Plan for Elk Watching and Nature Tourism in North Central Pennsylvania

Executive Summary

Prepared for:

Lumber Heritage Region of Pennsylvania
North Central Pennsylvania Regional Planning and Development Commission
Pennsylvania Department of Conservation and Natural Resources (DCNR)
Pennsylvania Game Commission

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Key individuals that contributed to, and supported the project include John C. Oliver, Secretary, Department of Conservation and Natural Resources; Vern Ross, Executive Director, Pennsylvania Game Commission; Dan Surra, Pennsylvania House of Representatives; Ron Kuleck, Executive Director, North Central Regional Planning and Development Commission; Bert Reis, Chairman, Benezette Township Supervisors; June Sorg, Christine Gavazzi and Joe Koch, Elk County Commissioners; Dave Morris, Director, Northwest Pennsylvania’s Great Outdoors Visitors Bureau; and, Guy Tiracorda, Pennsylvania Department of Transportation.

We also wish to thank the many individuals from across the elk range who supported the project through participation in public meetings or by providing information and recommendations.

Photography by Ted Eubanks
Jon Benner (cover elk)
PA Game Commission Photo/Hal Karber
(covers eagle)
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The participating agencies are expected to implement the plan as appropriate for their areas of responsibility. Key implementing agencies include NCPRPDC, Pennsylvania’s Lumber Heritage Region, DCNR, the Game Commission, the Pennsylvania Department of Transportation, and the Pennsylvania State Police. The Rocky Mountain Elk Foundation, a longtime supporter of the state’s elk, has committed funding to support several of the plan’s recommendations. The study was funded with the support of DCNR, Appalachian Regional Commission, US Forest Service, and the Game Commission.

**Introduction**

Fermata, Inc. was engaged to develop a nature tourism strategy for the Elk Range of North Central Pennsylvania. The Plan for Elk Watching and Nature Tourism in North Central Pennsylvania fulfills the requirements of a contract between Fermata Inc. and the North Central Pennsylvania Regional Planning and Development Commission (NCPRPDC). Other program partners are the Department of Conservation and Natural Resources, the Lumber Heritage Region, and the Pennsylvania Game Commission.

The subject of this plan is visitor management, including elk viewing and nature tourism, not elk management, which is the responsibility of the Game Commission. The main objective of the project is to develop a five-year plan for elk viewing and other nature-related tourism that will:

- Provide recommendations to improve visitor services and guide the development of appropriate infrastructure.
- Support the long-term ecological needs of an expanded wild elk herd.
- Stimulate economic benefits for local communities and minimize conflicts with private landowners and other forest users.
- Educate tourists and residents about responsible stewardship of the elk herd and the region’s other natural resources.
- Protect the natural integrity of the region.
- Promote elk watching and other nature tourism activities.

Fermata conducted on-site assessments of proposed elk-viewing destinations, including all the state parks and natural and wild areas in or near the elk range. The project also reviewed trend information on outdoor recreation, wildlife watching, nature tourism and visitation to north central Pennsylvania. Periodic public involvement activities took place during the plan’s development, including approximately forty meetings held throughout the elk range with partner agencies, the public, and local and county government.
Fermata believes that the Pennsylvania Elk Range has exceptional elk watching, wildlife viewing, and general nature tourism opportunities that can be significant attractions for nature tourists. These world-class natural assets provide important recreational benefits to local residents and have tremendous potential to increase visitation. This conclusion is based on an assessment of the natural assets of the elk range, Fermata’s own proprietary research, and a review of national and regional tourism trends.

According to the Travel Industry Association of America research (1998), the most prominent adventure travel activities were camping, hiking, biking and wildlife watching. See Figure 1.

The Elk Range is in the middle of the 15-county Lumber Heritage Region of Pennsylvania with the largest concentration of public land in the Commonwealth. See Map 1. The range acts as a gateway to more than 2.5 million acres of spectacular public lands that include countless miles of waterways and forest trails and numerous wild and natural areas.

Figure 1. Most rapidly growing types of soft adventure travel (TIA, 1998).
Fermata believes that a regional strategic plan for nature tourism should be founded on a broad-based, diverse range of outdoor recreational activities, with elk viewing playing a significant, but by no means exclusive, role in the plan. The Elk Range has traditionally relied heavily on hunting and fishing as primary forms of outdoor recreation. More recently, elk watching has joined hunting and fishing to become a major form of outdoor recreation, with concurrent increases in mountain biking, birding, hiking, and canoeing. Elk viewing has gradually grown so that it is now one of the most important forms of recreation (in terms of participant days) in the Elk Range.

