
THE ECONOMIC IMPACT OF NATIONAL HERITAGE AREAS

A CASE STUDY ANALYSIS OF SIX NATIONAL HERITAGE
AREAS IN THE NORTHEAST AND MIDWEST REGIONS



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.

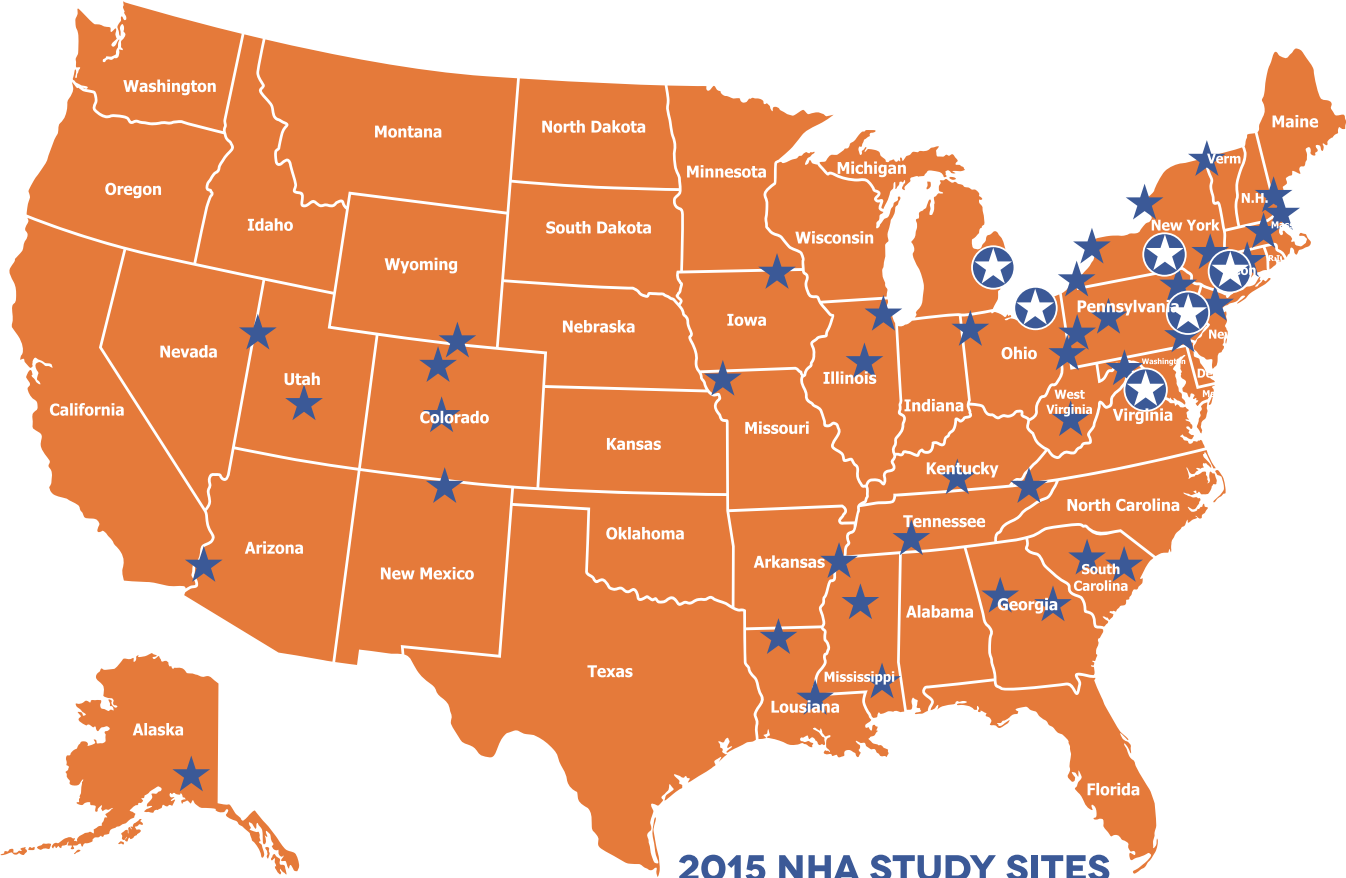
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MAP OF NATIONAL HERITAGE AREAS



2015 NHA STUDY SITES

- ERIE CANALWAY NATIONAL HERITAGE CORRIDOR
- THE JOURNEY THROUGH HALLOWED GROUND NATIONAL HERITAGE AREA
- SCHUYLKILL RIVER NATIONAL HERITAGE AREA
- UPPER HOUSATONIC VALLEY NATIONAL HERITAGE AREA
- MOTORCITIES NATIONAL HERITAGE AREA
- OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA

INTRODUCTION

National Heritage Areas (NHAs) provide economic benefits to communities and regions through their commitment 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 generate increased economic impact for regions in which they are located.

In 2012, Tripp Umbach completed a comprehensive economic impact study on six NHA sites in the Northeast Region that also included an extrapolation of the economic benefit of all 49 NHA sites on the national economy. The annual economic impact was estimated to be \$12.9 billion. The economic activity supports approximately 148,000 jobs and generates \$1.2 billion annually in Federal taxes from sources such as employee compensation, proprietor income, indirect business tax, households, and corporations.¹ This study seeks to further quantify the economic impacts of individual NHAs based upon a case study approach.^{2,3}

The results presented in the NHA economic impact study are generated on an annual basis. The economic impact in future years can either be higher or lower based on the visitor or tourist data, number of employees, operational expenditures, and capital expansion.

NHAs SUPPORT REGIONAL ECONOMIES

NHAs DIRECTLY AND INDIRECTLY GENERATE
\$12.9 BILLION PER YEAR IN THE U.S.



CREATE AND SUPPORT 148,000 JOBS



\$1.2 BILLION
IN TAX REVENUE

The economic impact of the six NHAs studied shows:

- Erie Canalway National Heritage Corridor (NY) generates **\$307.7 million** in economic impact, supports **3,240 jobs**, and generates **\$34.9 million** in tax revenue.
- The Journey Through Hallowed Ground National Heritage Area (MD, PA, VA, and WV) generates **\$703.0 million** in economic impact, supports 8,401 jobs, and generates **\$51.1 million** in tax revenue.
- Schuylkill River National Heritage Area (PA) generates **\$589.9 million** in economic impact, supports **6,154 jobs**, and generates **\$37.7 million** in tax revenue.
- Upper Housatonic Valley National Heritage Area (CT and MA) generates **\$169.9 million** in economic impact, supports **1,944 jobs**, and generates **\$15.0 million** in tax revenue.
- MotorCities National Heritage Area (MI) generates **\$410.4 million** in economic impact, supports **4,560 jobs**, and generates **\$35.4 million** in tax revenue.
- Ohio & Erie Canalway National Heritage Area (OH) generates **\$408.1 million** in economic impact, supports **4,200 jobs**, and generates **\$34.7 million** in tax revenue. The Metroparks of the Ohio & Erie Canalway NHA generate an additional direct impact of **\$24.0 million**.

1. In the same 2012 study, Tripp Umbach calculated the impact of the 21 current NHAs in the Northeast Region of the United States. This study revealed that the NHAs in the Northeast Region generate an annual economic impact of \$5.4 billion, support more than 66,880 jobs, and generate \$602.7 million in local and state taxes.

2. Tripp Umbach. "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." www.nps.gov/history/heritageareas/.

3. Tripp Umbach. "The Economic and Community Impact of National Heritage Area Sites: Essex National Heritage Area, Oil Region National Heritage Area, Yuma Crossing National Heritage Area." www.nps.gov/history/heritageareas/.

PROJECT OVERVIEW

In July 2015, Tripp Umbach was retained by the Heritage Development Partnership to measure the economic, employment, and government revenue impacts of operations and research of six NHAs. The following report highlights the economic impact of the six national heritage areas. The goals of the NHA economic impact study included the following:

- To quantify the economic and employment impacts of NHA operations on their individual NHA service areas utilizing the methodology used in the previous studies.
- To demonstrate the broader community impact that NHAs have within their geographic areas of operation.

This study builds upon previous work completed to assess the economic benefit of NHAs to their regions, states, and local communities by measuring employment and revenue generation in addition to economic impacts. The research protocol included kickoff calls and progress reports with leadership from each NHA, interviews with key stakeholders within the six NHA regions, and data collection of existing NHA visitor estimates, operating budgets, and grant/capital awards information. The data collection process guided the economic impact analysis using IMPLAN.⁴

Each NHA profiled has distinct qualities and features, as noted in Table 1. The economic impact of an NHA will vary from site to site as each NHA is unique, operating in its local and state economy.

2015 NHA STUDY OVERVIEW

Study Period:

Three-Year Average for 2012, 2013, 2014

NHAs by Region:

Northeast – Erie Canalway NHC, The Journey Through Hallowed Ground NHA, Schuylkill River NHA, and Upper Housatonic Valley NHA

Midwest Region – MotorCities NHA and Ohio & Erie Canalway NHA

NHA Geography:

Erie Canalway NHC – NY
JTHG NHA – MD, PA, VA, WV
Schuylkill River NHA – PA
Upper Housatonic – CT and MA
MotorCities – MI
Ohio & Erie Canalway – OH

Methodology:

IMPLAN 2013 Data

4. This 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>.

TABLE 1: NHA CASE STUDY SITE PROFILES

HERITAGE AREA	National Register Features ⁵	National Historic Landmarks ⁶	Area Population ⁷
Erie Canalway	18,643	43	3,232,572
The Journey Through Hallowed Ground	27,007	15	1,413,038
Schuylkill River	23,943	45	1,854,081
Upper Housatonic	2,683	7	123,105
MotorCities	17,268	14	5,255,454
Ohio & Erie Canalway	7,177	4	1,034,899

The size and shape of an NHA also plays a key role in defining its personality. Localized or focused sites are concentrated. While this leads to partnerships with more defined, common goals, it can place limitations on available resources. Sites that span geographic areas (multiple counties) have the unique challenge of balancing where and how their resources are allocated. Finally, corridor sites that span multiple counties or states must serve as trusted collaborators to numerous partners spanning many varied interests. Despite all potential iterations of NHA types, the objectives of each NHA are connected by their Federal designation and mission.⁸ 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.

An additional area of consideration that distinguishes NHAs is the partnerships that they engage in. 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. Partnerships among NHAs and their collaborators play a key role in leveraging federal investment.

TABLE 2: NHA PARTNERSHIPS (2014)

HERITAGE AREA	Formal Partnerships	Informal Partnerships
Erie Canalway	53	115
The Journey Through Hallowed Ground	7	350
Schuylkill River	206	99
Upper Housatonic	4	95
MotorCities	16	6
Ohio & Erie Canalway	8	250

5. National Register of Historic Places. February 2014. Via National Heritage Area Statistics.

6. National Register of Historic Places. February 2014. Via National Heritage Area Statistics.

7. U.S. Census Bureau Blockgroup Data, 2010.

8. Additional information on NHA Federal designation and mission can be found at: <http://www.nps.gov/history/heritageareas/FAQ/>

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.

