Nature-Based Placemaking 2.0: Using natural assets as economic generators

Presenters: Jerry Walls & Julie Fitzpatrick
About your speakers

• Jerry Walls, FAICP - Susquehanna Greenway Partnership

• Julie Fitzpatrick - PA Downtown Center
Susquehanna Greenway Partnership (SGP)

• Jerry Walls, FAICP - SGP Board Chair

Susquehanna Greenway Partnership is a leading champion for the Susquehanna River Watershed. We advocate for public and private efforts to connect people with our natural and cultural resources, and promote a sustainable and healthy environment.

susquehannagreenway.org
Pennsylvania Downtown Center (PDC)

- Julie Fitzpatrick - Assistant Director

PDC is a statewide non-profit organization. Our mission is to build and support the capacity of local non-profit organizations, municipalities and individuals to enhance the overall well-being and sustainability of Pennsylvania’s ‘core’ communities.

www.padowntown.org
Synergistic & Collaborative Partnerships

• Importance of working together
  – Sharing resources: time & money

• Stewards of our land, our communities, our resources
  – Corporations
  – Organizations
  – Individuals
Synergistic & Collaborative Partnerships

• Public-Private Partnerships
  – Conservationists
  – Community/Economic development professionals
  – Municipal leaders
  – Residents
  – Businesses
Partnerships

• Types of Partnerships
  – Philosophical: values & vision
  – Advocacy: support a desired outcome
  – Geographic: local/regional considerations
  – Philanthropic: specific problem/issue → outcomes
  – Programmatic: focus areas → outcomes
Downtown/Community Vision

- Asset-driven, market-based vision
  - Identify the assets
  - Determine how you want to enhance or develop the assets
  - Use consensus to create the vision
  - Develop a strategy that helps achieve the vision
Downtown Economic Strategies

• A Regional Tourist Destination... “Downtown offers something for everyone, whether you’re a history buff or a friend to the outdoors...”

• An Economic Center... “that cultivates new and innovative ideas and businesses...”

• “A residential utopia of students, young families and empty nesters living in a welcoming, walkable downtown...”
Supporting the Vision

• Businesses to support the vision
• Community/residential buy-in to the vision
• Municipal strategies to support the vision
  – Local & Regional
• Partnerships to support the vision
• Types of customers to support the vision
PA Tourism Data

• $40.8 billion - Spending by travelers to and/or w/i PA
  – $20.8 billion - leisure overnight travelers
  – $13.8 billion - leisure day-trippers
• Lodging - $5.5 billion
• Food and beverage - $8.4 billion
• Retail - $6.5 billion
• Recreation - $6.9 billion
• Transportation - $13.5 billion

Tourism Economics 2015
PA Tourism Data

• In-state spending rose 2.9% to $38.04 billion
• Leisure visitors - Day-trip leisure visitors accounted for 57% of all domestic visitor spending on recreation in PA
  • 127.4 million day-trip leisure visitors - $14.4 billion
    – Each visitor spent est. $128/trip
  • 58 million domestic overnight leisure travelers, spending $16.7 billion
    – Each visitor spent est. $290/trip

Tourism Economics 2015
2015 Domestic Day-Trip Leisure Traveler Spending by Category

- Recreation: 25%
- Transportation within PA: 32%
- Shopping: 25%
- Food & Beverage: 19%
2015 Domestic Overnight Leisure Traveler Spending by Category

- Transportation within PA: 36%
- Lodging: 23%
- Food & Beverage: 16%
- Shopping: 13%
- Recreation: 11%
Hot Buttons

- A fun place for a vacation/getaway
- **Exciting destination**
- Good for adult vacation/getaway
- **Lots to see and do**
- A good place for couples & families to visit
- Must see destination
- **Truly beautiful scenery**
- A place where I feel welcome
- Good place to getaway & relax
- A fun place for kids
- **Great place for walking/strolling about**
- Great shopping
- **Interesting cities/towns**
- A welcoming place for children
- Warm/Friendly people
Trail Users

• Trail studies by Rails-to-Trails Conservancy ask...
  – Zip code
  – Frequency of use
  – Age
  – Children participating
  – Gender
  – Primary activity on trail
  – Influence of trail
    • Type
    • Frequency
  – Use trail for...
  – Activity during visit
  – How to get to trail
  – Learn about the trail
Economic Impact Studies

