Nature-Based Placemaking 2.0:

How can community leaders & businesses prepare for and accommodate eco-tourists?

Julie Fitzpatrick, Assistant Director, PDC

PENNSYLVANIA
Downtown Center
• Since 1987 •

About your speaker

- Julie Fitzpatrick - PA Downtown Center

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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

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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

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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

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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

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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…"*

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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

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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

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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

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How Travel & Tourism Generates Impact

- Direct Spending
  - Recreation, lodging, food & beverage, transportation, etc.
  - Supports a number of jobs, wages, taxes & GDP
- Indirect Spending
  - Purchasing by direct businesses (wholesalers, utilities, banks, etc.)
  - Benefit from traveler spending
- Induced Spending
  - Employees whose wages are generated, either directly or indirectly, by travel and tourism spend those wages in the local economy.

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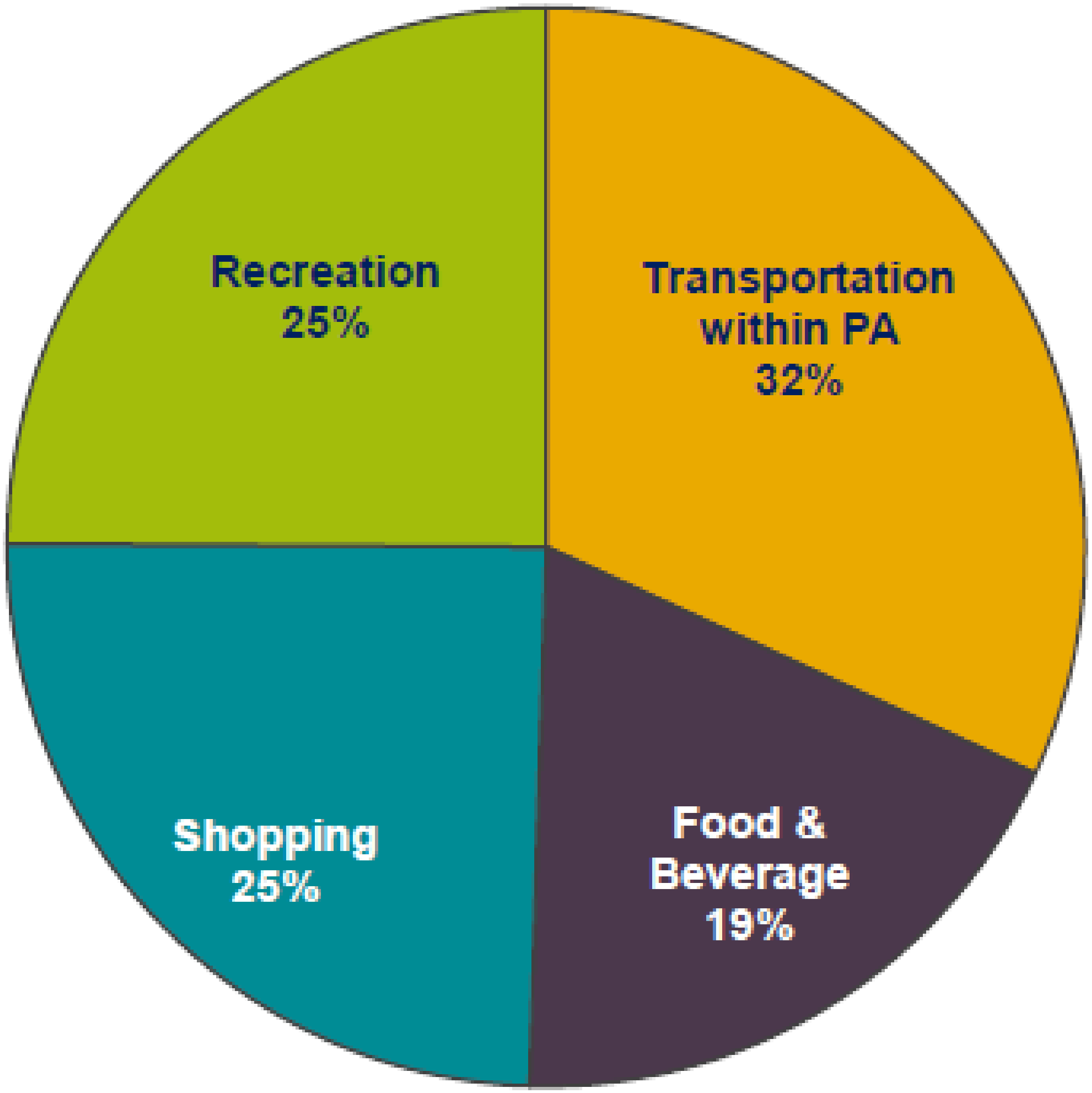
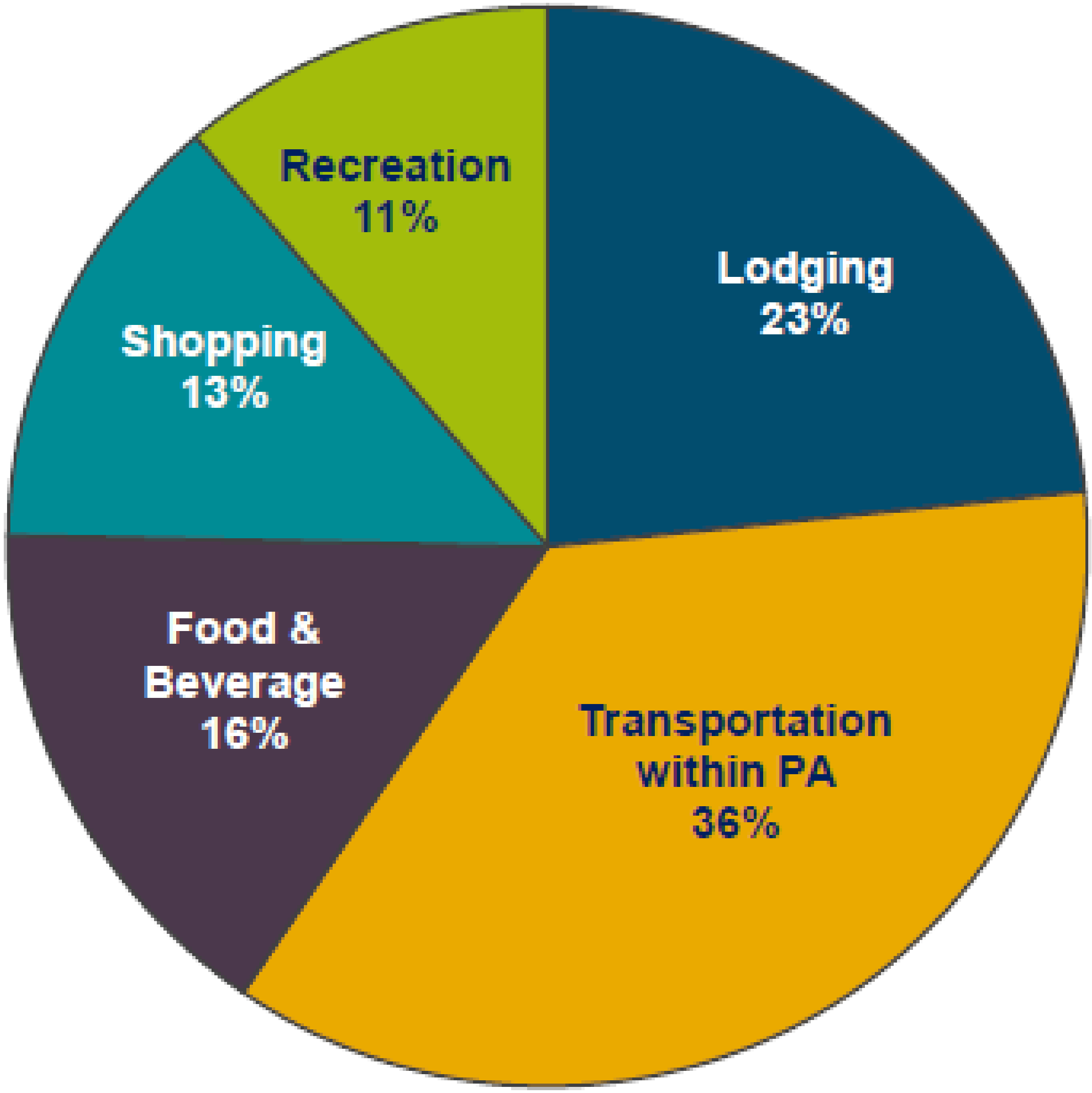
2015 Domestic Day-Trip Leisure Traveler Spending by Category