Key economic impact findings presented within the summary include the total projected impact (FY 2015), including the economic, employment, and state and local government revenue impact of each individual NHA in their respective state. 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.

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.⁹ 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: These expenditures are 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 Capital 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 in which they operate.

NHAs also provide intangible benefits that are not able to be quantified. Knowledge sharing, facilitating collaborative partnerships, and increasing the quality of life are elements that each NHA brings to their communities. While these critical concepts that are not quantified within the context of this report, they are highlighted through qualitative data that was collected.

In order to gain a better understanding of the qualitative impact National Heritage Areas have on the regions they are located in, the Tripp Umbach project team conducted a series of kickoff calls and stakeholder interviews during the Fall of 2015 for each of the selected sites. Through phone interviews, Tripp Umbach representatives interviewed community leaders and representatives of organizations that have knowledge of the mission of each NHA. These stakeholders were asked a series of questions to determine the strengths of the NHA and the most important key messages regarding the NHA's economic impact.

During the course of these interviews, several themes emerged across the board for all sites. NHAs serve as catalysts in their communities, taking on projects that otherwise may be overlooked or be considered too difficult to tackle. By encouraging collaboration and working with their partners to see projects through, NHAs increase quality of life for individuals living in these communities and provide unique destinations for visitors coming to these areas.

In addition, primary data was collected via a standardized data collection form. Data collected included: visitor data (primary data from actual reported visitor counts), operational expenditure data, capital expenditure data, and grantmaking activities. From the primary data in concert with qualitative information stemming from kickoff calls and stakeholder interviews, the economic and community impacts were calculated. The following provides the regional assets of each of the selected sites as described by the stakeholders in addition to the economic impact breakout for each specific NHA.

9. The analysis of visitor spending includes local spending estimates.

ERIE CANALWAY NHC

A. OVERVIEW OF THE ERIE CANALWAY

The combination of exceptional scenery, history, culture, and natural resources of the Erie Canalway earned the NYS Canal System and communities along its shores designation as a National Heritage Corridor in 2000. The Erie Canalway National Heritage Corridor is among the largest of the National Heritage Areas that have been designated by Congress. It spans upstate New York east to west, for 524 miles, encompassing more than 230 municipalities and approximately 2.7 million residents linked by the Erie, Champlain, Cayuga-Seneca and Oswego Canals and Cayuga and Seneca Lakes – together known as the New York State Canal System. The legislation affirms a national interest in the preservation and interpretation of the Corridor’s important historic, cultural, recreational, educational, scenic and natural resources.

Working in partnership with federal, state, and local agencies, various non-profits and individuals, the Erie Canalway National Heritage Corridor (ECNHC) works to preserve our extraordinary canal heritage, promote the Corridor as a world-class tourism destination, and foster vibrant communities connected by the waterway. ECNHC achieves its mission in partnership with the National Park Service, New York State agencies, non-profit organizations, local residents, and more than 200 communities across the full expanse of upstate New York.

“Spotlight” Project – Ticket to Ride

Educating future generations on the historic significance of the Canalway is essential to the future preservation of the heritage area. The Erie Canalway NHC established the Ticket to Ride program as an opportunity for students to have a hands-on learning experience to better understand the rich history of their region.

By sponsoring bus and tour fees, the Ticket to Ride program makes it possible for students to participate in educational field trips to sites and museums throughout the heritage area. More than 18,500 school children have taken part in the Ticket to Ride program since 2012. The program has a special focus on serving underserved youth.

In 2006 the Secretary of the Interior approved the Erie Canalway's Preservation & Management Plan. The plan presents a comprehensive and unified approach to the organization's ongoing efforts to protect, interpret, and promote its wealth of resources and offers guidance in formulating policies and taking action to achieve the full potential of the National Heritage Corridor. Achieving the vision and goals set forth in this Preservation & Management Plan requires a creative implementation strategy based on strong partnerships, a clear understanding of opportunities and objectives, and an entrepreneurial approach to resource development. The Preservation & Management Plan identifies six key areas of focus that serve to ensure goals are met. Goals include: (1) preserving canal resources, (2) reaching the highest standards of environmental quality, (3) providing recreational opportunities in harmony with heritage resources, (4) assuring the Corridor's current and future generations of residents and visitors value their canal heritage, (5) striving to encourage economic growth that is balanced and self-sustaining, and (6) promoting the Corridor as a must do travel experience for regional, national, and international visitors.

Through strategic partnerships, Erie Canalway leverages the significant canal assets of the region and fosters vibrant communities for residents and visitors alike. The tourism initiatives that Erie Canalway NHC undertakes are intended to utilize the Corridor's heritage resources to stimulate economic activity. For example, through a formal Partner Program the Erie Canalway has created an integrated system of more than 30 museums and cultural organizations that, through collaboration, strengthens the visitor experience and heightens awareness of the sites. The program creates a clear mechanism for Erie Canalway to direct resources and technical assistance to these sites and encourages partner staff to embrace and champion the goals of the Preservation & Management Plan. Increased visitation that stimulates economic activity is a result.

Expanded, focused, and coordinated tourism development leads to greater visitor awareness of important resources and encourages appropriate programmatic activities that realize economic benefits. The Erie Canalway also works closely with New York's other three national heritage areas to exchange information and create opportunities to grow tourism across the state.

Sponsoring events in the region allows residents and visitors to experience the rich assets of the area and to better understand the history and culture of the Canalway. For example, the ECNHC has supported Parks & Trails New York's efforts to conduct the annual "Cycle the Erie Canal," an eight-day bike tour that spans from Buffalo to Albany, "...allowing riders to enjoy the scenery and come to know the people, places, and events that shaped the Erie Canal and its role in American history."¹⁰

In addition, the Erie Canalway works with a number of local organizations, including the Syracuse Convention & Visitors Bureau, which will co-host, with the NYS Canal Corporation, the 2017 World Canals Conference, an event that will bring international visibility and tourism to the Erie Canalway NHC.¹¹

In October of 2014, Erie Canalway spearheaded the successful listing of the entire New York State Barge Canal on the National Register of Historic Places inspiring new generations to safeguard and celebrate the engineering marvels that changed the course of American history and helped make New York the Empire State. The multi-year effort, again in close cooperation with the NYS Canal Corporation, resulted in comprehensive documentation that serves as a valuable public record, available to scholars, students, community planners, and canal enthusiasts. Such designation will serve to attract more tourists and more economic impact throughout the Erie Canalway Corridor.

10. "Cycle the Erie Canal 18th Annual Bike Tour" www.ptny.org.

11. The 2017 World Canals Conference will bring together hundreds of canal enthusiasts, professionals, and scholars from around the world to exchange best practices and information on the history, preservation, and other various elements of canals. The 2017 World Canals Conference will mark the bicentennial of the Erie Canal. <http://inlandwaterwaysinternational.org/world-canals-conference/>.

Events such as “Cycle the Erie Canal” utilize the recreational assets the Erie Canalway NHC has to offer both residents and visitors alike. Over 500 miles of canals, rivers, and lakes are open for recreational use between the months of May and November, allowing boaters, kayakers, and canoers to enjoy the splendor of the Canalway. The Erie Canalway Trail spans between Buffalo and Albany and offers visitors and residents the chance for hiking, jogging, walking, and bicycling along the historic canal. The trail is also available for cross-country skiing in the winter months.

With the recreational offerings, historic sites and museums, and the increase in tourism through the efforts of the ECNHC and its partners, the Erie Canalway has been able to preserve the richness of the region, and in the process, foster growth in the more than 230 communities in the Corridor. The increase in tourism and offerings in the ECNHC also translates into an increase in business and economic development in the communities along the waterway. The ECNHC works with communities to leverage their assets, realize their strengths, and rediscover their roles in the heritage and preservation of the region. Doing so allows communities to achieve self-sustaining growth and add to the quality of life for its residents.

The Erie Canalway has historically served as a symbol of ingenuity and determination and is the oldest continuously operating canal system in the United States. Today, the Canalway continues to exemplify innovation and strength through the efforts of the ECNHC and its partners. The Erie Canalway NHC has been able to preserve the history of the region while also fostering economic growth along the 524-mile corridor.

B. OVERALL ECONOMIC IMPACT

The economic impact of the Erie Canalway NHC is **\$307.7 million annually**. This economic impact consists of three main components: tourism (\$304.8 million), operations (\$2.8 million), and grantmaking activities (\$47,000).¹² See Figure 1.

FIGURE 1: OVERALL ECONOMIC IMPACT OF ERIE CANALWAY NHC

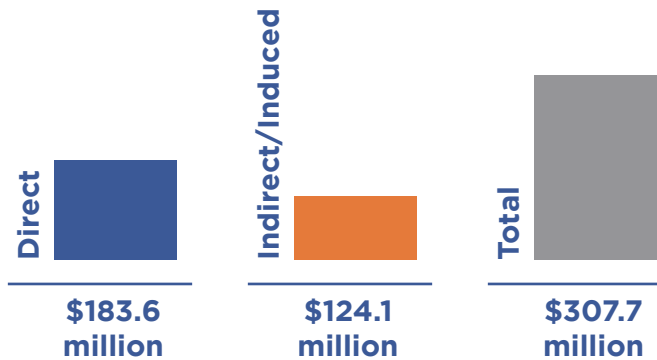


TABLE 3: ERIE CANALWAY NATIONAL HERITAGE CORRIDOR – OVERALL ECONOMIC IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Economic Impact	\$183,565,754	\$58,732,436	\$65,414,690	\$307,712,880
<i>Tourism</i>	\$181,824,262	\$58,262,288	\$64,740,556	\$304,827,106
<i>Operations</i>	\$1,741,492	\$470,148	\$627,147	\$2,838,787
<i>Grantmaking</i>	\$0	\$0	\$46,987	\$46,987

The table below shows the top 10 sectors in the NHC region impacted by the Erie Canalway NHC's activities and visitors (See Table 4).

TABLE 4: ERIE CANALWAY NATIONAL HERITAGE CORRIDOR TOP 10 ECONOMIC IMPACT SECTORS

Industry	Economic Output
Hotels and motels, including casino hotels	\$77,061,683
Limited-service restaurants	\$58,192,949
Museums, historical sites, zoos, and parks	\$20,627,368
Retail – Miscellaneous store retailers	\$13,194,693
Real estate	\$12,251,608
Owner-occupied dwellings	\$8,167,524
Transit and ground passenger transportation	\$7,376,171
Wholesale trade	\$5,794,173
Retail – Food and beverage stores	\$5,674,523
Insurance carriers	\$5,427,510

12. Data used to calculate impacts was based on three-year averages – 2012, 2013, and 2014.

C. TOURISM IMPACT

The effects of visitation and tourism have the greatest economic benefit for the regions in which NHCs operate. NHCs play a substantial role in supporting and encouraging tourism within their regions. Tourism numbers are calculated by the Erie Canalway NHC’s regional partners. The three-year average total of visitors and tourists to the Erie Canalway NHC region was approximately 3,247,628 visitors. 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 NHC region and its partner sites, more than \$304.8 million in economic benefit was supported annually within the region and state.

