

# The Economic Impact of National Heritage Areas

A Case Study Analysis of Six National Heritage Area Sites in the Northeast Region of the United States and Projections on the National Impact of All National Heritage Areas

This report and accompanying research quantifies the economic benefit of select NHAs to their local and state communities — measuring job, revenue generation, and economic impacts through a protocol comprising interviews, IMPLAN analysis, and existing data sources. The protocol provides a benchmark for NHAs to complete future economic impact studies. The analysis also extrapolates the national economic benefit of all NHAs.

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## Introduction and Executive Summary

Since 1984, 49 National Heritage Areas (NHAs) have been designated by Congress. NHAs conserve nationally significant landscapes and promote and protect their natural, historic, cultural, and recreational resources.<sup>1</sup> The areas are affiliated with the National Park Service (NPS), and managed by independent Federal Commissions, non-profit groups, or state or municipal authorities. Heritage areas rely considerably on local partnerships to carry out their mission. Along with the goals of cultural, historical, and natural resource protection, heritage area management organizations strive to improve the quality of life in their regions by fostering the development of sustainable economies. Through their resources, NHAs tell nationally important stories that celebrate our nation's diverse heritage. Furthermore, NHAs are lived-in landscapes. Consequently, NHA entities collaborate with communities to determine how to make heritage relevant to local interests and needs.<sup>2</sup>

NHAs provide economic benefits to the communities and regions committed to heritage conservation and economic development. Through public-private partnerships, NHA entities support historic preservation, natural resource conservation, recreation, heritage tourism, and educational projects. Leveraging funds and long-term support for projects, NHA partnerships foster pride of place and an enduring stewardship ethic.<sup>3</sup>

The report herein is the Economic Impact of National Heritage Areas. The study assesses the economic benefit of specific NHAs to their regions, states, and local communities by measuring employment and revenue generation and economic impacts through a protocol comprising of interviews, focus groups, economic impact analysis, and secondary data analysis. Additional extrapolations estimate the national economic benefit of all NHAs. The research protocol included site visits to each of the six NHA regions listed in Table 1, focus groups, and interviews with key stakeholders within the six NHA regions, facilitation and data collection of existing NHA visitor estimates, operating budgets, and grant/awards information. The data collection process guided the economic impact analysis, and subsequent estimations, using IMPLAN economic impact software.



Six National Heritage Area Case Study Sites in the Northeast Region

<sup>1</sup> <http://www.nps.gov/history/heritageareas/FAQ/>

<sup>2</sup> *Ibid.*

<sup>3</sup> *Ibid.*

Heritage Area	Size of the Region – Square miles	National Register Properties, 2012 <sup>4</sup>	National Historic Landmarks	National Park Units	Area Population 2010
<b>Baltimore National Heritage Area<sup>5</sup></b>	80.94	26,212	24	5	620,961
<b>John H. Chafee Blackstone River Valley National Heritage Corridor<sup>6</sup></b>	1,920.27	8,396	17	1	1,425,219
<b>Delaware &amp; Lehigh National Heritage Corridor</b>	2,679.64	8,446	13	4	1,659,648
<b>Hudson River Valley National Heritage Area<sup>7</sup></b>	6,023.02	18,524	66	2	2,789,259
<b>Rivers of Steel National Heritage Area</b>	5,857.42	10,363	24	1	2,394,971
<b>Wheeling National Heritage Area</b>	13.79	1,923	2	0	28,486

Table 1: NHA Case Study Site Profiles

NHA partnerships are encouraged through initiatives that increase educational and recreational opportunities for both local residents and tourists. Increased visitation by tourists and the increased economic activity are important objectives of heritage areas. The partnership approach creates the opportunity for a diverse range of associates to voice a range of visions and perspectives. Partners collaborate to shape a plan and implement a strategy that focuses on the distinct qualities that make their region special.<sup>8</sup> Partnerships among NHAs and their collaborators play a key role in leveraging federal investment.

The variety of activities and heavy partner involvement makes evaluation of the heritage programs fairly challenging. Utilizing baseline information about visitor characteristics, awareness of heritage areas, visitor use patterns, and evaluations of programs and facilities provides a foundation for data collection. Estimates of visitor spending and local economic impacts help to position the heritage areas within the regional tourism market and local economy.

The economic analysis completed for this assignment focused specifically on data collection and analysis of six National Heritage Areas. Additional analysis was completed to extrapolate the economic benefit of all 49 NHA sites in the United States. The intent of the extrapolation analysis is to utilize the findings from the individual sites to develop a model based on the average economic impact and the geographic scope of the site.

Results of the modeling projected the economic benefit of all 49 NHA sites on the nation's economy at \$12.9 billion annually. The economic activity supports approximately 148,000 jobs and \$1.2 billion annually in Federal taxes from sources such as employee compensation, proprietor income, indirect business tax, households, and corporations.

The 21 NHAs in the Northeast Region of the United States combine for a projected annual economic impact of \$5.4 billion. The NHAs in the Northeast Region annually support more than 66,880 jobs and generate \$602.7 million in local and state taxes.

<sup>4</sup> Includes all National Registry listings that fall partially or wholly within the NHA boundary. Collected by National Park Service in October 2012.

<sup>5</sup> City of Baltimore data used; However, BNHA does not cover the entire City of Baltimore boundary.

<sup>6</sup> John H. Chafee Blackstone River Valley National Heritage Corridor study area for this analysis is Worcester County, Massachusetts and Providence County, Rhode Island.

<sup>7</sup> Village of Waterford (Saratoga County) info N/A on U.S. Census site.

<sup>8</sup> <http://www.nps.gov/history/heritageareas/FAQ/>

The economic impact of an NHA will vary from site to site as an NHA is unique, operating in its local and state economy. The size and shape of an NHA play key roles in defining their personality. **Corridor sites** that span multiple counties or states must serve as a trusted collaborator to numerous partners spanning many varied interests. The corridor sites do have the added benefit of an increased pool of potential resources. Localized or **focused sites** such as Baltimore and Wheeling are concentrated. While this leads to partnerships with more defined, common goals, it places a limitation on available resources. Sites that span large geographic areas (**multiple counties**) with urban and rural communities have the unique challenge of balancing where and how their resources are allocated. Despite all potential iterations of NHA types, the objectives of each NHA are connected by their Federal designation and mission.<sup>9</sup> Similarities do exist and the impact study attempts to illustrate this by identifying the three areas (visitor, operational, and grantmaking), where NHAs have the greatest economic value to their local regions and states.

**Visitor and Tourism Expenditures:** The economic impact of visitors to NHAs is the primary source of economic benefit quantified in this analysis. The direct consequence of visitor expenditures become business receipts, which in turn are used to pay wages, salaries and taxes. The initial direct round of spending ripples through the regional economy supporting additional economic benefits. Given the unique challenges of capturing visitor data by NHAs, the economic model includes local visitor estimates within the analysis.<sup>10</sup> The visitor benefit analysis model clearly states an explicit relationship to overall visitor estimates reported by the NHAs and analysis of the visitor segments and their spending patterns. The model also estimates visitor expenditures.

**Operational Expenditures:** The economic impact of the NHA's organizational spending and staff. This refers to the day-to-day spending of the NHA to "get things done." Wages, rent, and professional fees paid by the NHA on an annual basis are included in this segment.

**Grantmaking and Support Expenditures:** The economic value of NHA-secured federal and state funding within the region primarily circulates through the economy in the form of knowledge transfer and increased salary amounts for organizations receiving the specific grant funding. Additional grant funding focused on capital and construction development is quantified as well. This segment includes the educational aspect of NHAs, and the role that the staff has in serving as catalysts for economic development opportunities in the regions which they operate.

The economic analysis completed for the operational and grantmaking impact uses actual expenditures and NHA employment to drive estimates of employment, income, tax revenue, and other economic variables.

An economic benefit is best understood as a gross increase in the wealth or income, measured in monetary terms, of people located in an area over and above the levels that would prevail in the absence of the activity under study. Of the benefits examined in this report, the greatest impact in terms of dollars is visitor and tourism spending.

One aspect of economic development that is difficult to define in dollars and cents is the impact that NHAs can have on the local natural resources in the regions they operate. The efforts of NHAs produce

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<sup>9</sup> <http://www.nps.gov/history/heritageareas/FAQ/>

<sup>10</sup> The analysis of visitor spending includes local spending estimates.

both tangible and intangible benefits. Heritage conservation efforts are grounded in a community’s pride in its history and traditions, and in residents’ interest and involvement in retaining and interpreting the landscape for future generations. It offers a collaborative approach to conservation that does not compromise traditional local control over and use of the landscape.<sup>11</sup>

Another difficult impact to quantify is the knowledge-based resources and guidance provided by NHA staff and volunteers. As the Alliance of National Heritage Area (ANHA) points out, “The heritage area concept offers an innovative method for citizens, in partnership with local, state, and federal government, and non-profit and private sector interests, to shape the long-term future of their communities.”<sup>12</sup> Partnerships create opportunities; economic development opportunities evolve from ideas generated by NHAs. As reported during an interview with the Delaware & Lehigh National Heritage Corridor stakeholders, “the staff of an NHA thinks about heritage-related economic development every second, every minute, and every day.” NHAs are eager to capitalize on development opportunities and can provide a catalyst for organizing collaborative efforts. This theme was consistent among all of the NHA case study sites. NHAs are catalysts for educational and programmatic opportunities related to cultural and natural resource preservation. The economic value of generating ideas is captured in the grant-funding analysis by quantifying the payroll increase of NHA sponsored grants and privately matched funding within the regional economy.

NHA staff knowledge, resources, and guidance may also be quantified by an increase in the number of National Register Properties. The National Park Service administers the National Register of Historic Places. The National Register is the official federal list of districts, sites, buildings, structures, and objects significant in American history, architecture, archeology, engineering, and culture. Nominations for listing historic properties come from State Historic Preservation Officers, from Federal Preservation Officers for properties owned or controlled by the United States Government, and from Tribal Historic Preservation Officers for properties on Tribal lands.<sup>13</sup> The most frequently cited economic benefit of a National Register designation is a tax provision where owners may be eligible for a 20% investment tax credit for the certified rehabilitation of income-producing certified historic structures such as commercial, industrial, or rental residential buildings. NHAs often assist private individuals and organizations, local governments, and American Indian tribes to process and prepare the necessary documentation for review and approval. Since 2002, the six NHA case study sites have seen an increase in the number of National Register Properties within their defined geographic borders.

Heritage Area	2002 National Register Properties <sup>14</sup>	2012 National Register Properties <sup>15</sup>	10-Year Change
<b>Baltimore National Heritage Area</b>	17,814	26,212	+8,398
<b>John H. Chafee Blackstone River Valley National Heritage Corridor</b>	7,229	8,396	+1,167
<b>Delaware &amp; Lehigh National Heritage Corridor</b>	7,873	8,446	+573
<b>Hudson River Valley National Heritage Area</b>	17,077	18,524	+1,447
<b>Rivers of Steel National Heritage Area</b>	10,110	10,363	+253
<b>Wheeling National Heritage Area</b>	1,919	1,923	+4

Table 2: Increase in Number of National Register Properties

<sup>11</sup> <http://www.nps.gov/history/heritageareas/FAQ/>

<sup>12</sup> *Ibid.*

<sup>13</sup> <http://www.nps.gov/nr/faq.htm#nr>

<sup>14</sup> Includes all National Registry listings that fall partially or wholly within the NHA boundary as of 2002. Collected by National Park Service in October 2012.

<sup>15</sup> Includes all National Registry listings that fall partially or wholly within the NHA boundary as of 2012. Collected by National Park Service in October 2012.

