

Outdoor recreation,  
more than a good time  
outside...

**It's an industry &  
strategic tool for  
economic development!**

Nathan Reigner, PhD

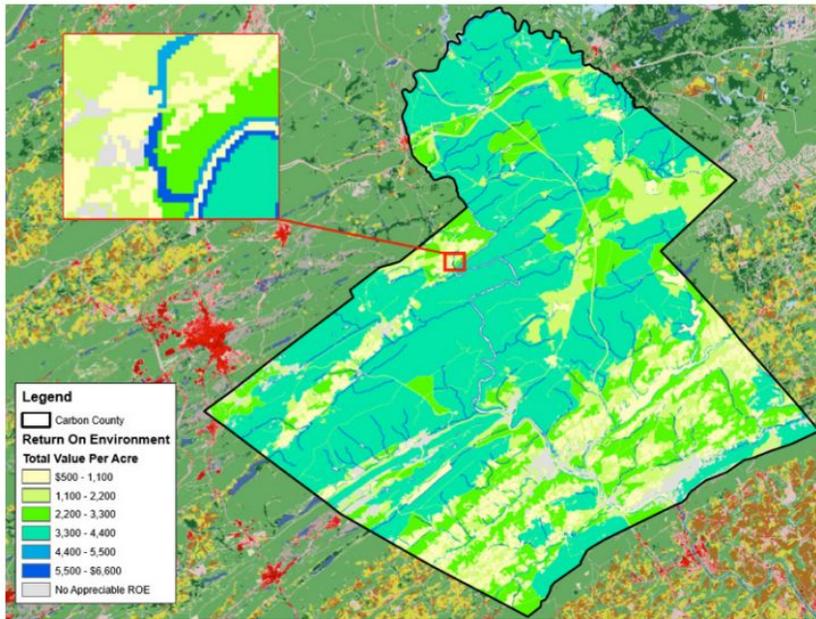
Director

Pennsylvania Office of Outdoor Recreation





FIGURE 06 // CARBON COUNTY ROE MAP

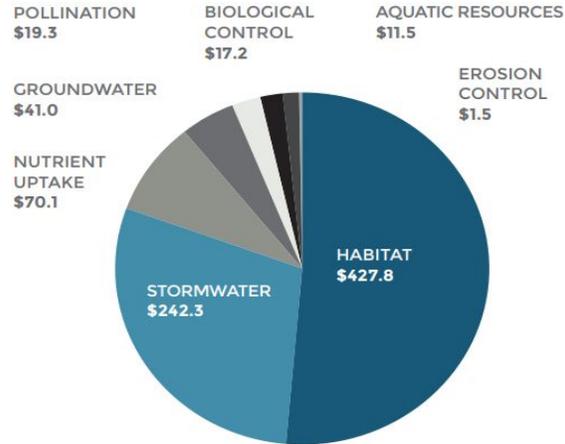


While difficult to see from a map at this scale, the highest ROE is in green corridors along streams and creeks, with the second highest being ridges and slopes. See the map cutout.

**\$830.6** MILLION IN ANNUAL SAVINGS

**NATURAL SYSTEM SERVICES** 💧

Source: Costanza et al (2006)



Lehigh Valley  
Return on Environment

# Outdoor Infrastructure is Green Infrastructure

- Stormwater management
- Temperature regulation
- Habitat connectivity
- Air & water purification



The Economic Value of Protected Open Space in Southeastern Pennsylvania



Lehigh Valley Planning Commission 2014

## Return on Environment

- Ecosystem services
- Property values
- Tourism & commercial opportunities
- Health & healthcare

**More  
fresh air.  
Less hot air.**

Capital Blue Cross



**Health  
Benefits**

**(Physical + Mental) X Population = Public Health = Reduced  
healthcare  
costs**

**“...parks are the best idea we ever had.  
Absolutely American, absolutely democratic, they reflect us at our  
best”**

Wallace Stenger



# Macroeconomics

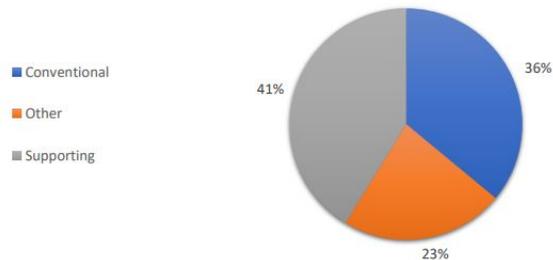


## 2022—Pennsylvania

Value added [gross domestic product]		Employment		Compensation	
ORSA total	Share of state	ORSA total	Share of state	ORSA total	Share of state
\$16.9 billion	1.8%	164,344 jobs	2.7%	\$7.7 billion	1.5%

Value Added by Select ORSA Activity [Thousands of dollars]				
Activity	2020	2021	2022	State rank
RVing	567,292	808,463	863,745	11
Motorcycling / ATVing	530,357	546,662	583,164	4
Boating / fishing	561,817	566,189	575,541	19
Hunting / shooting / trapping	318,038	341,941	342,859	9
Equestrian	186,955	193,116	207,826	6
Snow activities	129,572	158,578	207,804	9
Climbing / hiking / tent camping	171,067	154,880	178,953	8
Bicycling	127,867	107,177	114,120	6
Recreational flying	25,150	34,181	86,406	9

Value-Added Composition of Outdoor Recreation Activities



**Conventional ORSA** activities include traditional outdoor activities, such as camping, hiking, boating, and hunting.  
**Other ORSA** activities include those that take place outside, such as gardening and outdoor concerts.  
**Supporting ORSA** activities are those that contribute to the core activities and include such things as construction, travel and tourism, local trips, and government expenditures.

