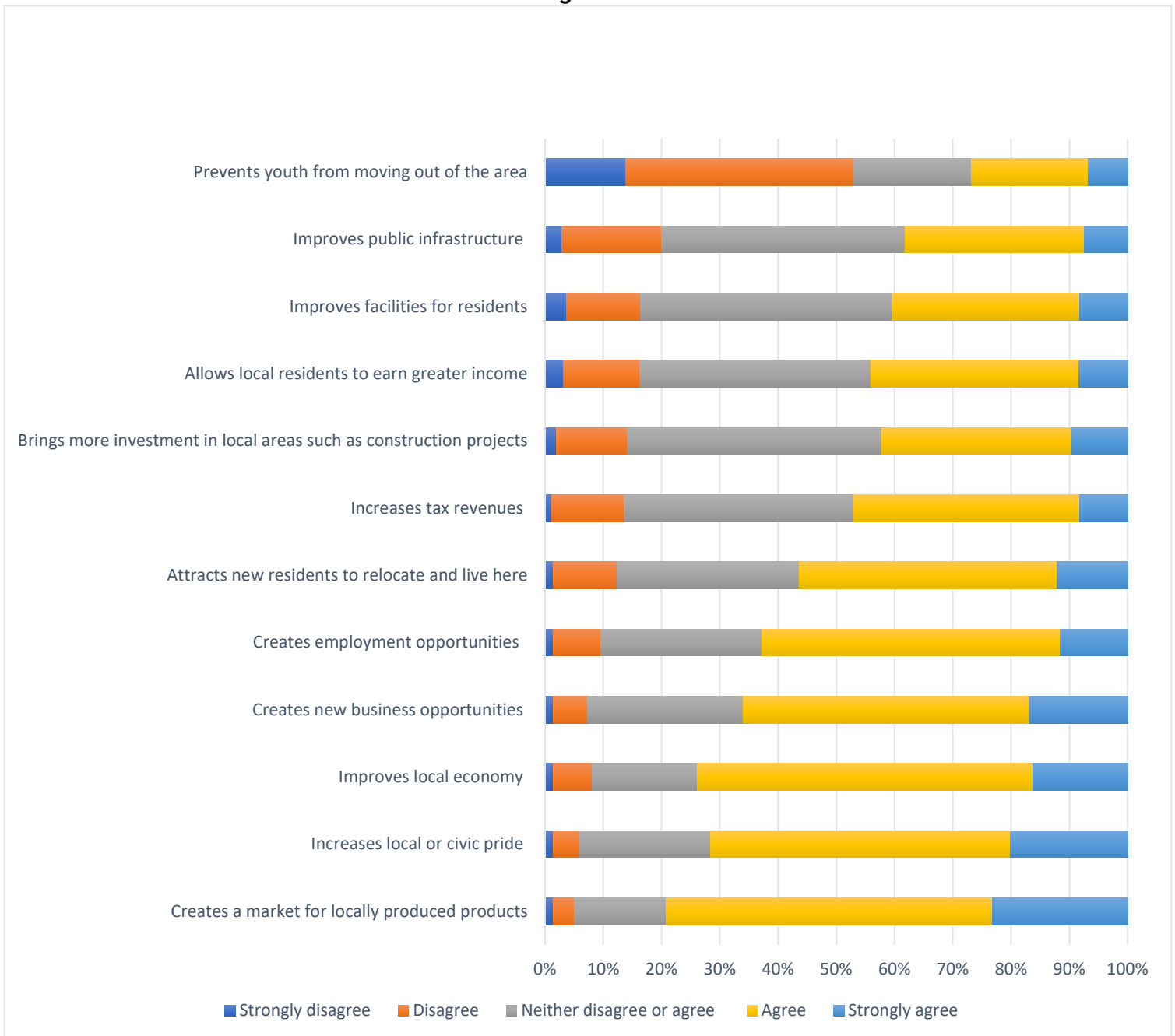
The PA Wilds is mission-driven with a series of organizational values that shape its work. The survey queried the resident community about its identification with these key descriptors. When calculated as a weighted average, resident stakeholder responses rated the improved local quality of life as the highest (See Figure 20). When presented as a frequency distribution and weighted average, the weighted averages were within .21 percent of each other across five descriptors from 3.89 to 3.68. This evenness indicates consistency across the levels of an agreement, most strongly tending toward agree or strongly agree. The even distribution demonstrates that the brand's focal points resonate positively and evenly throughout the resident community.

Figure 20



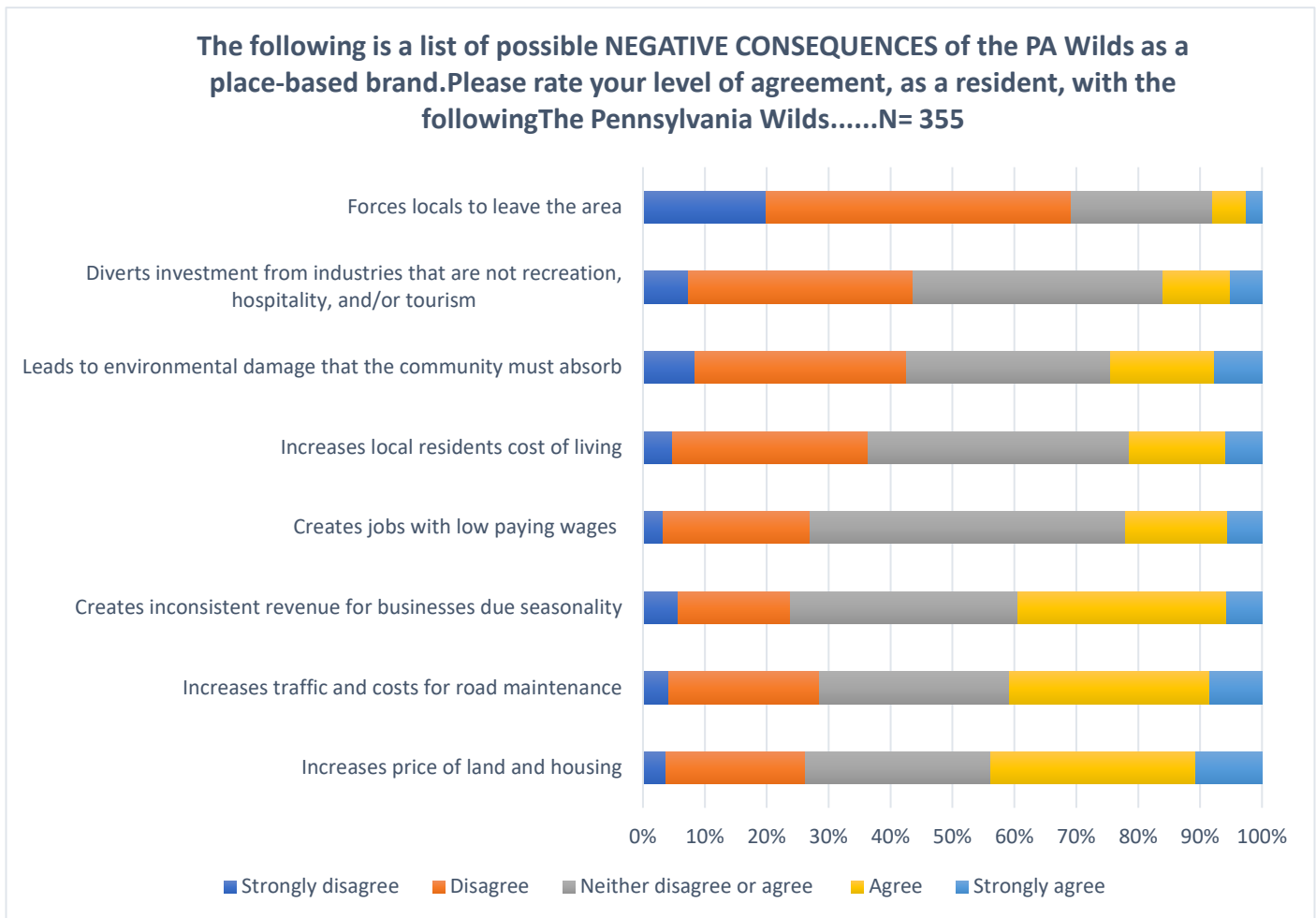
The survey gathered insight into the resident community's perception of the positive and negative impacts of tourism and recreation development in the Pennsylvania Wilds. According to the resident community, the highest-ranked possible positive consequence of the PA Wilds as a place-based brand was creating a market for locally produced goods (weighted average of 3.96). The lowest rated response was it *prevents youth from moving out of the area* (weighted average of 2.75). Figure 21 presents the survey responses by frequency distribution.

Figure 21



The following question asked about the possible negative consequences of the PA Wilds as a place-based brand (See Figure 22). With a weighted average of 3.25, increased housing and land prices were rated the highest. The lowest rated possible negative consequence was that it forces locals to leave the area (weighted average 22).

Figure 22



Overall, the resident community resonates with the PA Wilds stated brand attributes and evenly recognizes its mission-vision focal points. When prompted to consider the positive and negative impacts of the brand, none of the possibilities stood out alarmingly, which indicated a neutral reception of possible positive and negative consequences of the PA Wilds as a place-based brand.