## Research Protocol

The study and analysis within utilizes recommendations from previous research to establish a procedure and baseline analysis of how NHAs impact the economy. The research protocol established utilizes existing NHA data collection processes to streamline efforts required by an NHA to complete the analysis. The six sites chosen for this analysis of NHAs in the Northeast region will hopefully be the trailblazers for additional sites in the Northeast region and other regions.

Within each case study, the analysis attempts to focus on a specific event, or “Spotlight Project,” that best illustrates the economic value NHAs provide to the region. The estimates made in this analysis are intentionally conservative as to not inflate the results. In fact, the estimates are conservative in that many types of visitor spending are not counted due to limitations of data collection and trip purpose. In most cases, visitor counts and trip purpose are not quantified with existing data sources. All six sites utilized visitor counts prepared for the National Park Service, with a majority relying on partners and visitor counts from the primary attractions and visitor centers in their area.

Based on measures of use patterns from visitor surveys, we made some adjustments for potential double-counting and under-reporting of visitors. The research team determined that the best method to eliminate double- or under-counting was to utilize a three-year average of visitor counts to the NHA regions. This provides a data-driven estimate of the annual number of visitors, and accounts for annual spikes in visitor activity. The final visitor impact estimates are substantial and demonstrate the importance of heritage tourism to a local economy. We must be aware that within economic analysis, the results are dependent on the data sources utilized to conduct the analysis.<sup>16</sup> Day visitors were more likely to make the trip specifically to visit the heritage area attraction than visitors on overnight trips. The report identifies these limitations and the effect they have on the analysis. Collecting visitor data is a challenge to the existing resources of NHAs. Approximations of visit data for different facilities may not be completely consistent and vary considerably. As with all economic impact assessments, data utilized and estimates should be viewed as estimates based on the best information presently available.<sup>17</sup> Finally, the report provides recommendations based on the current protocol as a means to seek to improve future analysis and development.<sup>18</sup>

Tripp Umbach based visitor and general tourist spending patterns on National Park Visitor Spending estimates established in 2010.<sup>19</sup> The use of a secondary source provides the analysis with a research-based assumption that can be readily duplicated in future years for additional impact studies. No inflation adjustments were made to the 2010 NPS spending amounts. After completing interviews with the six NHA sites, the research team determined it would be valuable to the sites in the future to utilize existing secondary data sources already collected by NHAs via the completion of their Annual Performance Measure Survey completed for the National Park Service. It was determined that developing a comprehensive analysis using existing data sources would be the most cost-effective

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<sup>16</sup> In most cases, we lack a clear definition of which visitors to the destination region should be considered “heritage area visitors” and there are questions about the accuracy and consistency of visit statistics reported by some facilities. In a previous study, Stynes et al. research identified that on average, 57% of visitors to an NHA reported that one or more of the attractions in the heritage area was the primary purpose of their trip.

<sup>17</sup> In previous NHA economic impact studies completed in 2004 and 2005, Stynes et al. determined that NHAs could utilize a ratio that approximates that 25,000 visitors spend \$2.5 million in the local region. The direct impacts of this spending are \$780,000 in wages and salaries, \$1.2 million in value added, and 51 jobs. Tripp Umbach utilized these projections as a gauge to determine the relative similarities between the TU IMPLAN models and the MGM spending model.

<sup>18</sup> Stynes, D. J. 2011. Economic benefits to local communities from national park visitation and payroll, 2010. Natural Resource Report NPS/NRSS/EQD/NRR—2011/481. National Park Service, Fort Collins, Colorado.

<sup>19</sup> *Ibid.*



means to utilize available resources. In previous NHA studies, research has recommended the need for improved visitor counts and provided specific direction for future visitor surveys. Additional development of visitor surveys and tabulation among the NHAs is again recommended for future analysis, as it is quite likely that spending by heritage area visitors is different from that of park visitors or tourists in general. More precise estimates of spending must also take into account how spending may vary from one heritage area to another. Spending profiles for visitors to specific heritage areas should be developed as a collaborative effort to create a standard, cost-effective, and easily implemented visitor survey for all NHAs.

While the analysis focuses on developing a readily repeatable protocol requiring minimal resources among NHA staff, there are particular efforts that all NHAs and the NPS could consider when conducting future economic impact or benefits analyses.

NHAs and NPS should seek to utilize emerging technologies of convenience and adaptability such as mobile devices and applications such as Twitter to capture details regarding the visitor origination and spending. During interviews with stakeholders at all of the case study sites, discussions related to accuracy and quantifying visitation and tourism to NHA sites evolved into how people can “check-in” at heritage sites that do not have admission or ticket sales or a gate. One idea that generated moderate interest was a discussion to utilize Twitter handles as a virtual check-in tool. For example, when a visitor passing through a Rivers of Steel National Heritage Area trail site stopped to enjoy a scenic view or signage, the visitor could enter their zip code and travel purpose into Twitter for later tabulation by NHA staff. This can efficiently utilize existing social media applications to standardize data collection for all NHA sites. Spending profiles for visitors to specific heritage areas should be developed as a collaborative effort to create a standard, cost-effective, and easily implemented visitor survey.

The bulk of economic activity supported by NHAs is accounted by the spending of visitors to NHAs. The type of visitor can be segmented into specific segments consistent with those identified in previous impact studies conducted for the NPS. The segments identified as NHA visitors were local day-trip, non-local day-trip and overnight hotel/motel guests. This analysis utilizes the spending patterns of these three distinct NHA visitor segments. It is quite probable that the number of local day visitors to NHAs is under represented. Therefore, visitor spending estimates rely on reported visitors to each NHA, followed by breaking down visits into segments with distinct spending patterns and applying spending averages based on existing spending trends.

### ***Economic Analysis Process***

Tripp Umbach’s protocol for calculating NHA economic benefits may be conducted for other NHA sites. The intention to develop a protocol requiring minimal resources from NHAs was balanced with the development of a protocol that could be replicated with a basic understanding of economic impact input-output analysis, the data collection process, IMPLAN software, and the purchase of IMPLAN data specific to the geographic footprint of the NHA site. The data collection process primarily consists of data points aggregated by NHAs for their Annual Performance Measure Survey, completed annually for the National Park Service. Additional information regarding the use and purchase of IMPLAN3 software is available through MIG, Inc.<sup>20</sup> State Plus data packages offered from MIG, Inc. are priced differently for

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<sup>20</sup> The analysis requires the use of IMPLAN3 software and geographic data representative of the NHAs local and state region. Additional information on IMPLAN can be found at the MIG, Inc. website: <http://implan.com/V4/Index.php>.

each state. The cost of the data package ranges from approximately \$3,500 – \$8,500, primarily driven by the geographic size of the region and the number of industries within the state.

It is helpful to think of an input-output model such as IMPLAN as an economic exercise, based on the collection of known data source variables then inputted into the model to simulate how a change in a sector of the economy affects the overall conditions of the economy. An input-output model can simulate the ripple effects of a given sector on the entire economy. The data collection process provides the direct spending effects of a particular sector attributable to the NHA. The model simulates the indirect effects and the induced effects. Summing the direct, indirect, and induced effects provides a reasonable estimate for the impact that a certain sector has on the entire economy.

For example, the economic impact of visitors to NHAs is the primary source of economic benefit to the regions which NHA operates. The **direct** consequence of travel expenditures become business receipts which in turn are used to pay wages and salaries and taxes.<sup>21</sup>

**Indirect** or secondary benefits are attributed to local businesses spending part of their receipts on goods and services they require to serve customers, including investment in new equipment and structures. In turn, their suppliers must purchase certain items from others. This is the ripple effect of economic activity attributed to visitor spending to NHAs. Each level of impact creates salaries, employment, and tax revenues.

The other type of secondary benefit is **induced**. This benefit accounts for the consumption spending of the wage and salary income directly generated by the visitors to the NHA. Induced effects refer to money recirculated through the spending patterns of households causing further local economic activity.

For each case study site, the “Top Employment Sectors” table illustrates the sectors with the largest number of jobs (includes direct, indirect, and induced jobs) supported by the NHA. Industries such as food services, hotels, and retail stores represent the largest number of jobs attributable to NHAs, while the ripple effect illustrates that jobs in real estate, healthcare, and other indirect industry sectors also support jobs indirectly attributable to the NHA.

The step-by-step process illustrates the economic impact modeling process.

### ***Step One – Data Collection***

The economic impact analysis is quantified from available data sources. NHA sites are asked to complete the data collection form developed by Tripp Umbach. All data points are described within the data collection form. These include visitation numbers, operating expenditures, the number of NHA employees, funding from NHAs specific to capital and construction activities, funding from NHAs for educational and support grants, plus any additional public or private matching dollars associated with the NHA grant. The annual amounts for the three most recent years are inputted and an average of those three years is calculated within the data collection form.

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<sup>21</sup> The analysis does not quantify the direct costs such as visitors utilizing a recreation area that requires expenditures to repair or maintain.

## Step Two – Visitation inputs

Visitor expenditures are best viewed as the initial monetary activity that stimulates the production process and initiates realistic measurement of economic benefit or impact. Estimating visitors is perhaps the greatest challenge that NHAs face when developing annual counts. They depend primarily on the working relationships and partnerships that they share among partners, sites, and attractions within their areas to calculate visitor estimates.

Visitor economic impact typically requires three basic inputs: (1) the number and types of visitors, (2) visitor spending patterns, and (3) local economic ratios and multipliers. Multipliers for this analysis were obtained from IMPLAN databases, geographically focused for regions around heritage areas and the state economies.

Annual visitation averages are applied to three specific visitor segments approximated from national NPS visitor information data.<sup>22</sup> The segments identified within qualitative interviews with NHA site directors and stakeholders as the most likely visitors to NHAs are local day, non-local day, and overnight visitors. The percentage of the overall visitors and their respective segments are represented in Table 3: Visitor Spending by Segment.

Visitor Segment	% of Total Visitation*	Average Daily Spending
Local Day <sup>23</sup>	29%	\$40.36
Non-Local Day <sup>24</sup>	40%	\$69.60
Overnight <sup>25</sup>	31%	\$262.41

Table 3: Visitor Spending by Segment

Each of the visitor segments spends varying amounts of money while visiting the NHA region. The spending estimates of these groups are then applied to spending averages from the 2010 National Park Service (NPS) economic impact study.<sup>26</sup> The ratio of visitors and spending averages are then calculated to provide total spending estimates for each segment and for each specific type of spending associated with visitation and tourism.<sup>27</sup>

<sup>22</sup> Stynes, D. J. 2011. Economic benefits to local communities from national park visitation and payroll, 2010. Natural Resource Report NPS/NRSS/EQD/NRR—2011/481. National Park Service, Fort Collins, Colorado.

<sup>23</sup> Local day users are defined as those visitors living within the geographic region of the NHA and visiting a heritage attraction, site, or facility for the day. The definition is consistent with those used in the National Park Service Natural Resource Report.

<sup>24</sup> Non-local day visitors are defined as those visitors living outside the geographic region of the NHA and visiting a heritage attraction, site, or facility for the day.

<sup>25</sup> Overnight visitors are defined as those visitors living outside the geographic region of the NHA and visiting a heritage attraction, site, or facility for multiple days, including an overnight stay.

<sup>26</sup> Stynes, D. J. 2011. Economic benefits to local communities from national park visitation and payroll, 2010. Natural Resource Report NPS/NRSS/EQD/NRR—2011/481. National Park Service, Fort Collins, Colorado.

<sup>27</sup> The analysis acknowledges the possibility of average spending variance through the utilization of average spending derived from consumer choices, estimates, and average visitor counts.