Elk viewing has the potential to draw uninitiated and casual nature tourists into the region, and with the diversity of the region’s nature tourism options, presents a tremendous opportunity for small business development in the communities of North Central Pennsylvania. This diversity can also help create year-round opportunities to sustain service providers before and after the peak-viewing season in fall, relieving pressures at Winslow Hill and increasing and spreading tourism revenue to communities. Promoting elk viewing along with other nature assets can result in a long-term sustainable tourism and development benefit, including an increase in overnight travelers and the opportunity to bring conservation messages to new audiences. Elk are extremely effective as a “portal species,” that is, one that attracts uninitiated and casual visitors. Fermata’s research and the work of others have shown that nature tourism and wildlife watching are profitable and growing rapidly throughout the country and as such, we can expect that visitation to the region will continue to grow, and with it, revenue potential.

Increased visitation comes primarily from creating new markets or expanding existing markets. Pennsylvania’s elk range has an important location advantage. There are at least 46 million people who reside in the urban and suburban areas within a 6-hour drive of Benezette, in the center of the Elk Range. See Map 2.

The most recent National Survey on Recreation and the Environment (2000) found that 69.4 million people (or 25% of all Americans) view birds. See Table 1. Fermata projects that the same proportion of people within a six-hour drive of the region would share an interest in elk and wildlife watching. That amounts to a potential market size of over 11.6 million people, most of whom may be unaware of the resources available in this region.
Table 1. Most popular outdoor recreation activities in the United States in 1999.

<table>
<thead>
<tr>
<th>Outdoor Activity</th>
<th>% Population over 16</th>
<th># of People in Millions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>84.3</td>
<td>174.8</td>
</tr>
<tr>
<td>Viewing natural scenery</td>
<td>60.9</td>
<td>126.2</td>
</tr>
<tr>
<td>Visiting nature center, trail, or zoo</td>
<td>57.5</td>
<td>119.2</td>
</tr>
<tr>
<td>Picnicking</td>
<td>54.9</td>
<td>113.8</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>53.7</td>
<td>111.3</td>
</tr>
<tr>
<td>Pleasure driving for natural scenery</td>
<td>53.4</td>
<td>110.7</td>
</tr>
<tr>
<td>Viewing other wildlife</td>
<td>45.9</td>
<td>95.2</td>
</tr>
<tr>
<td>Viewing wildflowers &amp; vegetation</td>
<td>45.4</td>
<td>94.1</td>
</tr>
<tr>
<td>Bicycling</td>
<td>39.5</td>
<td>81.9</td>
</tr>
<tr>
<td>Visiting a wilderness/primitive area</td>
<td>34.1</td>
<td>70.7</td>
</tr>
<tr>
<td>Hiking</td>
<td>33.6</td>
<td>69.7</td>
</tr>
<tr>
<td>Birdwatching</td>
<td>33.5</td>
<td>69.4</td>
</tr>
<tr>
<td>Developed camping</td>
<td>24.9</td>
<td>51.6</td>
</tr>
<tr>
<td>Off-road driving</td>
<td>17.3</td>
<td>35.9</td>
</tr>
<tr>
<td>Primitive camping</td>
<td>15.2</td>
<td>31.5</td>
</tr>
<tr>
<td>Hunting</td>
<td>11.3</td>
<td>23.4</td>
</tr>
<tr>
<td>Backpacking</td>
<td>11.0</td>
<td>22.8</td>
</tr>
<tr>
<td>Horseback riding</td>
<td>10.2</td>
<td>21.1</td>
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</table>

Expenditures for outdoor recreation-based travel statewide accounted for $4 billion in 1997, or a full one-third of all Pennsylvania leisure spending (Shifflet 1999). Of the total spending by outdoor recreation travelers, 34.6 percent of expenditures were by tourists who participated in activities on state or public forests, parks, or gamelands. In the Allegheny National Forest tourism region, average daily expenditures of all overnight leisure travelers was $48.70 per person per day, with total 1999 visitor spending of $608.6 million (Shifflet 2000).

A Penn State study (Strauss 1999) estimated that elk tourists in the Benezette/Winslow Hill area contributed approximately $1.0 million (about $16/person/day) to the region, a figure that Fermata believes represents a significant under-valuation of the potential. Studies show that typical nature tourists spend considerably more than this. In fact, Fermata’s research (n=2,787) shows nature tourists spend $138.45/day.