PA Wilds Tourism Product Stakeholders

A product stakeholder functions on the supply side of the tourism system. Since residents are part of the tourism product, this can include residents. However, the study separated residents as described above. Therefore, the study classified product stakeholders as follows:

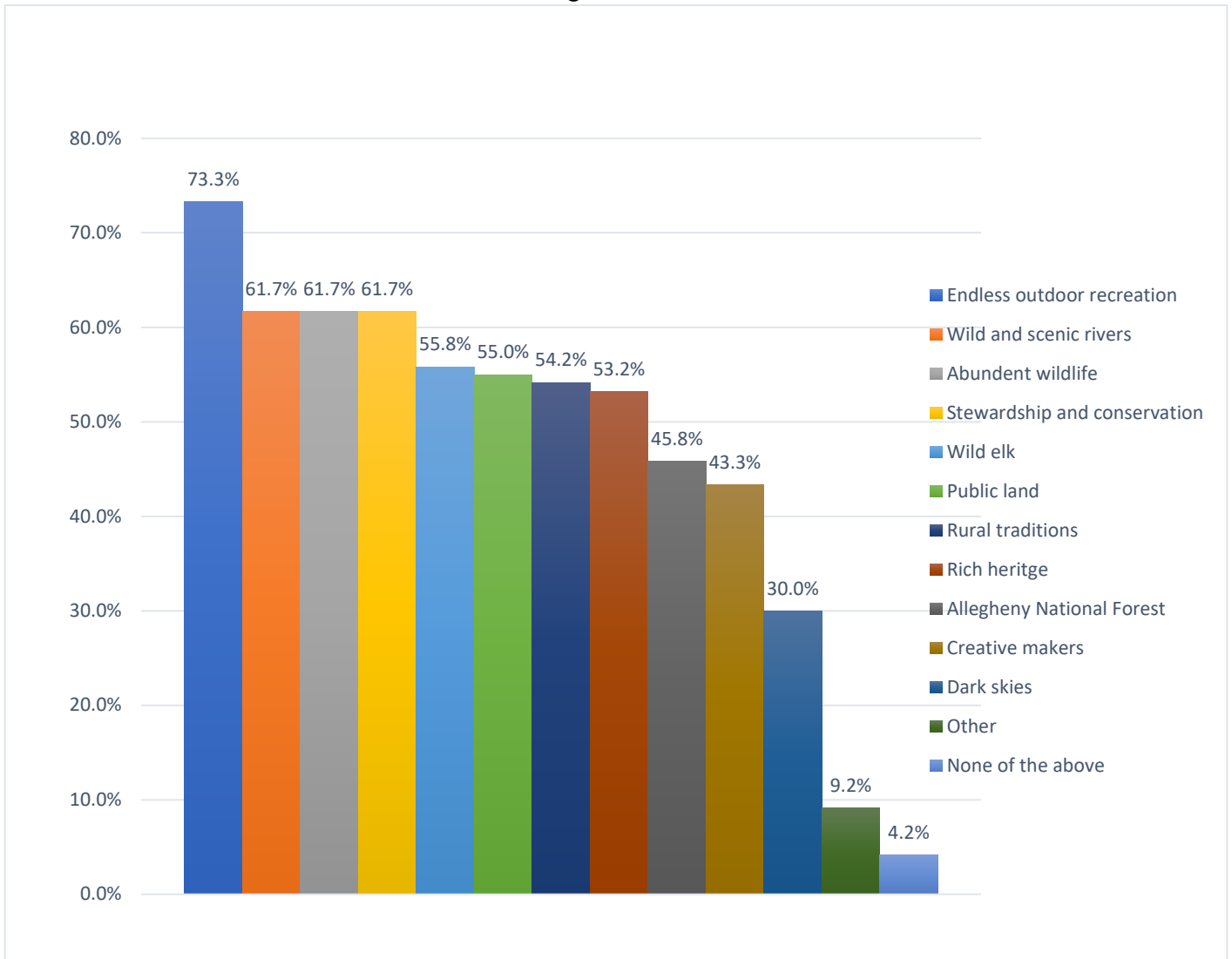
- Creators, experience makers, and other entrepreneurs
- Official destination marketing organizations (DMOs, CVBs, TPAs)
- Nature-based, adventure, agritourism, and other rural tourism operators

- Policy influencers and makers
- Other tourism operators

The social survey captured input from all groups and called these *business community stakeholders* instead of product stakeholders to be more user-friendly for the survey. The stakeholder interviews focused more exclusively on the policy influencers and makers.

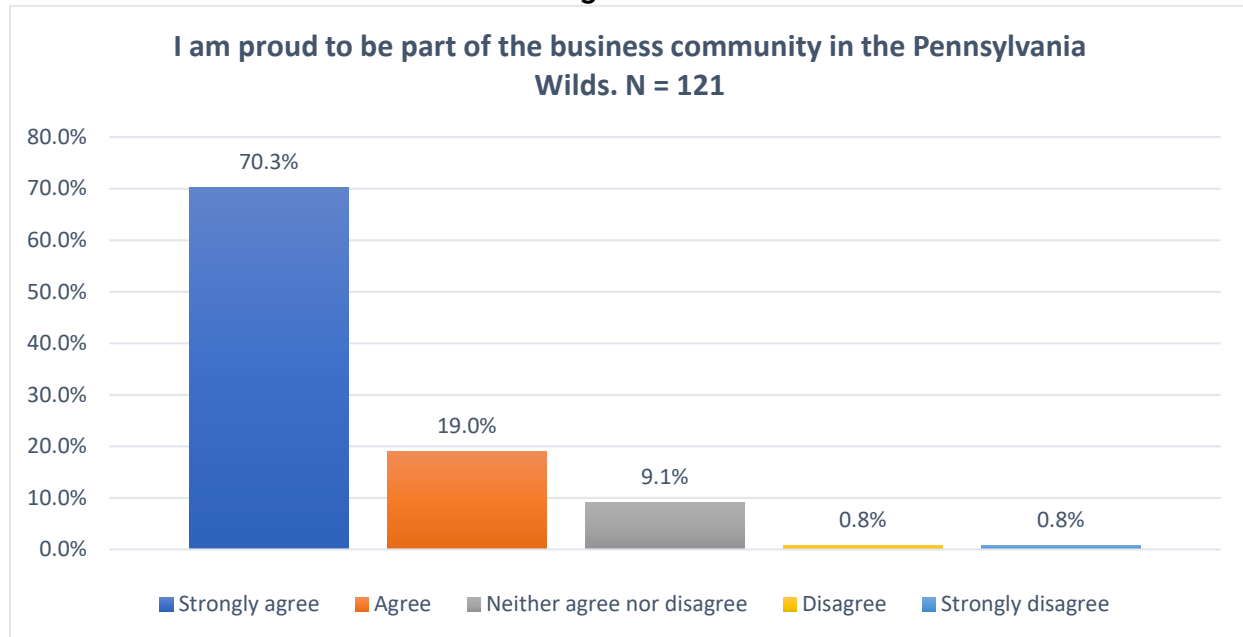
For consistency, the survey asked business stakeholders many of the same questions as the resident community stakeholders. Business stakeholders shared the top three rankings in slightly different order of the brand attributes of endless outdoor recreation, wild and scenic rivers, and abundant wildlife (See Figure 23). Their lowest levels of brand attribute identification also reflected resident stakeholders with creative makers, dark skies, other, and none of the above with the lowest levels of representation.

Figure 23



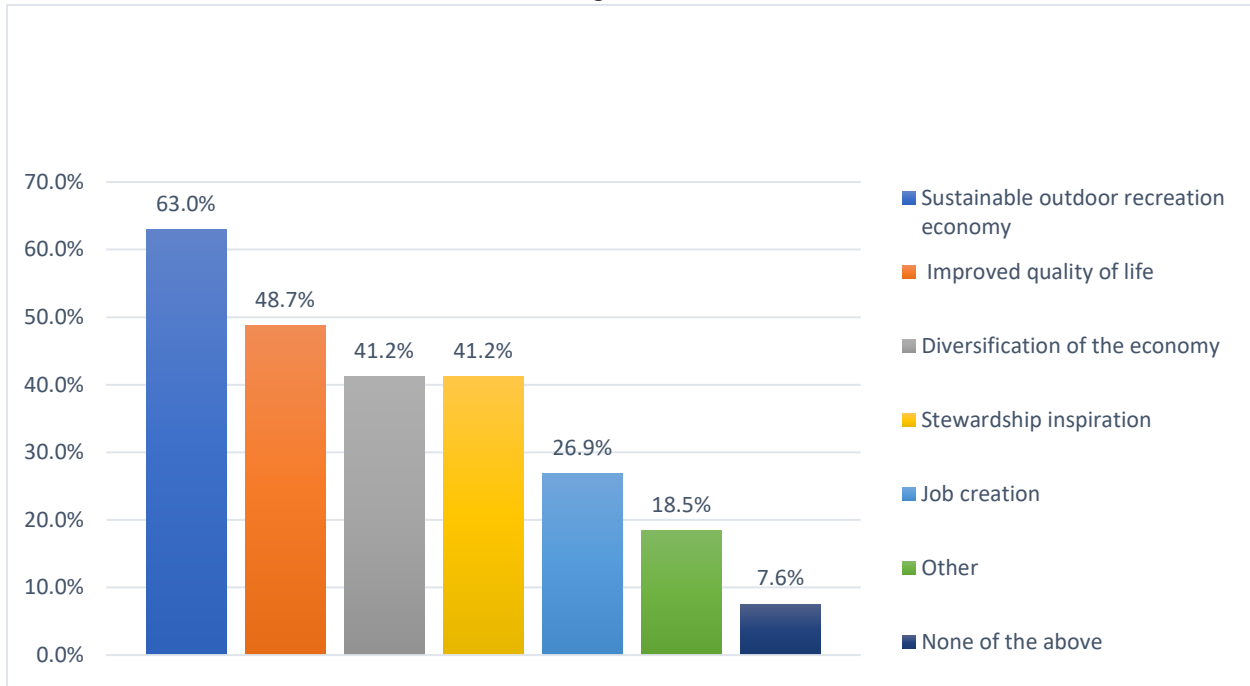
The survey asked business stakeholders their level of agreement with the statement, "I am proud to be part of the business community of the Pennsylvania Wilds." They agreed with this statement like the resident stakeholder counterparts (See Figure 24). The identification was more substantial than the resident stakeholders, with 89.26 percent agreeing or strongly agreeing with the statement.