Spending Estimates by Visitor Type								
	Motel, hotel, B&B	Camping fees	Restaurants & bars	Amusements	Groceries	Gas & oil	Local transportation	Retail Purchases
Local day-trip spending allocation	0.0%	0.0%	31.2%	11.3%	15.1%	21.7%	1.4%	19.3%
Non-local day-trip spending allocation	0.0%	0.0%	27.8%	13.3%	9.9%	27.3%	2.8%	18.9%
Overnight spending allocation	39.9%	0.1%	23.8%	7.9%	5.8%	8.6%	3.5%	10.4%

Table 4: Spending Estimates by Visitor Type

Each spending category has an associated IMPLAN code for which it is related to within the IMPLAN software. The spending category and IMPLAN codes are detailed in table 4: Spending Estimates by Sector Type.

IMPLAN Sector	Sector Name	Spending Type
324	Retail Stores – Food and beverage	Groceries
326	Retail Stores – Gasoline stations	Gas & oil
329	Retail Stores – General merchandise	Retail Purchases
336	Transit and ground passenger transportation	Local transportation
410	Other amusement and recreation industries	Amusements
411	Hotels and motels, including casinos	Motel, hotel, B&B
412	Other lodging accommodations	Camping fees
413	Food service and drinking place	Restaurants & bars

Table 5: Spending Estimates by Sector Type

Once the spending amounts are calculated for each visitor segment and spending type, the next step is entering the spending amounts into the IMPLAN software. Each visitor segment, local day, non-local, and overnight visitors are created as a unique event within the IMPLAN model.

Economic impact measures attempt to estimate the likely losses in economic activity to the region in the absence of the heritage site. Should the heritage area and its partners not be available, it is assumed that local residents would spend the money on other local activities, while visitors from outside the region would not have made a trip to the region. Based on visitors sampled at heritage areas, approximately two-thirds of the associated economic impacts would be lost to the regions in the absence of the heritage attractions. The largest impacts result from overnight visitors staying in local lodging establishments. Local resident spending is included in the economic benefits measures, as this captures all economic activity associated with heritage area visits, including local and non-local visitors. Spending by local residents on visits to heritage areas does not represent new money to the region.<sup>28</sup>

### Step Three – Operational Impacts

The operational impacts of NHAs are estimated from the total number of direct jobs employed by the NHA. Total jobs include full-time and part-time employees. Operational expenditures may also be

<sup>28</sup> The economic effect of NHAs is an overall contribution to their regional economies. Though local visitor spending is not considered within a marginal analysis due to the fact local residents have choices on where they spend their money within the region, in a contribution sense, residents of the local area do make choices to spend money in the local NHA region due to the NHAs mission fulfillment of preservation and education. In a contribution sense, this economic effect does benefit the regional economy.

calculated by entering the actual expenditures of the organization over the annual time period. Again, a three-year average is utilized to eliminate drastic variations (cuts or increases) to annual spending amounts. The employment or spending is entered into the IMPLAN model within Sector 424, Grantmaking, Giving, and Social Advocacy Organizations.

The economic analysis completed for the operational impact analysis uses actual expenditures and NHA employment to drive estimates of employment, income, and tax revenue. Operational impacts refer to the day-to-day management, coordination, and activities executed by the NHA and its staff. It refers to the impact of “doing business” as a non-profit organization in the region. Business refers to a number of activities for each NHA, but for purposes of this analysis, operational impacts are derived from the number of paid employees working for the NHA.

#### ***Step Four – Grant Funding and Support***

NHA-funded grants to regional partners and associated revenue “matches” from regional organizations are tracked by each NHA site annually. Grant funding is calculated in the economic impact model as sector 5001 employee compensation. The assumption being that grant support ultimately supports the salaries of the organization(s) receiving grant funding. The economic value of NHA-developed federal and state funding within the region primarily circulates through the economy in the form of knowledge transfer and increased salary amounts for organizations receiving the grant funding.

Capital-specific funding is calculated separately. Funding for a specific construction or capital improvement project is assigned as a unique event within the IMPLAN software, categorized under IMPLAN code 36, construction of non-residential structures. Additional grant funding focused on capital and construction development also includes the educational mission of NHAs and the role that the staff has in serving as catalysts for economic development opportunities in the regions which they operate. For example, if an NHA facilitates the award of a \$25,000 federally sponsored grant to develop a section of biking trail, this economic benefit to the region is captured within the analysis by capturing the estimated increase in salaries and wages to facilitate award of the grant within the NHA and within the receiving organization. Further, if a portion of the award was attributable to specific capital improvements or construction, this was attributed accordingly within the input-output model to account for related construction expenditures and jobs. Grants awarded were included in the model based on year effective when the year that the grant was awarded was not the same.

## National and Regional Economic Benefits of NHAs

National Heritage Areas (NHAs) serve a substantial role within the regional economy, support jobs, and generate tax revenue for their local governments and states. An “economic benefit” is best understood as a gross increase in the wealth or income, measured in monetary terms, of people located in an area over and above the levels that would prevail in the absence of the activity under study.

The economic analysis completed for this assignment focused specifically on data collection and analysis of six National Heritage Areas. Additional analysis was completed to extrapolate the economic benefit of all 49 NHA sites in the United States and even further on the 21 NHAs within the Northeast Region of the United States. The intent of the extrapolation analysis is to utilize the findings from the individual sites to develop a model based on the average economic impact and the geographic scope of the site.

### Projecting the National Economic Benefit

The extrapolation analysis was completed by identifying each of the six NHA case study sites as one of three geographic areas: urban-focused, corridor, or multi-county regions. Using these geographic classifications for all NHA sites, the project team identified 17 NHAs corridor sites, seven classified as focused sites and 25 classified as multi-county sites.

Once all NHAs were classified by geographic type, the economic impact model applied the average number of tourism visits, jobs and grant dollars awarded among the six NHA case study sites to the total number of geographically classified sites.<sup>29</sup>

Table 6 illustrates the results and the projected annual inputs utilized for the input-output model.<sup>30</sup>

Site Description	Number of Sites	Projected Annual Visit Counts	Projected Annual Operations (Jobs)	Projected Annual Grants Awarded (Dollars)	Projected Annual Capital Grants (Dollars)
Corridor Sites <sup>31</sup>	17	34,913,965	181.28	\$25,437,826	\$5,727,592
Focused Sites <sup>32</sup>	7	9,266,467	85.16	\$5,260,041	\$2,153,597
Multi-County <sup>33</sup>	25	10,198,108	200	\$ 19,137,713	\$2,027,344
<b>Total NHA Sites</b>	<b>49</b>	<b>54,378,541</b>	<b>466</b>	<b>\$49,835,582</b>	<b>\$9,908,534</b>

Table 6: National Economic Benefit Projections

<sup>29</sup> The analysis and the economic impact of NHAs are not driven by the supply of Heritage sites in the United States. The national and regional economic effect projections are extrapolations of the overall contribution of six specific NHAs on their regional economies. Data from the six NHAs was aggregated as an average to represent projected visitor counts and organizational spending among all NHAs. Because the spending of each heritage area is different, the analysis utilized geography as a distinguishing characteristic of visitation and spending. All NHAs were classified as a specific geographic type upon which average visitor and organizational spending were applied. The final inputs were entered into IMPLAN to produce the projected National and Northeast Region economic benefits.

<sup>30</sup> The national analysis utilizes the 2010 United States IMPLAN dataset.

<sup>31</sup> John H. Chafee Blackstone River Valley NHC, Delaware and Lehigh NHC, and Hudson River Valley NHA

<sup>32</sup> Baltimore NHA and Wheeling NHA

<sup>33</sup> Rivers of Steel NHA

Table 7 illustrates the results of modeling the economic benefit of all 49 NHA sites on the nation’s economy. NHAs contribute \$12.9 billion annually. The economic activity supports approximately 148,000 jobs and \$1.2 billion annually in Federal taxes from sources such as employee compensation, proprietor income, indirect business tax, households, and corporations.

Projected Annual Economic Benefit of all 49 NHAs on the United States Economy				
Economic Benefits	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Output (\$ in millions)	\$4,595	\$2,881	\$5,424	\$12,900
Jobs	93,579	17,106	37,550	148,235

Table 7: Projected Economic Benefit of all 49 NHAs on the United States Economy

The projected economic activity supported by NHAs is classified as direct, indirect, and induced effect. For example, the economic impact of visitors to NHAs is the primary source of economic benefit to the regions which NHA operates. The **direct** consequence of travel expenditures become business receipts which in turn are used to pay wages, salaries, and taxes. **Indirect** or secondary benefits are attributed to local businesses spending part of their receipts on goods and services they require to serve customers. In turn, their suppliers must purchase certain items from others. This is the ripple effect of economic activity attributed to visitor spending to NHAs. Each level of impact creates salaries, employment, and tax revenues. The other type of secondary benefit is **induced**. This benefit accounts for consumption spending or the wage and salary income directly generated by the visitors to the NHA.

The economic benefits of NHAs are realized in three primary methods: tourism and visitation, operational expenditures and grantmaking, and intellectual capacity. Of the \$12.9 billion benefit to the national economy, the majority (99%) is attributed to tourism and visitation spending.<sup>34</sup>

Economic benefits and local jobs are supported by the economic activity and contributions associated with National Heritage Areas. It is helpful to compare NHA activity to other public and private organizations to understand the scope of how positive a role NHAs support in contributing to the economy community.

### Annual Economic Activity – Comparisons

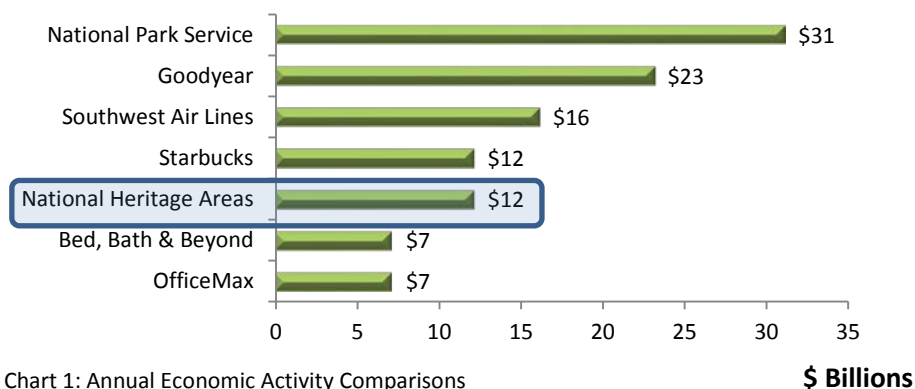


Chart 1: Annual Economic Activity Comparisons

Chart 1 illustrates comparisons of the National Heritage Areas economic benefit to other organizations.<sup>35</sup> National Heritage Areas generate \$12 billion for the national economy each year. We

<sup>34</sup> The economic impacts of NHAs are not driven by the supply of Heritage sites in the United States. It is not the intention of this analysis to recommend policies to increase the impact of visitor spending at specific NHAs.

compared the annual impact of National Heritage Areas to select Fortune 500 companies to provide an informative comparison.

National Heritage areas support more than 148,000 jobs, of which approximately 94,000 are directly supported by NHAs, and 54,000 are indirect and induced jobs. The majority of employment supported by NHAs nationally is concentrated within sectors traditionally associated with visitor spending and travel. Food service, retail, lodging, and amusements rest prominently among the businesses with the largest number of NHA related employment.