TABLE 5: ERIE CANALWAY 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	19%	\$7,606,923	\$2,619,666	\$3,025,231	\$13,251,819
Non-Local Day	41%	\$25,175,583	\$9,017,369	\$10,127,431	\$44,317,383
Overnight	40%	\$149,044,757	\$46,625,253	\$51,587,894	\$247,527,904
Total	100%	\$181,824,262	\$58,262,288	\$64,740,556	\$304,827,106

The economic spending analysis demonstrates within the region, visitors traveling 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 40% of NHC visitation, overnight visitors account for approximately 80% of the economic benefit of the NHC. This is primarily driven by the increased amount of fresh dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

D. OPERATIONAL IMPACT

In addition to attracting visitors and promoting tourism in the region, the analysis quantifies the economic benefit of the Erie Canalway NHC 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 NHC staff serve as independent catalysts for their regional economy.

TABLE 6: ERIE CANALWAY NATIONAL HERITAGE CORRIDOR ANNUAL ECONOMIC IMPACT OF OPERATIONS

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Operations	\$1,741,492	\$470,178	\$627,147	\$2,838,787

E. GRANTMAKING

The Erie Canalway NHC is active in the region with its partners through grantmaking efforts that support projects and programs that are aligned with the educational, cultural, promotional, and economic development missions of NHCs. Similar to how tourism and operations support economic activity within the region, grantmaking provides an infusion of funds to assist with the development of the Erie Canalway NHC. For the purposes of this study, grants are quantified as increased salary provided by the NHC within their region.

TABLE 7: ERIE CANALWAY NATIONAL HERITAGE CORRIDOR ANNUAL ECONOMIC IMPACT OF GRANTMAKING

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Grantmaking	\$0	\$0	\$46,987	\$46,987

F. OVERALL EMPLOYMENT IMPACT

The Erie Canalway NHC supports a substantial number of jobs in the region. The total employment impact is **3,240 jobs** (2,412 direct jobs and 828 indirect/induced 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 NHCs.

FIGURE 2: OVERALL EMPLOYMENT IMPACT OF ERIE CANALWAY NHC

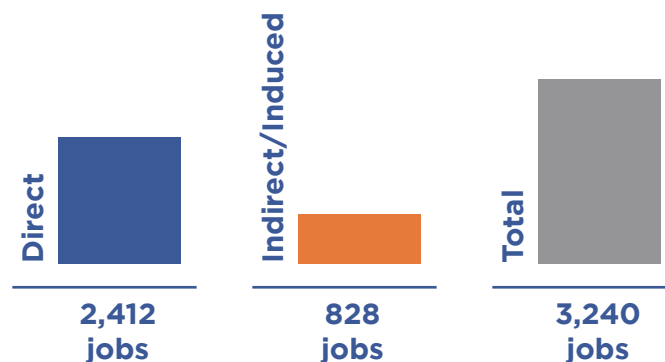


TABLE 8: ERIE CANALWAY NATIONAL HERITAGE CORRIDOR – OVERALL EMPLOYMENT IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Employment Impact	2,412 jobs	352 jobs	476 jobs	3,240 jobs
<i>Tourism</i>	2,404 jobs	349 jobs	471 jobs	3,224 jobs
<i>Operations</i>	8 jobs	3 jobs	5 jobs	16 jobs

**Grantmaking did not add to the overall employment impact*

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

**TABLE 9: ERIE CANALWAY NATIONAL HERITAGE CORRIDOR
TOP 10 EMPLOYMENT IMPACT SECTORS**

Industry	Jobs
Limited-service restaurants	960 jobs
Hotels and motel, including casino hotels	659 jobs
Retail - Miscellaneous store retailers	335 jobs
Museums, historical sites, zoos, and parks	249 jobs
Transit and ground passenger transportation	124 jobs
Retail - Food and beverage stores	90 jobs
Real estate	59 jobs
Retail - Gasoline stores	51 jobs
Hospitals	33 jobs
Full-service restaurants	29 jobs

G. GOVERNMENT REVENUE IMPACT

NHCs also support state and local governments with the generation of government revenue or tax revenue. As a result of the Erie Canalway NHC's attraction of visitors, operations, and capital activity, the NHC generates over **\$34.9 million** in tax revenue annually. Direct taxes generate over **\$25.4 million** of government or tax revenue.

TABLE 10: ERIE CANALWAY NATIONAL HERITAGE CORRIDOR – STATE AND LOCAL TAX IMPACT

Description	Employee Compensation	Tax on Production and Imports	Households	Corporations
Dividends				\$57,250
<i>Socials In Tax – Employee Contribution</i>	\$60,743			
<i>Social Ins Tax – Employer Contribution</i>	\$117,437			
<i>Tax on Production and Imports: Sales Tax</i>		\$12,163,287		
<i>Tax on Production and Imports: Property Tax</i>		\$14,453,362		
<i>Tax on Production and Imports: Motor Vehicle License</i>		\$192,521		
<i>Tax on Production and Imports: Severance Tax</i>				
<i>Tax on Production and Imports: Other Taxes</i>		\$1,626,554		
<i>Tax on Production and Imports: S/L NonTaxes</i>		\$43,437		
<i>Corporate Profits Tax</i>				\$1,717,227
<i>Personal Tax: Income Tax</i>			\$3,804,960	
<i>Personal Tax: NonTaxes</i>			\$501,860	
<i>Personal Tax: Motor Vehicle License</i>			\$86,116	
<i>Personal Tax: Property Taxes</i>			\$61,119	
<i>Personal Tax: Other Tax (Fish/Hunt)</i>			\$19,356	
Total	\$178,181	\$28,479,161	\$4,473,410	\$1,774,476

OVERALL IMPACT: \$34,905,228

H. VOLUNTEER IMPACT

It is estimated that volunteers at sites throughout Erie Canalway NHC generate more than **\$1.6 million annually** as a result of their volunteer services.¹³ Volunteers give their time to cleaning the trails and Canalway, helping with events for local community organizations and sites that are part of the NHC, and serving as Erie Canalway Volunteer in Parks (VIP), or volunteers who greet visitors and help provide tours of local parks and sites within the corridor. These benefits are in addition to the **\$307.7 million annual impact** generated by the Erie Canalway NHC.

13. Primary data about number of volunteers and hours volunteered was provided to Tripp Umbach by the Erie Canalway NHC. A conservative assumption of \$22.14 per hour was used to calculate the value of volunteer services. This amount was calculated independently by the Points of Light Foundation.

JOURNEY THROUGH HALLOWED GROUND NHA

A. OVERVIEW OF THE JTHG

Extending from Gettysburg, Pennsylvania, through Maryland and West Virginia, to its southern boundary at Thomas Jefferson's Monticello in Charlottesville, Virginia, the Journey Through Hallowed Ground (JTHG) National Heritage Area preserves and promotes the history and heritage of "Where America Happened." Home to nine presidential homes, 13 national parks, hundreds of battlefields that commemorate the French and Indian War, Revolutionary War, War of 1812, and the Civil War, and numerous other museums and historic sites, the 180-mile long, 75-mile wide JTHG NHA is one of the most historic regions in the United States. The JTHG has a number of offerings that go beyond telling the history of the region; it is also home to a number of amenities and tourist attractions, including 30 Main Street Communities; over 100 wineries, craft breweries, and distilleries; thousand of farms, orchards, and vineyards; and 100 scenic streams and rivers. The JTHG NHA focuses its work and mission on the preservation of this rich history and the natural and scenic beauty of the region. Through the creation of integral partnerships, attention on expanding tourism opportunities, and educational opportunities, the JTHG NHA has strengthened the heritage, economy, and quality of life in the region.

Partnerships are important to an NHA's ability to leverage funds and increase opportunities for tourism and preservation. The JTHG has over 350 partnering organizations that are actively engaged in promoting the NHA. The JTHG has generated partnerships in all four states. Some critical partners include, government entities and elected officials, convention and visitor bureaus, national park units, educational institutions, preservation and conservation organizations, and historic associations. The partnerships of the JTHG have allowed for increased collaboration among the various sites, entities, and organizations that realize the importance of promoting, preserving, and developing the historic and natural resources of the region. These partnerships and collaborations help enhance the offerings of the NHA and provide locals and tourists with a rich historic, recreational, and cultural experience throughout the NHA.

"Spotlight" Project - EXTREME Journey Summer Camp Program

Designed for 6th- through 8th-graders, the EXTREME Journey Summer Camp is the cornerstone of JTHG's educational programs. Launched in 2006 with a group of 24 students, EXTREME Campers spend two weeks uncovering "the mysteries of history, through espionage." The camp has grown in popularity, with 137 students in 2015 and the addition of camp sessions and locations.

The camp combines historic content with kinesthetic learning to allow for the highest degree of student engagement. By the end of the program, students create documentaries that showcase the history, research, filmmaking, and language knowledge they gained over the course of the program. The EXTREME Journey Summer Camp not only provides a fun educational opportunity for students, but also create stewards for the future preservation of the heritage area's important history and culture.

The JTHG's partnerships and collaborations throughout the region have played an important role in the NHA's ability to attract visitors and generate increased tourism to the sites and resources of the heritage area. The number of historic sites, national parks, and historic towns throughout the JTHG welcome millions of visitors each year. The designation in 2009 of the Journey Through Hallowed Ground National Scenic Byway, the highest designation for a public road, has also played an important role in bringing tourists to the region.¹⁴ The designation shows the JTHG's commitment to preserving the history and resources of the region. At the same time, the designation has also served as a tool to better connect the various offerings of the NHA across state lines. The heritage area has created itineraries and maps that are available online to help visitors plan their tours of the JTHG. Tourism to the region has created a need for restaurants, hotels, and amenities to serve visitors, spurring increased economic development for towns and communities throughout the heritage area.

In addition to increased tourism and economic development, the work of the JTHG has also allowed locals and visitors to expand their knowledge and come to better understand the important history of the region. The JTHG NHA is committed to providing educational opportunities so that others can come to appreciate and also recognize the importance of preserving the culture and heritage of the area. Educational programs offered by the NHA specifically focus on helping students develop an appreciation for the past and responsibility for the future. The "Of the Student, By the Student, For the Student" Program and the "EXTREME Journey Camp" gives students an opportunity to become immersed in American history and heritage and become stewards of the rich history and culture of the area.

The Journey Through Hallowed Ground National Heritage Area is committed to preserving and raising awareness for one of the most historic regions in America. As home to numerous historic towns, museums, sites, parks, and one of the nation's National Scenic Byways, the region is rich in historical and culture significance, as well as natural beauty. Wineries, restaurants, vineyards, and Main Street communities serve as tourist attractions and add to the economic development initiatives of the NHA region. To promote and preserve the importance of the heritage area, the JTHG has formed key partnerships, focused on increasing tourism and economic development, and provided educational opportunities to future generations. As the organization embarks on its second decade, the JTHG continues to remain committed to promoting the importance of this region in our nation's history, forming partnerships and collaborations across state lines, and attracting visitors to come to learn and experience part of our shared American Heritage.

14. "The Journey Through Hallowed Ground Named National Scenic Byway by Department of Transportation." www.hallowedground.org. October 16, 2009.