Figure 24



The business stakeholders were asked more in-depth questions because of their unique perspectives on economic development. The survey asked the business stakeholder group what the brand represented to them using the mission focal points, followed by more in-depth ranking questions to create a more nuanced view of the brand's stated mission-oriented focal points. When asked what the PA Wilds represented to them as a place-based brand, the most frequent response, 63 percent, was the sustainable outdoor recreation economy (See Figure 25).

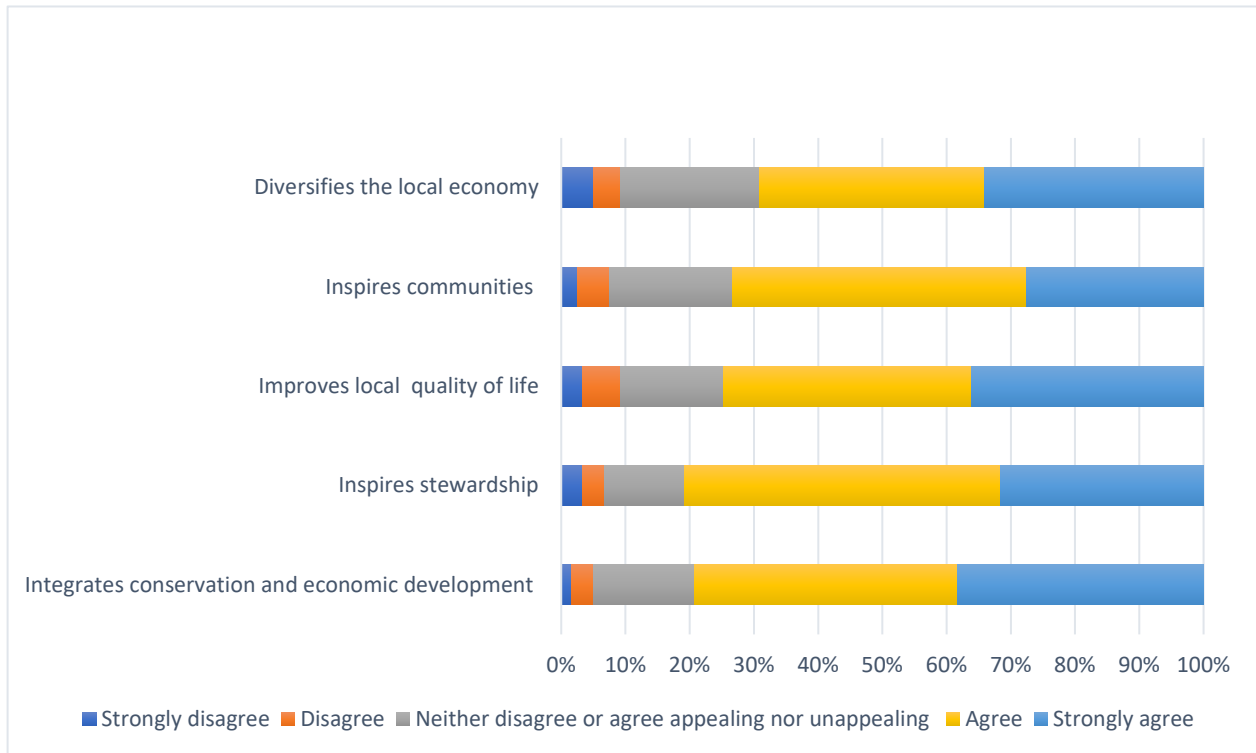
Figure 25



When PA Wilds Center mission focal points were framed as a series of agreement rankings, the most substantial level of agreement was with a 4.11 weighted average (See Figure 26). Notably, there was little variation in the responses, with the weighted averages ranging from 3.89 to 4.11 or .22 overall. Similar to the resident stakeholders, there was an evenness in agreement with the statements of the Pennsylvania Wilds improving the local quality of life, inspiring stewardship, integrating conservation and economic development, inspiring communities, and diversifying the local economy.

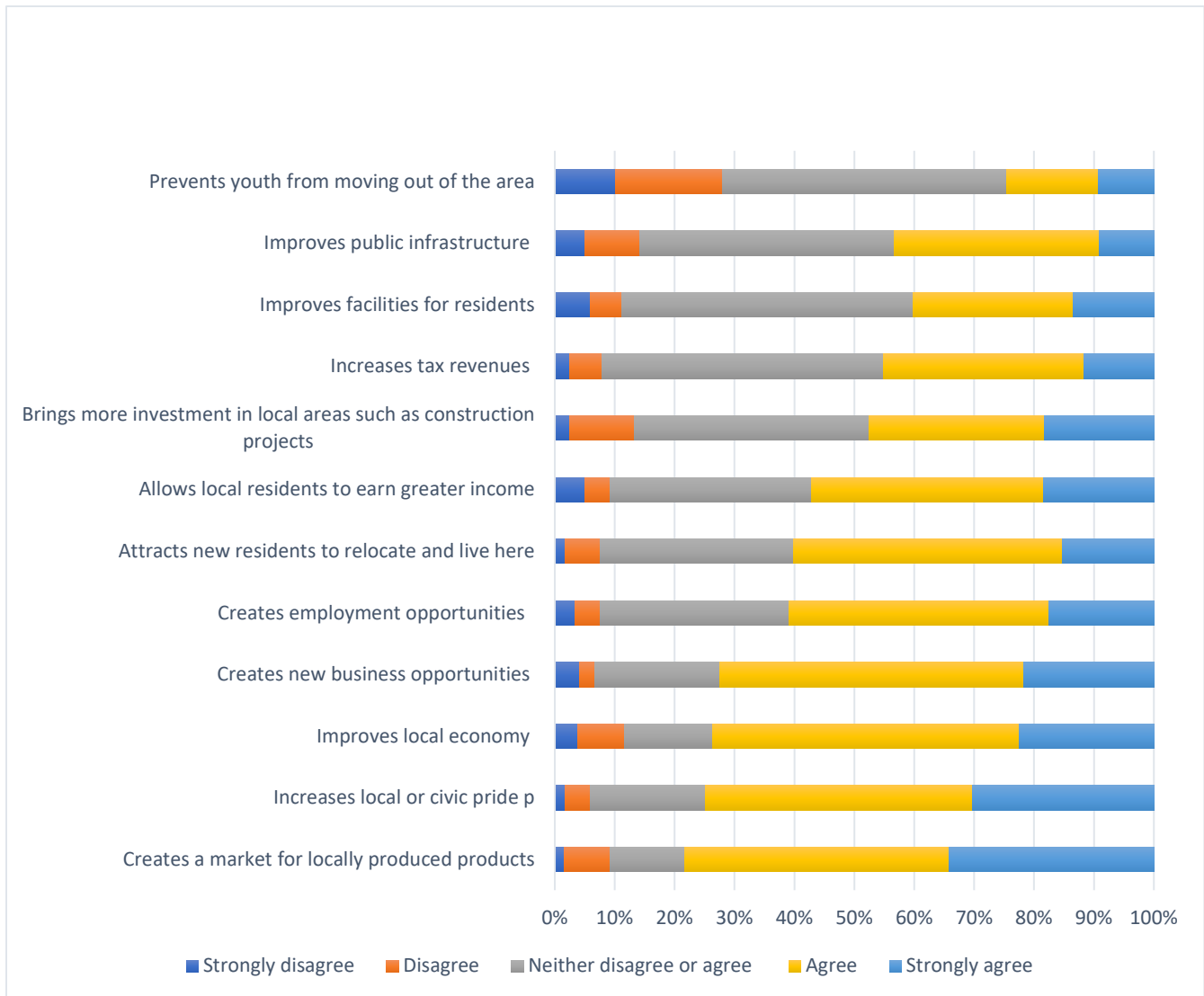
When analyzed as a weighted average, the strongest levels of agreement were with the integration of conservation and economic development.