**8<sup>th</sup>**  
 Largest OR  
 economy in  
 the US

**2%**  
 of PA's  
 economy

**\$19** billion  
 value added to  
 PA's GDP

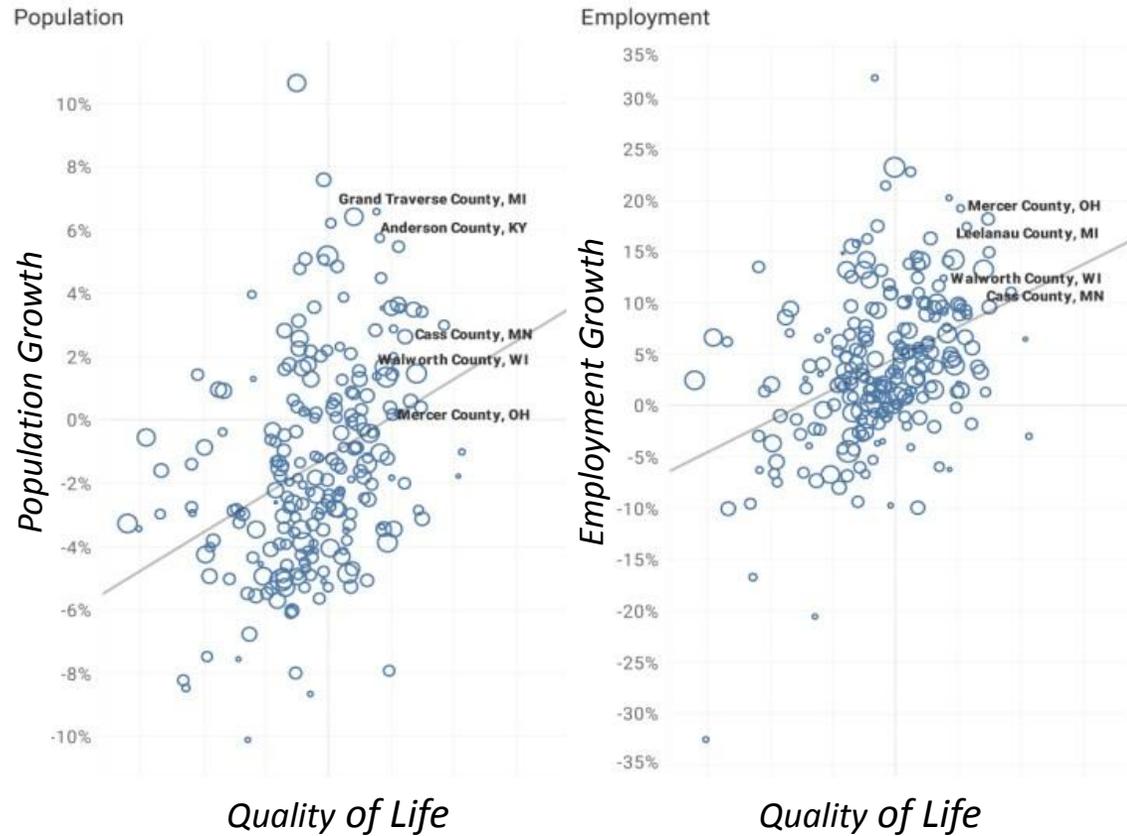
**168,000**  
 Jobs directly in  
 OR

# Macroeconomics

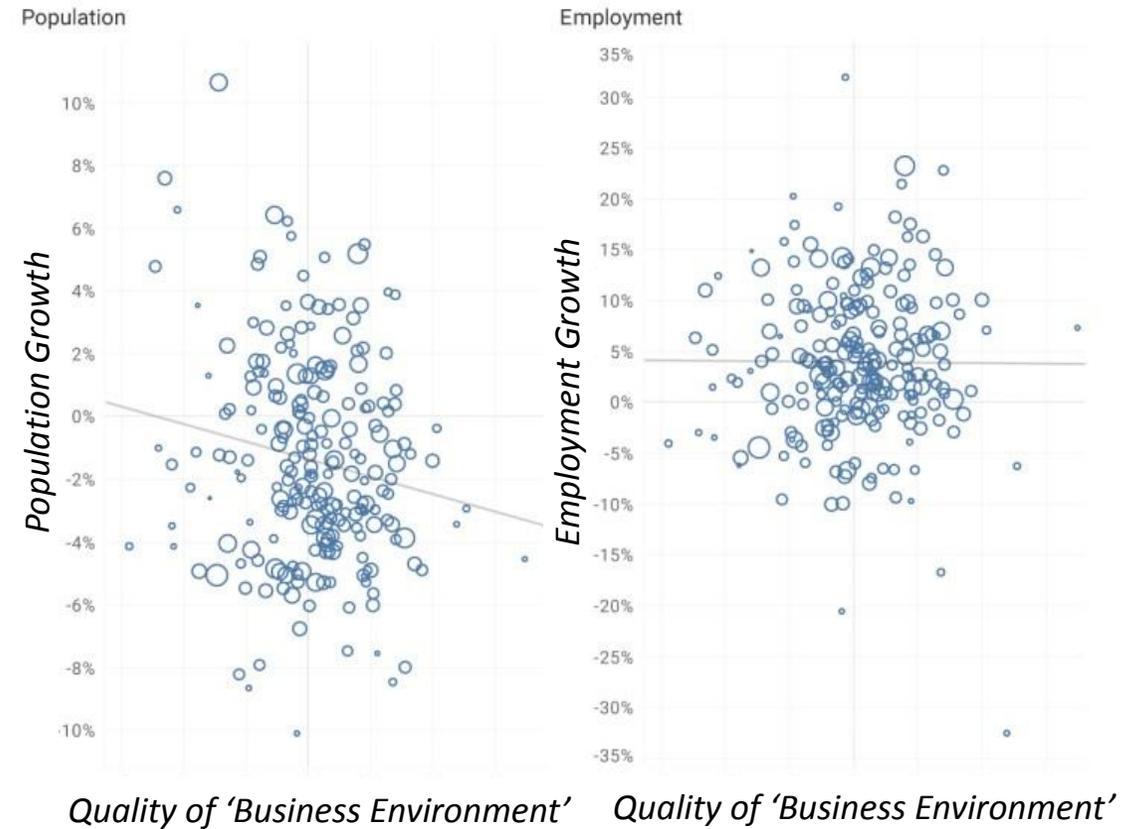
PA's Private Sector Industry (2023)	\$ Billion	% PA GDP
Agriculture, forestry, commercial fishing & hunting	\$4.2	0.5%
Mining & quarrying	\$6.6	0.7%
Arts and entertainment	\$7.8	0.9%
Oil and gas extraction	\$10.0	1.1%
Utilities	\$17.4	1.9%
<b>Outdoor recreation</b>	<b>\$18.9</b>	<b>2.1%</b>
Other private sector services	\$21.9	2.5%
Accommodation & food services	\$24.4	2.7%
Transportation & warehousing	\$36.4	4.1%
Construction	\$38.4	4.3%
Information	\$44.7	5.0%
Wholesale trade	\$53.0	5.9%
Retail trade	\$55.6	6.2%
Manufacturing	\$107.4	12.0%
Education, health care, & social assistance	\$120.8	13.5%
Professional and business services	\$136.6	15.3%
Finance, insurance, real estate, rental, & leasing	\$188.8	21.1%
<b>All Private Industries</b>	<b>\$892.7</b>	<b>100.0%</b>

PA's Private Sector Outdoor Industry (2023)	\$ Million	% of OR
Retail trade	\$5,108	27.6%
Arts and entertainment	\$2,967	16.1%
Manufacturing	\$2,844	15.4%
Accommodation and food services	\$1,991	10.8%
Wholesale trade	\$1,726	9.3%
Transportation and warehousing	\$1,670	9.0%
Finance, insurance, real estate, rental, and leasing	\$727	3.9%
Agriculture, forestry, commercial fishing & hunting	\$362	2.0%
Construction	\$314	1.7%
Other private sector services	\$223	1.2%
Professional and business services	\$255	1.4%
Education, health care, and social assistance	\$176	1.0%
Mining and utilities	\$50	0.3%
Information	\$45	0.2%

# Outdoors Communities



Source: Authors' calculations using Census Bureau data



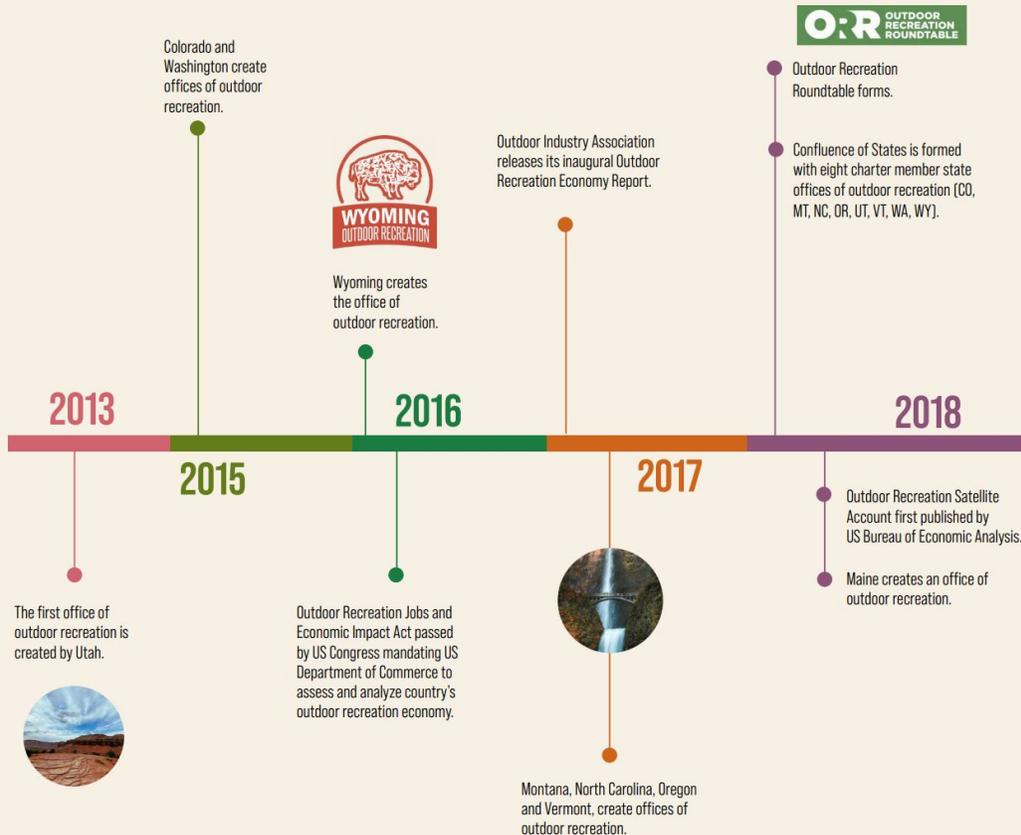
Source: Authors' calculations using Census Bureau data