Trail studies by Rails-to-Trails Conservancy

• Use of trail influencing purchases
  – Hard Costs
    • Annual spending
    • Where purchasing
  – Soft Costs
    • Additional spending
    • Types of services

  – Accommodations
    • Type
    • Number of nights
    • Spending
2011 Rails-to-Trails User Survey/Economic Impact Analysis

- 85% local/15% non-local
- 60% for health/35% for recreation
- 80% purchased “hard good” - ave. $327 pp/pt
- 56% purchased “soft goods” - ave. $12.57 pp/pt
- 125,244 est. total user visits annually
- $875,320 est. annual soft goods
- $1,326,117 est. of total user spending
Current visitor vs. potential visitor

• Who is your current visitor?
• Who is your potential visitor?
• What is the difference between the two? Why is it important?
Existing Visitors

• Who are they? Where are they coming from?
• How did they learn about your trail/town/park?
• What else are they doing while they’re visiting?
• Are they having a memorable experience that they are sharing with friends and family?
• How can you help make their trip worthwhile?
• Are they returning?
  – To visit
  – To live
Potential Visitors

• Who are they? Where are they coming from?
• How do you get their attention?
• How can you get them to choose your town over another town?
Next steps

• Do you know who your users are?
• Do you have a trail study or trade area study done for your community/business district?
• Do you currently apply it to your strategy?
  – How do you apply it to your strategy?
PRIZM® Profiles

Through *Nielsen/Claritas/Environics* – a marketing research information company –

- Demographic Data – education, income, housing and race
- Economic Data - # of businesses, employees, sales/class; types of businesses, etc.
- Psychographic Data (consumer behavior profiles) – including comprehensive information about media preferences, travel, auto, restaurants, shopping, telecommunications and financial services
PRIZM® Profiles

• PRIZM Household Data (psychographic profiles)
  – Lifestyles of customers to your town/trail/park
  – Urban – Suburban – Rural
  – Young Professionals - Young Families – Empty Nesters – Retirees (Lifestages)
  – Ethnicity and race
  – Educational levels and income levels
  – Behavioral spending patterns/disposable income
• Young, upper-middle-class families seeking to escape suburban sprawl find refuge in new Homesteaders, a collection of small rustic townships filled with new ranches and Cape Cods. With decent paying jobs in white and blue-collar industries, these dual-income couples have fashioned comfortable, child-centered lifestyles; their driveways are filled with campers and powerboats, their family rooms with PlayStations and Game Boys.

• Backpacking, hiking, bicycling, fishing, hunting, snowboarding, rock-climbing, gardening, camping, entertaining at home, photography, buying sporting equipment, going to the zoo, eating at family-friendly restaurants, own a cat
There’s a laid-back atmosphere in Country Casuals, a collection of older, upscale households that have started to empty-nest. Most households boast two earners who have well-paying management jobs or own small businesses. Today these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares, and going out to eat.

Hunting, fishing, gardening, play golf, play tennis, ski, bicycle, go camping, own a motorcycle, go horseback riding, eat at steakhouses, do woodworking/refinish furniture, own a dog.
Like the old Andy Griffith Show set in a quaint picturesque berg. Mayberry-ville harks back to an old-fashioned way of life. In these small towns, upper-middle-class couples like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles, and pickup trucks.

Buy fishing equipment, go hunting, buy camping equipment, own a rifle/shotgun, go fishing, garden, camping, eat at burger joints & pizza shops, go to a beach/lake, belong to an environ. org., own a dog.
Profiles of Recreational Users

• More likely to:
  – Belong to an arts association & environ. org.
  – Contribute to PBS
  – Go to the movies, museums & live theater
  – Belong to a civic club & a parent assoc.
  – Buy board games & books in stores & online
  – Own a dog and/or a cat
  – Dine out at non-fast food restaurants
  – Enjoy photography and/or woodworking
  – Enjoy entertaining at home
PRIZM® Profiles