B. OVERALL ECONOMIC IMPACT

The economic impact of tourism within the Journey Through Hallowed Ground NHA is **\$703.0 million annually**. This economic impact consists of two main components: direct/indirect spending through tourism (\$701.0 million) and operations (\$1.9 million).¹⁵ See Figure 3.

FIGURE 3: OVERALL ECONOMIC IMPACT OF THE JOURNEY THROUGH HALLOWED GROUND NHA

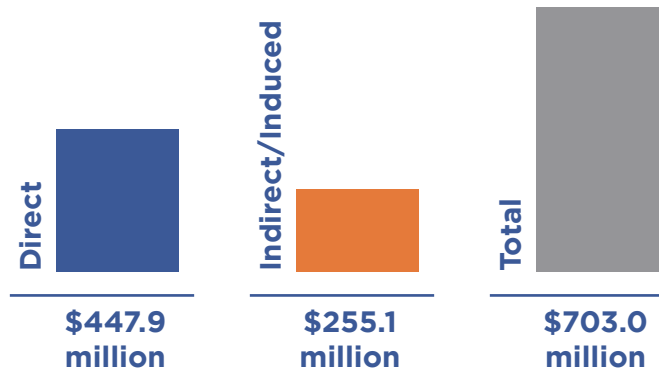


TABLE 11: JOURNEY THROUGH HALLOWED GROUND NHA - OVERALL ECONOMIC IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Economic Impact	\$447,862,332	\$130,305,829	\$124,818,077	\$702,986,238
<i>Tourism</i>	\$446,711,586	\$130,007,141	\$124,327,223	\$701,045,950
<i>Operations</i>	\$1,150,746	\$298,688	\$490,854	\$1,940,288

The table below shows the top 10 sectors in the NHA region impacted by the JTHG's activities and visitors (See Table 12).

TABLE 12: JOURNEY THROUGH HALLOWED GROUND NHA TOP 10 ECONOMIC IMPACT SECTORS

Industry	Economic Output
Hotels and motels	\$190,680,640
Limited-service restaurants	\$142,740,283
Museums, historical sites, zoos, and parks	\$50,714,142
Retail - Miscellaneous store retailers	\$32,231,374
Real estate	\$26,221,857
Owner occupied dwellings	\$22,211,084
Transit and ground passenger transportation	\$18,371,665
Retail - Food and beverage stores	\$13,690,624
Electric power transmission and distribution	\$11,222,365
Advertising, public relations, and related services	\$10,031,783

15. Data used to calculate impacts was based on three-year averages - 2012, 2013, and 2014.

C. TOURISM IMPACT

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 and encouraging tourism within their regions. Tourism numbers are calculated by the JTHG’s regional partners. The three-year average total of visitors and tourists to the JTHG NHA region is 9,975,609 visitors. 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 \$701.0 million in economic benefit was supported annually within the region and state.

**TABLE 13: JOURNEY THROUGH HALLOWED GROUND NHA
ANNUAL ECONOMIC IMPACT OF TOURISM AND VISITATION**

Visitor Segment	% of Total Visitation	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Local Day	19%	\$18,692,681	\$5,432,756	\$5,471,280	\$29,596,717
Non-Local Day	41%	\$61,767,294	\$18,411,031	\$18,267,719	\$98,446,044
Overnight	40%	\$366,251,611	\$106,163,354	\$100,588,224	\$573,003,189
Total	100%	\$446,711,586	\$130,007,141	\$124,327,223	\$701,045,950

The economic spending analysis demonstrates that within the region, visitors traveling 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 40% of NHA visitation, overnight visitors account for over 80% of the economic benefit of NHAs. This is primarily driven by the increased amount of new dollars from outside the region spent on lodging, accommodations, restaurants, transportation, etc.

D. OPERATIONAL IMPACT

In addition to attracting visitors and promoting tourism in the region, the analysis quantifies the economic benefit of the JTHG 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.

**TABLE 14: JOURNEY THROUGH HALLOWED GROUND NHA
ANNUAL ECONOMIC IMPACT OF OPERATIONS**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Operations	\$1,150,746	\$298,688	\$490,854	\$1,940,288

E. OVERALL EMPLOYMENT IMPACT

The tourism industry within the Journey Through Hallowed Ground NHA supports a substantial number of jobs in the region. The total employment impact is **8,401 jobs** (6,564 direct jobs and 1,837 indirect/induced 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.

FIGURE 4: OVERALL EMPLOYMENT IMPACT OF JOURNEY THROUGH HALLOWED GROUND NHA

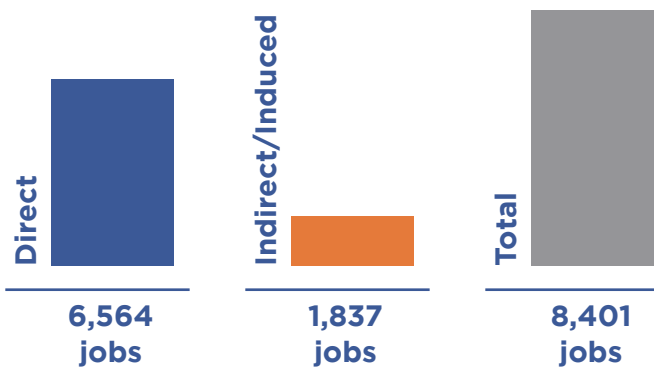


TABLE 15: JOURNEY THROUGH HALLOWED GROUND NHA – OVERALL EMPLOYMENT IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Employment Impact	6,564 jobs	859 jobs	978 jobs	8,401 jobs
<i>Tourism</i>	6,553 jobs	857 jobs	974 jobs	8,384 jobs
<i>Operations</i>	11 jobs	2 jobs	4 jobs	17 jobs

The “Top Employment Sectors” table below illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the JTHG 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 hospitals are also supported by the spending attributable to The JTHG NHA.

TABLE 16: JOURNEY THROUGH HALLOWED GROUND NHA TOP 10 EMPLOYMENT IMPACT SECTORS

Industry	Jobs
Limited-service restaurants	2,627 jobs
Hotels and motels,	2,025 jobs
Retail - Miscellaneous store retailers	914 jobs
Museums, historical sites, zoos, and parks	564 jobs
Transit and ground passenger transportation	267 jobs
Retail - Food and beverage stores	205 jobs
Real estate	140 jobs
Retail - Gasoline stores	122 jobs
Full-service restaurants	77 jobs
Retail - General merchandise stores	65 jobs

F. GOVERNMENT REVENUE IMPACT

NHAs also support state and local governments with the generation of government revenue or tax revenue. As a result of the JTHG’s attraction of visitors, operations, and capital activity, the NHA generates over **\$51.5 million** in tax revenue annually (\$37.3 million direct taxes).

TABLE 17: JOURNEY THROUGH HALLOWED GROUND NHA – STATE AND LOCAL TAX IMPACT

Description	Employee Compensation	Tax on Production and Imports	Households	Corporations
Dividends				\$55,143
<i>Socials In Tax – Employee Contribution</i>	\$121,043			
<i>Social Ins Tax – Employer Contribution</i>	\$234,016			
<i>Tax on Production and Imports: Sales Tax</i>		\$17,982,173		
<i>Tax on Production and Imports: Property Tax</i>		\$20,680,266		
<i>Tax on Production and Imports: Motor Vehicle License</i>		\$448,579		
<i>Tax on Production and Imports: Severance Tax</i>		\$229,043		
<i>Tax on Production and Imports: Other Taxes</i>		\$3,275,133		
<i>Tax on Production and Imports: S/L NonTaxes</i>		\$95,131		
<i>Corporate Profits Tax</i>				\$874,600
<i>Personal Tax: Income Tax</i>			\$6,119,418	
<i>Personal Tax: NonTaxes</i>			\$653,134	
<i>Personal Tax: Motor Vehicle License</i>			\$212,093	
<i>Personal Tax: Property Taxes</i>			\$90,733	
<i>Personal Tax: Other Tax (Fish/Hunt)</i>			\$87,931	
Total	\$355,059	\$42,710,325	\$7,163,308	\$929,742

OVERALL IMPACT: \$51,158,434

G. VOLUNTEER IMPACT

It is estimated that volunteers at the JTHG generate close to **\$34,000 annually** as a result of their volunteer services.¹⁶ Volunteers at The Journey Through Hallowed Ground NHA give their time to serving as counselors to children during “EXTREME Journey Summer Camp” program, providing research skills to the Living Legacy Tree Planting Project, helping with office administration, and special event planning. These benefits are in addition to the \$703.0 million annual impact generated by the NHA.

16. Primary data about number of volunteers and hours volunteered was provided to Tripp Umbach by The Journey through Hallowed Ground NHA. A conservative assumption of \$22.14 per hour was used to calculate the value of volunteer services. This amount was calculated independently by the Points of Light Foundation.

SCHUYLKILL RIVER NHA

A. OVERVIEW OF SCHUYLKILL RIVER

The Schuylkill River National Heritage Area (NHA) has transformed communities along the 128-mile Schuylkill River – towns and cities once known for being industrial and manufacturing hubs – into thriving destinations for tourists, businesses, and residents alike. Since its designation in 2000, the Schuylkill River NHA has formed connections between its five counties and 3.2 million residents to advance a common goal of preserving the rich culture and history of the region. Known as the “Revolutionary River” for its connection to the American Revolution, Industrial Revolution, and Environmental Revolution, the Schuylkill River is the birthplace of some of America’s most influential movements that shaped the nation’s growth and fueled its future.

The NHA uses the Schuylkill River as the main focal point of its endeavors; it works with partners and communities to make the River a vital feature that attracts people to the region. By combining conservation, education, recreation, and historic and cultural preservation, the Schuylkill River NHA has created a successful model of community revitalization and economic development that will continue to promote the assets of the Schuylkill River and its surroundings.

The Schuylkill River NHA endeavors to restore and improve the water quality of the Schuylkill River, which serves as the “spine” of the NHA’s geography. Conservation of the Schuylkill River and the promotion of its use have been top priorities since the origins of the organization in the mid-1970s as the Schuylkill River Greenway Association. Residents of the region and tourists have long associated the Schuylkill River with pollution. The Schuylkill River NHA has taken numerous steps to change that image. The NHA has partnered with major organizations such as Exelon, the Philadelphia Water Department, Aqua, and Coca-Cola and¹⁷ to create The Schuylkill River Restoration Fund, a program that generates funding for water quality and restoration projects for the Schuylkill River watershed.

“Spotlight” Project – The Schuylkill River Trail

Named the “Best Urban Trail” by USA Today in June 2015, the Schuylkill River Trail is a multi-use trail in Southeastern Pennsylvania that provides residents and over two million visitors a year with a great way to exercise and enjoy the assets of the region. The trail connects dozens of communities over 60 miles, from Philadelphia to Reading.

The Schuylkill River NHA is working to expand the trail and its offerings to more communities and individuals. When completed, the trail is projected to run 130 miles. The increase in the length and reach of the trail will mean a growth in the number of visitors and residents who use the trail and a need for additional services and businesses. The popularity of the trail not only benefits residents and recreation enthusiasts but brings economic development to the communities that surround it.