<b>National Employment Supported by NHAs – Top 10 By Industry Sector</b>	
<b>INDUSTRY</b>	<b>JOBS</b>
Food services and drinking places	33,848.9
Retail Stores – General merchandise	16,964.6
Hotels and motels, including casino hotels	16,434.7
Retail Stores – Gasoline stations	12,822.5
Other amusement and recreation industries	10,795.4
Retail Stores – Food and beverage	9,881.7
Real estate establishments	3,259.7
Services to buildings and dwellings	1,749.4
Wholesale trade businesses	1,648.3
Offices of physicians, dentists, and other health practitioners	1,605.7

Table 8: NHA - National Top Employment Sectors

### **Economic Benefits of the 21 NHAs in the Northeast Region**

In order to estimate the economic benefits of the 21 NHAs in the Northeast Region (NER), a similar protocol to the National level extrapolation was utilized. The analysis projects the economic benefit of the Northeast Region NHAs to be approximately \$5.4 billion annually. Combined, the NHAs in the Northeast Region support more than 66,880 jobs and \$602.7 million annually in local and state taxes.<sup>36</sup>

<b>Projected Annual Economic Benefit of 21 Northeast Region NHAs on the Regional Economy</b>				
<b>Economic Benefits</b>	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Output (\$ in millions)</b>	\$2,509	\$1,026	\$1,876	\$5,411
<b>Jobs</b>	47,942	5,959	12,983	66,884

Table 9: Projected Economic Benefit of 21 Northeast Region NHAs on the Regional Economy

The analysis and its projections demonstrate the incremental increase of economic benefits from the individual NHA level, the Northeast Region, and ultimately, demonstrating the overall national economic benefits supported by all NHAs in the United States.

<sup>35</sup> Organizations and figures taken from the National Parks Conservation Association <http://my.npca.org/site/PageNavigator/infographic.html>

<sup>36</sup> The geography utilized for this analysis consisted of IMPLAN datasets for the following states: Massachusetts, Maryland, New York, Pennsylvania, Rhode Island, and West Virginia.



## Case Studies

In order to gain a better understanding of the quantitative impact National Heritage Areas have on the regions they are located in, the Tripp Umbach project team conducted a series of visits and stakeholder interviews at six sites. These sites were selected through a survey of peer NHA organizations in the Northeast Region of the United States. Data was collected via a standardized data collection form. From the data collection, site visits, and stakeholder interviews, regional assets of each NHA were determined.

### I. Baltimore National Heritage Area (BNHA)

Baltimore is an industrial city that has gone through 30 years of challenging decline, but is re-emerging due to its thriving medical and education institutions. The city is in a recovery phase and with improvements to its core urban issues, some focus has been able to be shifted, making it more attractive as a tourist destination. The city's most viable tourism hot spot is the Inner Harbor, and with support from the Baltimore National Heritage Area (BNHA), the neighborhoods surrounding the harbor have been made more accessible, in turn allowing for this area's rich history to be shared by visitors and residents alike.

This "big small town" is an affordable city with plenty of attractions for all age groups. Recreation in the harbor area includes activities such as outdoor yoga classes, paddle boats, and a number of trails. The harbor is the nexus of the Heritage area and is part of the greater Chesapeake Bay Gateway Network, with a number of trails such as the Mount Vernon Cultural Walk, the Flagship Heritage Walk, the Star Spangled Banner National Historic Trail and the John Smith National Trail having a starting point in or near this area.

The BNHA serves as a catalyst with resources and ability to create ideas for tourism, capital, education, conservation, and preservation in the area. Several projects that the BNHA is involved with include:

- Providing funds to maintain and improve the harbor fleet. These funds also allow for admission fees to remain reasonable.
- Funding the construction of a tour bus facility that holds approximately 60 buses via a \$70,000 grant.
- The Pride of Baltimore serves as a national ambassador of the BNHA while traveling U.S. waterways during the summer months. An estimated 90,000 visitors come aboard this ship and learn about Baltimore from staffers who are trained by Visit Baltimore.

#### **"Spotlight" Project – Star Spangled Sailabration**

*Each NHA serves as a catalyst for economic development within the regions they operate. Specific examples within each NHA stand out to local stakeholders, residents, and visitors to the region.*

*Sailabration attracted an estimated 1.54 million visitors over the seven-day event, June 13-19, 2012. Survey research shows that more than 1.1 million Marylanders experienced the event, while another 435,000 visitors came from out-of-state. The total economic impact of Sailabration generated by the spending of visitors (residing outside Baltimore City) is estimated at \$166.1 million for the week-long historic event.*

*Overnight visitors generated approximately 42,159 room nights, resulting in a direct impact of \$6.8 million for hotels and other overnight accommodations. Other visitor expenditures included retail, attractions, parking, gasoline, and ground transportation. Each non-local visitor spent an estimated \$80 while enjoying Sailabration.*

It is important to note that one of the challenges the BNHA faces is reaching residents living in suburbs who feel disinvested with the city. It can be a struggle to convince these individuals that it is not only safe, but worthwhile to visit Baltimore. The Bicentennial Celebration and “Sailabration” provided excellent platforms for the BNHA to be able to demonstrate the significant events that are held in the city.

**The Combined Annual  
Economic Benefits - Baltimore  
National Heritage Area**

<b>Economic</b>	<b>\$318,776,087</b>
<b>Employment</b>	<b>4,184 jobs</b>
<b>Tax Revenue</b>	<b>\$31,792,626</b>

Lastly, while stakeholders acknowledged that although most people do not come to Baltimore seeking a heritage experience, once they are in the city and begin to connect sites and attractions, there is an immediate link to heritage. The BNHA has filled the void between the Inner Harbor and cultural institutions in outlying areas and facilitates the marriage between strategic product development in the cultural tourism ring, establishing the process of investments being made that are consistent with what the market demands.

### Baltimore National Heritage Area – Regional Economic Benefits

The effects of visitation and tourism have the greatest economic benefit for the regions in which NHAs operate. NHAs play a substantial role in supporting tourism within their regions. Tourism numbers are calculated by BNHA’s regional partners. The three-year average total of visitors and tourists to the BNHA region was approximately 2,218,411 visitors.<sup>37</sup> These visitors spend money in the region, creating a positive ripple effect on the economic structure. Based on the annual average number of visitors to the NHA region and its partner sites, more than \$313,678,182 in economic benefit was supported annually within the region and state(s).

<b>Baltimore National Heritage Area – Annual Economic Impact of Tourism and Visitation</b>					
<b>Visitor Segment</b>	<b>% of Total Visitation*</b>	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Local Day</b>	29%	\$14,363,488	\$3,740,422	\$4,925,980	\$23,029,890
<b>Non-Local Day</b>	40%	\$32,843,757	\$8,577,812	\$11,170,809	\$52,592,378
<b>Overnight</b>	31%	\$139,783,505	\$42,996,217	\$55,276,191	\$238,055,913
<b>Total*</b>	100%	\$186,990,751	\$55,314,450	\$71,372,981	\$313,678,182

Table 10: BNHA Economic Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

The economic spending analysis demonstrates within the region, visitors travelling from outside the region and staying overnight represent the largest economic benefit to the economy of the local region and the state. Although overnight visitors only comprise an estimated 31% of NHA visitation, overnight visitors account for approximately 75% of the economic benefit of NHAs. This is primarily driven by the increased amount of fresh dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

<sup>37</sup> Annual tourism projections were utilized from 2009, 2010, and 2011.

<b>Baltimore National Heritage Area – Annual Employment Impact of Tourism and Visitation</b>				
<b>Visitor Segment</b>	<b>Direct Effect (jobs)</b>	<b>Indirect Effect (jobs)</b>	<b>Induced Effect (jobs)</b>	<b>Total Effect (jobs)</b>
<b>Local Day</b>	244	25.6	40.9	311
<b>Non-Local Day</b>	556.1	59	92.7	708
<b>Overnight</b>	2,351.60	313.2	458.9	3124
<b>Total</b>	3,151.70	397.8	592.5	4142

Table 11: BNHA Employment Impact of Tourism and Visitation

*\*Totals may not add due to rounding*

In addition to visitor tourism, the analysis quantifies the economic benefit of BNHA through its operating activities. This impact is represented by the spending of the organizations and the employees it supports. Although not as great as the impact of tourism and visitation on the regional economy, the intellectual benefits and resources of NHA staff serve as independent catalysts for their regional economy. We estimate the impact of this benefit through the quantification of grants and funding supported by NHAs and their regional partners.

<b>Baltimore National Heritage Area – Annual Economic and Employment Impact of Operations</b>				
	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Economic</b>	\$1,665,717	\$623,750	\$829,000	\$3,118,467
<b>Employment</b>	15	5.4	6.9	27.3

Table 12: BNHA Economic and Employment Impact of Operations

The BNHA is active in the region as a grantmaking organization. Grant opportunities are provided by NHAs to regional partners for collaborative projects aligned with the educational, preservation, promotional and economic development missions of NHAs. Similar to how tourism and operations support economic activity within the region, grantmaking provides an infusion of funds to assist with the development of projects. Grants are quantified as increased salary or as specific capital investment provided by the NHA within their region.<sup>38</sup>

<b>Baltimore National Heritage Area – Annual Economic and Employment Impact of Grantmaking</b>				
	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Economic</b>	\$615,313	\$153,522	\$1,210,603	\$1,979,438
<b>Employment</b>	3.6	1.2	10	14.8

Table 13: BNHA Economic and Employment Impact of Grantmaking

NHAs also support state and local governments with the generation of government revenue or tax revenue. The tourism, operations, and grantmaking activities of Baltimore National Heritage Area generate \$31,792,626 in tax revenue annually.

BNHA supports a substantial number of jobs. The direct jobs are based on business receipts which in turn are used to pay wages and salaries within industries such as food services, retail and lodging.

<sup>38</sup> Grants not affiliated with capital improvements or construction are included in the input-output model as salary and therefore have no direct or indirect economic effects associated with them. This protocol exhibits a conservative estimate on the regional effects of grants facilitated by the NHA.

Indirect or induced jobs are supported in the region by local businesses spending part of their receipts on goods and services they require to serve customers, including investment in new equipment and structures. This is the ripple effect of economic activity attributed to NHAs.

The “Top Employment Sectors” table illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the NHA. Industries such as food services, hotels and retail stores represent the largest number of jobs while the ripple effect illustrates that jobs in real estate and health care are also supported by the spending attributable to NHAs.

<b>Baltimore National Heritage Area – Top Employment Sectors</b>	
<b>Industry</b>	<b>Jobs</b>
Food services and drinking places	1,272.5
Hotels and motels, including casino hotels	645.4
Retail Stores – General merchandise	485.4
Other amusement and recreation industries	436.2
Retail Stores – Gasoline stations	238.5
Retail Stores – Food and beverage	235.3
Real estate establishments	58.9
Services to buildings and dwellings	39.6
Offices of physicians, dentists, and other health practitioners	38.8
Employment services	32.9

Table 14: BNHA Top Employment Sectors

## II. John H. Chafee Blackstone River Valley National Heritage Corridor (BRVNHC)

The John H. Chafee Blackstone River Valley National Heritage Corridor (BRVNHC) encompasses the area that is considered the birthplace of the American Industrial Revolution. This area is centered around the Blackstone River with many communities along the river and within its watershed.<sup>39</sup> The innovative ideas emerging from this area, such as the development of the wage economy and Samuel Slater’s blueprint of the modern business plan captured the ethos of the region. In more recent history, the valley experienced a rapid decline due to the disappearing manufacturing industry. However, over the past few decades, community members tapped into the spirit of the area and helped to ensure that the region has evolved into a very desirable place to live, work, and play.

Although tourism is not the BRVNHC’s primary focus, effort is put forth to promote and enhance the area. Community activists came together and were able to secure a \$200,000 grant to study the feasibility of reopening the Blackstone canal, which resulted in some revitalization to the area. Stakeholders feel that further investment would generate economic impact for the region in regards to increased tourism. The canal project is only one part of BRVNHC’s “revitalization” producing efforts.

Thirty years ago, one of the most significant environmental events in our country’s history took place along the Blackstone River. Over 10,000 volunteers, more than 500 businesses, and scores of governmental and non-profit agencies staged a massive clean-up of the Blackstone River from south-central Massachusetts to Narragansett Bay on September 9, 1972.<sup>40</sup> Cleaning up the river and building the bikeway are legacy projects for BRVNHC involving investments, partnerships, and leveraging. These projects have also been producing positive results in terms of increasing recreational use and visitation but also in terms of stimulating economic (re)development.