Visitor spending should be expected to increase significantly following implementation of Fermata’s recommendations. The average visitor expenditure in ten years could be equal to that of the typical nature tourist surveyed by Fermata. A span of ten years has been chosen as a development period since the type of visitor who spends this amount requires more in the way of infrastructure and interpretation than is presently available in the elk region.

However, even the short-term and mid-term improvements will encourage an overnight visitor to spend more. Fermata projects figures of $75.95/person/day by 2005 and $197.40/person/day in 2012 (adjusted for inflation). See Table 2.

Primary research conducted by Fermata (1998-2000) in four regions of the US resulted in a profile of a nature tourist (n=2787 respondents). See Table 3. Data collected by HLA and ARA Consulting Firms of North America in 1994, shown in the second column, provides a similar profile (Wight 1996). A third column contrasts the current travel profile of overnight leisure travelers to the Allegheny National Forest tourism region as characterized by the 1999 PA Travel Profile (Shifflet 2000).

### Table 2. Summary of current and possible future Elk Region tourism spending estimates.

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Current</td>
<td>$16/person/day</td>
<td>$48.70/person/day</td>
<td>$138.45/person/day</td>
</tr>
<tr>
<td>Possible future (adjusted for inflation)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td></td>
<td></td>
<td>$75.95/person/day</td>
</tr>
<tr>
<td>2012</td>
<td></td>
<td></td>
<td>$197.40/person/day</td>
</tr>
</tbody>
</table>

**FINDING #2**

There are significant factors that currently limit the development of the region’s nature tourism economic potential.

The potential attraction of the region’s exceptional elk viewing and nature tourism opportunities is limited by several factors:

- lack of facilities to manage visitation;
- conflicts with private property owners;
- limited availability of goods and services that leads to low visitor spending;
- lack of signage and services to help the uninitiated traveler navigate the elk range.

The region has no visibility on I-80 and it lacks a simple concise theme to promote the broad array of attractions. It suffers from a
<table>
<thead>
<tr>
<th></th>
<th>Fermata research – four US regions aggregate</th>
<th>1994 HLA and ARA Consulting Firms data</th>
<th>1999 PA Travel Profile – ANF tourism region</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age</strong></td>
<td>52.1 years</td>
<td>35-54 years</td>
<td>41.3 years</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td>Male–48.3% Female–51.7%</td>
<td>Male–50% Female–50%</td>
<td></td>
</tr>
<tr>
<td><strong>Annual income</strong></td>
<td>$61,962 (2000 dollars) (n=1266)</td>
<td></td>
<td>$46,453 (2000 dollars)</td>
</tr>
<tr>
<td><strong>Travel group size</strong></td>
<td>2.45 persons</td>
<td>2.7 persons</td>
<td></td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td>16.36 years (four years of college plus some graduate school)</td>
<td>16 years – 82%</td>
<td></td>
</tr>
<tr>
<td><strong>Tourist’s origin</strong></td>
<td>Urban - 28.9% Suburban - 47.6% Rural (farm) - 4.3% Rural (non farm) - 19.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Distance to reach destination</strong></td>
<td>160.4 miles (one-way)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Average length of stay</strong></td>
<td>2.33 days</td>
<td>11 days</td>
<td>4.2 days</td>
</tr>
<tr>
<td><strong>Party composition</strong></td>
<td>Travel as couple or family: 78.5% Travel alone: 21.5%</td>
<td>Travel as couple: 61% Travel as family: 15% Travel as singles:13%</td>
<td>Travel as a couple: 34% Travel as family: 35%</td>
</tr>
</tbody>
</table>

lack of effective directional signage, attractive parking, and interpretive signage at many of the finest overlooks, natural attractions, and trailheads. In addition, current viewing has a negative impact on residents, tourists, and the elk with illegal parking, trespassing, and spotlighting of animals and residences. Numerous safety problems arise from a lack of facilities, staff, and controlled viewing opportunities. Wildlife viewing in the Elk Range has developed ad hoc, and the behavior of unmanaged wildlife viewers in the area has caused significant conflict with local residents. In addition, we are concerned that unethical wildlife viewing practices represent direct harassment of the elk themselves.