Figure 26



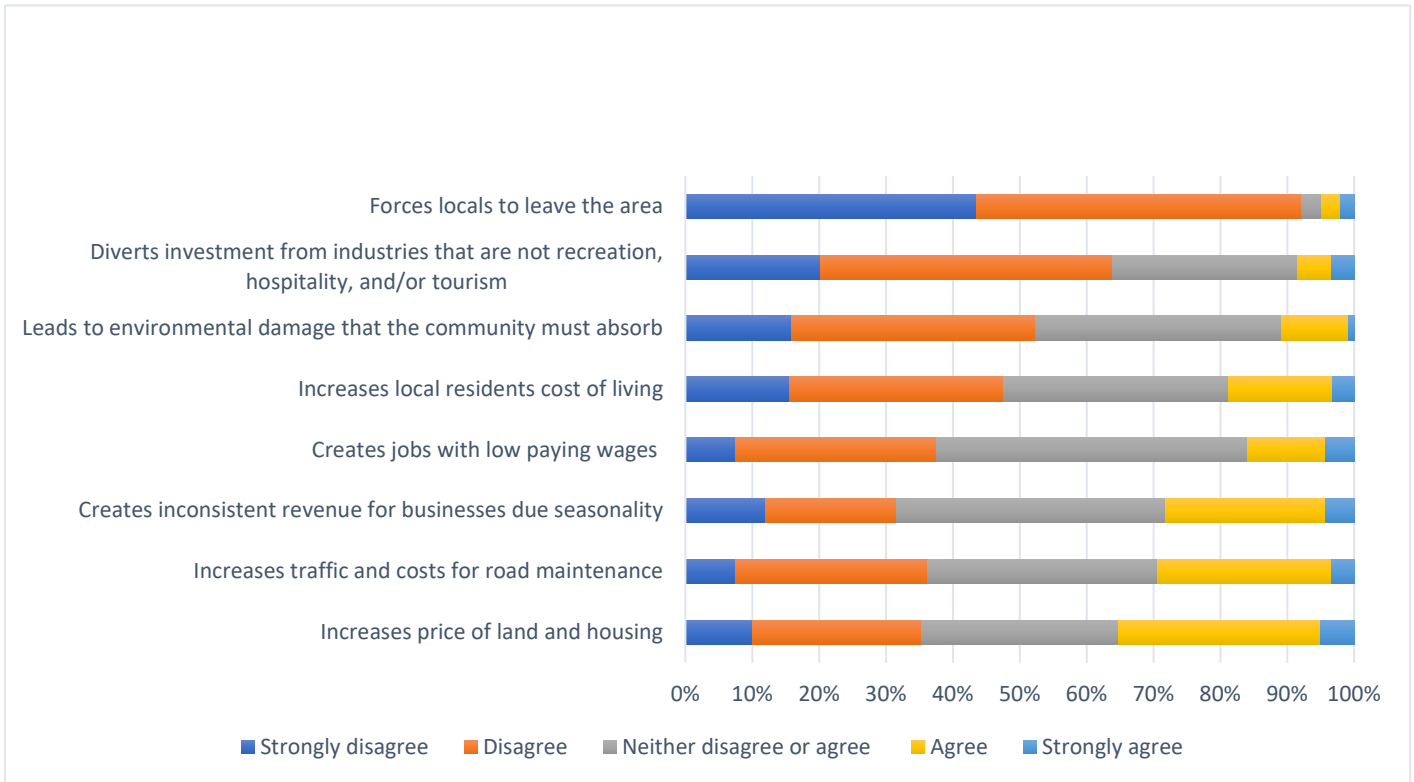
When considering the agreement level as a weighted average, the most favorable consequence of the PA Wilds on this list, according to business stakeholders, was creating a market for local products, with a weighted average of 4.17 out of 5. The weighted average order paralleled the resident stakeholder from highest to lowest, although the weighted averages themselves were slightly different. In general, the order was the same in their agreement with the positive consequences of the PA Wilds as a place-based brand; however, the levels of agreement were slightly higher (strongly agree or agree) over resident stakeholders who tended toward neutral (neither agree nor disagree) (See Figure 27).

Figure 27



When considering the possible negative consequences, the business community mirrored the resident stakeholder community. Business stakeholders had the highest level of agreement with the possible negative consequence statement the PA Wilds increases the prices of land and housing and the least level of agreement with forces locals to leave the area. (See Figure 28).

Figure 28



The survey's business stakeholder segment findings demonstrate strong similarities to the resident stakeholder community. The brand attributes of the PA Wilds resonated with this group. The group is overwhelmingly proud to be a PA Wilds business stakeholder community member. The mission focal points of the PA Wilds resonated evenly with the group, indicating that the brand has a consistent impact in communicating and delivering on its stated mission.

Key Themes from Thematic Content Analysis

As noted in the methods section of the report, there were three key sources of qualitative data merged for analysis. These sources included audio transcripts from the stakeholder interviews, web content, and open-ended questions from the web-based surveys. Specifically, for the open-ended questions, this yielded more depth to the analysis than the descriptive statistical analysis discussed in the preceding section since these closed or semi-closed questions were pre-determined categorical questions structured around the brand attributes of the PA Wilds. For example, stakeholder groups were asked to answer the following open-ended question:

Please let the researchers know anything that you think is important about the community and economic impacts of the Pennsylvania Wilds as a place-based brand and tourism region.

These responses were merged with the stakeholder interview transcripts and NCaptured web content (e.g., social media posts, blogs, and other website textual content). This merger created a large textual database that was imported into NVivo for thematic analysis. The data were organized into main concerns by stakeholder groups as patterns were observed in the data.

The following emerged as prominent concerns due to repetition, validation from the literature, or complementary evidence from other elements of the study’s mixed methods approach (See Table 8). Due to the nature of thematic content analysis as a qualitative technique, the research did not rank or attach other numerical measures to the concern (Braun, 2022); these concerns were observed as prominent. These are thematic patterns captured across the data through methods and analysis meant to probe more deeply than the categorical web survey questions were able.

Table 8

Data Theme Extracted from Merged Qualitative Database	Prominent Concern by Stakeholder Group		
	Business Stakeholder	Resident Stakeholder	Visitors
Mixed concerns about seasonal fluctuation of demand (positive and negative)	✓	✓	✓
Positive tourism impacts not known or understood	✓	✓	■
PA Wilds Center as a threat to other promotion and economic development organizations	✓	■	■
Misconceptions about tourism and its benefits	✓	✓	■
Lacking high-quality promotional assets	✓	■	■
Inadequate directional signage	✓	✓	✓
Lack of high-speed internet in the region	✓	✓	✓
Mixed concerns about vacation rentals and short-stay accommodations (too many or too few)	✓	✓	✓
Lack of tourism data for business decision making	✓	✓	■
Longevity of the PA Wilds Center and its leadership team concern	✓	✓	■
Distrust of how occupancy tax is used	✓	✓	✓
Uneven distribution of occupancy tax	✓	✓	■
Competing with urban regions for resources	✓	✓	■
Skilled workforce shortage (focus on higher education)	✓	✓	■
Lack of higher education options in the region	✓	✓	■
Lack of government funding for the region	✓	✓	■
No reliable funding for the PA Wilds Center	✓	✓	■

✓ Prominent concern ■ Not a prominent concern

As noted above in the literature review, tourism policy falls into the general categories of demand and revenue management and supply and cost management. The product and market dynamic for tourism is different because products are produced and

consumed simultaneously at the point of the destination. This dynamic means the product is the destination, thus making supply-side policy recommendations much more noticeable and concerning to business and resident stakeholders. This explains, in part, the emergent concerns are most notable in the business and resident stakeholder categories.

PA Wilds Center Performance in Tourism Development Best Practices

Qualitative research relies on organizing unstructured information into observed categories or patterns. These categories are referred to as themes, which is why one methodology of this type of research is called thematic content analysis, or thematic analysis for short. The merged qualitative database of interview transcripts, NCaptured web content (e.g., content indexed on the internet that fit the project keywords such as social media posts, blogs, and website text), and the open-ended social survey questions underwent further thematic analysis as a larger NVivo project file subfile. This subfile can be viewed as evidence from various stakeholder groups since a brand and its effectiveness exists across a large swath of brand consumers (i.e., people exposed to or who experience the brand). The reader can visualize the recommended activities and best practices list discussed in the literature review as a figurative checklist and the merged qualitative database as evidence to verify that the practice was taking place. In this case, the unstructured data were reviewed against the list of accepted actions or best practices as the themes. The research determined if there was enough credible evidence to show the practice as being met or unmet based on observations extracted from the dataset.

This thematic analysis revealed that the PA Wilds Center satisfies all the recommended activities and best practices established and supported in the literature for effectiveness in developing and managing regional place-based tourism. To help the reader visualize the software-supported process of thematic analysis in NVivo and its rigor, one can visualize using different colored highlighters and sticky notes on separate file folders and grouping them based on a similar idea (i.e., theme). For example, one set of themes used was the series of best practices. As a simplified example of this process, the reader can visualize the best practices from Table 9 titled *implement and apply brand standards*. When searching the merged content database, several credible examples of this standard are observed as being met. For example, the PA Wilds has a published brand book, the stakeholders in their interviews discuss the expanded use of the brand standards, and there is visual evidence that brand standards are being upheld in social media posts by Wilds Center partners. This practice to *implement and apply brand standards* is therefore met. The research did not quantify the extent to which it was met, how many times it was met, or how well it was met. It was simply coded in the project file as met or unmet based on the body of evidence (i.e., the merged qualitative database).

The original intent of the portion of the thematic analysis approach was to use any unmet practices to derive policy recommendations. Using the above example, if *implement and apply brand standards* was not met, then the researchers would have made policy recommendations. However, the research result indicated that the PA Wilds Center, over the past 10 years, has and continues to meet all 15 attributes. (See Table 9).