17. Exelon is the leading U.S. competitive energy provider. Exelon has one of the nation’s cleanest and lowest-cost power generation portfolios. Exelon is headquartered in Chicago, Illinois and does business in 48 states, the District of Columbia and Canada. www.exeloncorp.com

By working to restore and improve the quality of the Schuylkill River, the NHA has been able to utilize the river as a recreational asset for the region. The Schuylkill River has become a major tourist attraction. Running along the Schuylkill River, the trail also serves as a main attraction for visitors and a recreation spot for residents. The Schuylkill River Trail is a multi-use trail that runs along 60 miles of the Schuylkill River in southeastern Pennsylvania. The trail is projected to span 130 miles long after completion; it will reach a larger number of communities and residents and serve an increased number of visitors. The popularity of the Schuylkill River and Trail is continually increasing due to the recreational events and programs that the NHA sponsors each year. In the summer of 2015, the Schuylkill River NHA hosted 184 paddlers for its 17th annual Schuylkill River Sojourn, and a record-breaking 73 paddlers participated in the full 112-mile trip.

The commitment to revitalize the natural resources of the NHA through the restoration of the Schuylkill River and creation of the Schuylkill River Trail has not only provided the region with recreational assets but has also served as a catalyst for economic development. The Schuylkill River Trail and Schuylkill River function as economic development engines for the towns that run along them. With the improved image of the river and development of the trail, the riverfront has increasingly served to bolster community revitalization efforts to the benefit of residents and businesses alike. Bicycle, kayak, and canoe rental shops, fishing stores, restaurants, breweries, and hotels have all opened in cities and towns along the Schuylkill River to serve visitors, tourists, and local residents.

Finding opportunities for future growth and development plays a role in all of the initiatives of the Schuylkill River NHA. The NHA is constantly looking for ways to promote the region and its offerings. The Schuylkill River NHA was a trailblazer in the state of Pennsylvania by creating one of the first free bike share programs in the state. NHA

leadership is continuing to create innovative ways to further the growth and expand the benefits of the Schuylkill River NHA. The recent and growing partnership between the Schuylkill River and Sly Fox Brewery has been considered an innovative and attractive partnership that will help the Schuylkill River NHA engage a broader constituency of for-profit partners. The Schuylkill River NHA and Sly Fox Brewery have collaborated to bring increased marketing and attention to one another, while also working to generate funding for the initiatives of the NHA. In the spring of 2015, the Schuylkill River NHA and Sly Fox joined forces to create “SRT Ale” that celebrates the Schuylkill River Trail and its benefits to the region. Proceeds from the sale of the ale went to the NHA and totaled over \$4,000. Sly Fox Brewery will start selling SRT Ale again in the spring of 2016.

While the Schuylkill River NHA looks to continue the development of the area, the organization always maintains its focus on preserving the rich history and culture of the region. The Schuylkill River NHA shares the unique history of the river and the region’s role in shaping the nation. The NHA realizes the importance of maintaining the region’s historical assets; it ties together the cultural and historical elements of the 128-mile corridor to tell a cohesive story to all who come to experience the region.

The opportunities for community revitalization and economic development are many along the Schuylkill River due in large part to the efforts of the Schuylkill River NHA. Through a focus on preservation and revitalization of the river, the NHA has been able to create recreational assets that make for viable and healthy communities and attract people to come to live, work, and visit the Schuylkill River. Through robust programs, key partnerships, attractions and events, the Schuylkill River NHA is able to tie the important history and culture of the Schuylkill River to initiatives and endeavors that will come to further the growth and development of the Schuylkill River communities.

B. OVERALL ECONOMIC IMPACT

The economic impact of the Schuylkill River NHA is **\$589.9 million annually**. This economic impact consists of four main components: tourism (\$588.1 million), operations (\$1.1 million), grantmaking activities (\$388,000), and capital expenditures (\$279,000).¹⁸ See Figure 5.

FIGURE 5: OVERALL ECONOMIC IMPACT OF SCHUYLKILL RIVER NHA

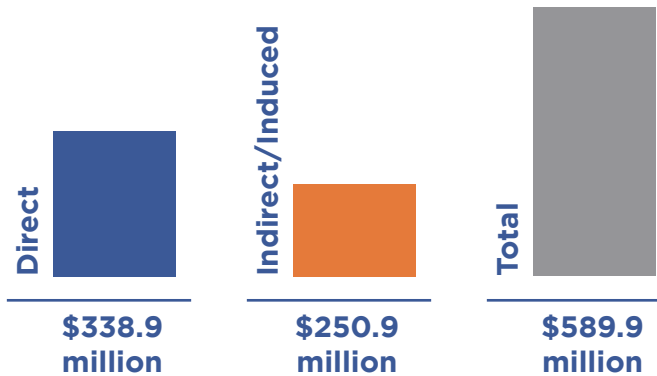


TABLE 18: SCHUYLKILL RIVER NATIONAL HERITAGE AREA - OVERALL ECONOMIC IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Economic Impact	\$338,936,782	\$112,128,742	\$138,818,710	\$589,884,233
<i>Tourism</i>	\$338,176,496	\$111,906,270	\$138,021,302	\$588,104,068
<i>Operations</i>	\$602,838	\$167,232	\$343,243	\$1,113,312
<i>Grantmaking</i>	\$0	\$0	\$387,653	\$387,653
<i>Capital Projects</i>	\$157,448	\$55,240	\$66,511	\$279,200

The table below shows the top 10 sectors in the NHA region impacted by the Schuylkill River NHA's activities and visitors (See Table 19).

TABLE 19: SCHUYLKILL RIVER NATIONAL HERITAGE AREA TOP 10 ECONOMIC IMPACT SECTORS

Industry	Economic Output
Hotels and motels, including casino hotels	\$143,298,939
Limited-service restaurants	\$107,818,432
Museums, historical sites, zoos, and parks	\$38,423,283
Retail - Miscellaneous store retailers	\$24,531,897
Real estate	\$24,348,564
Owner-occupied dwellings	\$16,889,569
Transit and ground passenger transportation	\$13,836,549
Wholesale trade	\$11,956,246
Retail - Food and beverage stores	\$10,787,593
Insurance carriers	\$9,852,869

¹⁸ Data used to calculate impacts was based on three-year averages - 2012, 2013, and 2014.

C. TOURISM IMPACT

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 and encouraging tourism within their regions. Tourism numbers are calculated by Schuylkill River’s regional partners. The three-year average total of visitors and tourists to the Schuylkill River NHA region is 7,791,979 visitors. 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 \$588.1 million in economic benefit was supported annually within the region and state.

TABLE 20: SCHUYLKILL RIVER 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	19%	\$14,148,171	\$4,746,400	\$5,827,270	\$24,721,842
Non-Local Day	41%	\$46,818,730	\$16,134,293	\$19,410,217	\$82,363,240
Overnight	40%	\$277,209,594	\$91,025,576	\$112,783,816	\$481,018,986
Total	100%	\$338,176,495	\$111,906,269	\$138,021,303	\$588,104,068

The economic spending analysis demonstrates that within the region, visitors traveling 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 40% of NHA visitation, overnight visitors account for over 80% 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.

D. OPERATIONAL IMPACT

In addition to attracting visitors and promoting tourism in the region, the analysis quantifies the economic benefit of the Schuylkill River NHA 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.

TABLE 21: SCHUYLKILL RIVER NATIONAL HERITAGE AREA ANNUAL ECONOMIC IMPACT OF OPERATIONS

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Operations	\$1,665,717	\$623,750	\$829,000	\$3,118,467

E. GRANTMAKING

The Schuylkill River NHA is active in the region with its partners through capital investment and grantmaking efforts that support projects and programs that are aligned with the educational, cultural, 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 the NHA. For the purposes of this study, grants are quantified as increased salary provided by the NHA within their region.

**TABLE 22: SCHUYLKILL RIVER NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF GRANTMAKING**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Grantmaking	\$0	\$0	\$387,653	\$387,653

F. CAPITAL PROJECTS

Capital investment of the Schuylkill River NHA supports the creation of projects and sites within the NHA that allow for the further development of opportunities and mission expansion of the NHA. Similar to how tourism and operations support economic activity within the region, capital projects provide an infusion of funds to assist with the development of buildings, sites, and projects within the NHA.

**TABLE 23: SCHUYLKILL RIVER NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF CAPITAL PROJECTS**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Capital Projects	\$157,448	\$55,240	\$66,511	\$279,200

G. OVERALL EMPLOYMENT IMPACT

The Schuylkill River National Heritage Area supports a substantial number of jobs in the region. The total employment impact is **6,154 jobs** (4,588 direct jobs and 1,566 indirect/induced 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.

FIGURE 6: OVERALL EMPLOYMENT IMPACT OF SCHUYLKILL RIVER NHA

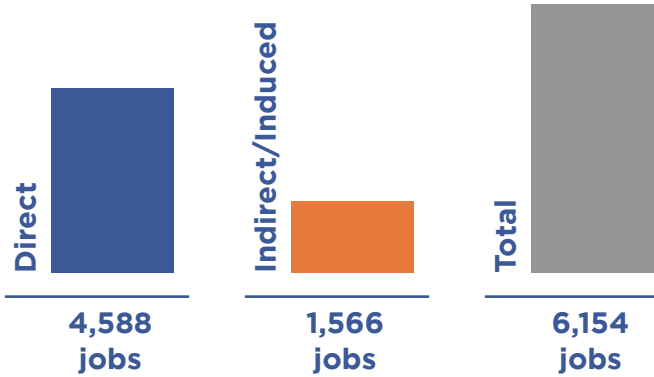


TABLE 24: SCHUYLKILL RIVER NATIONAL HERITAGE AREA - OVERALL EMPLOYMENT IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Employment Impact	4,588 jobs	615 jobs	951 jobs	6,154 jobs
<i>Tourism</i>	4,581 jobs	614 jobs	945 jobs	6,140 jobs
<i>Operations</i>	6 jobs	1 jobs	2 jobs	9 jobs
<i>Grantmaking</i>	0 jobs	0 jobs	3 jobs	3 jobs
<i>Capital Projects</i>	1 job	0 jobs	1 job	2 jobs

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

TABLE 25: SCHUYLKILL RIVER NATIONAL HERITAGE AREA TOP 10 EMPLOYMENT IMPACT SECTORS

Industry	Jobs
Limited-service restaurants	1,850 jobs
Hotels and motel, including casino hotels	1,362 jobs
Retail - Miscellaneous store retailers	650 jobs
Museums, historical sites, zoos, and parks	373 jobs
Transit and ground passenger transportation	195 jobs
Retail - Food and beverage stores	173 jobs
Real estate	112 jobs
Retail - Gasoline stores	95 jobs
Hospitals	63 jobs
Full-service restaurants	58 jobs

H. GOVERNMENT REVENUE IMPACT

NHAs also support state and local governments with the generation of government revenue or tax revenue. As a result of the Schuylkill River NHA’s attraction of visitors, operations, and capital activity, the NHA generates over **\$37.7 million** in tax revenue annually (\$24.9 million direct taxes).