The BRVNHC has facilitated a number of visioning and revitalization planning in the Blackstone River Valley communities, which has in many cases resulted in restoration and revitalization being prioritized and implemented. BRVNHC’s involvement has additionally helped to develop and market the region’s identity. BRVNHC has provided a culture in which building and landscape preservation, economic development efforts, and meeting social needs are considered in tandem in the context of a sustainable region and society.

Moreover, the area that the BRVNHC has been vital to is preservation. The BRVNHC has adopted the motto of “Restore rather than destroy.” In holding true to this, BRVNHC has put efforts towards a number of structures, museums, and farms in the region. BRVNHC’s diversity of preservation and revitalization results are representative of the organization and a significant factor in attracting visitors. Some of the projects that the BRVNHC is involved with include:

### The Combined Annual Economic Benefits – John H. Chafee Blackstone River Valley National Heritage Corridor

<b>Economic</b>	<b>\$89,589,423</b>
<b>Employment</b>	<b>1,135 jobs</b>
<b>Tax Revenue</b>	<b>\$8,746,892</b>

<sup>39</sup> The Blackstone River Valley and its adjacent counties, Worcester County, Massachusetts and Providence County, Rhode Island were defined for this economic benefit analysis.

<sup>40</sup> <http://www.nps.gov/blac/naturescience/get-involved.htm>

- Union Station (Worcester, MA) - This early 20<sup>th</sup> century structure was originally known as the “million dollar station.” After years of neglect, Union Station has recently been renovated, reopened, and returned as a highlight of the Worcester skyline.<sup>41</sup>
- Manchaug Mills (Sutton, MA) – A chalk ware collectible company moved into this building. This unique business attracts tourists by providing hands-on experience of going to the shop and also observing production. This historic site is in the heart of Blackstone Valley and is home to over 30 tenants in a wide variety of businesses.<sup>42</sup>
- Slater Mill (Pawtucket, RI) - Has been and continues to be a point of restoration as well as partnership for the BRVNHC. Located on the Blackstone River, Slater Mill is a museum complex dedicated to bringing the American Industrial Revolution to life. The Mill develops an informed understanding of American heritage in innovative economic, industrial, cultural, artistic and social terms. Slater Mill provides high quality, relevant experiences designed to educate, entertain and inspire.<sup>43</sup>
- Daniels Farm (Blackstone, MA) - Daniels Farm is one of the finest remaining farms in the Blackstone Valley. This 112 acre farm dates back to the mid-1700s and remained active through the mid-20th Century. The farm is now a preserved green space.<sup>44</sup>
- Museum of Work and Culture – (Woonsocket, RI) - See the face of people who left their lives as farmers in Quebec to be mill workers in Woonsocket. The museum exhibit traces their lives from the Quebec farm, through the mill floor, triple-decker house and union hall and tells the story of “La Survivance” their attempt to preserve their language and way of life.<sup>45</sup>

Furthermore, BRVNHC has been vital in bringing the community together and allows Massachusetts and Rhode Island to collaborate with no regard to state boundaries. Legislators from the area as well as local residents are engaged and supportive. In addition, due to the lack of regional planning services in Rhode Island, local towns enjoy joining forces with BRVNHC and appreciate the planning aspect that the BRVNHC is able to provide.

	Formal Partnerships	Relationship Partnerships
2011	34	62
2010	45	29
2009	48	39

Table 15: BRVNHC Partnership Information

Those behind the BRVNHC have promoted a dialogue in the region with a focus on the importance of history, culture, and preservation. BRVNHC has also created a brand for the community with a strong identity of commerce, entrepreneurial spirit, and heritage, enhancing the ability to promote the area as being valued and identifying places that create opportunities for increased economic development.

### John H. Chafee Blackstone River Valley National Heritage Corridor – Regional Economic Benefits

The effects of visitation and tourism have the greatest economic benefit for the regions in which NHAs operate. NHAs play a substantial role in supporting tourism within their regions. Tourism numbers are calculated by BRVNHC’s regional partners. The three-year average total of visitors and tourists to the BRVNHC region was approximately 585,007 visitors.<sup>46</sup> These visitors spend money in the region, creating a positive ripple effect on the economic structure. Based on the annual average number of visitors to

<sup>41</sup> <http://www.nps.gov/blac/planyourvisit/valley-sites-worcester.htm>

<sup>42</sup> <http://www.manchaugmills.com/>

<sup>43</sup> <http://www.slatermill.org/museum/about/>

<sup>44</sup> <http://www.nps.gov/blac/planyourvisit/valley-sites-woonsocket-blackstone.htm>

<sup>45</sup> <http://www.nps.gov/blac/planyourvisit/valley-sites-woonsocket-blackstone.htm>

<sup>46</sup> Annual tourism projections were utilized from 2009, 2010, and 2011.

the NHA region and its partner sites, more than \$84,728,290 in economic benefit was supported annually within the region and state(s).

John H. Chafee Blackstone River Valley National Heritage Corridor – Annual Economic Impact of Tourism and Visitation					
Visitor Segment	% of Total Visitation*	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Local Day	29%	\$3,787,727	\$1,011,746	\$1,392,802	\$6,192,275
Non-Local Day	40%	\$8,661,071	\$2,327,964	\$3,141,345	\$14,130,380
Overnight	31%	\$36,861,642	\$11,636,880	\$15,907,112	\$64,405,634
<b>Total</b>	<b>100%</b>	<b>\$49,310,441</b>	<b>\$14,976,589</b>	<b>\$20,441,260</b>	<b>\$84,728,290</b>

Table 16: BRVNHC Economic Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

The economic spending analysis demonstrates within the region, visitors travelling from outside the region and staying overnight represent the largest economic benefit to the economy of the local region and the state. Although overnight visitors only comprise an estimated 31% of NHA visitation, overnight visitors account for approximately 75% of the economic benefit of NHAs. This is primarily driven by the increased amount of fresh dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

John H. Chafee Blackstone River Valley National Heritage Corridor – Annual Employment Impact of Tourism and Visitation				
Visitor Segment	Direct Effect (jobs)	Indirect Effect (jobs)	Induced Effect (jobs)	Total Effect (jobs)
Local Day	64.1	7.1	11	82.2
Non-Local Day	144.9	16.4	24.9	186.2
Overnight	613.4	85.2	126	824.6
<b>Total</b>	<b>822.4</b>	<b>108.7</b>	<b>161.9</b>	<b>1093</b>

Table 17: BRVNHC Employment Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

In addition to visitor tourism, the analysis quantifies the economic benefit of BRVNHC through its operating activities. This impact is represented by the spending of the organizations and the employees it supports. Although not as great as the impact of tourism and visitation on the regional economy, the intellectual benefits and resources of NHA staff serve as independent catalysts for their regional economy. We estimate the impact of this benefit through the quantification of grants and funding supported by NHAs and their regional partners.

John H. Chafee Blackstone River Valley National Heritage Corridor – Annual Economic and Employment Impact of Operations				
	Direct Effect	Indirect Effect	Induced Effect	Total Effect
<b>Economic</b>	\$1,452,048	\$698,359	\$746,422	\$2,896,829
<b>Employment</b>	15	5.6	5.9	26.5

Table 18: BRVNHC Economic and Employment Impact of Operations

BRVNHC is active in the region as a grantmaking organization. Grant opportunities are provided by NHAs to regional partners for collaborative projects aligned with the educational, preservation, promotional and economic development missions of NHAs. Similar to how tourism and operations support economic activity within the region, grantmaking provides an infusion of funds to assist with the development of

projects. Grants are quantified as increased salary or as specific capital investment provided by the NHA within their region.<sup>47</sup>

<b>John H. Chafee Blackstone River Valley National Heritage Corridor – Annual Economic and Employment Impact of Grantmaking</b>				
	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Economic</b>	\$0	\$0	\$1,964,304	\$1,964,304
<b>Employment</b>	0	0	15.5	15.5

Table 19: BRVNHC Economic and Employment Impact of Grantmaking

NHAs also support state and local governments with the generation of government revenue or tax revenue. The tourism, operations, and grantmaking activities of BRVNHC generate \$8,746,892 in tax revenue annually.

BRVNHC supports a substantial number of jobs. Direct jobs are based on business receipts which in turn are used to pay wages and salaries within industries such as food services, retail and lodging.

Indirect or induced jobs are supported in the region by local businesses spending part of their receipts on goods and services they require to serve customers, including investment in new equipment and structures. This is the ripple effect of economic activity attributed to NHAs.

The “Top Employment Sectors” table illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the NHA. Industries such as food services, hotels and retail stores represent the largest number of jobs while the ripple effect illustrates that jobs in real estate and employment services are also supported by the spending attributable to NHAs.

<b>John H. Chafee Blackstone River Valley National Heritage Corridor – Top Employment Sectors</b>	
<b>Industry</b>	<b>Jobs</b>
Food services and drinking places	343.2
Hotels and motels, including casino hotels	169.6
Retail Stores – General merchandise	115.9
Other amusement and recreation industries	111.6
Retail Stores – Food and beverage	75.9
Retail Stores – Gasoline stations	55.8
Real estate establishments	18.5
Grantmaking, giving, and social advocacy organizations	16.8
Services to buildings and dwellings	13.7
Employment services	12.2

Table 20: BRVNHC Top Employment Sectors

<sup>47</sup> Grants not affiliated with capital improvements or construction are included in the input-output model as salary and therefore have no direct or indirect economic effects associated with them. This protocol exhibits a conservative estimate on the regional effects of grants facilitated by the NHA.



### III. Delaware & Lehigh National Heritage Corridor (D&L)

The Delaware and Lehigh National Heritage Corridor (D&L), which includes Bucks, Carbon, Lehigh, Luzerne, and Northampton counties in eastern Pennsylvania, is an important contributor to the tourism efforts of this region. There is opportunity for much more investment in the area and stakeholders believe the corridor can be marketed strongly as a tourist attraction.

The D&L has the ability to collaborate with other municipalities and establish a connection with each one. Specifically, the NHA designation allows the D&L to collaborate with local economic development organizations in a non-competitive manner. The D&L is always

	Formal Partnerships	Relationship Partnerships
2011	135	165
2010	150	200
2009	135	160

Table 21: D&L Partnership Information

***“Spotlight” Project – Lehigh Gap Nature Center***

*Each NHA serves as a catalyst for economic development within the regions they operate. Specific examples within each NHA stand out to local stakeholders, residents, and visitors to the region.*

*Lehigh Gap Nature Center construction was driven by NHA fundraising and staff resources. The project created a total of \$2 million of economic impact and 15 jobs. The center continues to support 15 jobs annually in the region.*

looking for ways to make connections by helping organizations to create and generate ideas due to having the operational capacity to develop projects and provide planning and resources. In addition, the D&L name provides credibility to organizations and smaller towns as it bolsters their image being part of a greater whole.

The D&L has been instrumental in the preservation of cultural and artistic attractions, and natural resources along the corridor by linking the outdoors and local history. The D&L is active in the development and preservation of historic elements, as well as environmental awareness along the corridor. The D&L has been able to tell the story of the area by passing out information at local festivals and kiosks. Moreover, D&L is providing the educational framework for people to remember the history of the area. D&L staff members published a book, “Tales of the Towpath,”

with a curriculum that is being taught in at least a dozen school districts in the region. Due to this, the history of the D&L is being spread to thousands of 4th and 5th grade students who then pass along information to their families. This has shown to be not only a valuable educational tool, but also a solid marketing source.

The trail is the spine of the D&L, providing recreation and educational opportunities in addition to stimulating economic activity. In regard to local residents, the addition of D&L projects has improved the quality of life and has created healthier activities for families to partake in. Tourists are also patronizing the area to enjoy the outdoor and recreational aspects. While taking advantage of the trails, they are coming into the towns along the corridor to shops and restaurants, spurring business in these areas.