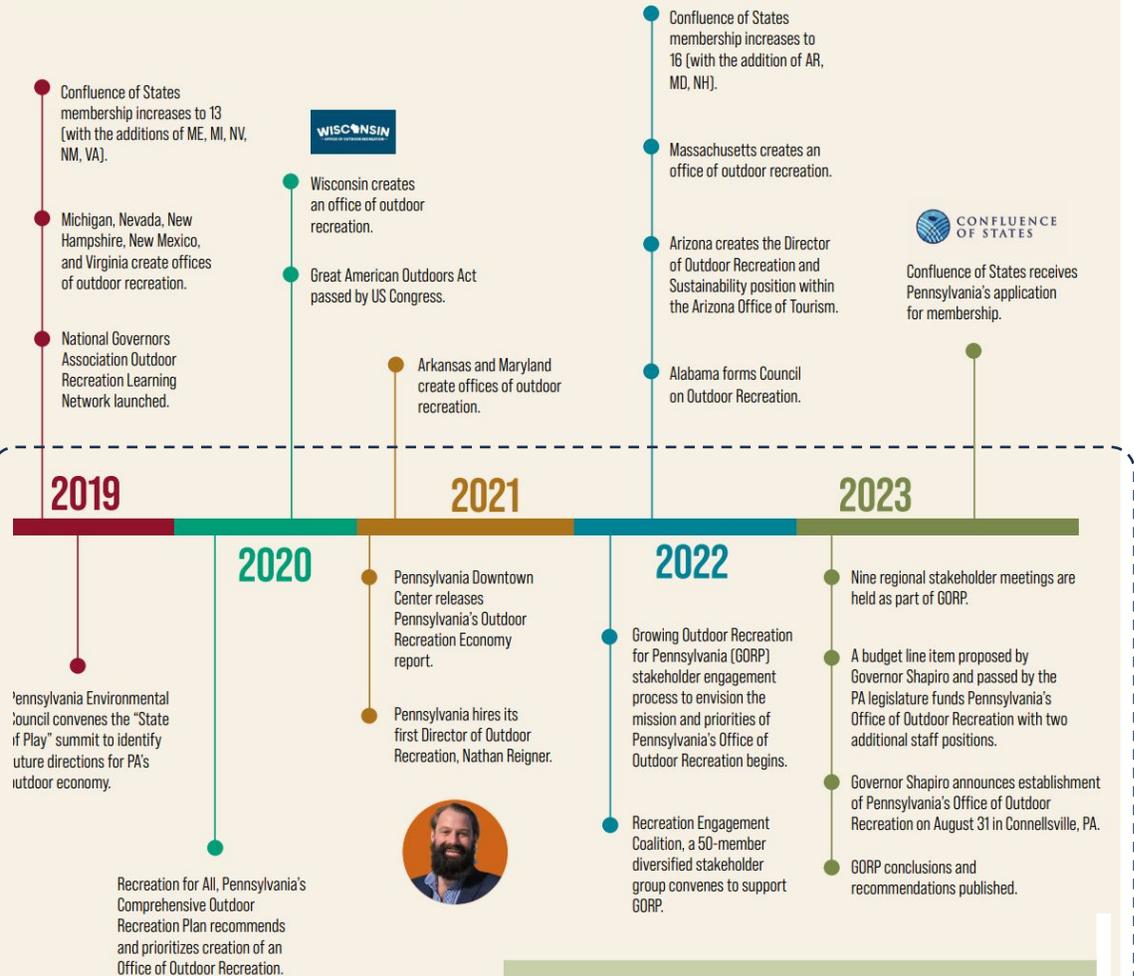
*Outdoor Recreation + Historic Downtown + Cultural Services = High Quality of Life*

*High Quality of Life = Population Growth + Employment*

# A Decade of Momentum

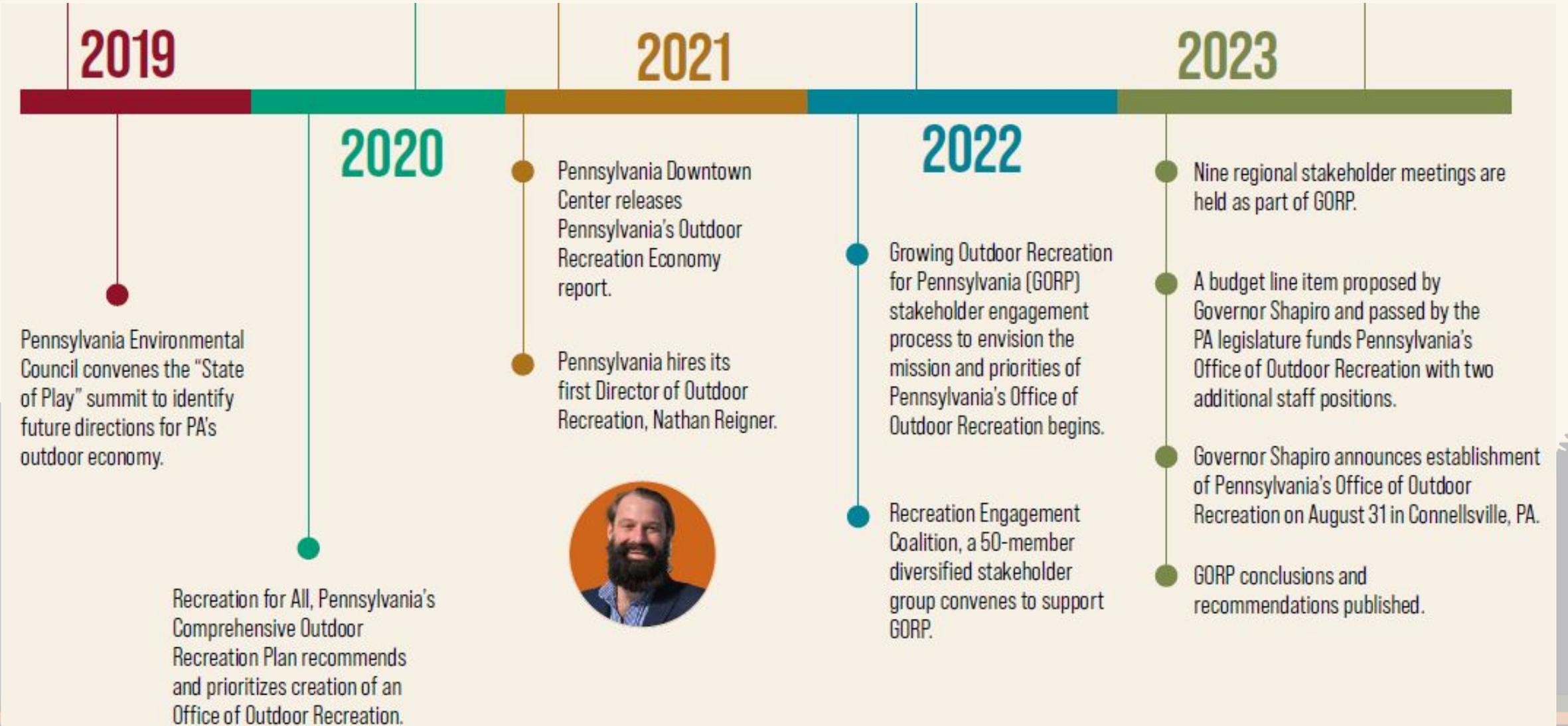


# National Movement



# Pennsylvania Movement

# Pennsylvania's Process Toward and Office



# Stakeholder Input



# Con + Stwd

- platform C
- gateway C
- awareness → Ed. system
- coordination C
- high-level
- Conserv Ethics E
- Expertise + data E
- match-making MM
- problem solver E
- Informing + Awareness
- Coordinating when A decisions are being made
- add in Rec perspective in non-Rec decisions A
- ↳ standard Practice

# K.C.P

- Resource E
- Advocate V
- Problem solve E
- mobilize C
- convene C
- prioritize projects/fundings EM
- culture change
- ↳ "cores" A
- ↳ authority A
- Mobilize V/C Industry
- Awareness - internal V
- Mkt for internal A awareness

# E+R Dev

- integrated C
- ↳ admin
- ↳ geographic
- Liaison V
- Ombuds Advocate V
- Engage New folks
- Mkt Mechanics in weeds
- identify & direct. Tarrigon vs.
- Not Political wrist-slapper.
- Ally V
- Regime/efficiency
- ↳ Not New