Table 9

Literature Supported Recommended Activity or Best Practice for Place-based Branding and Regional Tourism Development	Met by PA Wilds Center	Unmet by PA Wilds Center
Apply for external funding.	✓	
Catalog and managing knowledge.	✓	
Communicate goals, objectives, and actions constantly and transparently.	✓	
Create community engagement.	✓	
Facilitate an organizational framework, including leadership and decision-making structures.	✓	
Encourage entrepreneurship.	✓	
Establish quality standards and controls.	✓	
Focus on natural and cultural asset stewardship.	✓	
Implement and apply brand standards.	✓	
Inventory tourism assets.	✓	
Promote tourism assets.	✓	
Role model innovation.	✓	
Support innovation.	✓	
Support private enterprise.	✓	
Support the celebration of place.	✓	

Therefore, this thematic analysis revealed the PA Wilds Center is an effective regional place-based tourism brand manager. The following section will discuss how this, and the study's other findings, should be applied through specific policy recommendations to further support and enhance this effectiveness.

Discussion and Policy Considerations

The following section will identify and discuss research-based policy considerations for the appropriate policy entities. All policy recommendations are driven by the research findings summarized in the previous section.

Recommended Development Strategy

One task of the research was to identify a development opportunity recommendation. Based on the conceptual framework established earlier in this report, development opportunities of a destination can be subdivided by making changes or staying the same on either the product or market side of the destination, which leaves four simplified options: market penetration, market development, product development, and diversification.

As reviewed in the findings section of this report, the study determined the PA Wilds has positive brand recognition and conversion. Economic development is attributed to the brand, and the PA Wilds is delivering on its messaging, as evident through satisfaction, visitor retention, mission-values, and attribute resonance with all stakeholders. The researchers have concluded the brand management is effective. Therefore, a dramatic overhaul of products and markets is unnecessary.

Based on the research results, the researchers recommend that the PA Wilds maintain its course through a market penetration strategy. This strategy is recommended when there is an existing effective product-market match and brand management is effective. A simplified way of viewing a market penetration strategy is to keep doing the same things without dramatically changing the type of visitor to the region or the predominantly nature-based and outdoor economy-based products those visitors enjoy; the product-market match is working, and the brand has achieved value. This option does not imply, however, that it cannot enhance its effectiveness. Due to this “stay the course” approach, this recommendation is also the lowest risk and lowest investment. It aims to stabilize and increase positive community and economic impacts over time. Continued and more robust success can be achieved through the policy recommendations in the final section of this report.

Residents and businesses are overwhelmingly proud to be part of the Pennsylvania Wilds, indicating positive community impacts. This brand effectiveness has been paralleled by an increase in economic contributions in the tourism and recreation sectors in the region while the region overall has experienced a population decline. The brand is serving its mission effectively with subsequent positive community and economic impacts. The primary brand manager, the PA Wilds Center, is doing what a regional placed-based tourism and recreational brand entity should. However, with some public policy attention, it can improve on this solid foundation.

A market penetration strategy means continuing its current course with the same tourism markets and products. This recommendation also will address the one theme of mixed seasonality concerns that emerged in the qualitative portion of the methods

because enhanced positive impacts tend to smooth seasonal fluctuations to make them less abrupt (Gunn, 2010). Seasonality is a common tourism development concern that policymakers cannot control because they cannot change fundamental earth sciences. The remaining concerns from Table 9 are paired with the prominent stakeholder concerns derived from the research findings. This leaves the results of the thematic analysis and resulting major stakeholder concerns to be connected through specific policy actions, which are underpinned by the market penetration strategy recommendation.

In summary, the research has yielded this market penetration recommendation because the PA Wilds has proven to be an effective brand expressing recognizable mission-values attributes that resonate across all stakeholder groups. A market penetration strategy means that the PA Wilds should continue to do its good work and can do so more effectively if the study's policy recommendations are implemented.

Demand and Revenue Management Policy Recommendations

Governments primarily use five general policy strategies to manage the demand and revenue side of the tourism system: marketing and promotion; information provision and network development; pricing; controlling access; and security and safety (Fletcher, 2018). The research yields recommendations in marketing and promotion, and information provision and network development.

Marketing and Promotion

As noted, the research findings summary shows that the PA Wilds Center is doing good work in extending an effective brand, which indicates effective marketing and promotion. However, a few areas need attention from different stakeholder groups. These recommendations will focus on action items concerning specific agencies; the report has no room to detail where each specific policy works well; it will only identify limitations and gaps that must be addressed.

Spreading the word about positive impacts

There is some misconception about the PA Wilds' role as an industry partner among product stakeholders. The research indicates that some business stakeholders, some Destination Marketing Organizations (DMOs) (official convention and visitors bureaus and tourism promotions agencies), and economic development groups or chambers of commerce doing DMO work view the PA Wilds effort as a threat to their efforts. As the closest state-level government entity to the DMOs, DCED's Office of Marketing, Tourism, and Film should work to communicate that the existence of the PA Wilds enhances their destination regions and does not detract from them. This public relations effort will help erode misconceptions and correct potential ineffective institutional thickness, that is the density of institutions and organizations that act in a territory to promote development actions (OECD, 2020). This communication must come from the Office of Tourism or

DCED, not the PA Wilds, to resonate effectively with the overlapping DMOs, local governments, and chambers of commerce in the region, which often do DMO work by default without being designated officially by the state.

The researchers also recommend community public relations. The study revealed some misconceptions about tourism in the qualitative portions of the research. Sometimes this is called the NIMBY effect or *Not in My Backyard*. This means there is a general understanding that tourism is positive but some residents do not want it close to them (Hashimoto, 2008). There is agreement that tourism is important and yields opportunities for a region in population decline. This consensus is a foundation from which to continue to communicate positive messages.

Tourism is not a heal-all to any one region's economic woes. However, the PA Wilds region is enjoying positive consequences for employment, spending multipliers, and increased tax revenue. That message should be widely communicated through press releases and other grassroots efforts to advance community awareness at all levels, most notably local government, since place-based tourism is fundamentally reliant on its relationship at the local levels and since sense-of-place is generated at that level (Foroudi, 2021).

Promotional assets

Local businesses need marketing and promotion support. While the DCED One-Stop is an excellent resource, access to high-production value marketing assets such as copyright-free stock and drone footage of the region would enhance the marketing and promotional materials of small and medium-sized tourism operators. Most visitors hear about the PA Wilds from VisitPA.com, the official tourism website of Pennsylvania. If the PA Tourism Office created these or opened a catalog of selected assets to members along with their vendor Miles Partnership, there would be continuity between a look and feel that already resonates with the market. The PA Tourism Office already has an industry area via <https://www.visitpa.com/industry>, and an established member management system for its Happy Traveler Guide, and VisitPA.com listings that could put the assets behind a secure user and password wall to help manage appropriate use.

Information provision and network development

TODS

Tourism Orientation and Directional Signage, or TODS, improve tourism asset connectivity and seamless transport for visitors. These are critical in rural tourism since rural areas are more difficult to navigate, rely on visitors traveling by vehicle, and consist of passthrough visitors (Gunn, 2010). Scenic driving was the most popular activity, according to the research. Road signage is, therefore, a critical component to maximizing the success of the destination and cross-over activity and spending. Based on one of the themes in the qualitative analysis, the current extent of TODS is a barrier to regional promotion. Grant programs in 2008 and 2012 supported gateway signage in

the region. However, this is not a long-term fix, as signs require maintenance and replacement.

The researchers recommend that the PA Tourism Signage Trust pilot a clear, region-wide destination-branded signage program in partnership with the PA Wilds and its brand standards. The PA Tourism Signage Trust has an existing framework for sign placement, PA Tourism Office logo use, appearance continuity, and maintenance. A pilot program for the PA Wilds, where regional identity is proven to be a strong link to the tourism economy and wayfinding, may also inform the extension of the regional TODS signage program into the other 10 tourism regions.

Closing the broadband divide

Lack of broadband access restricts the PA Wilds' economic development potential. The Pennsylvania Broadband Development Authority (PBDA), as an independent agency of DCED, is currently working on "closing the digital divide." PBDA has identified four factors contributing to this divide: infrastructure availability, affordability, devices, and digital literacy. The stakeholders of the Pennsylvania Wilds especially point to infrastructure availability as the most pressing issue in the digital divide.

Lack of broadband availability directly restricts tourism innovation in new technologies for marketing, promotion, booking, network development, asset management, and digital sales and distribution. The PA Wilds cannot harness the potential of digitalization and the application of new technologies without filling the infrastructure gaps. The PBDA was signed into law on December 22, 2021, and is actively implementing a statewide broadband plan, including the distribution of funds. This report serves as a critical reminder to DCED and PBDA that the economic development of the PA Wilds relies on the agency's continued work. The researchers have no specific recommendations since good work is in progress. However, this study serves as a benchmark that, without attention, this established problem will only worsen.

Supply and Cost Management Policy Recommendations

The methods governments generally use to influence the supply side of the tourism industry are land-use planning and environmental control; building regulations; market regulation; market research and planning; taxation; ownership; education and training; and investment or investment incentives. The research yields recommendations in five of these eight areas.

Market regulation

One of the notable growth areas of the tourism industry in rural areas is the "gig" or "side-hustle" economy. This economic aspect includes seasonal or at-home marketplaces (i.e., cottage industries), home sharing, or vacation rentals. This growth brings commercial activity into residential areas, which can create friction between

businesses and the community. This study did not indicate that this is a problem but it may be a potentially emergent concern as there were some mixed concerns about home sharing and vacation rentals. However, local governments, with the PA Wilds Center as a unifying body, should continue to pay attention to frictions and advocate for regulatory interventions if necessary.