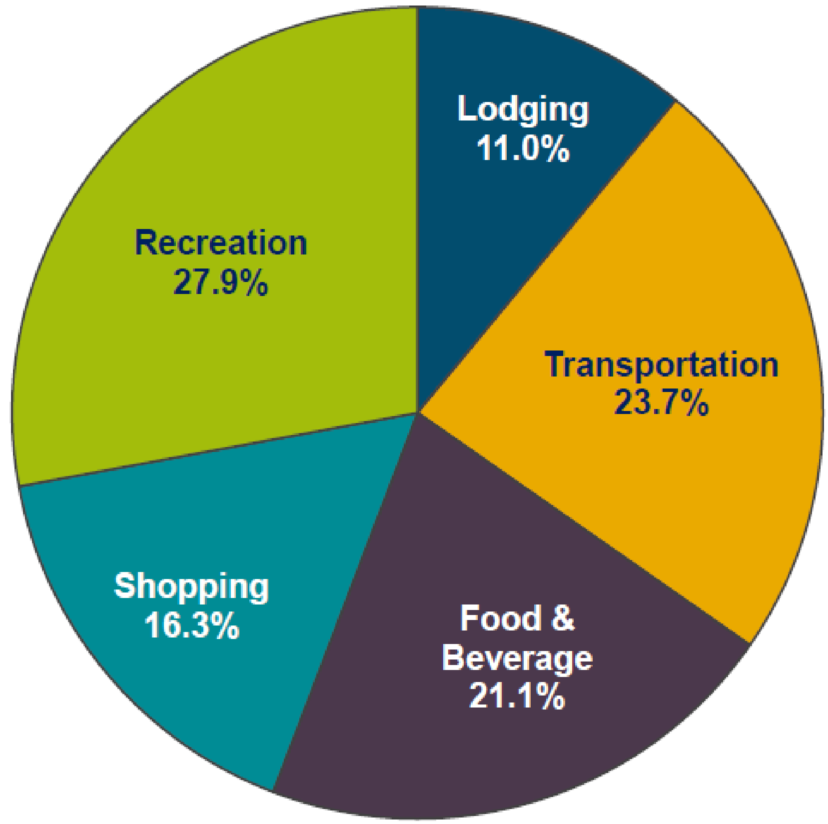
2015 Domestic Overnight Leisure Traveler Spending by Category



Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Travelers spent nearly $2.2 billion in the Lehigh Valley region in 2016 – a new record high and a 4.3% increase from 2015, which was once again the second largest percentage increase of the state's 11 tourism regions and the fourth largest in dollar terms.
- With its close proximity to the NY and NJ markets, a strong day-trip market, and numerous regional attractions, the Lehigh Valley region continued to have the highest proportion of traveler spending on recreation among PA's tourism regions and the lowest share spent on transportation in 2016.

Lehigh Valley Region 2016 Spending by Category



Source: Tourism Economics

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

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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

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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

D & L Trail User Survey

2012 Rails-to-Trails User Survey/Economic Impact Analysis

- 77.5% local/22.5% non-local
- 52% for health/40% for recreation
- 11.4% - spent average 2.2 nights - **$132 pp/pt**
  - $9.3 M est. accommodations
- 77.4% purchased “hard good” - **$425 pp/pt**
  - $2.7 M est. annual hard goods
- 73.6% purchased “soft goods” - **$34 pp/pt**
  - $6.9M est. annual soft goods
- 282,796 est. total user visits annually
- **Total Economic Impact - $19 million**

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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?

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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 chose 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

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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

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32 - *New Homesteaders* – MHHI $56,181

- 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

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25 - *Country Casuals* – MHHI $71,235

- 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

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37 - *Mayberry-ville* – MHHI $53,744

- 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

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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

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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

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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

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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

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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

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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