# Well People + Commit.

- partnership (Army) C
- Inclusive B
- ↳ vulnerable
- ↳ access
- Education as infrastructure.
- Movement
- we are + all around us
- ↳ influencers
- ↳ Advocates
- PPP's + incentives MM
- Health = cost/Exp
- ↳ flip this
- Convene + Spot light
- Redefine A
- "Every opportunity"
- QoL

# IDEA

- Access knowledge promotion/commitment E
- Belong? "Yes you do" B
- cross-cutting C
- Process
- Assets disparity
- Open + Creative B
- ↳ definition of OR
- Leverage Unconventional B
- ↳ Resources/Pol in
- ↳ Activities
- Land use history + privileges
- ↳ in chas./addresses
- Inclusive B culture in connection
- ↳ data tracking - use participation E
- Bias Realization/integration MM
- Integrate Ed + workforce MM
- Recruitment inclusive B
- Biz + Industry action MM



# Stakeholder Input





Growing Outdoor  
Recreation for Pennsylvania



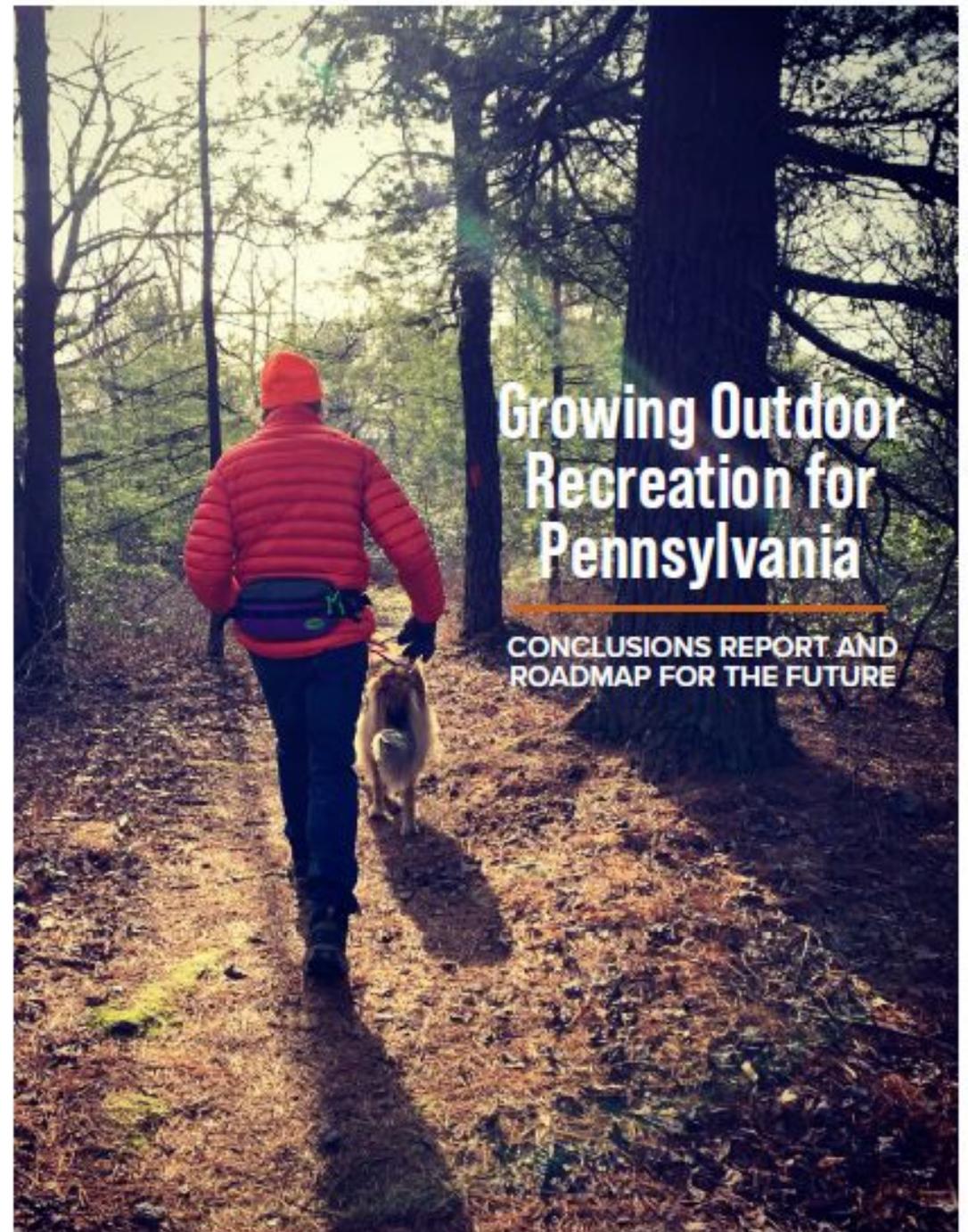
Welcome to our panel

- Joe Syrnick – Schuylkill River Development Corporation
- Kelsey Brooks – National Wildlife Foundation
- Kiasha Huling – Deeply Rooted
- Maitreyi Roy – Bartram's Garden



# Recommendations

- Background
- Process
- Mission
- Strategic Priorities
  - Action Items





# **Editorial: New Pa. outdoor recreation office is government done right**

```
graph TD; A[Secretary of DNCR] --> B[Office of Outdoor Recreation]; B --> C[Director]; C --> D[Deputy Director]; C --> E[Outreach & Engagement Manager];
```

Secretary of DNCR

Office of  
Outdoor Recreation

Director

Deputy  
Director

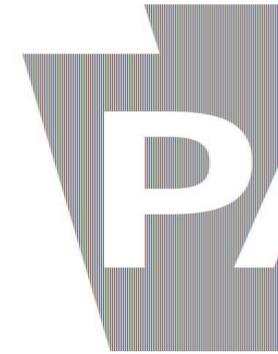
Outreach &  
Engagement  
Manager

# Pennsylvania's Office of Outdoor Recreation

Brought to you by,



in cooperation with,



and collaborating among,



with many more...

# Mission

# Unite, grow, and strengthen Pennsylvania's outdoor economy

Outdoor Industry



Community & Economic  
Development



Green Infrastructure &  
Public Health Cost Savings





## Producers of outdoor gear

- design
- manufacture
- distribution
- retail
- repair

of outdoor clothing, equipment, and vehicles



## Providers of outdoor experiences

- guides and trip planners
- outfitters and rental shops
- ski area, hut and fish lodges
- adventure centers
- event organizers
- hospitality outdoor recreationists