Market research and planning

Current, credible, geographically relevant, and timely market research is not readily available or easily accessible for small businesses in the PA Wilds for tourism operators to make responsive data-driven decisions. The PA Tourism Office makes data from outside vendors available publicly via <https://www.visitpa.com/research-statistics>. As of April 2023, the most recent report available via VisitPA was 2020 economic impact reporting and 2021 traveler profile reports. Commercially available reports, such as Smith Travel Research, lack accuracy for rural geographies and dominant independent ownership and operation patterns of lodging in the PA Wilds. These reports, referred to as the STR – "star" – reports, are also behind a paywall. If the PA Tourism Office is going to continue using an outside vendor for statewide data, it must be more widely disseminated in a timely manner to product stakeholders so that they can make data driven business decisions and understand tourism patterns in their communities.

Succession planning for leadership

The strength of the PA Wilds Center's leadership was a repetitive theme in the research. The leadership praise was part of the evidence used for the best practice attribute *facilitate an organizational framework, including leadership and decision-making structures*. When examining this data more deeply, stakeholders connect the success of the PA Wilds Center to its CEO and Founder, Tataboline Enos, and the team she has assembled. Through effective leadership, Ms. Enos has created a community and environmental stewardship culture that has extended through the environmental ecosystem cultivated by the PA Wilds. The Wilds Center has assembled a competent executive team.

This leadership best practice extends into a stakeholder concern. The thematic analysis reveals a prominent concern for the longevity of this leadership strength (See Table 8). The stakeholder interviews revealed a perception that the PA Wilds Center could actively develop an influx of new talent through internships and cooperative experiences. However, since the last economic impact and policy-related study of the PA Wilds was approximately 10 years ago, this report preemptively cautions the PA Wilds itself to develop a succession plan for the CEO role, including a plan for knowledge transfer.

Occupancy tax transparency and division

According to the research participants, the hotel tax distribution process lacks transparency. Changes as recent as 2019 were made by the Department of Revenue to the consumption option taxes to address the changing dynamic of lodging supply and demand regarding home sharing, vacation rentals, and other short-term rentals. These changes are especially critical to the PA Wilds because the informal and independent sharing economy style lodging is a potential growth area for rural areas, but also emerged as a prominent concern.

Many accommodation modes in the PA Wilds do not fall into the current occupancy tax structure. For example, a dominant form of lodging in the area is camping, which is difficult to track and not always subject to tax as it is dependent on the provision of utilities to the camper, local authorities, and if the land is public or private (Pennsylvania Department of Revenue, 2023). The tax is governed at the state level in cooperation with the county government, intending that a percentage of the funds are then disseminated at the county level with reinvestment into that county's official tourism promotion entity. The rural and nature-based characteristics of the PA Wilds region mean less funding is collected, yet arguably there is a higher need for funding to be reinvested into tourism promotion.

The discrepancy in this system is that rural counties will always have fewer lodging providers creating a pool of available funds. Urban areas, especially Pittsburgh (+1 percent) and Philadelphia (+2 percent), are authorized to impose a higher rate under the Cooperation Authority Act, which will continue fueling a larger occupancy tax collection cycle, with subsequently more funds to reinvest into urban tourism promotion. This cycle creates a lopsided collection and redistribution system under which rural tourism promotion agencies are penalized for the unique characteristics of their tourism product.

The problem with occupancy tax for rural areas is documented. The implementation and use of the hotel room and rental tax were studied in 2012 in Pennsylvania's 3rd through 8th Class Counties (Holoviak, 2012). Many of the issues identified in that research are still prevalent in the PA Wilds, including a reliance on hotel room tax by Tourism Promotion Agencies and a lack of transparency for how the funding is disseminated. For example, this study revealed there is an impression that some counties take a portion of this for county-level projects before it reaches the TPAs. The researchers, therefore, recommend increased transparency by the Pennsylvania Department of Revenue, county governments, and DCED for the amount and eventual distribution of funds.

Rural destinations, like the PA Wilds, are complimentary to the state's urban tourism products and not in competition. However, they do not benefit from the occupancy tax system equally for their tourism promotion. While there is no easy fix to this problem, DCED, county commissioners, and the Department of Revenue should jointly study this issue to evaluate the current system and address shortcomings already documented in the 2012 study.

Education and Training

The qualitative analysis shows evidence that there is concern about skilled workforce development with specific reference to the Pennsylvania State System of Higher Education (PASSHE) schools. In 2022, PASSHE collapsed six universities into two. In the northeast, Bloomsburg, Mansfield, and Lock Haven universities became Commonwealth University. In the west, Edinboro, Clarion, and California became PennWest University. Notably, five of the six affected schools are in or adjacent to counties in the PA Wilds (PASSHE, 2023). Figure 29 is an illustration that shows a simplified view of the PASSHE universities for general spatial context.

Figure 29 (PASSHE, 2023)



Two impacted schools offered parks, recreation, and tourism management programs. Lock Haven and California had commercial recreation and parks management academic programs. However, PASSHE eliminated parks and recreation management from Lock Haven and, therefore, Commonwealth University. Lock Haven's Parks and Recreation Management program was the most noted example in the merged qualitative dataset. PennWest eliminated a nationally accredited parks and recreation degree program and reduced it to a concentration in California. Therefore, PASSHE's elimination of academic programs through their state school consolidations may directly impact the PA Wilds skilled workforce development needs and its growing outdoor recreation economy. PASSHE could reverse these through the Chancellor's Office since moratoriums can be changed within five years. This change would encourage investment and improvements in the quality of the tourism industry and the skills of people employed in the sector.

Investment

According to the interview respondents, current funding levels across major agencies and destination marketing organizations are insufficient. The research has indicated that the current extent of marketing is adequate if Pennsylvania is striving for "good enough" but could be exponentially enhanced through more consistent funding.

The interviews revealed that the PA Wilds Center does not have adequate, stable, predictable, year-to-year funding. It relies on grant writing and other ad hoc funding programs, as available, through state and regional departments, agencies, and

commissions. The center’s funding efforts are laudable, as evident by its achievement as a finalist in the Economic Development Administration’s (EDAs) \$1 billion “Built Back Better Regional Challenge,” which was a \$1 billion grants competitions for challenge communities created through the American Rescue Plan Act (U.S. EDA, 2023).

For the PA Wilds to continue to do its proven good work and pursue strategic efforts in recreation infrastructure development, workforce development, entrepreneurial ecosystem expansion, cluster sustainability and resilience, and profile raising to attract private investment, it needs more funding. While groundbreaking and essential, the Intergovernmental Cooperative Agreement of the Wilds creates gaps in funding stability. The overlap between DCNR and DCED with the PA Wilds as the official nonprofit entity bringing together sustainable natural resource use and economic development puts it in an awkward middle ground that makes it easier for its funding needs to be overlooked. While a level of formal funding exists, the current stop-gap system of short-term funds and other investment programs prohibits long-term strategic planning. It must be corrected jointly with DCED and DCNR sharing responsibility.

Conclusions

The data-driven policy recommendations for the continued positive community and economic impacts of the PA Wilds as a place-based tourism brand and regional destination are a continued market penetration strategy achieved through:

Demand Revenue Management

Marketing and promotion

Public relations with local governments and regional DMOs

Responsible party: DCED Office of Marketing, Tourism, and Film

High production value marketing assets

Responsible party: DCED Office of Marketing, Tourism, and Film

Information provision and network development

Regional TODS pilot program

Responsible party: PA Tourism Signing Trust

Closing the digital divide through broadband

Responsible party: Pennsylvania Broadband Development Authority

Supply and Cost Management

Market regulation

Monitoring the informal lodging sector

Responsible party: PA Wilds Center

Market research and planning

Provision of accurate and current tourism data

Responsible party: DCED Office of Marketing, Tourism, and Film

Succession planning for leadership

Responsible party: PA Wilds Executive Leadership Team

Taxation

Occupancy tax transparency and study

Responsible party: PA Department of Revenue and DCED

Education and training

Public higher education recreation and tourism programs

Responsible party: PASSHE

Investment

Stable budget line items dedicated to the PA Wilds Center

Responsible parties: DCED and DCNR

The study established that the PA Wilds, administered by the PA Wilds Center, as a regional place-based tourism brand, has positive brand recognition, attribute resonance, and positive conversion. The brand's effectiveness corresponds with the positive community and economic impacts. Economic impacts in commercial recreation and tourism in the PA Wilds region have been positive while the region's overall population has declined. However, current funding levels across major agencies are not sufficient or stable. The research has indicated that the current extent of the PA Wilds is adequate if Pennsylvania is striving for "good enough" but could be enhanced through more consistent funding with policy action from the PA Wilds Center, the PA Tourism Signing Trust, the PA Broadband Development Authority, the PA Department of Revenue, PASSHE, DCNR, DCED, and most specifically, DCED's Office of Marketing, Tourism, and Film.

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Appendix 1

Email Recruitment Methodological Notes

All email invites identified ryan@pennwest.edu for the sender policy framework to ensure Dr. Ryan was the verified sender. The study team used domain-based messaging authentication to ensure emails were deliverable. These techniques enhanced the likelihood of the email being received and not filtered as unwanted. Although these emails did not solicit users for commercial or transactional purposes, they complied with the CAN-SPAM Act of 2003. Therefore, the researchers made efforts to ensure the emails. Accordingly, the project and the Center for Rural Pennsylvania, as its funding agent, acted with the highest standards for direct email conduct to avoid recipients viewing them as bothersome or solicitous.