**The Combined Annual Economic Benefits – Delaware and Lehigh National Heritage Corridor**

<b>Economic</b>	<b>\$238,677,237</b>
<b>Employment</b>	<b>3,323 jobs</b>
<b>Tax Revenue</b>	<b>\$22,407,779</b>

A key success will be when “Delaware and Lehigh Valley” is used to describe the region as opposed to referencing each individual town. However, it is difficult to find a balance between over-branding and under-branding. Another issue that needs addressed is that stakeholders feel that instead of competing against the Greater Philadelphia region, the D&L area needs to harmonize with this region in order to maximize the organization’s reach. Finally, stakeholders feel that more data is needed to show the impact the NHA is making in the area. Some feel that local politicians take the area for granted and therefore, solid data is needed to illustrate that the Corridor is truly an asset and has provided substantial benefits to this region.

### Delaware and Lehigh National Heritage Corridor – Regional Economic Benefits

The effects of visitation and tourism have the greatest economic benefit for the regions which NHAs operate. NHAs play a substantial role in supporting tourism within their regions. Tourism numbers are calculated by D&L’s regional partners. The three-year average total of visitors and tourists to the D&L region was approximately 1,576,281 visitors.<sup>48</sup> These visitors spend money in the region, creating a positive ripple effect on the economic structure. Based on the annual average number of visitors to the NHA region and its partner sites, more than \$233,554,847 in economic benefit was supported annually within the region and state(s).

Delaware and Lehigh National Heritage Corridor – Annual Economic Impact of Tourism and Visitation					
Visitor Segment	% of Total Visitation*	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Local Day	29%	\$10,205,906	\$2,827,673	\$3,947,093	\$16,980,672
Non-Local Day	40%	\$23,336,972	\$6,458,595	\$8,980,961	\$38,776,528
Overnight	31%	\$99,322,485	\$33,959,299	\$44,515,865	\$177,797,649
<b>Total</b>	<b>100%</b>	<b>\$132,865,363</b>	<b>\$43,245,566</b>	<b>\$57,443,918</b>	<b>\$233,554,847</b>

Table 22: D&L Economic Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

The economic spending analysis demonstrates within the region, visitors travelling from outside the region and staying overnight represent the largest economic benefit to the economy of the local region and the state. Although overnight visitors only comprise an estimated 31% of NHA visitation, overnight visitors account for approximately 75% of the economic benefit of NHAs. This is primarily driven by the increased amount of fresh dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

Delaware and Lehigh National Heritage Corridor – Annual Employment Impact of Tourism and Visitation				
Visitor Segment	Direct Effect (jobs)	Indirect Effect (jobs)	Induced Effect (jobs)	Total Effect (jobs)
Local Day	184.7	20.6	33.5	238.8
Non-Local Day	418.6	47.3	76.2	542.1
Overnight	1,864.3	257	377.8	2,499.1
<b>Total*</b>	<b>2,467.6</b>	<b>324.9</b>	<b>487.6</b>	<b>3,280.1</b>

Table 23: D&L Employment Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

<sup>48</sup> Annual tourism projections were utilized from 2009, 2010, and 2011.

In addition to visitor tourism, the analysis quantifies the economic benefit of D&L through its operating activities. This impact is represented by the spending of the organizations and the employees it supports. Although not as great as the impact of tourism and visitation on the regional economy, the intellectual benefits and resources of NHA staff serve as independent catalysts for their regional economy. We estimate the impact of this benefit through the quantification of grants and funding supported by NHAs and their regional partners.<sup>49</sup>

<b>Delaware and Lehigh National Heritage Corridor – Annual Economic and Employment Impact of Operations</b>				
	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Economic</b>	\$1,346,729	\$630,723	\$710,581	\$2,688,033
<b>Employment</b>	13	5.5	6	24.5

Table 24: D&L Economic and Employment Impact of Operations

D&L is active in the region as a grantmaking organization. Grant opportunities are provided by NHAs to regional partners for collaborative projects aligned with the educational, preservation, promotional and economic development missions of NHAs. Similar to how tourism and operations support economic activity within the region, grantmaking provides an infusion of funds to assist with the development of projects. Grants are quantified as increased salary or as specific capital investment provided by the NHA within their region.

<b>Delaware and Lehigh National Heritage Corridor – Annual Economic and Employment Impact of Grantmaking</b>				
	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Economic</b>	\$1,010,751	\$306,776	\$1,116,830	\$2,434,357
<b>Employment</b>	6.4	2.3	9.5	18.2

Table 25: D&L Economic and Employment Impact of Grantmaking

NHAs also support state and local governments with the generation of government revenue or tax revenue. The tourism, operations, and grantmaking activities of D&L generate \$22,407,779 in tax revenue annually.

D&L supports a substantial number of jobs. Direct jobs are based on business receipts which in turn are used to pay wages and salaries within industries such as food services, retail and lodging.

Indirect or induced jobs are supported in the region by local businesses spending part of their receipts on goods and services they require to serve customers, including investment in new equipment and structures. This is the ripple effect of economic activity attributed to NHAs.

The “Top Employment Sectors” table illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the NHA. Industries such as food services, hotels and retail stores represent the largest number of jobs while the ripple effect illustrates that jobs in real estate and health care are also supported by the spending attributable to NHAs.

<sup>49</sup> Grants not affiliated with capital improvements or construction are included in the input-output model as salary and therefore have no direct or indirect economic effects associated with them. This protocol exhibits a conservative estimate on the regional effects of grants facilitated by the NHA.

**Delaware and Lehigh National Heritage Corridor – Top Employment Sectors**

<b>Industry</b>	<b>Jobs</b>
Food services and drinking places	984.0
Hotels and motels, including casino hotels	560.8
Retail Stores – General merchandise	355.2
Other amusement and recreation industries	306.8
Retail Stores – Food and beverage	201.8
Retail Stores – Gasoline stations	195.2
Real estate establishments	62.7
Services to buildings and dwellings	37.7
Offices of physicians, dentists, and other health practitioners	29.8
Employment services	29.6

Table 26: D&L Top Employment Sectors

#### IV. Hudson River Valley National Heritage Area (HRVNA)

The Hudson River Valley National Heritage Area (HRVNHA), comprising Albany, Columbia, Dutchess, Greene, Orange, Putnam, Rensselaer, Rockland, Saratoga County (village of Waterford only), Ulster, and Westchester counties, is a historic destination, a place with view sheds, great culinary attractions, and vineyards. The stakeholders agreed that a commitment to the Hudson River Valley region could be based on the successful and sustainable development of creating the Hudson Valley area as a “destination spot.”

The HRVNHA provides cohesiveness amongst the smaller towns, while making the area as a whole a distinct region. Prior to developing the NHA, people identified themselves as being from specific areas; now the regional identity is growing stronger as more people are referring to the area as “the Hudson River Valley.” The Hudson River Valley name is being used more often by businesses as well. This identification has several positive effects. One effect is being able to attract employers to the region because of quality of life. In particular, in the Northern portion of the Hudson Valley, Albany has the ability to attract new and relocating businesses, along with expanding organizations, to create jobs in high tech industries such as nanotechnology and healthcare. Another advantage is expanding tourism regionally as opposed to visiting one town or component part of the region.

HRVNHA facilitates and builds collaboration amongst communities in the region that may otherwise not have the resources to develop or seek funding related to architectural preservation, art education, and natural preservation. The NHA designation gives credibility to organizations who otherwise would not receive recognition. In addition, the NHA creates synergy by fostering a spirited cooperation among sites by providing resources and support. Organizations are now scheduling events around NHA-sponsored events, as they’ve seen attendance numbers increase when hosting in conjunction with other NHA events. Furthermore, the NHA is able to leverage volunteers to help with the rescue and preservation of sites because they feel that they will have the necessary support to complete projects.

#### The Combined Annual Economic Benefits – Hudson River Valley National Heritage Area

<b>Economic</b>	<b>\$584,986,026</b>
<b>Employment</b>	<b>6,530 jobs</b>
<b>Tax Revenue</b>	<b>\$66,667,434</b>

Respondents focused on the beneficial impact that tourism supports within the regional economy. However, in addition to tourism, there are other economic benefits associated with the work completed by the HRVNHA such as commerce, agriculture, culinary, land value, and job creation. By continuing to build upon these themes, HRVNHA will continue to provide worthwhile services and benefits to this region.

#### “Spotlight” Project – Hudson River Ramble

*Each NHA serves as a catalyst for economic development within the regions they operate. Specific examples within each NHA stand out to local stakeholders, residents, and visitors to the region.*

*The Hudson River Valley Ramble is an event series that celebrates the history, culture, and natural resources of the HRVNHA. Each year, during several weekends in September, roughly 200 guided hikes, bike tours, historic site walks, paddles, festivals, and educational events are held in communities throughout the Hudson River Valley. Visitor counts have grown over the past decade from only a few thousand to 200,000 in 2009.*

*The Hudson River Ramble and the associated visitor spending generates an economic impact of approximately \$21 million annually for the region.*

## Hudson River Valley National Heritage Area – Regional Economic Benefits

The effects of visitation and tourism have the greatest economic benefit for the regions in which NHAs operate. NHAs play a substantial role in supporting tourism within their regions. Tourism numbers are calculated by HRVNHA’s regional partners. The three-year average total of visitors and tourists to the Hudson River Valley National Heritage Area region was approximately 4,000,000 visitors.<sup>50</sup> These visitors spend money in the region, creating a positive ripple effect on the economic structure. Based on the annual average number of visitors to the NHA region and its partner sites, more than \$583,098,897 in economic benefit was supported annually within the region and state(s).

Hudson River Valley National Heritage Area – Annual Economic Impact of Tourism and Visitation					
Visitor Segment	% of Total Visitation*	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Local Day	29%	\$25,898,694	\$6,833,825	\$10,081,236	\$42,813,755
Non-Local Day	40%	\$59,220,320	\$15,582,111	\$22,965,517	\$97,767,948
Overnight	31%	\$252,042,539	\$73,893,363	\$116,581,293	\$442,517,195
<b>Total</b>	<b>100%</b>	<b>\$337,161,552</b>	<b>\$96,309,299</b>	<b>\$149,628,046</b>	<b>\$583,098,897</b>

Table 27: HRVNHA Economic Impact of Tourism and Visitation

\*Totals may not add due to rounding.

The economic spending analysis demonstrates within the region, visitors travelling from outside the region and staying overnight represent the largest economic benefit to the economy of the local region and the state. Although overnight visitors only comprise an estimated 31% of NHA visitation, overnight visitors account for approximately 75% of the economic benefit of NHAs. This is primarily driven by the increased amount of fresh dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

Hudson River Valley National Heritage Area – Annual Employment Impact of Tourism and Visitation				
Visitor Segment	Direct Effect (jobs)	Indirect Effect (jobs)	Induced Effect (jobs)	Total Effect (jobs)
Local Day	392.7	38.9	70.2	501.8
Non-Local Day	888.1	89.4	159.9	1137.4
Overnight	3,627	437.6	811.7	4,876
<b>Total</b>	<b>4,907.80</b>	<b>565.9</b>	<b>1,041.80</b>	<b>6,515.50</b>

Table 28: HRVNHA Employment Impact of Tourism and Visitation

\*Totals may not add due to rounding.

In addition to visitor tourism, the analysis quantifies the economic benefit of Hudson River Valley National Heritage Area through its operating activities. This impact is represented by the spending of the organizations and the employees it supports. Although not as great as the impact of tourism and visitation on the regional economy, the intellectual benefits and resources of NHA staff serve as independent catalysts for their regional economy. We estimate the impact of this benefit through the quantification of grants and funding supported by NHAs and their regional partners.

<sup>50</sup> Annual tourism projections were utilized from 2009, 2010, and 2011.