## Professionals supporting outdoor recreation

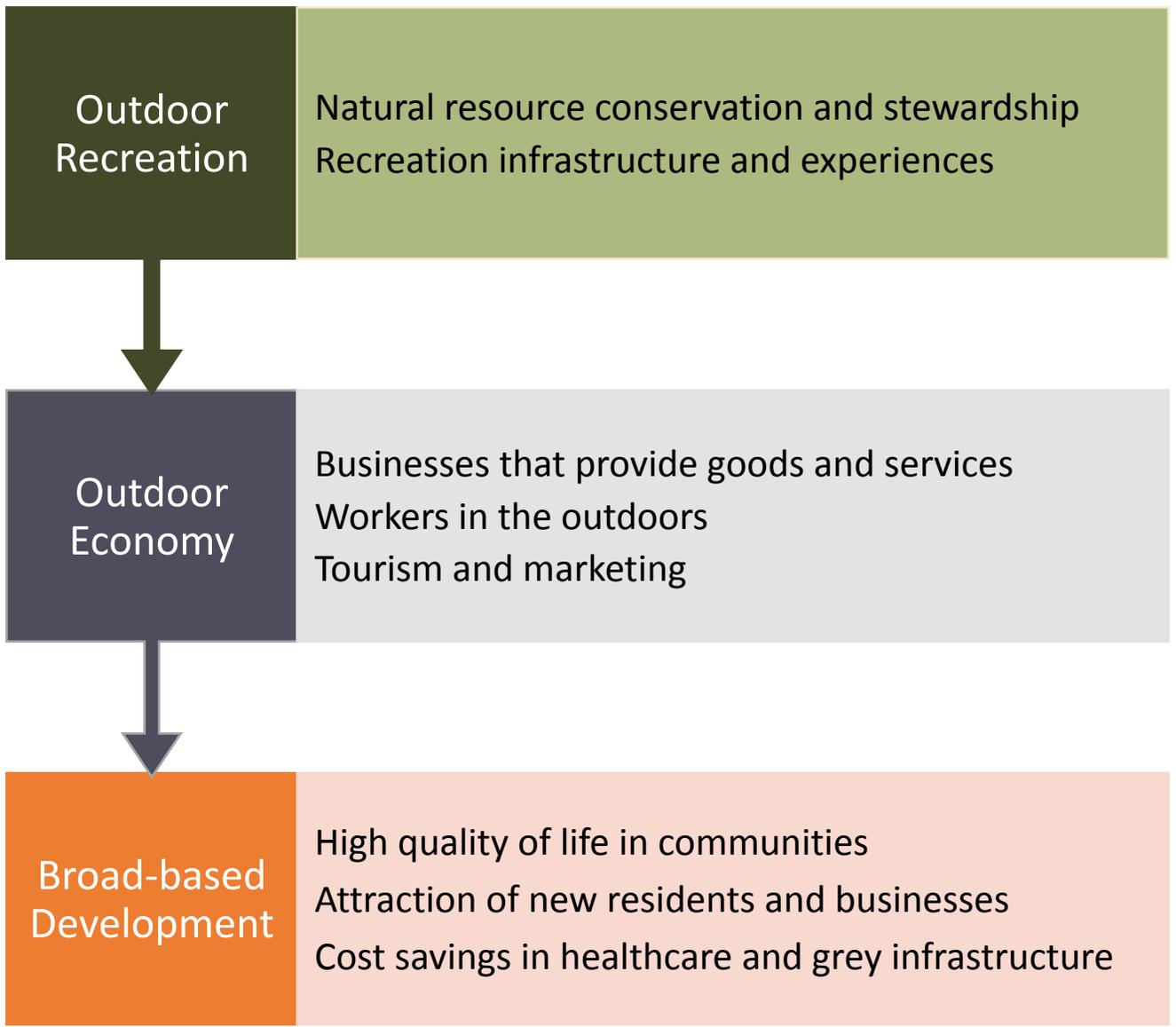
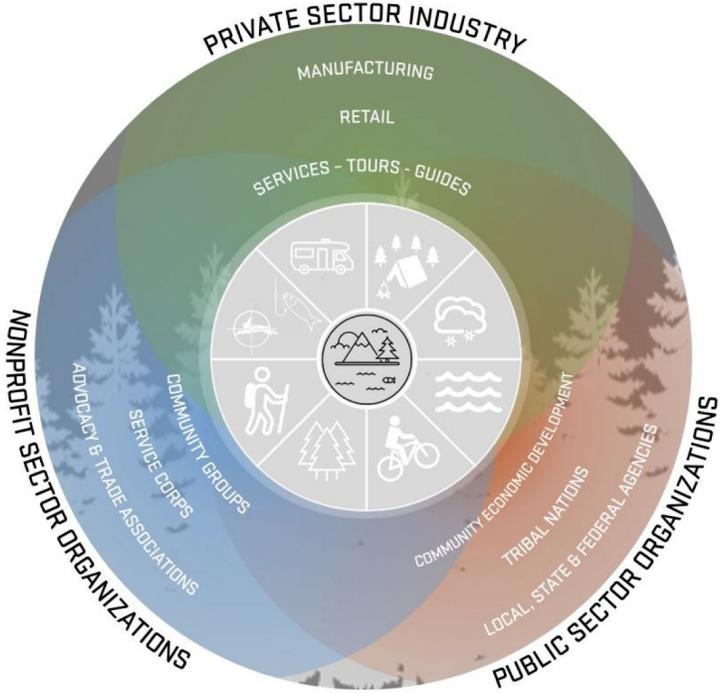
- planners and designers
- map and guidebook makers
- data providers and researchers
- educators and trainers
- photographers, videographers, journalists, artists
- accountants, attorneys, consultants
- public-sector employees and leaders

# Pennsylvania's Outdoor Industry

\$19 billion

168,000 jobs

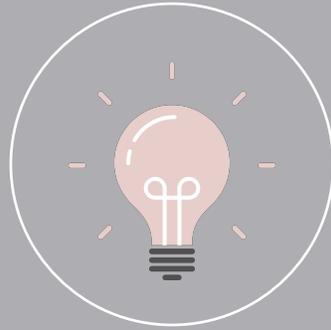
# Community & Economic Development through outdoor recreation



# ***Core Strategy: Build Outdoor Industry Capacity***



**Organize the  
outdoor industry**



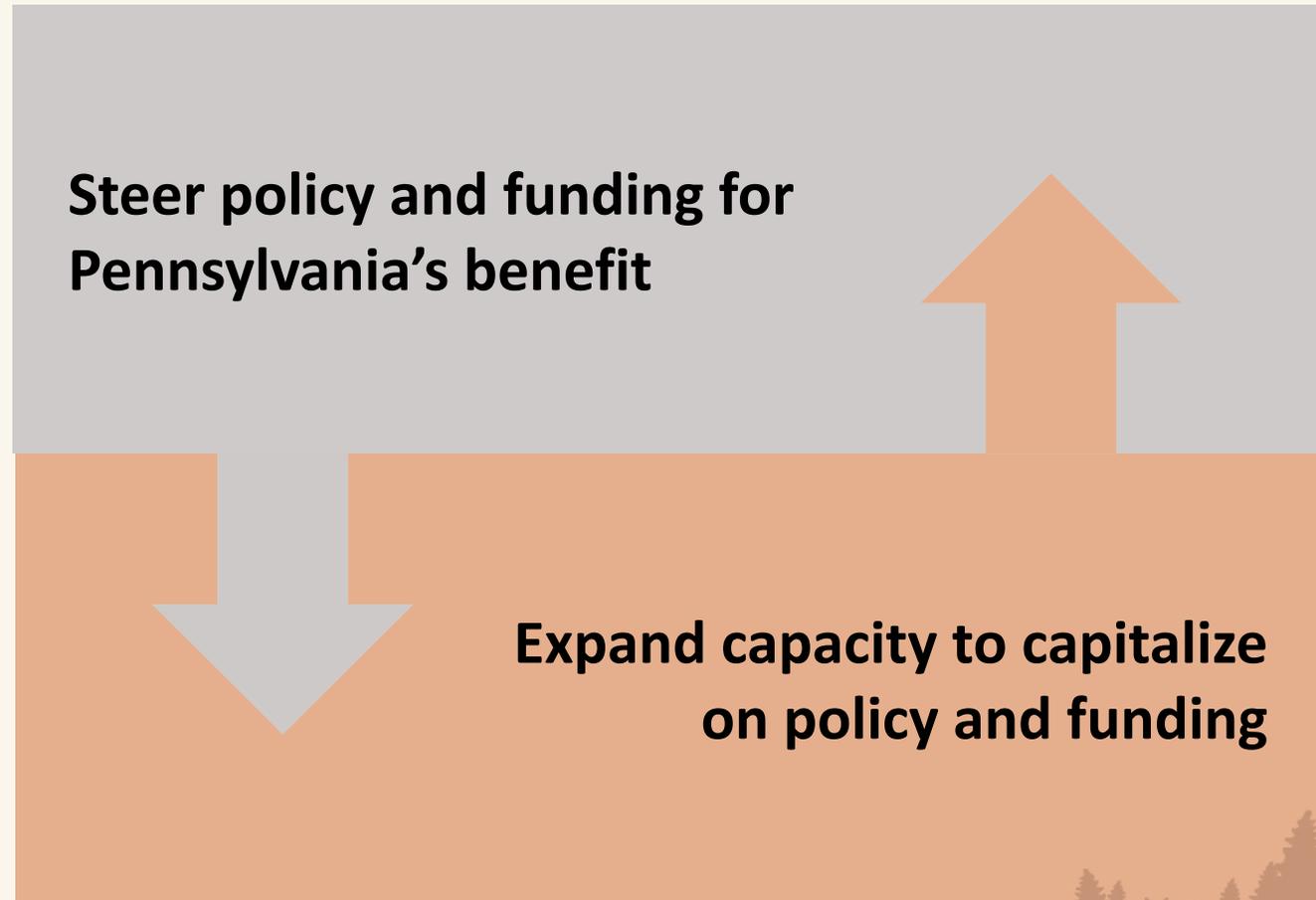
**Develop our  
outdoor  
workforce**



**Communicate  
the value of the  
outdoors**



***Core Strategy:***  
**Build Capacity**  
**for**  
**Community**  
**and Economic**  
**Development**  
**through the**  
**Outdoors**