• PRIZM Household Data
  – Lifestyles of customers to your town/trail/park/river
  – Women Buying Power
    • 74.9% of women identified themselves as the primary shoppers for their households, *MRI’s Survey of the Am. Consumer, Fall 2011
    • women in the U.S. reported “controlling” 72.8% of household spending
Trends: Millennials • 1977-1995

- Latinos make up 20% of the youth in the U.S.
- 71% appreciate influence of other cultures (62% of Boomers)
- 14% first generation
- 12% second generation
- Strong ties to home country: food, language & media
- Many multigenerational homes
Trends: Millennials · 1977-1995

• 77 million strong – ages 18-36
  – 75% made a donation to a non-profit
  – 71% raise $ on behalf of a non-profit
  – 57% will volunteer for a cause they believe in
  – 75% will share on Facebook about events or causes
  – Over 60% will spend more for a product if it’s eco-friendly or from a socially responsible company
  – 66% under 25 owned a car
  – 98% own smartphones
Trends: Millennials · 1977-1995

• Healthy aging
  – 75% acknowledge that they are taking more personal responsibility for their health today
  – more likely to use acupuncture, herbal remedies and massage therapy and less likely to use prescription drugs, compared with older generations, to maintain their health as they age
Trends: Millennials ∙ 1977-1995

• Value authenticity, creativity & diversity
  – Handmade, vintage products
  – 57% more likely than average to visit Etsy
  – Localism & regional pride
  – Looking for personal, direct, customized experiences
  – They want an experience & a place to gather, not just a place to buy products
  – Fans of music – live or downloaded
Trends: Millennials · 1977-1995

• Print is not dead
  – They read magazines, but not newspapers
  – More likely than Boomers to read: Cosmo, Vogue, Rolling Stone, Wired & American Baby
POULATION BY GENERATION

Source: Nielsen Pop-Facts, 2013

HISPANIC GROWTH 167%
ASIAN GROWTH 142%
Trends: Boomers · 1946-1964

• 80 million strong
  – +/-50% of the U.S. population is 50+
  – Move from making money to spending money
    • Money to spend
    • Time to spend it
  – 67% of Boomers plan to spend more time on hobbies and interests
    • Shopping, traveling, entertaining & socializing
  – Worked hard, now it’s time to play hard
Trends: Boomers · 1946-1964

• 8 million spend 20+ hours/week online
• 1/3 shop online & spent $7 billion*
• 53% are on Facebook
• 40% more likely to own an iPhone
• New technology helps them stay socially and intellectually connected to the contemporary world – it helps to keep them feeling young

*Nielsen 2012
Trends

• Pet Owners
  – 56% of all households own pets
  – 43.3 million households own dogs
    • 36.5% households
  – 36.1 million households own cats
    • 30.4% households

Humane Society & AVMA
Outdoor Consumers - (Outdoor Industry Association)

- 198 million adults in US - 60% are outdoor consumers
- Looking for ways to be more active
- 43% have kids at home - encouraging outdoor activities
- 80% recreate with someone else
- 70% use technology related to their activity

Think of activities, products & services to help aging consumers stay engaged in the outdoors & ways to help parents get kids outdoors w/i time and budget restraints.
THE NATION'S OUTDOOR RECREATION ECONOMY GENERATES:

- $887 billion in consumer spending annually
- 7.6 million American jobs
- $65.3 billion in federal tax revenue
- $59.2 billion in state and local tax revenue
A Powerful Economic Sector

ANNUAL CONSUMER SPENDING

- Education: $278B
- Gasoline and Fuels: $304B
- Household Utilities: $313B
- Motor Vehicles and Parts: $465B
- Pharmaceuticals: $466B
- Outdoor Recreation: $887B
- Financial Services and Insurance: $921B
- Outpatient Health Care: $931B
- Hospital Care: $964B

'Bureau of Economic Analysis
<table>
<thead>
<tr>
<th>Activity</th>
<th>Spending</th>
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<tbody>
<tr>
<td>Trail Sports Gear</td>
<td>$20 Billion</td>
</tr>
<tr>
<td>Water Sports Gear</td>
<td>$14 Billion</td>
</tr>
<tr>
<td>Cycling and Skateboarding</td>
<td>$97 Billion</td>
</tr>
<tr>
<td>Home Entertainment</td>
<td>$18 Billion</td>
</tr>
<tr>
<td>Movie Tickets</td>
<td>$11 Billion</td>
</tr>
<tr>
<td>Video Games</td>
<td>$61 Billion</td>
</tr>
</tbody>
</table>
More Americans participate in outdoor recreation each year:

145 million

than attend NFL, NBA, MLB and NHL games combined (134 million)\(^2\)\(^0\)

Spending on snow sports results in more American jobs:

695,000

than the extractive industries in the United States (827,000)\(^2\)\(^1\)

Spending on hunting sustains more American jobs:

195,000

than the combined U.S. workforces of Apple (86,000) and Microsoft (64,000)\(^2\)\(^2\)
56% of Pennsylvania residents participate in outdoor recreation each year.

Outdoor recreation sustains more than three times as many jobs in Pennsylvania (251,000) as the natural gas industry (72,000).\(^1\)

Pennsylvania residents are more likely to participate in hunting and motorcycling than the average American.
IN PENNSYLVANIA OUTDOOR RECREATION GENERATES:

- $29.1 BILLION in consumer spending annually
- 251,000 direct jobs
- $8.6 BILLION in wages and salaries
- $1.9 BILLION in state and local tax revenue
Outdoor Consumer Population*

• 51% are women
• 38% are millennials
• 34% are urban - living in a city center or on the outskirts of a city
• 17% are Latino/Hispanic

*from Outdoor Industry Association - outdoorindustry.org
51% of outdoor consumers are women

Median age is 40

43% have children

More likely to be in the following segments:

- The Athleisureist
- The Sideliner
- The Complacent

Attitudes

- 84% feel engaging with nature is an important part of outdoor recreation
- 46% will never participate in outdoor activities at extreme levels
- 48% feel it's important to maintain some level of comfort when outdoors
- 33% prefer to participate in shorter outdoor activities than those that last hours
- 48% feel experiences are much more important than acquiring products or goods
- 44% are making a strong commitment to a healthier lifestyle
$465

Total amount spent per year across all 4 categories:

- Outdoor Gadgets: $81 / 18%
- Outdoor Apparel: $137 / 30%
- Outdoor Footwear: $123 / 26%
- Outdoor Equipment: $123 / 26%
Compared to all outdoor consumers, urban outdoor consumers tend to be:

- Younger
- Slightly more male
- More likely to be employed full-time
- More likely to have kids
- More ethnically diverse
19% of outdoor consumers browse/research in a store and buy online (i.e. showrooming)

27% of outdoor consumers browse/research online and buy in a store (i.e. webrooming)
More than 70% of outdoor consumers use smartphones and laptops on a regular basis and 91% of them use their smartphones during their outdoor activities.

15% of outdoor consumers believe that technology is an important part of enhancing their outdoor experience.
<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
<th>Median Age</th>
<th>Are Married</th>
<th>Have Kids</th>
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</thead>
<tbody>
<tr>
<td>Traditional Outdoor Consumers</td>
<td>50%</td>
<td>50%</td>
<td>39</td>
<td>56%</td>
<td>45%</td>
</tr>
<tr>
<td>Non-Traditional Outdoor Consumers</td>
<td>44%</td>
<td>56%</td>
<td>50</td>
<td>44%</td>
<td>21%</td>
</tr>
</tbody>
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Traditional Outdoor Consumers are more likely to be in the following segments:

- The Achiever
- The Outdoor Native
- The Athleisurist

Non-Traditional Outdoor Consumers more likely to be in the following segments:

- The Urban Athlete
- The Sideliner
- The Complacent
TOP MOTIVATIONS

AMONG LATINO/HISPANIC OUTDOOR CONSUMERS:

- TO HAVE FUN
- TO HAVE A FAMILY EXPERIENCE
- TO RELIEVE STRESS
- TO IMPROVE MY OVERALL PHYSICAL HEALTH
Nature-Based Strategies

• Recreation (visitors & locals)
  – Identify the nature-based assets - locally/regionally

• Tourism
  – Is your town visitor ready?