A vast set of resources exists upon which to build year-round nature tourism, however, the resources are so great that the casual visitor cannot easily navigate them. Road access is indirect and rarely straight, sites are disconnected, and travel time can be considerable. Fermata believes that a sound nature tourism strategy must be built upon the visitation that already occurs as a result of elk viewing. Nature tourism sites should be easily accessed from elk-viewing locations, requiring as little driving as possible along major roads.
Recommendations

RECOMMENDATION # 1
Address immediate problems of traffic congestion, trespass, and uncontrolled viewing practices.

Based upon numerous public meetings and discussions with local officials, Fermata believes that it is important to establish a public education and enforcement patrol to address uncontrolled elk-viewing activities during the peak fall viewing season in, and around, Benezette Township. The goals would be to:

- minimize traffic safety problems,
- control trespass and littering,
- minimize feeding, spotlighting, and close contact with elk, and
- provide information to visitors on elk-viewing opportunities and proper viewing ethics.

The program should be a joint effort of DCNR Rangers, Game Commission Wildlife Conservation Officers, and the PA State Police. The Township could assist with information about priority areas and times for patrols along Rte 555, Winslow Hill Road, Benezette, Medix Run, and any other areas of potential conflict.

The program would stress education and hospitality as a way to minimize problems and help visitors enjoy their elk-viewing experience. This would require development and distribution of a brochure on appropriate and enjoyable elk watching, and installation of additional signage along Rte 555 concerning elk watching and safety. The program would:

- limit parking or stopping on the roadway except to avoid elk crossing the highway,
- encourage watchers to pull off the road where the public right-of-way is sufficient,
- eliminate parking in driveways or on private property, and
• encourage watchers to visit Winslow Hill, Sinnemahoning State Park, or other viewing destinations.

In addition, the partner agencies should continue to work with the Pennsylvania Department of Transportation to improve traffic safety, especially during peak viewing periods. This work should include completion of a traffic safety analysis along Rte 555 in the heart of the elk range and a search for special state funding to pave the remaining portion of Winslow Hill Road.

**RECOMMENDATION #2**

Expand elk habitat improvements on public land to minimize conflicts with private landowners.

Fermata believes that it is extremely important to significantly increase improved wildlife habitat in the elk range to support the herd and minimize conflicts with private property owners. The plan fully supports the recently announced Habitat Challenge Initiative in the Elk Range. This program is a public private partnership of Department of Conservation and Natural Resources (DCNR), the Game Commission, the Rocky Mountain Elk Foundation, and other private donors. The initiative would undertake a public-private challenge grant program to invest $1.2 million in habitat improvements in the Elk Range. The purpose of the initiative is to support the elk herd and minimize conflicts with private landowners.

About 70% of the land in the 835-square mile Elk Range is publicly owned, with the large majority of the land being State Forest land administered by DCNR. The goal of DCNR and the Pennsylvania Game Commission has been to include a high concentration of public land in the elk range to minimize conflicts with private landowners.

The Game Commission and DCNR agree that the elk herd needs to expand beyond its current concentrated location at Winslow Hill. The Game Commission has been actively improving elk habitat through the development of herbaceous openings on publicly owned lands as part of a 1996 elk-habitat-management plan that recommends distribution of the herd to about 1.5 elk per square mile over the approximately 835-square mile range.

The plan for the Habitat Challenge Initiative calls for an increase in the habitat enhancement projects with a goal of doubling the amount of improved habitat on the Elk Range from its current level to about 2000 acres.

**RECOMMENDATION #3**

Establish a scenic highway to link visitors with the region’s elk-watching locations and significant natural assets.

Fermata’s extensive review of the area has lead to the conclusion that a much more systematic approach to guiding visitors around the area is critical for accessing its many assets. Current signing is inadequate to both guide and educate tourists about the region’s natural resources. The provision of appropriate signing and additional sites for elk viewing and other nature pursuits is essential to the success of the nature tourism program.
Fermata assisted Pennsylvania’s Lumber Heritage Region, the state’s newest designated State Heritage Region, to obtain $131,500 in enhancement funding to develop and sign a scenic highway corridor based on elk viewing and nature tourism. These funds would compliment $150,000 provided by the DCNR for planning the overall interpretive signage and way-finding system for the heritage region. The requested funds would also support the design, fabrication, and installation of signs for the main Elk Forest Scenic Highway corridor and approximately twenty-five waypoints identified in the elk and nature tourism plan.