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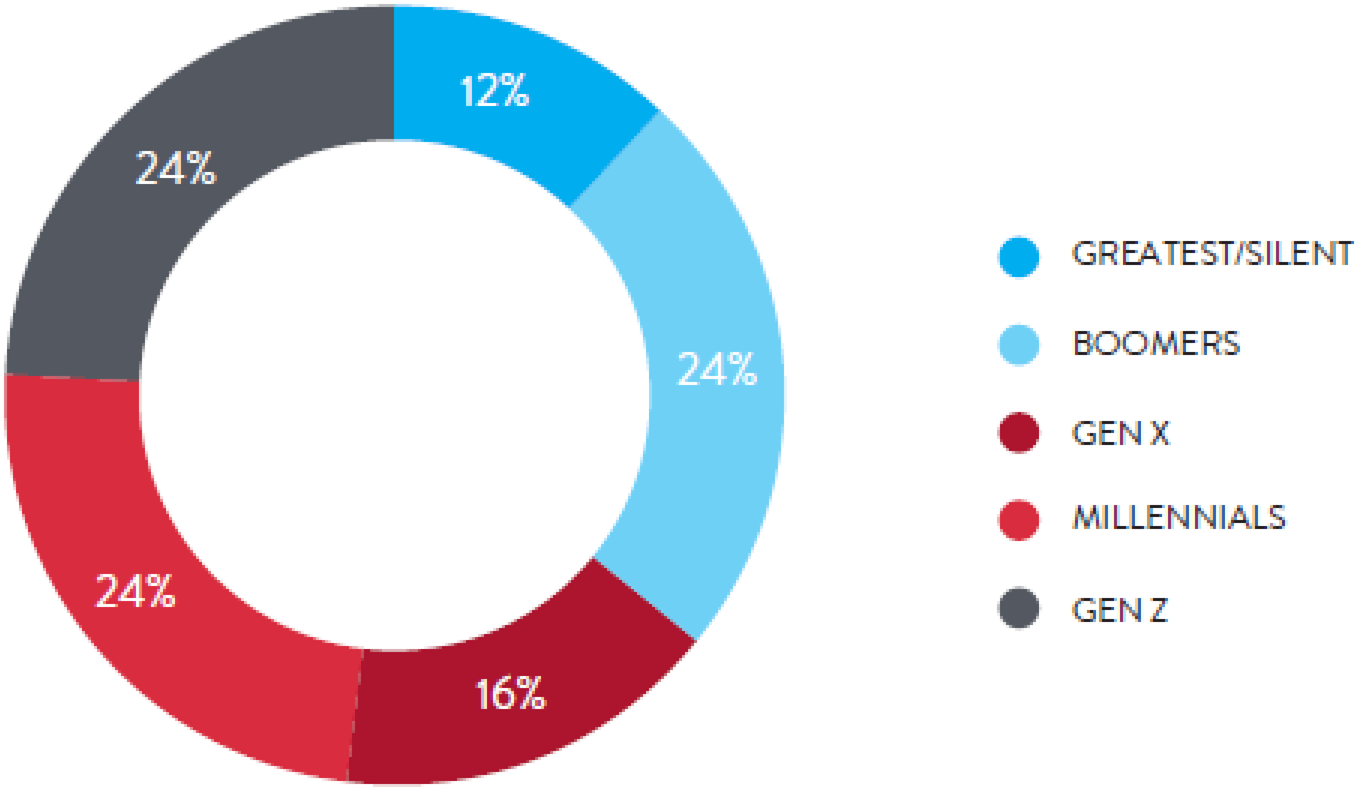
Trends: Millennials · 1977-1995

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

POPULATION BY GENERATION



Source: Nielsen Pop-Facts, 2013

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

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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

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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