Using a webpage scraping and email extraction platform, Email Extractor, the researchers manually harvested email addresses from public sources. The first technique for manual email harvesting used a common email domain metasearch. For example, the most popular domains include but are not limited to @gmail.com, @outlook.com, and @yahoo.com. Using the domain in the metasearch with a geographical location, such as city, state, and country, extracts the emails into the search results. The search results were imported into the extraction software to be converted into working email addresses to place in the email database of recipients.

Where the survey recruitment and referral participant needed help designing their survey recruitment piece, the research team provided a media toolkit with templated pre-designed pieces in standard social media sizes optimized for mobile and desktop viewing.

Appendix 2

Survey Recruitment and Referral Participants

The survey recruitment and referral campaign partners included but were not limited to:

- Allegheny College Creek Connections
- Allegheny Mountain Chapter of Trout Unlimited
- Allegheny National Forest
- Angler's Fishing Club of Pittsburgh Association (PSA)"
- Beaver County Sportsmen's League
- Black Ash Sportsman's Club
- Brandywine Conservancy –Penguin Court
- Brodhead Trout Unlimited
- Cameron County Chamber of Commerce
- City of Warren
- Clinton County Economic Partnership and Tourism Bureau
- Clinton-Irwin Rod and Gun Club
- Codorus TU
- Columbia County Trout Unlimited
- Corn Planter Trout Unlimited
- Cumberland Valley Trout Unlimited
- Deer Creek TU
- Delaware Valley Women's Fly Fishing Association
- Delco-Manning Trout Unlimited
- Department of Conservation and Natural Resources
- Dick Martin, Coordinator, Pennsylvania Forest Commission
- Doc Fritchey Trout Unlimited
- Donegal Trout Unlimited
- Elk Valley Sportsman Club
- Federation of Sportsmen's Clubs
- Friends of Fishing Creek
- General Braddock Fishing Club
- Glenn "G.T." Thompson, United States Congressmen, 15th District
- Harrisburg Hunters and Anglers Assn.
- Hemlock Rod & Gun Club
- James Decker, President/CEO, Warren County Chamber of Business & Industry
- Keystone Trails Association
- Lackawanna Trout Unlimited
- Lancaster Fly Girls; United Women On the Fly (SE PA)
- Lawrence Park Fish Club
- Let's Go Outdoors
- Lumber Heritage Region
- Mercer County Federation of Sportsman's clubs
- Muddy Creek Trout Unlimited (SE PA)
- Musky Inc.
- Neshannock Creek Chapter of Trout Unlimited
- Northcentral PA Conservancy
- Northeast Sportsmans Club
- Office of Marketing, Tourism, and Film
- Oil Creek Chapter Trout Unlimited
- Oil Creek Trout Unlimited
- Outdoor Afro - Pittsburgh
- PA Council of Trout Unlimited (PATU)
- PA Route 6 Alliance
- PA Steelhead Assoc
- Penns Woods West T.U. (SW PA)
- Pennsylvania Federation of Sportsmen's Club, Inc.
- Pennsylvania Fish and Boat Commission
- Pennsylvania Game Commission
- Pennsylvania Great Outdoor Visitor Bureau
- Pennsylvania Office of Tourism
- Pennsylvania Steelhead Association (PSA)
- Pennsylvania Steelhead
- Perkiomen Valley Trout Unlimited
- Pittsburgh Parks Conservancy - Frick Environmental Center
- Potter County Conservation District
- Pymatuning Lake Association (PLA)
- Ridgeway-Elk County Chamber of Commerce
- Sandycreek Conservancy
- Save Our Native Species (SONS of Lake Erie)
- Senator Cris Dush, Senator, Pennsylvania's 25th District
- Shenango River Watchers
- PA Small Business Development Centers
- Southeast Montgomery Trout Unlimited
- Sp. Club of Forest Co.
- Sparta Sportsman's Club
- Stanley Cooper Sr. Trout Unlimited
- Suskie Bassmasters
- The Progress Fund
- Tri-County Trout Club (TCTC)
- Tulpehocken Trout Unlimited (SE PA)
- Western Pennsylvania, Conservancy
- Westmoreland County Sportsmen's League
- Wilds Center for Entrepreneurship
- Williamsport/Lycoming Chamber of Commerce
- York Area Sportsmen's Association

Appendix 3

Survey Instrument

Appendix 4

Interview Protocol

Semi structured informal interview

Informed consent statement –read out loud, recording permissions also through Zoom “this meeting is being recorded” prompt.

Before we begin the research, I would like to read the following informed consent statement. I also provided a written copy of this in the electronic booking notification for this Zoom meeting. That invitation also includes my contact information at the University should you have any questions or concerns about the research. The following statement was approved by the Cal U Institutional Review Board for the protection of human research subjects.

I want to make sure that you understand you are participating in this research voluntarily. The interview is being recorded and I will use the audio transcript for research purposes. The transcript data and any resulting analysis is secured in a password protected area of the university network, which requires a two-factor authentication login process.

You may stop the interview at any time without consequences. If you stop the interview, the audio transcript will be deleted. There is minimal risk to this research. The data will be kept for future research purposes such as publications related to this study after the completion of the study. Your agreement in the interview indicates consent to use the data, which is the interview transcript.

You have been asked to participate in this public policy research as you are a critical public policy stakeholder. I will report my findings very generally, which might provide some anonymity. However, I cannot guarantee complete anonymity due to the exclusive nature of your position in and relationship to the Pennsylvania Wilds.

This is a semi-structured, informal interview. I have budgeted an hour for our time together. I am going to start with some prompting questions and we will see where our conversation about the community and economic impacts of the Pennsylvania Wilds’s goes from there. Is it ok to begin?

Prompts/Checkpoints

- Please briefly describe your relationship to the PA Wilds.
- Please describe the major ways that PA Wilds benefits Pennsylvania’s economy.
- Please describe the major ways the PA Wilds benefits Pennsylvania’s rural citizens.
- What are the public policy instruments that are essential to the PA Wilds as a place-based brand?
- What policy instruments are harmful to the PA Wilds? Please name specific entities or legislation.
- What public policy instruments and actions are essential to support the PA Wilds?
- What are policies that you recommend to help the PA Wilds thrive? Please name specific entities that might be the main policy actors.

Appendix 5

Contribution to Employment, Labor Income, and Output Additional Tables

Table 10 Total Contributions include direct, indirect, and induced contributions.

Contribution to Employment, Labor Income, and Output of the Accommodations Industry in the Pennsylvania Wilds, 2011 to 2021.						
	Direct Employment	Direct Labor Income	Direct Output	Total Employment	Total Labor Income	Total Output
2011	1,940	\$63,460,314	\$100,313,077	2,596	\$90,352,258	\$259,597,906
2012	1,975	\$64,890,107	\$101,557,985	2,634	\$92,476,926	\$266,175,750
2013	1,926	\$63,390,960	\$97,655,470	2,565	\$90,317,249	\$259,264,916
2014	1,981	\$64,651,606	\$98,306,170	2,648	\$92,062,396	\$267,604,345
2015	1,980	\$62,792,380	\$96,839,855	2,646	\$90,204,203	\$263,844,502
2016	2,027	\$60,837,405	\$94,367,206	2,716	\$89,395,580	\$268,357,445
2017	2,042	\$59,334,960	\$93,094,440	2,718	\$87,803,073	\$264,727,092
2018	2,057	\$61,443,778	\$93,969,126	2,681	\$88,002,378	\$254,174,948
2019	1,996	\$58,770,819	\$93,681,018	2,583	\$84,576,359	\$247,716,924
2020	1,711	\$55,033,881	\$77,394,433	2,154	\$75,712,162	\$186,945,616
2021	2,046	\$65,430,653	\$97,214,306	2,674	\$94,495,018	\$267,747,384
% Change, 2011-21	5.5%	3.1%	-3.1%	3.0%	4.6%	3.1%

Table 11 Total Contributions include direct, indirect, and induced contributions.

Contribution to Employment, Labor Income, and Output of the Amusement Industry in the Pennsylvania Wilds, 2011 to 2021.						
	Direct Employment	Direct Labor Income	Direct Output	Total Employment	Total Labor Income	Total Output
2011	825	\$15,931,919	\$44,814,870	992	\$22,396,707	\$67,203,370
2012	634	\$11,508,558	\$33,995,526	755	\$16,317,594	\$50,758,463
2013	608	\$13,170,056	\$35,047,696	733	\$18,220,115	\$52,745,624
2014	718	\$16,053,846	\$41,653,144	866	\$21,857,504	\$62,242,962
2015	685	\$14,997,299	\$40,448,669	832	\$20,704,096	\$60,808,241
2016	692	\$13,980,429	\$38,293,830	831	\$19,373,225	\$58,015,045
2017	647	\$13,287,063	\$37,754,743	779	\$18,526,110	\$56,699,318
2018	666	\$13,795,570	\$34,295,073	783	\$18,483,027	\$51,346,140
2019	631	\$14,311,722	\$34,362,055	757	\$19,462,264	\$53,241,028
2020	566	\$12,255,365	\$26,908,477	665	\$16,543,512	\$41,406,631
2021	633	\$15,211,681	\$32,928,685	753	\$20,625,314	\$52,164,382
% Change, 2011-21	-23.3%	-4.5%	-26.5%	-24.1%	-7.9%	-22.4%

Table 12 Total Contributions include direct, indirect, and induced contributions.