The Elk Forest Scenic Highway corridor consists of a main “hub” that would anchor SR 120, the Bucktail State Park Scenic Drive, to I-80 at two locations. See Map 3. The western connector would begin at the Penfield exit (or Dubois as an alternate) and include portions of State Routes 153, 255, and 555. The eastern connector would begin near the Snowshoe exit of I-80 and follow Rte 144 north to SR 120. The corridor is approximately 120 miles long and passes through three state forests and three state game lands. The Heritage Region could identify additional “spokes” connecting other key destinations in the region to the main corridor hub.

The proposal will help improve traffic management throughout the region, particularly at Winslow Hill near Benezette. This area presently experiences the greatest impact from visitation during August, September, and October. The signage will help to distribute and extend visitation to the region’s other nature tourism attractions. It is expected to help address the problems of highway congestion, visitor safety, and private property impacts. In addition, it is expected to help generate a more stable, well-managed, year-round series of historic, cultural, recreational, and nature tourism attractions for the Lumber Heritage Region of Pennsylvania.

RECOMMENDATION #4

Build seven model viewing sites to provide quality viewing opportunities throughout the region.

The construction of model viewing sites at select waypoints will help to create elk viewing and other nature-based destinations that will serve as demonstration sites for future developments in the region. Once constructed, model sites can be expected to provide, at a minimum, safe off-road parking, pedes-
trian access that is ADA compliant, walking trails with vegetative fencing, properly sited viewing platforms or viewing blinds, and good directional and interpretive signage.

Seven sites were chosen to serve as model elk and/or wildlife viewing sites along the Elk Forest Scenic Corridor. See Map 3. The first two are immediately off the corridor and are considered the highest priorities. The remaining five sites are listed in order of priority to be completed as funding permits.

The model sites are:

- Hick’s Run
- Sinnemahoning State Park
- Fish Dam Run Overlook
- Beaver Run
- Two Rock Run Overlook
- Old Hoover Farm
- Kettle Creek State Park

Fermata chose these sites from an extensive list of locations nominated for consideration by DCNR and Game Commission personnel. The sites were presented during the public meetings and were selected based on the following criteria:

- elk are consistently seen, or one or more nature tourism experiences exists presently;
- located on, or near, the Elk Forest Scenic Highway;
- off-highway, surfaced parking exists or could be created;
- the habitat is managed for elk viewing (applies to elk-viewing sites);
- viewing location can be limited to foot traffic with appropriate ADA features;
- shelters or blinds can be developed for viewing and photography in a non-intrusive, confined setting, to avoid impacting the resource;
- interpretive and directional signage exists, or can be developed; and
- location can be easily monitored by agency staff as part of the model evaluation process.

**RECOMMENDATION #5**

Build two major interpretive facilities to service elk watchers and nature tourists.

**Winslow Hill Portal**

Fermata recommends an expanded elk-viewing facility at Winslow Hill to serve as the elk-viewing portal for the Pennsylvania Elk Forest Scenic Corridor. The large amount of
improved habitat and the high numbers of elk that remain in and around Winslow Hill ensure that it will remain an attraction that continues to draw tens of thousands of visitors. While the reluctance to attract additional visitors during the fall rut is understood, Fermata also recognizes an opportunity to reach thousands of visitors who have little experience with nature. Winslow Hill is the ideal location for capturing these masses of the “uninitiated.”

Fermata’s recommendations for Winslow Hill are:
• Construct an all-weather visitor center building with an adjacent freestanding viewing platform.
• Manage vehicular traffic with the addition of a 40-car paved parking area (with adjacent overflow) and passive barriers.
• Install a permanent restroom facility with indoor flush toilets.
• Construct a network of screened walking trails with interpretive signage.
• Staff the visitor center seasonally with a special elk interpreter; supplement with volunteers or other agency staff.
• Utilize technology such as a webcam site, spotting scopes with digital (CCD) chips, sound amplification, dedicated radio broadcasts, and touch screen database driven web-based information kiosks.
• Install permanent indoor and outdoor interpretive exhibits.
• Conduct on-site engineering and testing to prepare detailed construction plans and estimates.
• Work with Benezette residents, local small business owners, members of non-profit organizations, and others to establish a Friends of Winslow Hill group to participate in development and management decisions.
• Consider charging a modest entrance fee, retail sales, and tour and seminar registration fees to support operational costs.

Also investigate donations, grants, endowments, and other user-related payments, and partnerships, to offset costs.