<b>Hudson River Valley National Heritage Area – Annual Economic and Employment Impact of Operations</b>				
	Direct Effect	Indirect Effect	Induced Effect	Total Effect
<b>Economic</b>	\$450,935	\$183,110	\$246,327	\$880,372
<b>Employment</b>	4	1.3	1.7	7

Table 29: HRVNHA Economic and Employment Impact of Operations

Hudson River Valley National Heritage Area is active in the region as a grantmaking organization. Grant opportunities are provided by NHAs to regional partners for collaborative projects aligned with the educational, preservation, promotional and economic development missions NHAs. Similar to how tourism and operations support economic activity within the region, grantmaking provides an infusion of funds to assist with the development of projects. Grants are quantified as increased salary or as specific capital investment provided by the NHA within their region.<sup>51</sup>

<b>Hudson River Valley National Heritage Area – Annual Economic and Employment Impact of Grantmaking</b>				
	Direct Effect	Indirect Effect	Induced Effect	Total Effect
<b>Economic</b>	\$0	\$0	\$1,006,757	\$1,006,757
<b>Employment</b>	0	0	7	7

Table 30: HRVNHA Economic and Employment Impact of Grantmaking

NHAs also support state and local governments with the generation of government revenue or tax revenue. The tourism, operations, and grantmaking activities of Hudson River Valley National Heritage Area generate \$66,667,434 in tax revenue annually.

Hudson River Valley National Heritage Area supports a substantial number of jobs. Direct jobs are based on business receipts which in turn are used to pay wages and salaries within industries such as food services, retail and lodging.

Indirect or induced jobs are supported in the region by local businesses spending part of their receipts on goods and services they require to serve customers, including investment in new equipment and structures. This is the ripple effect of economic activity attributed to NHAs.

The “Top Employment Sectors” table illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the NHA. Industries such as food services, hotels and retail stores represent the largest number of jobs while the ripple effect illustrates that jobs in real estate and health care are also supported by the spending attributable to NHAs.

<sup>51</sup> Grants not affiliated with capital improvements or constructions are included in the input-output model as salary and therefore have no direct or indirect economic effects associated with them. This protocol exhibits a conservative estimate on the regional effects of grants facilitated by the NHA.

<b>Hudson River Valley National Heritage Area – Top Employment Sectors</b>	
<b>Industry</b>	<b>Jobs</b>
Food services and drinking places	2,025.5
Hotels and motels, including casino hotels	798.6
Retail Stores – General merchandise	768.7
Other amusement and recreation industries	610.9
Retail Stores – Gasoline stations	481.6
Retail Stores – Food and beverage	459.2
Real estate establishments	78.7
Offices of physicians, dentists, and other health practitioners	64.7
Services to buildings and dwellings	63.6
Private hospitals	54.7

Table 31: HRVNHA Top Employment Sectors



## V. Rivers of Steel National Heritage Area (RSNHA)

The Rivers of Steel National Heritage Area (RSNHA) covers an eight-county region (Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Washington, and Westmoreland) in Southwestern Pennsylvania that includes the metro Pittsburgh region. Towns sprouted up along the rivers that provided easy transportation of products, allowing the steel industry to thrive. With the decline of the steel industry, these towns saw heavy population loss and faced deterioration. While the city of Pittsburgh itself has rebounded into one of the most livable cities in the nation, these river towns have continued to struggle. The RSNHA has been vital helping these towns begin to make a comeback through the preservation of historic sites and allowing tourism to come into these areas.

The RSNHA has the ability to tell the story of the region and educate the community. By educating the community and stirring excitement, tourism is spurred by residents bringing in outsiders to share their knowledge of the region’s history by taking them to sites that served important historical purposes. Although it was once the norm to conceal these sites, the attitude has shifted to preserving and essentially showcasing these areas. In fact, to ensure that visitors have constant access to sites, RSNHA launched Tour Anytime, a 24/7 source for self-guided cell phone tours. Some sites that the RSNHA is involved with include:

- Carrie Furnace site is owned by Allegheny County, but the area is maintained by RSNHA. The movie “Out of the Furnace” recently filmed at the Carrie Furnace site, providing positive economic effect on local small businesses.
- Rails to Trails has received RSNHA funding and has been an economic generator for the region.
- Development of Three Rivers Heritage Trail including the installation of 47 signs.
- The Historic Pump House in Homestead serves as a trailhead along the Great Allegheny Passage.
- Preservation of the W.A. Young & Sons Foundry and Machine Shop, a former foundry shop in Rice’s Landing, Greene County.

### ***“Spotlight” Project – the Waterfront***

*Each NHA serves as a catalyst for economic development within the regions they operate. Specific examples within each NHA stand out to local stakeholders, residents and visitors to the region.*

*The development of a former steel mill site into the Waterfront shopping and entertainment area has spurred multiple economic benefits for this area. The construction of hotels and residential units were also completed, and this site been developed into an upscale area, with a history behind it that serves as both a historic site and an economic generator. The Waterfront development was pivotal in bringing together the communities of Munhall and West Homestead and produces substantial tax revenue which essentially funds school systems in the area.*

	Formal Partnerships	Relationship Partnerships
2011	18	25
2010	19	29
2009	21	29

Table 32: RSNHA Partnership Information

Another area that RSNHA has been involved with is a partnership with the Westmoreland Museum of American Art for a large-scale exhibition of natural landscape paintings and artifacts, a book, and two films. Pieces from this museum have been on exhibit in Germany, allowing for the heritage of the Rivers of Steel area to be shown on an international platform.

**The Combined Annual Economic Benefits – Rivers of Steel National Heritage Area**

**Economic**            \$69,441,323  
**Employment**        901 jobs  
**Tax Revenue**        \$6,047,217

While operating behind the scenes, the RSNHA helps keep organizations to stay focused to complete projects. Furthermore, they provide stewardship to communities by serving as a guide, but allowing them to have ownership over what is going on in their areas. Lastly, RSNHA works to preserve the steel worker’s legacy with younger generations and pass along knowledge of the region’s industrial past and how it incorporates into the future.

**Rivers of Steel National Heritage Area – Regional Economic Benefits**

The effects of visitation and tourism have the greatest economic benefit for the regions which NHAs operate. NHAs play a substantial role in supporting tourism within their regions. Tourism numbers are calculated by Rivers of Steel National Heritage Area’s regional partners. The three-year average total of visitors and tourists to the Rivers of Steel National Heritage Area region was approximately 407,924 visitors.<sup>52</sup> These visitors spend money in the region, creating a positive ripple effect on the economic structure. Based on the annual average number of visitors to the NHA region and its partner sites, more than \$66,967,970 in economic benefit was supported annually within the region and state(s).

Rivers of Steel National Heritage Area – Annual Economic Impact of Tourism and Visitation					
Visitor Segment	% of Total Visitation*	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Local Day	29%	\$2,641,176	\$860,782	\$1,345,926	\$4,847,884
Non-Local Day	40%	\$6,039,352	\$1,970,122	\$3,054,590	\$11,064,064
Overnight	31%	\$25,703,572	\$9,754,032	\$15,598,418	\$51,056,022
<b>Total</b>	100%	\$34,384,100	\$12,584,936	\$19,998,934	\$66,967,970

Table 33: RSNHA Economic Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

The economic spending analysis demonstrates within the region, visitors travelling from outside the region and staying overnight represent the largest economic benefit to the economy of the local region and the state. Although overnight visitors only comprise an estimated 31% of NHA visitation, overnight visitors account for approximately 75% of the economic benefit of NHAs. This is primarily driven by the increased amount of fresh dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

Rivers of Steel National Heritage Area – Annual Employment Impact of Tourism and Visitation				
Visitor Segment	Direct Effect (jobs)	Indirect Effect (jobs)	Induced Effect (jobs)	Total Effect (jobs)
Local Day	47.8	5.8	10.9	64.5
Non-Local Day	108.6	13.5	24.8	146.9
Overnight	471.9	68.8	126.5	667.2
<b>Total</b>	628.2	88.1	162.2	878.5

Table 34: RSNHA Employment Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

<sup>52</sup> Annual tourism projections were utilized from 2009, 2010, and 2011.

In addition to visitor tourism, the analysis quantifies the economic benefit of Rivers of Steel National Heritage Area through its operating activities. This impact is represented by the spending of the organizations and the employees it supports. Although not as great as the impact of tourism and visitation on the regional economy, the intellectual benefits and resources of NHA staff serve as independent catalysts for their regional economy. We estimate the impact of this benefit through the quantification of grants and funding supported by NHAs and their regional partners.

<b>Rivers of Steel National Heritage Area – Annual Economic and Employment Impact of Operations</b>				
	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Economic</b>	\$677,951	\$364,185	\$479,511	\$1,521,647
<b>Employment</b>	8	2.9	3.9	14.8

Table 35: RSNHA Economic and Employment Impact of Operations

Rivers of Steel National Heritage Area is active in the region as a grantmaking organization. Grant opportunities are provided by NHAs to regional partners for collaborative projects aligned with the educational, preservation, promotional and economic development missions of NHAs. Similar to how tourism and operations support economic activity within the region, grantmaking provides an infusion of funds to assist with the development of projects. Grants are quantified as increased salary or as specific capital investment provided by the NHA within their region.<sup>53</sup>

<b>Rivers of Steel National Heritage Area – Annual Economic and Employment Impact of Grantmaking</b>				
	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Economic</b>	\$81,094	\$34,509	\$836,103	\$951,706
<b>Employment</b>	0.5	0.2	6.8	7.5

Table 36: RSNHA Economic and Employment Impact of Grantmaking

The economic benefit of Rivers of Steel National Heritage Area is quantified by demonstrating economic and employment impact. NHAs also support the generation of government revenue or tax revenue for local governments and states in which the NHA operates. The tourism, operations, and grantmaking activities of Rivers of Steel National Heritage Area generate \$6,047,217 annually.

NHAs also support state and local governments with the generation of government revenue or tax revenue. The tourism, operations, and grantmaking activities of Rivers of Steel National Heritage Area generate \$6,047,217 in tax revenue annually.

Rivers of Steel National Heritage Area supports a substantial number of jobs. Direct jobs are based on business receipts which in turn are used to pay wages and salaries within industries such as food services, retail and lodging.

Indirect or induced jobs are supported in the region by local businesses spending part of their receipts on goods and services they require to serve customers, including investment in new equipment and structures. This is the ripple effect of economic activity attributed to NHAs.

<sup>53</sup> Grants not affiliated with capital improvements or construction are included in the input-output model as salary and therefore have no direct or indirect economic effects associated with them. This protocol exhibits a conservative estimate on the regional effects of grants facilitated by the NHA.

The “Top Employment Sectors” table illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the NHA. Industries such as food services, hotels and retail stores represent the largest number of jobs while the ripple effect illustrates that jobs in real estate and health care are also supported by the spending attributable to NHAs.

<b>Rivers of Steel National Heritage Area – Top Employment Sectors</b>	
<b>Industry</b>	<b>Jobs</b>
Food services and drinking places	261.6
Hotels and motels, including casino hotels	137.7
Retail Stores – General merchandise	90.3
Other amusement and recreation industries	82.1
Retail Stores – Gasoline stations	51.0
Retail Stores – Food and beverage	48.5
Real estate establishments	15.0
Private hospitals	10.5
Grantmaking, giving, and social advocacy organizations	9.4
Services to buildings and dwellings	9.3

Table 37: RSNHA Top Employment Sectors

## VI. Wheeling National Heritage Area (WNHA)

The Wheeling National Heritage Area (WNHA) has been a catalyst for preservation and revitalization within the city of Wheeling. Without the organization, the city would be limited in its resources to fund revitalization and preservation in the downtown area. While emphasis is placed on the enhancing visitor experience and the necessary events and attractions to draw people to the NHA, WNHA is distinguished by a strong emphasis on community and economic development and identifying strategic opportunities to participate in job creation.