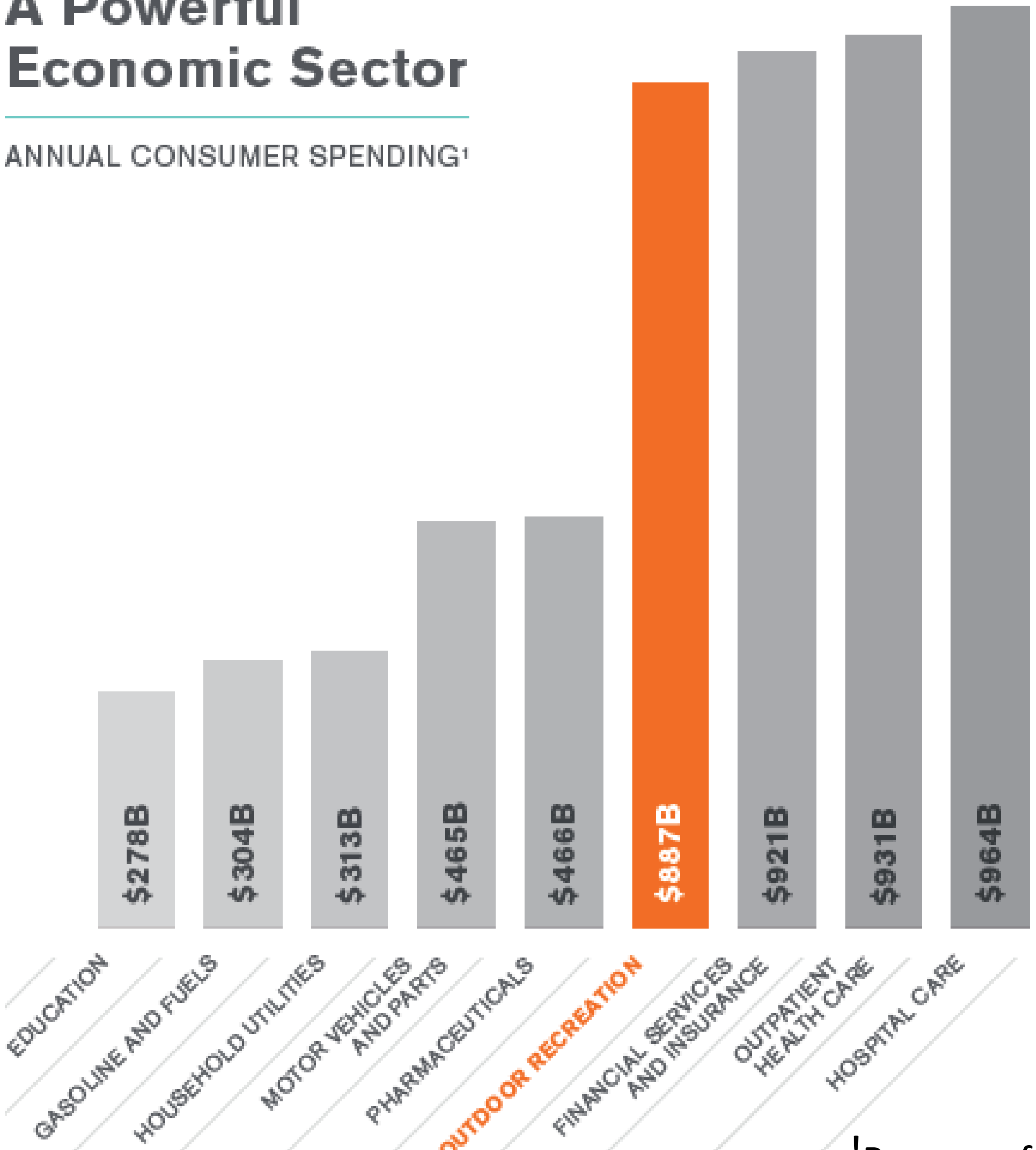
7.6 MILLION
AMERICAN JOBS

$65.3 BILLION
IN FEDERAL TAX REVENUE

$59.2 BILLION
IN STATE AND LOCAL TAX REVENUE

A Powerful Economic Sector

ANNUAL CONSUMER SPENDING[1]



[1]Bureau of Economic Analysis

EACH YEAR AMERICANS SPEND MORE ON		
TRAIL SPORTS GEAR ($20 BILLION)	THAN ON	**HOME ENTERTAINMENT** ($18 BILLION)[17]
WATER SPORTS GEAR ($14 BILLION)	THAN ON	**MOVIE TICKETS** ($11 BILLION)[18]
CYCLING AND SKATEBOARDING ($97 BILLION)	THAN ON	**VIDEO GAMES** ($61 BILLION)[19]

MORE AMERICANS PARTICIPATE IN OUTDOOR RECREATION EACH YEAR

145 MILLION

THAN ATTEND NFL, NBA, MLB AND NHL GAMES COMBINED (134 MILLION)[20]

SPENDING ON **SNOW SPORTS RESULTS IN MORE AMERICAN JOBS**

695,000

THAN THE EXTRACTIVE INDUSTRIES IN THE UNITED STATES (627,000)[21]

SPENDING ON **HUNTING SUSTAINS MORE AMERICAN JOBS**

195,000

THAN THE COMBINED U.S. WORKFORCES OF APPLE (66,000) AND MICROSOFT (64,000)[22]

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

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51%
OF OUTDOOR CONSUMERS ARE WOMEN

MEDIAN AGE IS
40

43%
HAVE CHILDREN

MORE LIKELY TO BE IN THE FOLLOWING SEGMENTS:

THE ATHLEISURIST

OR

THE SIDELINER

OR

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


OUTDOOR GADGETS
$81 / 18%
OUTDOOR APPAREL
$137 / 30%
$465
TOTAL AMOUNT SPENT PER YEAR ACROSS ALL 4 CATEGORIES
$123 / 26%
OUTDOOR FOOTWEAR
$123 / 26%
OUTDOOR EQUIPMENT


COMPARED TO ALL OUTDOOR CONSUMERS,
URBAN OUTDOOR CONSUMERS TEND TO BE...
YOUNGER
SLIGHTLY MORE MALE
MORE ETHNICALLY DIVERSE
MORE LIKELY TO HAVE KIDS
MORE LIKELY TO BE EMPLOYED FULL TIME

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)

TECHNOLOGY USAGE

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

	MALE	FEMALE	MEDIAN AGE	ARE MARRIED	HAVE KIDS
TRADITIONAL OUTDOOR CONSUMERS	50%	50%	39	56%	45%
NON-TRADITIONAL OUTDOOR CONSUMERS	44%	56%	50	44%	21%

TRADITIONAL OUTDOOR CONSUMERS ARE MORE LIKELY TO BE IN THE FOLLOWING SEGMENTS:

THE ACHIEVER OR THE OUTDOOR NATIVE OR THE ATHLEISURIST

NON-TRADITIONAL OUTDOOR CONSUMERS MORE LIKELY TO BE IN THE FOLLOWING SEGMENTS:

THE URBAN ATHLETE OR THE SIDELINER OR THE COMPLACENT


TOP
MOTIVATIONS
AMONG LATINO/HISPANIC
OUTDOOR CONSUMERS:
TO HAVE FUN
TO HAVE A FAMILY EXPERIENCE
TO IMPROVE MY
OVERALL PHYSICAL HEALTH
TO RELIEVE STRESS


PARKS ?
MRA/CH-Ps
CRO
LCF/CRO
CRO
WELCOME!
MINI ENVIRONMENTAL SESSION
HERITAGE RECREATION SESSION
CULTURAL ART / FOOD SESSION
RECREATION ENVIRONMENTAL SESSION
AND THEY KEEP COMING BACK!
COLUMBIA RIVER PARK
LUNCH
CRO
CHIQUES CREEK
CRO
HISTORY RIDE TRAIL
GARDEN / ART
CREEK STOMPING
AND THEY LIVED HAPPILY EVERAfter

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



BOOKS


bike rack


BIKE RACK
commissioned by
Louisville Downtown
Management District
designed by
Scott Scarboro
April, 2009


WAYPOINT


RESTROOMS
MEN
WOMEN


RESTROOM


Park Tool


Colorful!
Wild!
Festive!
Playful!
Fresh!
Unique!
Creative!
Campground
Water Park
Ice Complex
Tennis Center
Batting Cages
Driving Range
Public Works
Celebratory Gateway Banners and Event Banner Poles
Trailblazer Signs
Bike Way Signs
Pedestrian Kiosks
Large Identification Signs
STOP
DECATUR
Wilson Morgan Park
Jack Allen Soccer Complex
Waterfront
Welcome to
CITY OF
DECATUR
A Grand City on a Charming Scale
ID & Proximity Signs
Historic District Boundary & Street Signs
Beautification Department Signs
Fast Traffic Trailblazer Signage
Tertiary Gateway Signage


NAPOLI'S
PIZZA
654-6740


McCLEARY'S PUBLIC HOUSE


JOHN WRIGHT


S. PERRY ST

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

Nature-Based Placemaking (NBP)

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

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DCNR's Conservation Landscape (CL's):

Lehigh Valley Greenways CL (Lehigh & Northampton)

- *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

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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

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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

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Ecological Economics &Triple Bottom Line Theory

- People – Planet – Profit
- Society – Environment – Economy
- Healthy Communities – Natural Environment – Economic Vitality
- Social Responsibility – Environmental Stewardship – Economic Prosperity