In addition to the above, the Commonwealth should seek special funding to pave the remaining portion of Winslow Hill Road (about 1.5 miles) to provide improved traffic flow for visitors. This would allow for a better traffic pattern and eliminate the need for visitors to retrace their route back through the town of Benezette.

**Sinnemahoning State Park Portal**

We suggest the development of a general nature tourism portal at Sinnemahoning State Park. Its location, the presence of infrastructure capable of handling large numbers of people, an enthusiastic park manager, and the excellent wildlife-watching habitat make it an ideal anchor destination along the corridor. Most importantly, Sinnemahoning State Park has an abundance of nature-related activities for the outdoor recreationist.

• Develop Sinnemahoning State Park to serve as a major year-round, all-weather general nature tourism visitor center with an expanded interpretive center.
• Construct all-season elk-viewing improvements to control viewing use and limit human interactions with the elk.
• Build signed nature trails, create interpretive gardening/landscaping for butterflies, and establish one or more live cam sites and scopes on bald eagle nests.
• Nurture a volunteer program and create a Friends of the Park group. Provide educational programming by contractors or staff people year-round on weekends and also mid-week in summers.
• Provide visitor services for the three surrounding state forests – Moshannon, Elk, and Sproul – including camping information, maps, trail guides, and any necessary permits. Provide tourism information services to hunters including dining, equipment and ammo outfitters, and rental accommodations information.
• Develop partnerships with nature-based guides and outfitters and encourage them to base their services at the visitor center.

• Prepare detailed construction plans and cost estimates for all aspects of the visitor center proposal. Seek public input on final site design.

Development of the Sinnemahoning State Park portal also presents opportunities for small business development related to nature tourism for the Lumber Heritage region and the entire state. The new facilities that we recommend and the expanded role that North Central Regional Planning and Development Commission could play would both be important to helping businesses succeed. To address this need and take advantage of the unique set of opportunities, we recommend creating a range of private business development services at the center, consistent with the State’s management plan. Possible small business services and programming include the following:

• Create a business incubator facility as a pilot project for nature tourism-related entrepreneurial development consistent with the mission of the park and forests. This effort would be a partnership between DCNR and other agencies, with NCPRPDC providing the entrepreneurial assistance, business plan development, and revolving loan fund support for the project. The Lumber Heritage Region would be involved in the development of appropriate interpretation for the lumbering heritage of the region. North Central has indicated its interest in assessing and developing the feasibility of such an endeavor.

• Establish a partnership with Penn State Extension Service to offer other small-business-skills training in nature tourism-related activities including hospitality, backcountry safety, and others.

• Create a start-up revolving loan fund for nature tourism development to be administered by NCPRPDC or other economic development entity.

RECOMMENDATION #6
Establish a cooperative marketing effort that is consistent with the development of new facilities to service increased visitation.

The creation of an integrated elk and nature tourism project fits neatly within the existing platform of the Lumber Heritage Program. This cultural tourism umbrella embraces the history, culture, economics, and ecology of the central Pennsylvania forests, and seeks to unite a 14,000-square mile, 15-county area under a unified tourism theme. Elk viewing and other wildlife viewing qualify as activities compatible with the ecological and cultural history of the forests, and one important goal of this plan is to provide a working model that other counties can use to promote their own unique resources and destinations.

The proposed marketing strategy for the Elk Range emphasizes tourism development rather than tourism promotion. Tourism development differs from tourism promotion in that tourism promotion is predominantly a sales and marketing approach. On the other hand, tourism development creates the venues tourists want to visit in an environment that is mutually respectful of
the elk and the local population. Merely increasing visitation to the Elk Range, the goal of tourism promotion, will do no more than increase the problems that currently exist and negatively impact the region.

Product development in the region currently lags behind product promotion. Local communities have been specific and vociferous in expressing concerns that tourism promotion not outstrip their capacity to respond. Therefore, the objective of a marketing strategy must be tempered by the community's limits of acceptable change. Objectives may be set that on the surface would address the gap in tourism services but would also extend beyond the boundaries of acceptable change.

Marketing efforts in the elk region must be tied to the ability of the local communities to adapt to increased visitation and demand on local goods and services. Therefore, the cooperative marketing effort is not so much tied to time in terms of developing a multi-year plan as it is to action. Our strategy calls for managing current visitation while developing additional tourism products over the next three to five years. However, the success of the program will not be determined by time but rather by measurable accomplishments. In the Pennsylvania Elk Range, time is an artificial constraint that must be replaced by action.