Due to the support of the WNHA revitalization and preservation efforts, a number of buildings in the downtown area that would otherwise be vacant or demolished have been restored to full use. These buildings include the Stamping Building, the Artisan Center and the Capitol Theatre. In addition, Heritage Port, at the riverfront, was also created with the assistance of WNHA and a substantial infusion of Federal dollars.

WNHA is a catalyst. The NHA provided funding for the initial feasibility studies of several historic, but dilapidated, downtown buildings. One of these buildings was the Stamping Building, which had been abandoned for more than 20 years. With the determination that this was a viable building for redevelopment, the Regional Economic Development Partnership (RED) agreed to invest if a tenant was guaranteed to inhabit the building. WHNAC not only made the first investment in the structure by purchasing elevators and windows, it was instrumental in designating the Warehouse District as a historic district. With this designation followed historic tax credits, all part of the overall financing package to attract the Orrick, Herrington, and Sutcliffe law firm. It is strongly insinuated had WNHA not made the initial investment, than it may have been more opportune for Orrick to locate in another area. The initial investment of WHNA created a unique public/private partnership between RED, WHNAC, the City of Wheeling, and the local Wheeling churches. WNHA's initial investment allowed the organization to participate in the ongoing lease structure and now provides WHNA with monthly income to sustain ongoing operations of WHNA.

Orrick, an international law firm, moved their back office operations into the Stamping Building 10 years ago. As part of their operations, they also attracted a support firm, Williams Lea. This company has since expanded and moved into another restored building, the Stone Center. The development of the Stamping/Orrick Building has become a prime example of successful redevelopment in the state of West Virginia and has been recognized nationally by the National Trust for Historic Preservation.

### **"Spotlight" Project – the Stamping Building**

*Each NHA serves as a catalyst for economic development within the regions they operate. Specific examples within each NHA stand out to local stakeholders, residents, and visitors to the region.*

*The redevelopment of the Stamping Building has become a prime example of successful redevelopment initiated by the Wheeling NHA. An initial investment of \$1.9 million has positively impacted Wheeling. In 2012, the Orrick Law Firm supports 550 total jobs in the greater region and contributes \$3.7 million in state and local tax revenue.*

Other significant redevelopment projects include:

- Capitol Theatre: significant partner; strategically involved with promoting collaboration and community support to revitalize the theatre. WHNAC facilitated receipt of numerous grants which facilitated feasibility studies, architectural and engineering reports and a variety of restoration and construction projects. While restoring the theatre many artifacts were found that were preserved and archived by the NHA historian.
- The Artisan Center (WNHA Offices): This building also contains an artisan gift shop supplied by regional arts and craft products, a museum exhibit documenting many of the past industries of the area, a restaurant, which is also used for public events and wedding receptions.
- Heritage Port (riverfront): The Heritage Port at the riverfront was created after the demolition of a city-owned parking garage considered to be an eyesore. It is a tourism driver for the NHA with estimates of approximately 500,000 visitors annually attracted to this site for events.
- WV Northern Community College Education Center: WNHA feasibility study allowed restoration of the building to house new classrooms for culinary arts and gym facilities; also, due to rehabilitating this building, the college was able to keep green space and have a plaza for students.

<b>The Combined Annual Economic Benefits –Wheeling National Heritage Area</b>	
<b>Economic</b>	<b>\$56,577,478</b>
<b>Employment</b>	<b>784 jobs</b>
<b>Tax Revenue</b>	<b>\$3,761,090</b>

WNHA has created a cascade effect by planting the seed for a number of projects throughout the city by providing mini-grants and thus, is being recognized as the foundation of the future of downtown. Furthermore, WNHA bridges the gaps and provides the glue to keep current organizations and projects intact, creating significant impact for the greater good of the city.

### Wheeling National Heritage Area – Regional Economic Benefits

The effects of visitation and tourism have the greatest economic benefit for the regions which NHAs operate. NHAs play a substantial role in supporting tourism within their regions. Tourism numbers are calculated by WNHA’s regional partners. The three-year average total of visitors and tourists to the WNHA region was approximately 429,151 visitors.<sup>54</sup> These visitors spend money in the region, creating a positive ripple effect on the economic structure. Based on the annual average number of visitors to the NHA region and its partner sites, more than \$55,602,685 in economic benefit was supported annually within the region and state(s).

<b>Wheeling National Heritage Area – Annual Economic Impact of Tourism and Visitation</b>					
<b>Visitor Segment</b>	<b>% of Total Visitation*</b>	<b>Direct Effect</b>	<b>Indirect Effect</b>	<b>Induced Effect</b>	<b>Total Effect</b>
<b>Local Day</b>	29%	\$2,847,062	\$597,815	\$651,154	\$4,096,031
<b>Non-Local Day</b>	40%	\$6,691,786	\$1,375,151	\$1,536,796	\$9,603,733
<b>Overnight</b>	31%	\$28,263,684	\$7,197,007	\$6,442,229	\$41,902,920
<b>Total</b>	100%	\$37,802,533	\$9,169,973	\$8,630,179	\$55,602,685

Table 38: WNHA Economic Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

<sup>54</sup> Annual tourism projections were utilized from 2008, 2010, and 2011.

The economic spending analysis demonstrates within the region, visitors travelling from outside the region and staying overnight represent the largest economic benefit to the economy of the local region and the state. Although overnight visitors only comprise an estimated 31% of NHA visitation, overnight visitors account for approximately 75% of the economic benefit of NHAs. This is primarily driven by the increased amount of fresh dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

Wheeling National Heritage Area – Annual Employment Impact of Tourism and Visitation				
Visitor Segment	Direct Effect (jobs)	Indirect Effect (jobs)	Induced Effect (jobs)	Total Effect (jobs)
Local Day	54.7	5.4	6.5	66.6
Non-Local Day	128.7	12.6	15.4	156.7
Overnight	416.4	66.9	64.6	547.9
<b>Total</b>	<b>599.9</b>	<b>85</b>	<b>86.5</b>	<b>771.4</b>

Table 39: WNHA Employment Impact of Tourism and Visitation

*\*Totals may not add due to rounding.*

In addition to visitor tourism, the analysis quantifies the economic benefit of Wheeling National Heritage Area through its operating activities. This impact is represented by the spending of the organizations and the employees it supports. Although not as great as the impact of tourism and visitation on the regional economy, the intellectual benefits and resources of NHA staff serve as independent catalysts for their regional economy. We estimate the impact of this benefit through the quantification of grants and funding supported by NHAs and their regional partners.

Wheeling National Heritage Area – Annual Economic and Employment Impact of Operations				
	Direct Effect	Indirect Effect	Induced Effect	Total Effect
<b>Economic</b>	\$532,386	\$193,281	\$154,056	\$879,723
<b>Employment</b>	8	2	1.5	11.5

Table 40: WNHA Economic and Employment Impact of Operations

WNHA is active in the region as a grantmaking organization. Grant opportunities are provided by NHAs to regional partners for collaborative projects aligned with the educational, preservation, promotional and economic development missions of NHAs. Similar to how tourism and operations support economic activity within the region, grantmaking provides an infusion of funds to assist with the development of projects. Grants are quantified as increased salary or as specific capital investment provided by the NHA within their region.<sup>55</sup>

Wheeling National Heritage Area – Annual Economic and Employment Impact of Grantmaking				
	Direct Effect	Indirect Effect	Induced Effect	Total Effect
<b>Economic</b>	\$0	\$0	\$95,070	\$95,070
<b>Employment</b>	0	0	1	1

Table 41: WNHA Economic and Employment Impact of Grantmaking

<sup>55</sup> Grants not affiliated with capital improvements or construction are included in the input-output model as salary and therefore have no direct or indirect economic effects associated with them. This protocol exhibits a conservative estimate on the regional effects of grants facilitated by the NHA.

NHAs also support state and local governments with the generation of government revenue or tax revenue. The tourism, operations, and grantmaking activities of Wheeling National Heritage Area generate \$3,761,090 in tax revenue annually.

WNHA supports a substantial number of jobs. Direct jobs are based on business receipts which in turn are used to pay wages and salaries within industries such as food services, retail and lodging.

Indirect or induced jobs are supported in the region by local businesses spending part of their receipts on goods and services they require to serve customers, including investment in new equipment and structures. This is the ripple effect of economic activity attributed to NHAs.

The “Top Employment Sectors” table illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the NHA. Industries such as food services, hotels and retail stores represent the largest number of jobs while the ripple effect illustrates that jobs in wholesale trade and employment services are also supported by the spending attributable to NHAs.

<b>Wheeling National Heritage Area – Top Employment Sectors</b>	
<b>Industry</b>	<b>Jobs</b>
Food services and drinking places	283.5
Hotels and motels, including casino hotels	133.0
Other amusement and recreation industries	83.0
Transit and ground passenger transportation	45.9
Retail Stores – General merchandise	41.1
Retail Stores – Food and beverage	26.5
Retail Stores – Gasoline stations	17.2
Employment services	9.7
Grantmaking, giving, and social advocacy organizations	8.2
Wholesale trade businesses	7.6

Table 42: WNHA Top Employment Sectors



## Conclusions

- NHAs are valuable economic contributors to the local regions and states where they operate. Whether geographically focused or stretching through multiple counties and municipalities, all NHAs serve their missions of education, preservation, promotional, and economic development. However, it is true to say “if you have seen one NHA, you have seen one NHA.” Each NHA operates a unique role within its region, as if they gravitate to fill a most needed niche in their regional preservation and economic development landscape.
- National Heritage Areas that include a greater number of National Park Service (NPS) units within their borders demonstrated a higher overall economic impact on their regions when compared to NHAs without a NPS unit within their boundary. The analysis demonstrates a likely contribution and increased economic opportunity for the regions which benefit from the visitors attracted to the NPS entity and the NHA.
- The analysis and its projections demonstrate the incremental increase of economic benefits from the individual NHA level, to the Northeast Region and ultimately demonstrating the overall national economic benefits supported by all NHAs in the United States.
  - The 21 NHAs in the Northeast Region of the United States combine for a projected annual economic impact of \$5.4 billion. The NHAs in the Northeast Region support more than 66,880 jobs and generate \$602.7 million in local and state taxes.
  - Additional analysis extrapolates the economic benefit of all NHA sites in the United States. The projected annual economic benefit of all 49 NHA sites on the nation’s economy is \$12.9 billion. The economic activity supports nearly 150,000 jobs and \$1.2 billion in Federal taxes from sources such as employee compensation, proprietor income, indirect business tax, households, and corporations.
- Collecting visitor data is a challenge to the existing resources of NHAs. Approximations of visitor data for different facilities may not be completely consistent and vary considerably. NHAs and NPS should seek to utilize emerging technologies of convenience and adaptability such as mobile devices or Twitter to capture details regarding the number of visitors entering the NHA and how much they are spending while visiting. This can efficiently utilize existing “free” social media to standardize data collection for all NHA sites. Spending profiles for visitors to specific heritage areas should be developed as a collaborative effort to create a standard, cost-effective, and easily implemented visitor survey.
- An underlying theme of NHA staff interviews and stakeholder focus groups was the inherent impact of “preserving the beauty of a region.” This was noted by Stynes and Sun as much of the value parks provide society is not reflected in economic impacts: “The values that most people associate with National Parks are very different from those captured in an economic impact analysis.”<sup>56</sup> Similar sentiments are associated with NHAs as well. From an economic impact standpoint, the most valuable corridor visitors are likely tourists passing through in vehicles, stopping for food, lodging, or to shop in the region.

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<sup>56</sup> Stynes, Daniel J., and Ya-Yen Sun. Economic Impacts of National Park Visitor Spending on Gateway Communities. Rep. N.p., Apr. 2003. Web. 15 Jan. 2013.

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