TABLE 26: SCHUYLKILL RIVER NATIONAL HERITAGE AREA – STATE AND LOCAL TAX IMPACT

Description	Employee Compensation	Tax on Production and Imports	Households	Corporations
Dividends				\$55,931
<i>Socials In Tax – Employee Contribution</i>	\$95,572			
<i>Social Ins Tax – Employer Contribution</i>	\$184,772			
<i>Tax on Production and Imports: Sales Tax</i>		\$14,400,445		
<i>Tax on Production and Imports: Property Tax</i>		\$12,278,198		
<i>Tax on Production and Imports: Motor Vehicle License</i>		\$250,678		
<i>Tax on Production and Imports: Severance Tax</i>				
<i>Tax on Production and Imports: Other Taxes</i>		\$2,580,590		
<i>Tax on Production and Imports: S/L NonTaxes</i>		\$76,485		
<i>Corporate Profits Tax</i>				\$1,029,253
<i>Personal Tax: Income Tax</i>			\$5,248,587	
<i>Personal Tax: NonTaxes</i>			\$661,423	
<i>Personal Tax: Motor Vehicle License</i>			\$199,854	
<i>Personal Tax: Property Taxes</i>			\$95,297	
<i>Personal Tax: Other Tax (Fish/Hunt)</i>			\$132,864	
Total	\$280,344	\$30,036,397	\$6,338,024	\$1,085,185

OVERALL IMPACT: \$37,739,950

I. VOLUNTEER IMPACT

It is estimated that volunteers at sites throughout the NHA generate more than **\$60,000 annually** as a result of their volunteer services.¹⁹ Volunteers at the Schuylkill River NHA give their time to serving meals at the seven-day River Sojourn, supporting periodic bike rides, and maintaining the Schuylkill River Trail. These benefits are in addition to the **\$589.9 million** annual impact generated by the NHA.

19. Primary data about number of volunteers and hours volunteered was provided to Tripp Umbach by the Schuylkill River NHA. A conservative assumption of \$22.14 per hour was used to calculate the value of volunteer services. This amount was calculated independently by the Points of Light Foundation.

UPPER HOUSATONIC VALLEY NATIONAL HERITAGE AREA

A. OVERVIEW OF THE UPPER HOUSATONIC

The Upper Housatonic National Valley National Heritage Area fosters relationships and connections between various organizations and entities in the upper Housatonic Valley region to promote the rich history and culture of the region, preserve the natural resources and environment, and through these efforts, create viable economic growth and opportunities. Spanning 60 miles between Massachusetts and Connecticut, the Upper Housatonic NHA has a deep and expansive history; it is home to arts and literature, industry, America's revolution, and African American and Native American heritage. The Upper Housatonic NHA is also abundant with natural resources and boasts scenic treasures with the Housatonic River serving as the backbone of the heritage area. The upper portion of the NHA, which is more urbanized and connected to larger cities, differs from the more rural lower portion of the heritage area. Yet, the Upper Housatonic Valley NHA has been able to create unity among the various communities, sites, and stakeholders. By promoting the natural assets of the region through recreation, sponsoring programs and projects that educate individuals about the rich history of the region, and identifying opportunities for growth and development, the Upper Housatonic Valley National Heritage Area has added quality of life to the region that attracts individuals to reside in and visit the upper Housatonic Valley.

Opportunities for recreation are vast in the Upper Housatonic Valley NHA. The Housatonic River allows for canoeing and kayaking, which have become popular activities for visitors and natives alike. Cycling and walking trails are also important recreational fixtures in the Upper Housatonic NHA. Numerous biking and walking trails are available throughout the heritage area, including portions of the Appalachian Trail.

“Spotlight” Project – Annual Heritage Walks

Over three weekends in the fall, the Upper Housatonic Valley NHA hosts dozens of free, guided walking tours along the various trails and sites of the heritage area. This year, the Upper Housatonic Valley NHA hosted its 14th annual Heritage Walks where historians, environmentalists, and educators heritage walkers about the rich history, culture, and abundant resources of the heritage area.

The Heritage Walks allow residents to enjoy all of the offerings of the Upper Housatonic NHA and provides the NHA with a tourism attraction and chance to educate visitors and residents alike. The Heritage Walks also foster collaboration and the creation of strong partnerships as the Upper Housatonic Valley NHA works with various educators and organizations to make the Heritage Walks possible.

Leadership at the Upper Housatonic Valley NHA realizes how important the creation of recreational trails and activities are to tourism and economic growth for the heritage area. The NHA has a number of plans and projects currently underway to expand recreational offerings. The NHA is looking to further expand its bicycling and walking trails into the lower portion of the heritage area in Connecticut and is currently working on the creation of additional trails in the northern portion of Litchfield, CT. The Upper Housatonic NHA is also coordinating plans to build a contiguous network of bike trails that connect New York City to Montreal. These proposed bike trails would run through the Upper Housatonic NHA and would provide the opportunity for a major increase in the number of visitors who pass through the heritage area each year.²⁰ With an increase in the number of bike and walking trails comes the need for more businesses, such as hotels, restaurants, bike shops, and canoe rental stores, within the heritage area. All of which, would provide growth and development to communities in the region.

Just as the NHA has been able to connect its geography, sites, and stakeholders, it has also been able to merge its recreational offerings with the history of the region in a way that allows visitors to experience and understand the region's story. To enhance the experience when paddling the Housatonic River, the NHA helped to create a river guide for visitors who are planning a trip along the Housatonic River to know the historic sites, natural resources, and environment that are along the river. This provides visitors to the NHA with the opportunity to explore all that the region has to offer – the recreation, natural environment, and history. In addition to the river guide, the NHA offers heritage walks that combine short walks, hikes, biking, and/or canoeing with visiting historical sites and museums of the heritage area. This allows visitors to experience both the recreational and educational opportunities of the heritage area. The fact that the rich cultural heritage of the area and

the recreation and environmental assets are accessible in a way that is so well tied together serves as a big tourist draw as it blends together what brings people to the region.

In order to ensure that the preservation and legacy of the Upper Housatonic is alive and well in the region, it is imperative to teach and convey the history of the region to visitors and locals. The Upper Housatonic Valley NHA offers a variety of ways for people to come to better understand the diverse and expansive history and culture of the heritage area – from sponsoring a number of festivals and events, such as the Lift Ev'ry Voice Festival²¹, to having hands-on classes at the Paper Trail²² events. This school year, the Upper Housatonic NHA is partnering with a local regional school district to pilot a program called the Local Heritage Learning Lab that allows teachers and students to take part in place-based heritage education. This serves as an innovative way for students and teachers alike to learn more about their region's history.

The Upper Housatonic Valley NHA connects communities, people, and assets of the 60 mile region between Massachusetts and Connecticut to create a cohesive heritage area. The region boasts a number of recreational and environmental assets, including the Housatonic River. The Upper Housatonic NHA has worked to preserve these resources and make them true assets to the region. By creating cycling and walking trails, promoting the wealth of history and culture, and looking for continued ways to expand the number of recreational opportunities, the NHA is building tourism and economic development and growth for communities. The Upper Housatonic Valley NHA consistently weaves together recreation, history, culture, and interpretive programming in a way that makes visitors and locals aware of the offerings and richness of the area. Through expanded programs and offerings, and through building collaborations among heritage partners, the Upper Housatonic NHA will continue to add to the quality of life in the region.

20. The proposed trail is called the "Western New England Greenway" <http://wnegreenway.org/>.

21. The Lift Ev'ry Voice Festival is a summer festival hosted in the Berkshires that celebrates the rich traditions of African American community, culture, arts, history, and heritage. The Upper Housatonic NHA is a sponsor of this event. www.lifteveryvoice.org

22. Area teachers have the opportunity to learn the basics of hand papermaking in a workshop that is part of the Paper Trail site. This serves as an example of some of the distinct and hands-on education initiatives of the NHA.

B. OVERALL ECONOMIC IMPACT

The economic impact of the Upper Housatonic Valley NHA is **\$169.9 million annually**. This economic impact consists of three main components: tourism (\$169.6 million), operations (\$291,964), and grantmaking activities (\$37,768).²³ See Figure 7.

FIGURE 7: OVERALL ECONOMIC IMPACT OF UPPER HOUSATONIC VALLEY NHA

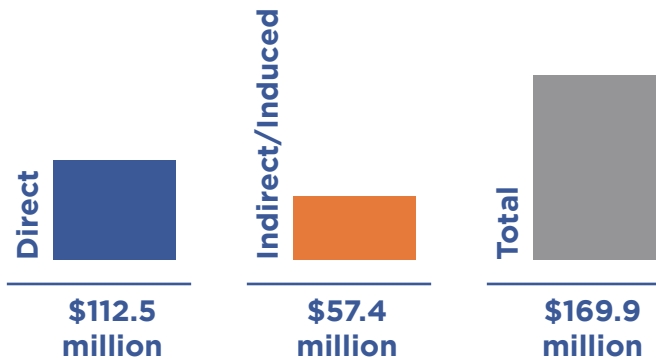


TABLE 27: UPPER HOUSATONIC VALLEY NHA - OVERALL ECONOMIC IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Economic Impact	\$112,465,465	\$27,692,464	\$29,733,910	\$169,891,839
<i>Tourism</i>	\$112,258,880	\$27,640,100	\$29,663,127	\$169,562,107
<i>Operations</i>	\$206,585	\$52,364	\$33,015	\$291,964
<i>Grantmaking</i>	\$0	\$0	\$37,768	\$37,768

The table below shows the top 10 sectors in the NHC region impacted by the Upper Housatonic Valley NHA's activities and visitors (See Table 28).

TABLE 28: UPPER HOUSATONIC VALLEY NHA TOP 10 ECONOMIC IMPACT SECTORS

Industry	Economic Output
Hotels and motels, including casino hotels	\$47,575,441
Limited-service restaurants	\$35,620,817
Museums, historical sites, zoos, and parks	\$12,749,415
Real estate	\$8,857,645
Retail - Miscellaneous store retailers	\$8,110,190
Owner-occupied dwellings	\$4,895,044
Transit and ground passenger transportation	\$4,668,615
Retail - Food and beverage stores	\$3,483,924
Wholesale trade	\$2,487,061
Electric power transmission and distribution	\$2,422,093

²³ Data used to calculate impacts was based on three-year averages - 2012, 2013, and 2014.

C. TOURISM IMPACT

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 and encouraging tourism within their regions. Tourism numbers are calculated by the Upper Housatonic Valley NHA’s regional partners. The three-year average total of visitors and tourists to the Upper Housatonic Valley NHA region was approximately 2,586,576 visitors. 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 \$169.6 million in economic benefit was supported annually within the region and state.