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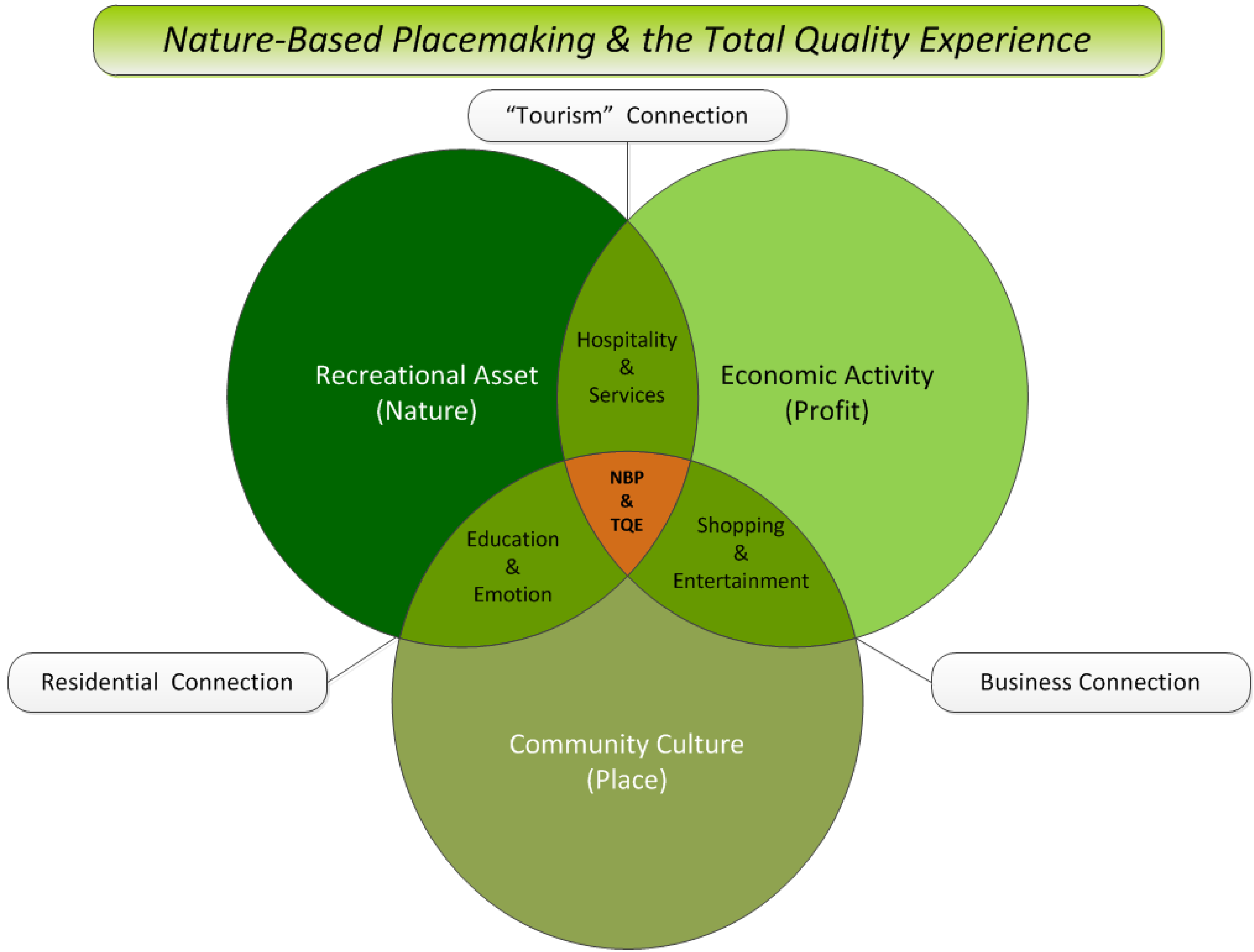
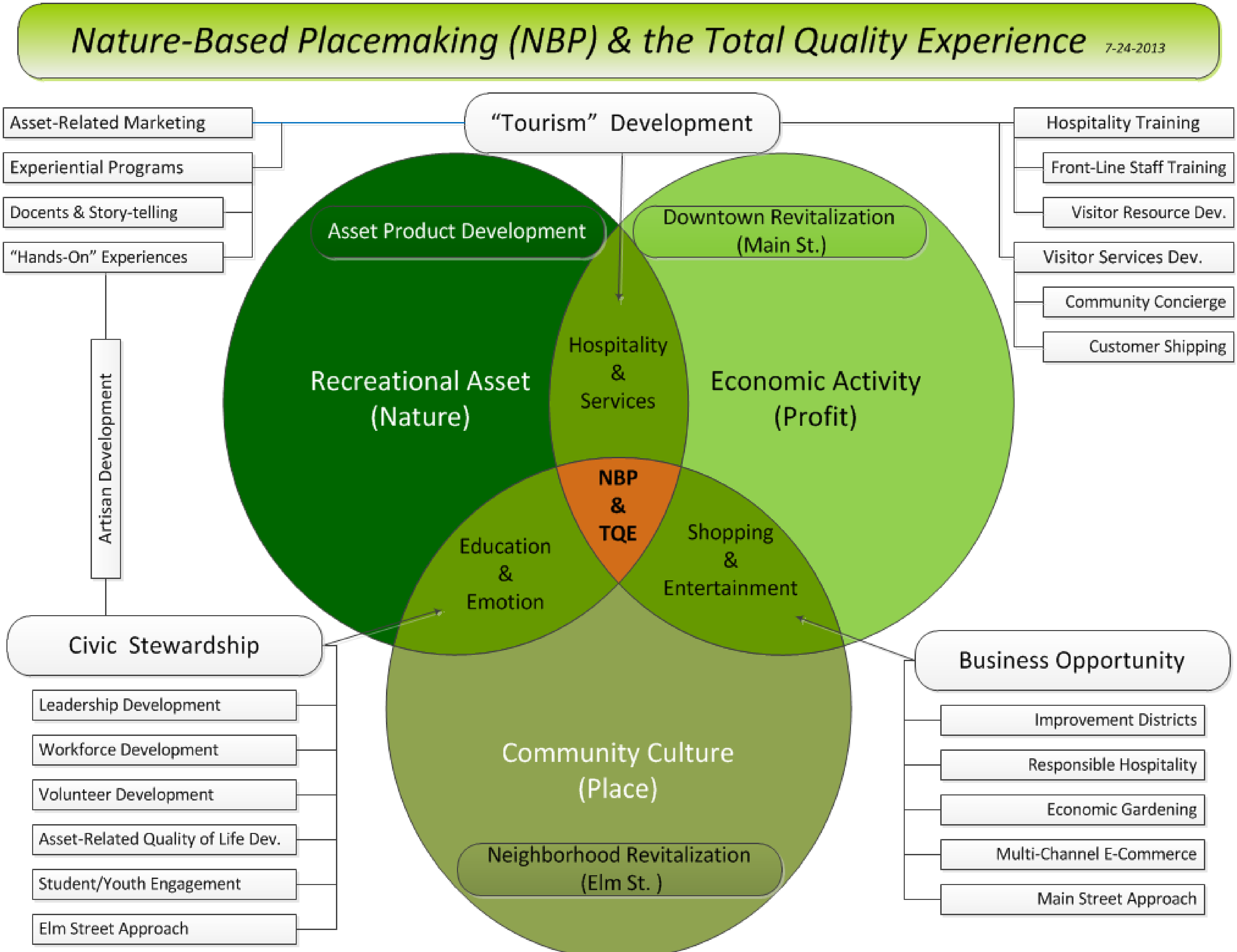
Nature-Based Placemaking (NBP)