The marketing strategy that we propose will target specific recreational groups, specialized market segments within these groups, and advantageous seasons until state agencies and the private sector has time to “ratchet up” capacity (programs and products). The concept here is to focus on a smaller group of visitors whose travel expectations are met by current product offerings. Our recommendation for incremental marketing steps will move from the most specialized (smallest segment) to the least specialized (largest segment) target market as product development is accomplished. This “ratchet up” approach responds to the concerns of the local communities and offers a framework for bringing new products and services online in a manageable way.

Existing visitation must be controlled before introducing additional visitors to the area. Maintaining the current visitation growth rate during the fall season over the next three to five years will provide the time for further development of portals, gateways, and the Elk Forest Scenic Corridor.

**Actions to Implement the Incremental Marketing Strategy**

- Transform existing day-trip visitation into overnight visitation during the elk bugling (fall) season.
- Target new avid nature tourists who are interested in specialized, low-impact outdoor recreation.
- Focus on the spring season over the next three to five years (or until program and product development is complete).
- Develop a web-based marketing campaign including informational viewing guide and promotional materials.
- Establish a marketing partnership with Pennsylvania wood products manufacturers.
- Develop, adopt, and support a unique, cohesive brand identity that unifies and connects the elk attractions with the array of other offerings and opportunities in the region.
- Establish joint funding and business development strategies.
- Create training programs and support materials for portal managers, resource managers, site staff, and volunteers.
- Expand elk viewing (fall) as portals (Sinnemahoning and Winslow Hill) and enhanced waypoints come on-line.
- Expand year-round tourism marketing to less specialized market segments once all product development is complete.
**ACTION #1**

**Convert existing day trip visitation to overnight visitation during the fall season.**

Elk are the portal species for the region and most visitors who come specifically to see the elk, go home once this goal is accomplished. Portals and enhanced waypoints are intended to expand opportunities and horizons from “elk only” to nature in general. “Elk only” is a day trip; nature in general demands an overnight stay. As the product and program development is implemented, it will engender a shift from elk-oriented visitation to destination-oriented visitation. Efforts should be made to convert current day trip visitors to overnight visitors by augmenting their experiences with additional nature-based opportunities.

**ACTION #2**

**Target market to avid nature tourists who are interested in specialized, low-impact outdoor recreation during the spring.**

During the product development period, the market segment that can be attracted to the area is the avid nature tourist, particularly during the spring season. This group requires little facilitation and can appreciate the experience with minimal infrastructure and improvement. The “as is” natural setting and public lands in the elk region satisfy these peoples’ demands to be outdoors and to enjoy the sights, smells, and sounds of nature. We recommend that the initial focus of the marketing initiative be aimed at the avid nature tourist who can access and appreciate the opportunities that are currently available.

The level of marketing messages required to attract different market segments is inversely proportionate to the degree of specialization of the groups. The uninitiated, general tourist has little or no awareness of the natural world nor the skills and equipment to access or appreciate it. The avid nature tourist needs no additional information or training. Although the avid nature tourist represents the smallest market segment, it is the largest group of spring travelers whose primary motivation for travel is recreation.

**ACTION #3**

**Develop a web-based marketing campaign (both information in the near-term and promotion in the longer term, following product development).**

In order to attract avid recreationists, we recommend a web-based marketing campaign that is content driven and appealing to a discriminating market segment, that is the avid nature tourist. The website must provide detailed, exciting descriptions and focus on what makes the region unique and worthy of visitation. Special pricing and packaging can be targeted to this specific group easily and affordably.

**ACTION #4**

**Establish a marketing partnership with Pennsylvania wood products manufacturers.**

We believe the region will be best served by establishing a unique relationship with the area’s wood manufacturing industry, and in particular the “green certified” manufacturers. Pennsylvania has more than 2.5 million acres of forests considered “well managed” under the standards of the Forest Stewardship Council (FSC) and 2.1 million of these acres are in the state forest system. Seventeen Pennsylvania manufacturers are certified as “chain-of-custody” manufacturers by SmartWood, an FSC accredited certification program. Certification helps Pennsylvania compete in the niche consumer market for certified wood products, a market that includes environmentally conscious timber consumers. Developing the elk region as a marketing vehicle for Pennsylvania green wood products will serve both the producer and consumer. The connection exists. The benefits of such a partnership are mutual.