TABLE 29: UPPER HOUSATONIC VALLEY NHA ANNUAL ECONOMIC IMPACT OF TOURISM AND VISITATION

Visitor Segment	% of Total Visitation	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Local Day	19%	\$4,696,536	\$1,216,311	\$1,337,364	\$7,250,211
Non-Local Day	41%	\$15,541,643	\$4,156,305	\$4,484,919	\$24,182,867
Overnight	40%	\$92,020,702	\$22,267,484	\$23,840,844	\$138,189,030
Total	100%	\$112,258,881	\$27,640,100	\$29,663,127	\$169,622,108

The economic spending analysis demonstrates within the region, visitors traveling 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 40% of NHA visitation, overnight visitors account for approximately 80% 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.

D. OPERATIONAL IMPACT

In addition to attracting visitors and promoting tourism in the region, the analysis quantifies the economic benefit of the Upper Housatonic Valley NHA through its operating activities. This impact is represented by the spending of the organization 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 the regional economy.

TABLE 30: UPPER HOUSATONIC VALLEY NHA ANNUAL ECONOMIC IMPACT OF OPERATIONS

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Operations	\$206,585	\$52,364	\$33,015	\$291,964

E. GRANTMAKING

The Upper Housatonic Valley NHA is active in the region with its partners through grantmaking efforts that support projects and programs that are aligned with the educational, historical, cultural, 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 the NHA. For the purposes of this study, grants are quantified as increased salary provided by the NHA within their region.

TABLE 31: UPPER HOUSATONIC VALLEY NHA ANNUAL ECONOMIC IMPACT OF GRANTMAKING

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Grantmaking	\$0	\$0	\$37,768	\$37,768

F. OVERALL EMPLOYMENT IMPACT

The Upper Housatonic Valley NHA supports a substantial number of jobs in the region. The total employment impact is **1,944 jobs** (1,527 direct jobs and 417 indirect/induced 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.

FIGURE 8: OVERALL EMPLOYMENT IMPACT OF UPPER HOUSATONIC VALLEY NHA

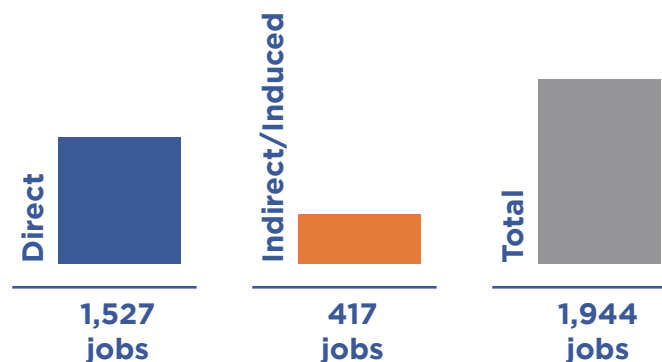


TABLE 32: UPPER HOUSATONIC VALLEY NHA – OVERALL EMPLOYMENT IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Employment Impact	1,527 jobs	183 jobs	234 jobs	1,944 jobs
<i>Tourism</i>	1,525 jobs	183 jobs	233 jobs	1,941 jobs
<i>Operations</i>	2 jobs	0 jobs	1 job	3 jobs
<i>Grantmaking</i>	0 jobs	0 jobs	0 jobs	0 jobs

**Grantmaking did not add to the overall employment impact*

The “Top Employment Sectors” table below illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the Upper Housatonic Valley 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 transportation are also supported by the spending attributable to the Upper Housatonic Valley NHA.

**TABLE 33: UPPER HOUSATONIC VALLEY NHA
TOP 10 EMPLOYMENT IMPACT SECTORS**

Industry	Jobs
Limited-service restaurants	602 jobs
Hotels and motels, including casino hotels	444 jobs
Retail, Miscellaneous store retailers	225 jobs
Museums, historical sites, zoos, and parks	135 jobs
Transit and ground passenger transportation	71 jobs
Retail - Food and beverage stores	57 jobs
Real estate	41 jobs
Retail - Gasoline stores	27 jobs
Full-service restaurants	18 jobs
All other food and drinking places	16 jobs

G. GOVERNMENT REVENUE IMPACT

NHAs also support state and local governments with the generation of government revenue or tax revenue. As a result of the Upper Housatonic Valley NHA’s attraction of visitors, operations, and capital activity, the NHA generates over **\$15 million** in tax revenue annually (\$11.4 million in direct taxes).

TABLE 34: UPPER HOUSATONIC VALLEY NHA - STATE AND LOCAL TAX IMPACT

Description	Employee Compensation	Tax on Production and Imports	Households	Corporations
Dividends				\$57,250
<i>Socials In Tax - Employee Contribution</i>	\$30,237			
<i>Social Ins Tax - Employer Contribution</i>	\$58,459			
<i>Tax on Production and Imports: Sales Tax</i>		\$4,902,422		
<i>Tax on Production and Imports: Property Tax</i>		\$7,069,096		
<i>Tax on Production and Imports: Motor Vehicle License</i>		\$77,690		
<i>Tax on Production and Imports: Severance Tax</i>		\$29		
<i>Tax on Production and Imports: Other Taxes</i>		\$394,280		
<i>Tax on Production and Imports: S/L NonTaxes</i>		\$27,210		
<i>Corporate Profits Tax</i>				\$371,881
<i>Personal Tax: Income Tax</i>			\$1,828,605	
<i>Personal Tax: NonTaxes</i>			\$148,252	
<i>Personal Tax: Motor Vehicle License</i>			\$40,510	
<i>Personal Tax: Property Taxes</i>			\$34,606	
<i>Personal Tax: Other Tax (Fish/Hunt)</i>			\$5,350	
Total	\$88,696	\$12,470,727	\$2,057,323	\$387,669

OVERALL IMPACT: \$15,004,415**H. VOLUNTEER IMPACT**

It is estimated that volunteers at sites throughout the NHA generate more than **\$188,000 annually** as a result of their volunteer services.²⁴ Volunteers give their time to heritage-related programs in the Upper Housatonic Valley National Heritage Area. These programs include the annual Heritage Walks and the Bascom Lodge Heritage Series, a weekly program of free heritage talks. Volunteers also contribute hundreds of hours to the repair and maintenance of trails within the NHA and to the annual Word X Word Festival.²⁵ These volunteer benefits are in addition to the **\$169.9 million annual impact** generated by the NHA.

24. Primary data about number of volunteers and hours volunteered was provided to Tripp Umbach by the Upper Housatonic NHA. A conservative assumption of \$22.14 per hour was used to calculate the value of volunteer services. This amount was calculated independently by the Points of Light Foundation.

25. The Word X Word Festival uses spoken word, poetry and storytelling in shared space and time to celebrate diversity and creativity, empower the individual, foster understanding and empathy, and make real human connections. <http://wordxwordfestival.com/>.

MOTORCITIES NHA

A. OVERVIEW OF MOTORCITIES

The automotive industry has been one of the most powerful, innovative, and prosperous industries in American history, as it created millions of jobs, forever changed the way people traveled, and generated a strong working class. The Greater Central and Southeast regions of Michigan were home to the creation of the automotive boom. Today, the automotive industry and its rich cultural significance are alive and well in Detroit and surrounding communities due to the MotorCities National Heritage Area (MCNHA). Designated as a NHA in 1998, MCNHA serves as a preserver of the automotive industry; it connects the sites, museums, and communities that tell the history of the automotive industry across 10,000 square miles. MCNHA has been able to spur collaboration and create a cohesive and authentic automotive heritage experience in a way that no other single organization has been able to do. Through strong collaboration, programming and events, and education, MCNHA promotes and generates lasting appreciation for the history and heritage of one of the nation's most important industries, while also spurring tourism and community development in the region.

The synergies that MCNHA has created among the various organizations and sites within the heritage area have been vital to the success of MCNHA's efforts. One way that MCNHA has been able to create alignment and cohesion among sites within the heritage area is through programs and events. The Lunch and Learn Series, for example, has created connections among heritage organizations. Periodically, MCNHA hosts a lunch series where representatives from sites come together to listen to presentations and trainings on how they can individually and collectively work to increase their capacity to be preservers and educators of automotive history in the region. Another program that demonstrates the way that MCNHA serves as an umbrella organization that brings together various entities and sites to tell a cohesive story is the Wayside signage program. MCNHA has installed 250 outdoor exhibits in communities throughout central and southeastern Michigan which commemorate Michigan's automotive heritage. The Wayside sign program attracts both locals and visitors alike to come to better understand the heritage of the region.

“Spotlight” Project – The Ford Piquette Avenue Plant

The Ford Piquette Avenue plant is Henry Ford's first factory built for the Ford Motor Company. While only operating as a Ford plant for a short period of time, the contributions from this facility were transformative. Most notable is the iconic Ford Model T, the car that “put the world on wheels”.

When the plant eventually became dormant, MotorCities NHA worked with local community volunteers to reclaim the property and transform the Ford Piquette Avenue plant into a regional asset and tourist attraction. Since 2007, MCNHA has provided grants to fund numerous projects, including façade restoration. Over \$1,500,000 has been leveraged by MCNHA and other public and private investors to open the site to 15,000 visitors annually. Investment in the Ford Piquette Plant has spurred significant additional economic investment in the surrounding area.

The grant making efforts of MCNHA have also played a significant role in creating strong sites within the heritage area. The Challenge Grant Program²⁶ provides organizations within the heritage corridor the opportunity to receive funding for projects and initiatives that promote the history of the automotive and labor industries, provide education, spur tourism, and generate community development in the region. Thanks to the grants provided by MCNHA, including over one million dollars in funding to over 100 organizations between 2002 and 2014, sites within the heritage area have had the ability to develop programs and projects that benefit not only their individual organizations but the heritage area as a whole.

Through the development of sites and organizations within the heritage area and the creation a cohesive automotive heritage community, the region has grown as a tourist destination. The sites within the heritage area alone bring millions of visitors per year, while the events under the umbrella of Autopalooza²⁷ particularly serve as big tourist draws to the region. Every summer, Autopalooza attracts millions of tourists to the Central and Southeast Michigan region and brings significant revenue to businesses throughout the region. Autopalooza serves as a prime example of MCNHA's activities and initiatives as it brings the rich history of the automotive industry to life, draws visitors to the region, and educates tourists and locals on the importance of the automotive industry. The MCNHA has partnered with tourist organizations in the region, including Pure Michigan and the Detroit Visitors & Convention Bureau, to provide increased visibility to the heritage area and promotion of its programs and events.

MCNHA focuses on preserving the history of the automotive industry in Detroit and surrounding communities, but is also looking toward the future of the industry. MCNHA has given attention to demonstrating to young people that the auto industry is not just about the past, but is also an important part of their economic present and future. Through factory tours and classroom presentations, MCNHA has helped young individuals in the region make a concrete connection to the importance of science, technology, engineering, and math (STEM) education. While the MCNHA has been able to create a heritage area that allows individuals to know the history of the automotive industry, through their educational programs, they are also helping to promote the future growth of the industry for years to come.

The automotive industry is one of the most innovative and prosperous industries in the nation's history. In the early 20th century, the creation of the automotive industry forever changed the way people travel. It is important for individuals to understand the significance of this industry, especially as it continues to play an important role in the nation's economy today. MCNHA provides individuals with the opportunity to come to learn about the automotive industry by connecting organizations and sites within the greater Detroit region to create a cohesive and comprehensive automotive heritage experience. By serving as an umbrella organization for a number of sites and entities within the heritage area, MCNHA has been able to provide programming, events, funding, and education that makes for a strong automotive heritage site. As MCNHA moves forward, the heritage site will continue to market and increase the visibility of the region and grow its partnerships to attract tourism, promote development, and allow a greater number of people to understand more about the automotive industry of the past, present, and future.