# ***Core Strategy: Build Capacity for Inclusive and Equitable Wellbeing through the Outdoors***

Empower ALL Pennsylvanians to derive benefits from the outdoors

Now

Future

Prepare the outdoors for Pennsylvania's future

# Connecting the dots is a big part of our work...



Connector  
Convenor  
Liaison



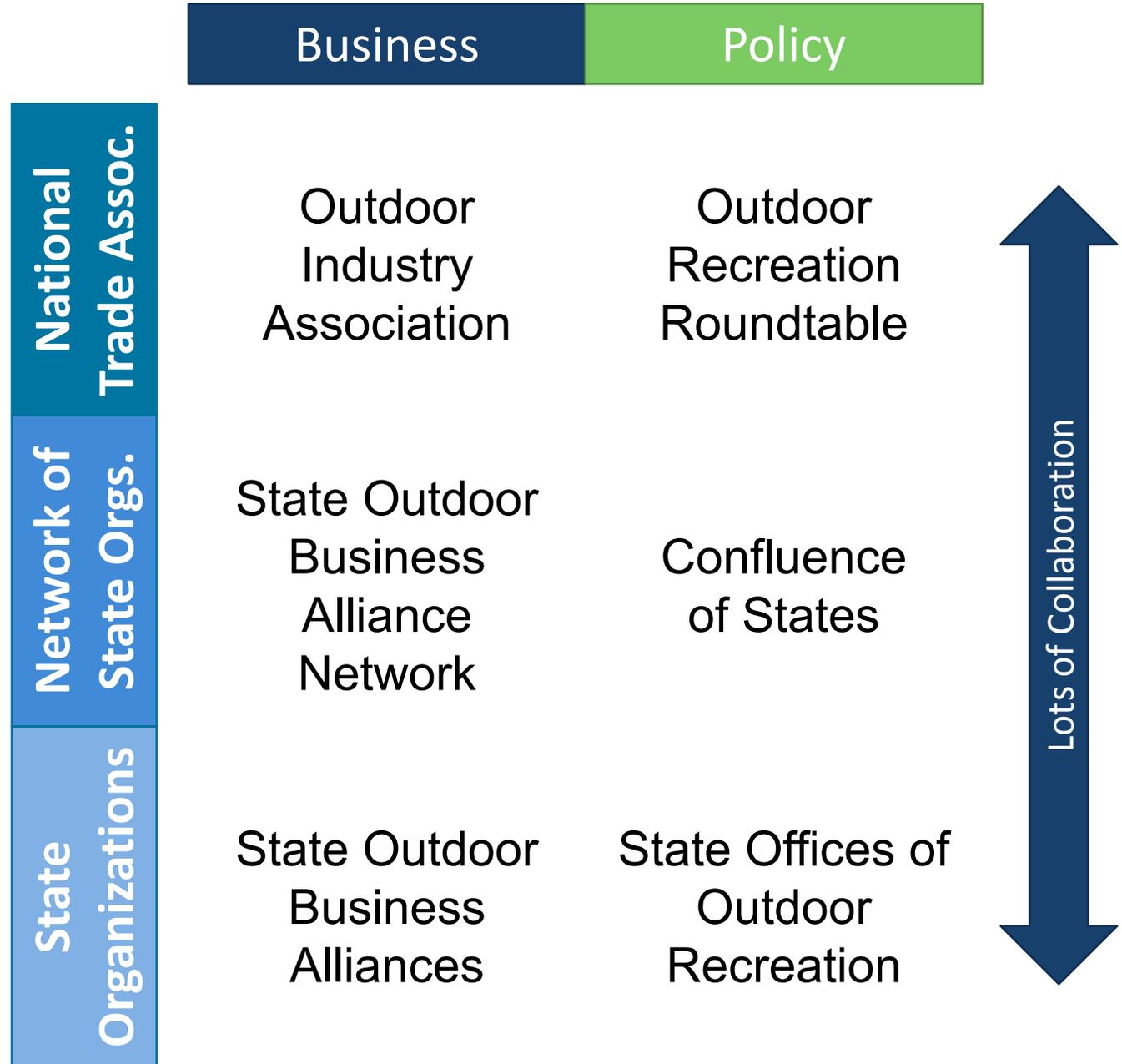
Advocate  
Messenger  
Data & Story



Policy  
Innovation  
Expertise

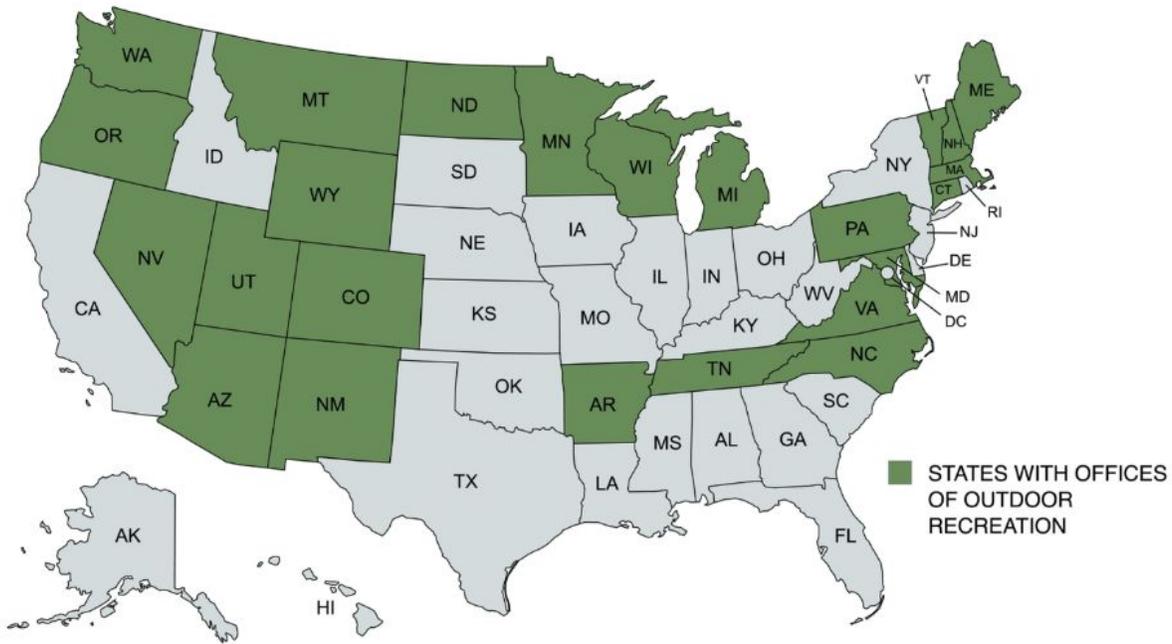


# Economy y Advocacy y *simplified & abridged*





# CONFLUENCE OF STATES



A GUIDEBOOK TO:

# DEVELOPING OFFICES OF OUTDOOR RECREATION

SECOND EDITION



CONFLUENCE  
OF STATES



OUTDOOR  
RECREATION  
ROUNDTABLE

**OUTDOOR  
INDUSTRY  
ASSOCIATION**



THE VF FOUNDATION



A GUIDEBOOK TO:

# DEVELOPING OFFICES OF OUTDOOR RECREATION

CONFLUENCE OF STATES

O:R OUTDOOR RECREATION ROUNDTABLE

OUTDOOR INDUSTRY ASSOCIATION

VF THE VF FOUNDATION

REI COOP

CONFLUENCE OF STATES

# 2022 OUTDOOR REPORT

JULY 2021 - JUNE 2022

December 2022  
www.confluenceofstates.com

## The Value of State Offices of Outdoor Recreation (ORECs)

## ELEVATING OUTDOOR RECREATION TOGETHER

Opportunities for synergy between state offices of outdoor recreation and federal land-management agencies, the outdoor recreation industry, non-governmental organizations, and local outdoor recreation providers

Brooke Sausser  
Jordan W. Smith, Ph.D.  
Institute of Outdoor Recreation and Tourism at Utah State University

## STATEWIDE COMPREHENSIVE OUTDOOR RECREATION PLAN COMPARISON REPORT

CONFLUENCE OF STATES

O:R OUTDOOR RECREATION ROUNDTABLE

OUTDOOR INDUSTRY ASSOCIATION

SOCIETY OF OUTDOOR RECREATION PROFESSIONALS

VF THE VF FOUNDATION

REI COOP

CONFLUENCE OF STATES O:R OUTDOOR RECREATION ROUNDTABLE OUTDOOR INDUSTRY ASSOCIATION VF THE VF FOUNDATION REI COOP

## STRATEGIES TO SUPPORT OFFICES OF OUTDOOR RECREATION

**WHY OUTDOOR RECREATION?**  
The outdoor recreation sector has never been more important in states across the nation, where it plays a vital and growing role in attracting and retaining talent, supporting urban and rural economies, improving public health, and ensuring a state's conservation legacy. This sector helps develop economies and create jobs, increases rural prosperity, improves public health outcomes and quality of life, and promotes environmental stewardship and conservation.