There is also a natural link to the Lumber Heritage Region that specifically embraces...
outdoor recreational activities and historical/cultural interpretation of logging in the North Central area. Factory tours of the green-certified companies that harvest timber and produce lumber, along with an educational component about how nature-tourism and working forests can compliment one another, could be considered. This cultural/historical theme can be used for enrichment, as an accent, to the elk viewing and natural resource based themes. To tie culture and history to the overarching nature themes is a logical approach that will prove to be very effective.

**ACTION #5**

*Develop, adopt, and support a unique, cohesive brand identity that unifies and connects the elk with the array of other offerings and opportunities in the region.*

The Pennsylvania Elk Range represents an expanse of remote, forested public lands within a six-hour drive of many major metropolitan areas having a population of 46 million people. The overriding theme for the area should create the essence of this rich forest juxtaposed in contrast to some of the most urbanized regions of the United States and Canada. The elk are the “calling card” and this signature species personifies the contrast. The scenic highway corridor that unifies the collection of portals and waypoints must be clearly and consistently branded with the Elk Forest Scenic Corridor identifier and provide ample directional signage for travelers. Development of a detailed interpretive plan will solidify the corridor resources and the story of the region as a whole. In addition a designated marketing and public relations committee can facilitate the development of a brand identity.

**ACTION #6**

*Establish joint funding and business development strategies.*

In addition to the nature tourism incubator at Sinnemahoning State Park in partnership with NCPRPDC, we recommend the designation of a Finance Committee. Responsibilities could include pursuing grant opportunities, creating a certification program for guides, corporate sponsorship opportunities, a line of merchandise, and a reading list of natural resource-related books, developing a members only section of the website, and inventorying area outfitters, touring companies, guides, etc.

**ACTION #7**

*Create training programs and support materials for specific market segments.*

As part of the product development process, we recommend a comprehensive training program specifically targeted to portal and/or site managers, travel counselors and Welcome Center staff, volunteers, and local businesses. In addition, we recommend working through legislative channels to help restore or increase funding for essential services.

**ACTION #8**

*Expand elk viewing as portals and waypoints are developed.*

During the ratcheting up process of portals and waypoints, new opportunities will come online, such as at Sinnemahoning State Park. At such time, develop a marketing campaign to raise awareness about the new things to experience and lead people to the new and improved park, nature programming in general, and elk-viewing opportunities in particular.

**ACTION #9**

*Market year-round tourism to less specialized market segments once product development is complete.*

Once the basic tourism development strategy has been implemented, the marketing effort should begin to target both an expanded fall season and the less specialized recreationists who demand facilitation, interpretation, and nurturing. The region will be able to provide these services only after the gateway/portal/waypoint structure is in place.
The non-specialized mass tourism market will consist of additional elk viewers in the fall, along with outdoor recreationists interested in wildlife photography, wildlife watching, or fall foliage viewing. Spring and summer will also become more robust tourist seasons. The challenge is to ratchet up the offerings to provide a sound foundation of products and services and then craft the promotional messages to attract these visitors. Developing environmental education messages in the integrated marketing communications campaign is linked to developing value or meaning for nature through wildlife appreciation. In the long-term, the most appropriate place to invest efforts is with the uninitiated as they are malleable and open to influence.

**RECOMMENDATION #7**

**Develop a regional visitor center on I-80 for the Lumber Heritage Area after the recommended facilities at Winslow Hill and Sinnemahoning State Park are constructed.**

Fermata recommends further study of a gateway welcome center on I-80 in partnership with Clinton County and PennDOT staff, which should proceed only after the Winslow Hill and Sinnemahoning State Park have been completed and the Elk Forest Scenic Corridor appropriately identified. The gateway welcome center would promote the entire gamut of resources within the Lumber Heritage region, rather than just the natural resources that are the focus of this report. The same methodology that Fermata has adopted for designation of natural resource waypoints and portals in this report is also applicable to cultural or historic sites. Therefore, we recommend that development be tied directly to the unfolding Lumber Heritage plan.

The specific location of the welcome center should be determined based on detailed assessments of potential sites and discussions with the affected communities. We recommend that particular attention be paid to the area near the intersection of I-80 and State Hwy. 153 as a possible location for the new welcome center. A welcome center located near here and associated with Moshannon State Forest and S.B. Elliott State Park would appear to be especially inviting. As part of the gateway concept, Fermata also recommends an eastern “entrance” to the elk region. Pennsylvania probably cannot afford to build two new visitor centers. However, an entrance indicator, perhaps highway directional signage, would facilitate visitor access to the area.