- 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)

The Nature-Based Placemaking Handbook
is available for download at padowntown.org


Nature-Based Placemaking & the Total Quality Experience
"Tourism" Connection
Recreational Asset
(Nature)
Hospitality
&
Services
Economic Activity
(Profit)
NBP
&
TQE
Education
&
Emotion
Shopping
&
Entertainment
Residential Connection
Business Connection
Community Culture
(Place)



Nature-Based Placemaking (NBP) & the Total Quality Experience 7-24-2013
"Tourism" Development
Asset-Related Marketing
Experiential Programs
Docents & Story-telling
"Hands-On" Experiences
Artisan Development
Hospitality Training
Front-Line Staff Training
Visitor Resource Dev.
Visitor Services Dev.
Community Concierge
Customer Shipping
Asset Product Development
Downtown Revitalization (Main St.)
Recreational Asset (Nature)
Hospitality & Services
Economic Activity (Profit)
NBP & TQE
Education & Emotion
Shopping & Entertainment
Community Culture (Place)
Neighborhood Revitalization (Elm St.)
Civic Stewardship
Leadership Development
Workforce Development
Volunteer Development
Asset-Related Quality of Life Dev.
Student/Youth Engagement
Elm Street Approach
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 (C_2P_2)
  - Conservation Landscape Mini-grants

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Thank you!

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