**CREATING AN OFFICE**  
Offices of Outdoor Recreation (or Outdoor Recreation Industry Offices) can be created through a number of measures, including legislation, budget line item, executive order, or gubernatorial action. They are created with the support of conservation stakeholders, business leaders, government, and non-profit partners. The following themes characterize strategies that states have utilized to create offices of outdoor recreation and educate others on the value this investment would make for their states:

- Leveraging Economic Power
- Achieving Bipartisanship
- Helping Coordinate Efforts
- Championing State's Natural Beauty
- Elevating the Outdoors for All
- Supporting Education and Workforce Development

**STATE OFFICES CREATED**

1. Utah	11. Nevada
2. Colorado	12. New Hampshire
3. Washington	13. New Mexico
4. Wyoming	14. Virginia
5. Montana	15. Wisconsin
6. North Carolina	16. Arkansas
7. Oregon	17. Maryland
8. Vermont	18. Massachusetts
9. Maine	19. Minnesota
10. Michigan	20. Pennsylvania

**THE VALUE OF OFFICES**  
While other agencies may focus exclusively on natural resource or recreation management, tourism promotion, public health, or economic development, no other state-level office is built with the mandate and expertise to partner with this fast-growing \$11 trillion industry and coordinate across outdoor recreation programs and partnerships to expand the benefits of outdoor recreation and enhance state competitiveness. Offices of Outdoor Recreation provide a centralized and dedicated home to coordinate efforts across agencies, identify new opportunities for economic growth, connect all communities to the benefits of time outside, and promote responsible recreation in a state's most treasured places.

## 2023 OUTDOOR RECREATION STATE REPORT

Outdoor Recreation Plans, Participation, and Economic Impact by State

Kelly Davis, Director of Research at OIA

OUTDOOR INDUSTRY ASSOCIATION

OUTDOOR FOUNDATION

CONFLUENCE OF STATES

# 2023 OUTDOOR REPORT

JULY 2022 - JUNE 2023

November 2023  
www.confluenceofstates.com



**25  
In  
2025**

**A Bipartisan  
Outdoor  
Recreation  
Movement**

# GROWING PENNSYLVANIA'S OUTDOOR RECREATION INDUSTRY

Elevate is an effort to move towards the creation of a statewide capacity building organization to represent the needs of the growing outdoor recreation industry in Pennsylvania.

The need for an industry organization has been identified by many partners. Such an organization will benefit outdoor recreation industry practitioners by elevating the needs of Pennsylvania's outdoor recreation industry, serving as an advocate and state government partner in advancing the sector.

This project is organized by the Pennsylvania Office of Outdoor Recreation and supported by the Southern Alleghenies Planning and Development Commission.



# State Outdoor Business Alliances (2023; according to SOBAN)

## ALASKA

Alaska Outdoor Alliance

## ARIZONA

Get Outdoor Arizona

## BRITISH COLUMBIA

Kootenay Outdoor Recreation  
Enterprise (KORE) Initiative

## CALIFORNIA

California Outdoor  
Recreation Partnership

## COLORADO

Colorado Outdoor  
Business Alliance

Pikes Peak Outdoor  
Recreation Alliance

## CONNECTICUT

Connecticut Outdoor  
Recreation Alliance

## IDAHO

Idaho Business for the Outdoors

## MAINE

Maine Outdoor Brands

## MICHIGAN

Land of Outsiders

## MONTANA

Business for Montana's Outdoors

## NEVADA

Nevada Outdoor  
Business Coalition

## NEW HAMPSHIRE

Granite Outdoor Alliance

## NEW YORK

New York Outdoor  
Recreation Coalition

## NEW MEXICO

endeavOR New Mexico

## NORTH CAROLINA

MADE X MTNS Partnership

North Carolina Outdoor  
Recreation Coalition

Outdoor Business Alliance of WNC

## OREGON

Oregon Outdoor Alliance

## UTAH

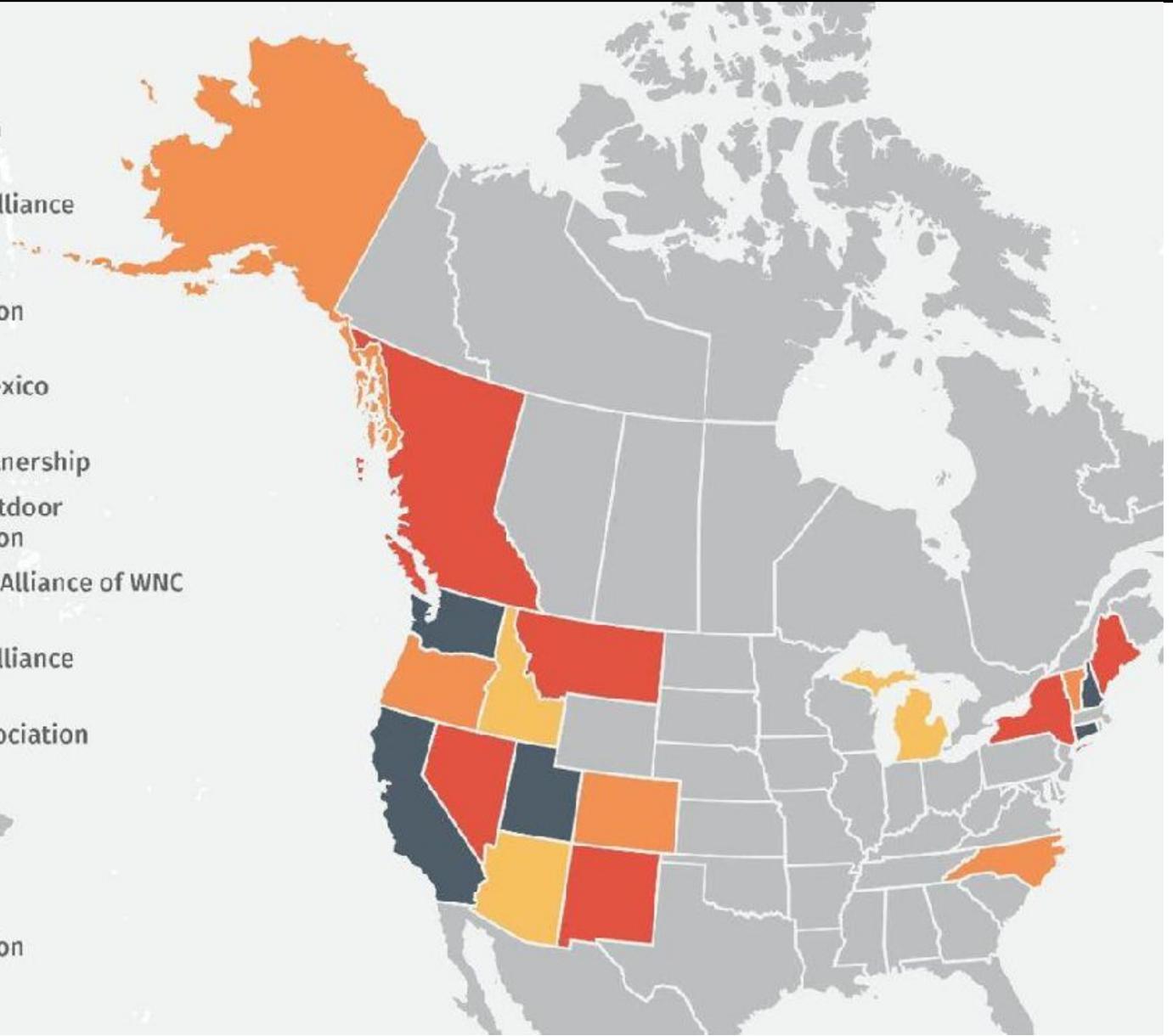
Utah Outdoor Association

## VERMONT

Vermont Outdoor  
Business Alliance

## WASHINGTON

Big Tent Outdoor  
Recreation Coalition



# Office OR FY'25 Work Plan

## INTERNAL OFFICE DEVELOPMENT

- CRM
- CoPilot AI Tools
- Office OR Workspace
- Communications

## PROJECTS & INITIATIVES

Outdoor business alliance  
Economic impact study  
Funding & investment  
Strategy & plan synthesis  
Insurance & liability  
Innovation  
Natural surface trails  
Data modernization



# Be Planful and implement!



## Strategic Priority: Build Capacity within Pennsylvania's Outdoor Industry

In comparison to other industries of its size and impact in Pennsylvania, the outdoor industry is underdeveloped, undercoordinated, and under recognized as a sector of our economy. The Office will help foster organization within the outdoor industry, understanding and empowering our outdoor workforce, and more effectively communicating its value to Pennsylvania's economic competitiveness, quality of life, and sense of place.