• Are these nature-based assets recognized as assets by the local community?
Nature-Based Strategies

• Is your town visitor ready?
  – Food/Beverage
  – Lodging
  – Retail
  – Visitor Center
  – Experiences
  – Training of staff
  – Hours of operation
  – Acceptance by Civic Leadership
  – Acceptance by Residents
Nature-Based Placemaking (NBP)

Developing the Concept:

• Moving forward and applying lessons learned from past initiatives & programs
  – What has worked? Why?
  – What hasn’t worked? Why?

• Nature-Based Placemaking (NBP) is the next generation of a nature-based revitalization strategy
The concept blends a variety of theories and approaches into a strategic, thoughtful, and practical revitalization program:

- PADCNR’s Conservation Landscapes
- PA Heritage Areas – River towns/Trail towns
- Main Street Four-Point Approach®
- PA Elm Street Five-Point Approach
- Civic Tourism (Dan Shilling)
- Ecological Economics/Triple Bottom Line Theory
DCNR's Conservation Landscape (CL's):

Susquehanna Riverlands CL (Lancaster/York Counties)

- **Sense of Place** – shared landscape not defined by political boundaries
- **Readiness** – participating in a region-wide effort
- **Engagement** – like-minded civic engagement process
- **Strategic Investments** – state and regional partners providing leadership, financial support, and technical assistance.
- **DCNR interests and lands** – staff support and state parks, state lands, or recreational investment
Main Street Four-Point Approach®

- **Design** - getting downtown into top physical shape
- **Organization** - creating consensus and cooperation amongst downtown stakeholders
- **Promotion** - marketing the best attributes of a downtown
- **Economic Vitality** - establishing new uses for downtown while creating new assets and better utilizing existing assets
PA Elm Street Five-Point Approach

- **Design** - getting the physical conditions of a neighborhood into top shape
- **Sustainable Organization** - establishing an ongoing structure to support revitalization
- **Image and Identity** - marketing the community to internal and external markets
- **Neighbors and Economy** - strengthening and creating access to economic resources for people living in the community
- **Safe, Clean and Green** - establishing strategies and partnerships to improve public safety and improve the environment of the neighborhood
Civic Tourism (Dan Shilling)

• “Good places to live are good places to visit and vice versa.”

• Mission: “To reframe tourism’s purpose, from an end to a means... from a market-driven growth goal to a tool that can help the public preserve and enhance what they love about their place, while revitalizing the local economy” – preserving a sense of place
Ecological Economics & Triple Bottom Line Theory

- People – Planet – Profit
- Society – Environment – Economy
- Healthy Communities – Natural Environment – Economic Vitality
- Social Responsibility – Environmental Stewardship – Economic Prosperity
Nature-Based Placemaking (NBP)

- The interaction and integration of a community’s natural assets, economic activity around those assets, and the culture of the community towards both the assets and activity.

- NBP occurs when all of these areas of focus are working in cooperation and conjunction with the other, creating the Total Quality Experience (TQE)
Nature-Based Placemaking (NBP) & the Total Quality Experience

“Tourism” Development

Asset Product Development
Downtown Revitalization (Main St.)
Economic Activity (Profit)

Recreational Asset (Nature)
Hospitality & Services
Shopping & Entertainment

Education & Emotion

Civic Stewardship

Asset-Related Marketing
Experiential Programs
Docents & Story-telling
“Hands-On” Experiences
Artisan Development
Leadership Development
Workforce Development
Volunteer Development
Asset-Related Quality of Life Dev.
Student/Youth Engagement
Elm Street Approach

Hospitality Training
Front-Line Staff Training
Visitor Resource Dev.
Visitor Services Dev.
Community Concierge
Customer Shipping

Business Opportunity

Improvement Districts
Responsible Hospitality
Economic Gardening
Multi-Channel E-Commerce
Main Street Approach
Funding Opportunities

• PA Dept. of Community & Economic Development (DCED)
  – Community Enhancement/Keystone Communities
  – Economic Development

• USDA - Rural Development
  – Business Development grants & loans
  – Community Facilities grants & loans

• DCNR - Bureau of Recreation and Conservation
  – Community Conservation Partnership Program (C₂P₂)
  – Conservation Landscape Mini-grants
Thank you!

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