Contribution to Employment, Labor Income, and Output of the Alcohol Production Industry in the Pennsylvania Wilds, 2011 to 2021.						
	Direct Employment	Direct Labor Income	Direct Output	Total Employment	Total Labor Income	Total Output
2011	122	\$6,723,970	\$75,672,862	305	\$15,350,329	\$104,870,381
2012	136	\$6,323,962	\$63,261,178	305	\$14,019,221	\$90,021,884
2013	176	\$8,423,581	\$69,588,329	347	\$16,662,221	\$97,644,597
2014	156	\$7,165,132	\$68,201,956	321	\$15,106,783	\$95,825,234
2015	168	\$7,638,047	\$78,143,346	358	\$16,560,562	\$109,153,663
2016	232	\$10,389,516	\$87,792,467	456	\$20,291,926	\$123,110,313
2017	199	\$7,546,370	\$79,846,650	397	\$16,782,068	\$112,113,523
2018	233	\$8,063,250	\$89,296,525	422	\$17,507,577	\$122,474,812
2019	296	\$9,777,650	\$106,159,818	518	\$21,089,083	\$146,434,024
2020	248	\$8,038,044	\$88,114,787	442	\$18,423,674	\$122,123,708
2021	298	\$9,145,869	\$98,650,793	488	\$19,694,808	\$135,911,191
% Change, 2011-21	145.2%	36.0%	30.4%	59.8%	28.3%	29.6%

Appendix 6

Survey Respondent Demographics

Figure 30

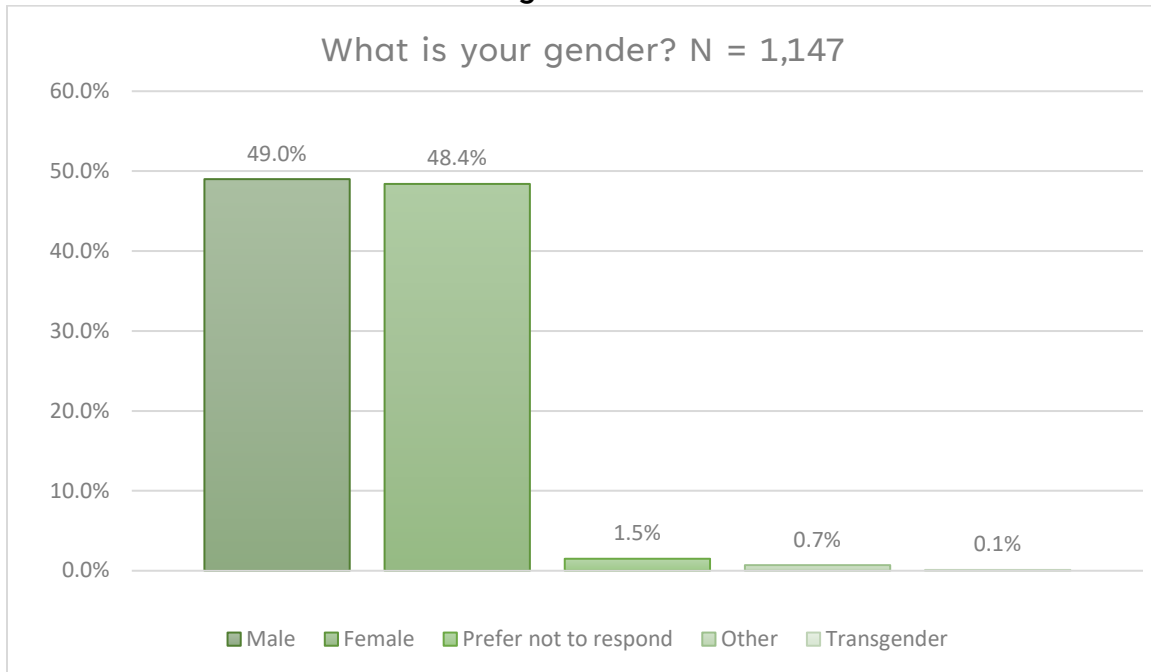


Figure 31

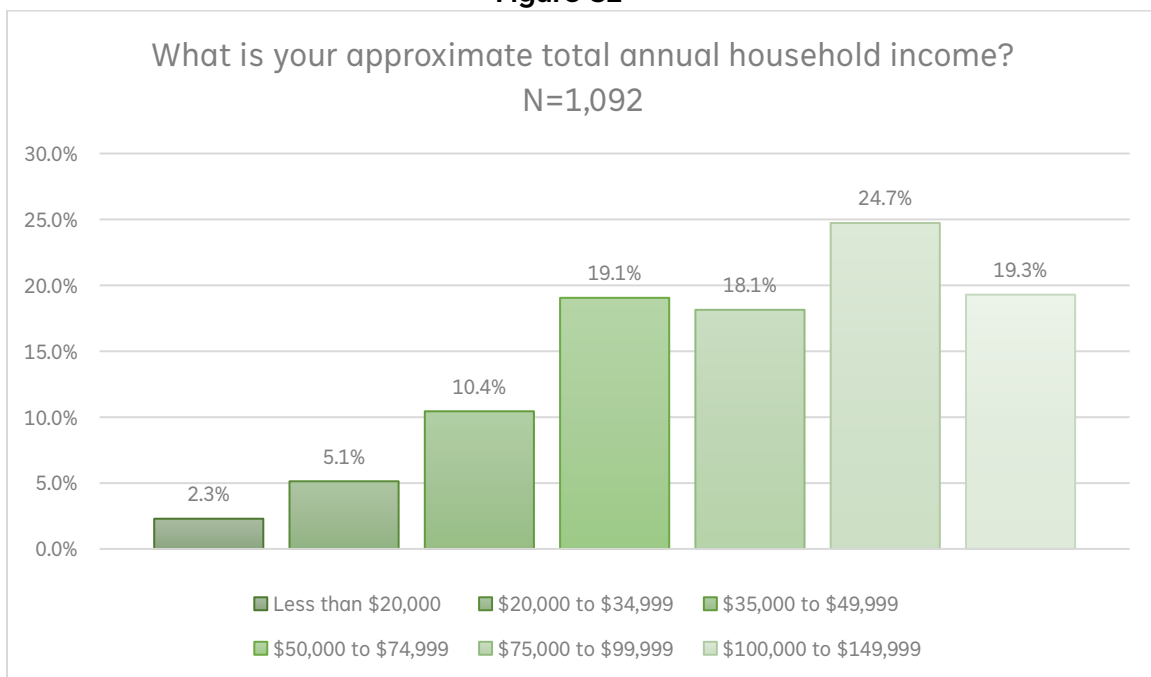
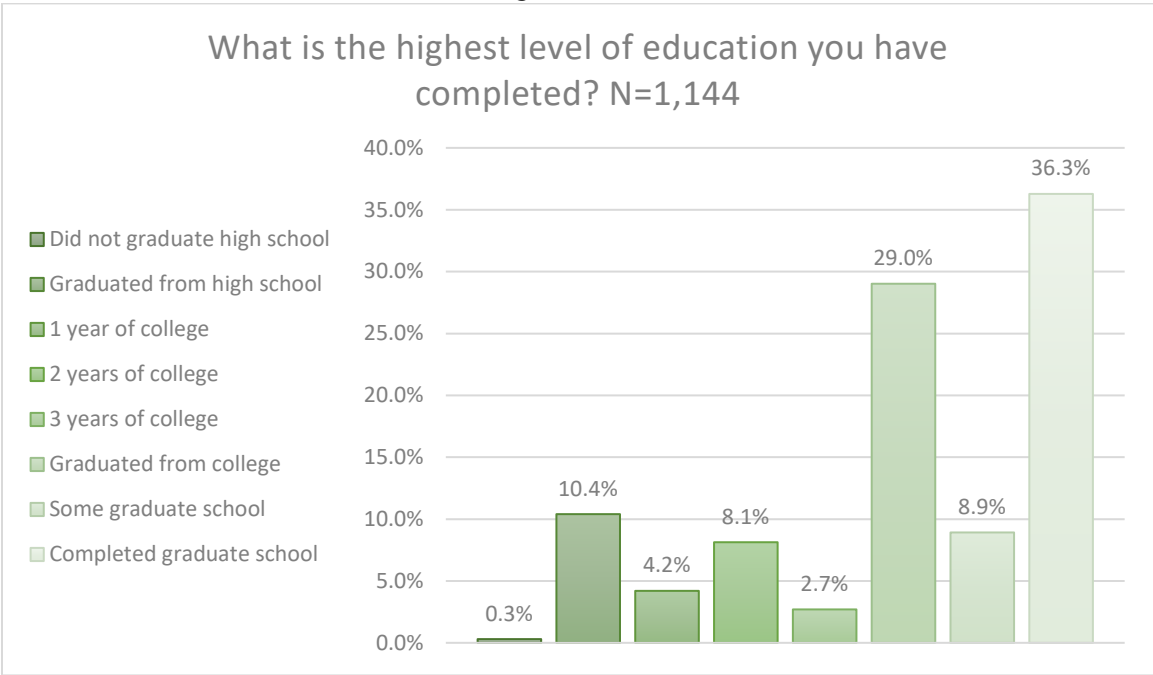


Figure 32



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