### ORGANIZE THE OUTDOOR INDUSTRY

- Support the formation of an outdoor business alliance through which the outdoor industry can organize.
- Develop outdoor innovation hubs or clusters to achieve critical mass and synergy across production and value chains.
- Develop and maintain databases of Pennsylvania's outdoor businesses and foster communication and collaboration among them.
- Hold business pitch contests, incubator/hack events, and support 'leaps' in business growth.
- Identify gaps in Pennsylvania's outdoor industry and coordinate programs to support filling them.
- Expand access to capital and technical supports for outdoor businesses.



## Simplify and Increase Funding for Pennsylvania's Economic Development Toolkit

*Update and grow Pennsylvania's economic development incentives to make programs more flexible, faster, and relevant to today's businesses.*

Pennsylvania's existing economic development incentives are outdated and underfunded. To access business assistance programs, businesses currently must navigate a complex, narrowly tailored set of incentive programs, many of which regularly face outsized demand compared to financial resources. For example, the PA First program is significantly underfunded when compared to similar flagship business attraction programs found in peer states. Pennsylvania's state tax credit programs exclude entire core industries from taking advantage of their financial benefits. And many programs are overly prescriptive, industry specific, and lack flexibility that many businesses need.

## A Ten-Year Strategic Plan for Economic Development in Pennsylvania

2024-2033

## Invest in Tourism and Recreation Asset Development to Drive Economic Growth

*Renew focus on tourism and outdoor recreation to strengthen regional economies, create and enhance quality of life for Pennsylvania residents.*

As one of the largest industries in Pennsylvania, tourism generates over \$66 billion per year in total economic impact and accounts for more than 450,000 jobs across the Commonwealth.<sup>40</sup> The industry includes subsectors like hospitality, transportation, regional attractions and entertainment, and travel tours and serves as a powerful economic engine in every corner of Pennsylvania. With minority populations making up roughly 50% of workers employed in the tourism industry and small businesses making up 80% of tourism-based businesses, increased investment in the tourism industry will assist in bridging equity divides and help to lift up all Pennsylvanians.<sup>41</sup>



Pennsylvania  
Department of Community  
& Economic Development

# Commonwealth of Pennsylvania Appalachian Development Plan

June 1, 2024



Commonwealth of Pennsylvania  
Josh Shapiro, Governor  
PA Department of Community & Economic Development  
Rick Sipes, Secretary  
dced.pa.gov



## ARC Goal 4 – Building Regional Culture and Tourism

Strengthen Appalachia's community and economic development potential by preserving and investing in the Region's local, cultural heritage, and natural assets.

### State Objective 4.1:

**Pennsylvania will invest in tourism and outdoor recreational asset development to drive economic growth.**

- PA Strategy (4.1.1) Develop initiatives to support tourism expansion, including heritage and eco-tourism development, through assessments, technical assistance, and marketing campaigns.
- PA Strategy (4.1.2) Promote asset-based development opportunities by encouraging economic and community development organizations to utilize their historical, environmental, and cultural resources.
- PA Strategy (4.1.3) Promote regional development, preservation and entrepreneurship along PA's vast river network, greenways, forests, trails, and other natural assets.
- PA Strategy (4.1.4) Promote asset-based entrepreneurial development based upon historical, cultural, structural, and geographic resources.
- PA Strategy (4.1.5) Increase domestic and international leisure travel to the Commonwealth to grow the tourism industry's economic impact.
- PA Strategy (4.1.6) Collaborate with industry stakeholders and partners to develop and implement cooperative marketing initiatives.
- PA Strategy (4.1.7) Preserve the natural, cultural, and heritage assets that abound throughout Pennsylvania and educate citizens on the value of our Appalachian region.

### State Objective 4.2:

**Pennsylvania will build capacity within the outdoor industry.**

- PA Strategy (4.2.1) Support outdoor business alliances to build capacity and organize the industry.
- PA Strategy (4.2.2) Develop outdoor innovation hubs or clusters to achieve critical mass and synergy across production and value chains.
- PA Strategy (4.2.3) Expand access to capital and technical supports for outdoor businesses.

### State Objective 4.3:

**Develop the outdoor workforce.**

- PA Strategy (4.3.1) Support outdoor industry apprenticeship and mentorship programs.
- PA Strategy (4.3.2) Foster connections between outdoor employers and educational institutions to enhance both professionalization and equitable inclusion in the outdoor workforce.
- PA Strategy (4.3.3) Expand outdoor recreation knowledge within related professions (e.g., economic development, planning and engineering, conservation, health care) through professional development, continuing education, and bootcamp modules.

### State Objective 4.4:

**Prepare the outdoors for Pennsylvania's future.**

- PA Strategy (4.4.1) Develop 'on-ramps' for individuals, including students, and organizations to develop toward leadership roles in Pennsylvania's future outdoor economy and recreation system.
- PA Strategy (4.4.2) Advance a long-term understanding of PA's outdoor needs and incorporate it into planning and development efforts.

*You see that you can actually strengthen a Main Street by investing more in outdoor rec and the outdoor economy, so we put more resources into it. We hired more people to do that work, partnering with local chambers of commerce, local outdoor organizations.*



*We're seeing a real positive ROI, a positive return on investment, there. We're going to continue to make those investments."*

Governor Josh Shapiro, 1/15/25  
Tribune-Democrat

**Thank you very much**

**Nathan Reigner, PhD**  
Director of Outdoor Recreation  
[nreigner@pa.gov](mailto:nreigner@pa.gov)

APRIL  
1978

A photograph of three children walking away from the camera on a dirt path through a forest. The child on the left is a girl with long brown hair wearing a red t-shirt and blue jeans. The child in the middle is a smaller child wearing a light blue hoodie and blue jeans. The child on the right is a boy wearing a red hoodie and blue jeans. They are all holding hands. The path is surrounded by green grass and trees with some autumn-colored leaves.

**Thank you very much**  
**We are looking forward to walking this path with you...**

**Nathan Reigner, PhD**  
Director of Outdoor Recreation  
[nreigner@pa.gov](mailto:nreigner@pa.gov)

A group of people are sitting in a circle around a bright campfire at night. The fire is the central light source, casting a warm glow on the people and the ground. The people are dressed in casual outdoor attire, including hoodies and jackets. Some are sitting on folding chairs, while others are on the ground. The background is dark, suggesting a nighttime outdoor setting. The overall atmosphere is cozy and communal.

**Thank you very much**  
**We are looking forward to walking this path with you...**

**Nathan Reigner, PhD**  
Director of Outdoor Recreation  
nreigner@pa.gov

Improving quality of life—not just business—is the best path to Midwestern rejuvenation

<https://www.brookings.edu/articles/improving-quality-of-life-not-just-business-is-the-best-path-to-midwestern-rejuvenation/>

PA Wilds Center for Entrepreneurship

<https://www.pawildscenter.org/>

Pennsylvania Office of Outdoor Recreation

<https://www.pa.gov/agencies/dcnr/programs-and-services/about/bureaus-and-offices/office-of-outdoor-recreation.html>

Pennsylvania 10-year Economic Development Strategy

<https://www.pa.gov/agencies/dcnr/programs-and-services/about/bureaus-and-offices/office-of-outdoor-recreation.html>

Outdoor Recreation Roundtable

<https://recreationroundtable.org/>

Confluence of States

<https://www.confluenceofstates.com/>