26. The MotorCities National Heritage Area Challenge Grant Program provides up to 20 percent of total project costs to the successful applicant organizations.

27. Autopalooza is an annual summer event across Metro Detroit that features automotive cruises, shows, and races while preserving the heritage of the area. The event is sponsored by The Detroit Metro Convention & Visitors Bureau, Pure Michigan, and the MotorCities National Heritage Area. www.autopalooza.org.

B. OVERALL ECONOMIC IMPACT

The economic impact of MCNHA is approximately **\$410.4 million annually**. This economic impact consists of four main components: tourism (\$408.6 million), operations (\$1.7 million), grantmaking (\$53,678), and capital projects (\$88,423).²⁸ See Figure 9.

FIGURE 9: OVERALL ECONOMIC IMPACT OF MOTORCITIES NHA

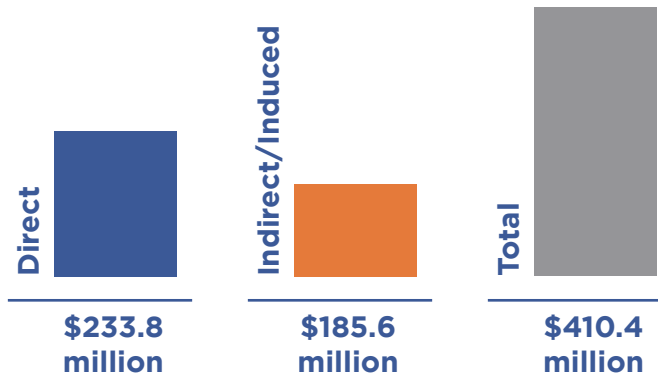


TABLE 35: MOTORCITIES NATIONAL HERITAGE AREA - OVERALL ECONOMIC IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Economic Impact	\$228,724,017	\$83,227,124	\$98,500,082	\$410,451,223
<i>Tourism</i>	\$227,561,978	\$82,842,128	\$98,170,918	\$408,575,024
<i>Operations</i>	\$1,113,191	\$366,666	\$254,242	\$1,734,099
<i>Grantmaking</i>	\$0	\$0	\$53,678	\$53,678
<i>Capital Projects</i>	\$48,879	\$18,330	\$21,245	\$88,423

The table below shows the top 10 sectors in the NHA region impacted by MCHNA's activities and visitors (See Table 36).

TABLE 36: MOTORCITIES NATIONAL HERITAGE AREA TOP 10 ECONOMIC IMPACT SECTORS

Industry	Economic Output
Hotels and motels, including casino hotels	\$99,320,778
Limited-service restaurants	\$74,895,620
Museums, historical sites, zoos, and parks	\$26,092,320
Real estate	\$17,527,380
Retail - Miscellaneous store retailers	\$16,767,051
Owner-occupied dwellings	\$12,484,728
Transit and ground passenger transportation	\$9,362,803
Wholesale trade	\$7,889,522
Insurance carriers	\$7,885,799
Retail - Food and beverage stores	\$7,136,777

28. Data used to calculate impacts was based on three-year averages - 2012, 2013, and 2014.

C. TOURISM IMPACT

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 and encouraging tourism within their regions. Tourism numbers are calculated by MCNHA’s regional partners. The three-year average total of visitors and tourists to the MCNHA region was approximately 5,742,130 visitors. 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 \$408.6 million in economic benefit was supported annually within the region and state.

**TABLE 37: MOTORCITIES 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	19%	\$9,520,431	\$3,579,417	\$4,383,085	\$17,482,933
Non-Local Day	41%	\$31,504,741	\$12,246,312	\$14,590,677	\$58,341,730
Overnight	40%	\$186,536,806	\$67,016,400	\$79,197,155	\$332,750,361
Total	100%	\$227,561,978	\$82,842,128	\$98,170,918	\$408,575,024

The economic spending analysis demonstrates within the region, visitors traveling 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 41% of NHA visitation, overnight visitors account for approximately 80% 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.

D. OPERATIONAL IMPACT

In addition to attracting visitors and promoting tourism in the region, the analysis quantifies the economic benefit of MCNHA 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.

**TABLE 38: MOTORCITIES NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF OPERATIONS**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Operations	\$1,113,191	\$366,666	\$254,242	\$1,734,099

E. GRANTMAKING

MCNHA is active in the region with its partners through grantmaking efforts that support projects and programs that are aligned with the educational, cultural, 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 the NHA. For the purposes of this study, grants are quantified as increased salary provided by the NHA within their region.

**TABLE 39: MOTORCITIES NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF GRANTMAKING**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Grantmaking	\$0	\$0	\$387,653	\$387,653

The grantmaking activities of MCNHA attract other organizations and funders in the region to also monetarily support the development of programs and projects that support the overall mission of the NHA. While not accounted for in the overall economic impact of MCNHA, the grantmaking of MCNHA allowed for leveraged funding for projects and initiatives, contributing an additional \$268,807 in economic impact.

F. CAPITAL PROJECTS

Capital investment of the MCNHA supports the creation of projects and sites within the NHA that allow for the further development of opportunities and mission expansion of the NHA. Similar to how tourism and operations support economic activity within the region, capital expenditures provide an infusion of funds to assist with the development of buildings, sites, and projects within the NHA.

**TABLE 40: MOTORCITIES NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF CAPITAL PROJECTS**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Capital Projects	\$48,849	\$18,330	\$21,245	\$88,423

G. OVERALL EMPLOYMENT IMPACT

MCNHA supports a substantial number of jobs in the region. The total employment impact is **4,560 jobs** (3,251 direct jobs and 1,309 indirect/induced 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.

FIGURE 10: OVERALL EMPLOYMENT IMPACT OF MOTORCITIES NHA

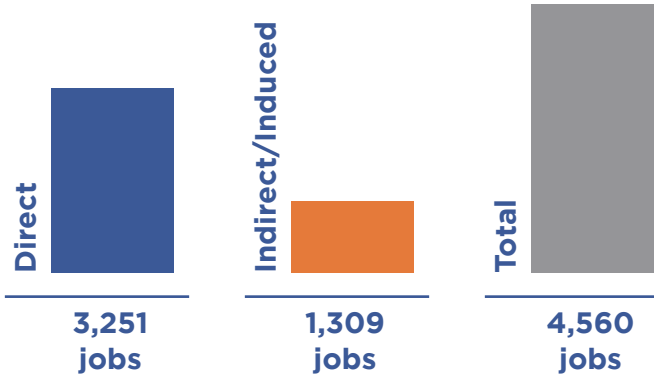


TABLE 41: MOTORCITIES NATIONAL HERITAGE AREA - OVERALL EMPLOYMENT IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Employment Impact	4,588 jobs	615 jobs	951 jobs	6,154 jobs
<i>Tourism</i>	3,246 jobs	546 jobs	758 jobs	4,550 jobs
<i>Operations</i>	4 jobs	3 jobs	2 jobs	9 jobs
<i>Capital Projects</i>	1 job	0 jobs	0 jobs	1 job

**Grantmaking did not add to the overall employment impact*

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

TABLE 42: MOTORCITIES NATIONAL HERITAGE AREA TOP 10 EMPLOYMENT IMPACT SECTORS

Industry	Jobs
Limited-service restaurants	1,403 jobs
Hotel and motel, including casino hotels	933 jobs
Retail - Miscellaneous store retailers	377 jobs
Museums, historical sites, zoos, and parks	313 jobs
Transit and ground passenger transportation	141 jobs
Retail - Food and beverage stores	106 jobs
Real estate	104 jobs
Retail - Gasoline stores	66 jobs
Employment services	52 jobs
Full-service restaurants	47 jobs

H. GOVERNMENT REVENUE IMPACT

NHAs also support state and local governments with the generation of government revenue or tax revenue. As a result of the Ohio & Erie Canalway's attraction of visitors, operations, and capital activity, the NHA generates **\$34.7 million** in tax revenue annually (\$22.5 million direct taxes).

TABLE 43: MOTORCITIES NATIONAL HERITAGE AREA - STATE AND LOCAL TAX IMPACT

Description	Employee Compensation	Tax on Production and Imports	Households	Corporations
Dividends				\$55,931
<i>Socials In Tax - Employee Contribution</i>	\$89,137			
<i>Social Ins Tax - Employer Contribution</i>	\$172,331			
<i>Tax on Production and Imports: Sales Tax</i>		\$14,797,916		
<i>Tax on Production and Imports: Property Tax</i>		\$14,468,752		
<i>Tax on Production and Imports: Motor Vehicle License</i>		\$393,798		
<i>Tax on Production and Imports: Severance Tax</i>		\$62,053		
<i>Tax on Production and Imports: Other Taxes</i>		\$894,553		
<i>Tax on Production and Imports: S/L NonTaxes</i>		\$255,575		
<i>Corporate Profits Tax</i>				\$409,203
<i>Personal Tax: Income Tax</i>			\$2,769,637	
<i>Personal Tax: NonTaxes</i>			\$638,041	
<i>Personal Tax: Motor Vehicle License</i>			\$199,056	
<i>Personal Tax: Property Taxes</i>			\$69,012	
<i>Personal Tax: Other Tax (Fish/Hunt)</i>			\$71,753	
Total	\$261,467	\$30,872,348	\$3,747,499	\$494,224

OVERALL IMPACT: \$35,375,538

I. VOLUNTEER IMPACT

It is estimated that volunteers at sites throughout MCNHA generate more than **\$49,000 annually** as a result of their volunteer services.²⁹ MCNHA volunteers give their time to the annual Autopalooza, featuring 16 different events focused on the automotive and labor industry. These benefits are in addition to the \$419.4 million annual impact generated by the NHA.

29. Primary data about number of volunteers and hours volunteered was provided to Tripp Umbach by the Schuylkill River NHA. A conservative assumption of \$22.14 per hour was used to calculate the value of volunteer services. This amount was calculated independently by the Points of Light Foundation.

OHIO & ERIE CANALWAY NHA

A. OVERVIEW OF OHIO & ERIE CANALWAY

The Ohio & Erie Canalway National Heritage Area was designated by Congress in 1996 to help preserve and celebrate the rails, trails, landscapes, towns and sites that grew up along the first 110 miles of the canal that helped Ohio and the nation grow.

At the beginning of the 19th century, Ohio was geographically isolated from the mainstream of the nation's economic vitality. The state was rich in natural resources, but landlocked and inaccessible to the established eastern markets. The Ohio & Erie Canal — the brainchild of George Washington — changed that fact. Built in the 1820s and 1830s, the canal was carved from the wilderness to provide an invaluable link in the nation's transportation system, completing the country's first inland shipping route between the East Coast and Gulf of Mexico. It transformed Ohio from a struggling frontier into the third richest & most populous states in the Union, and positioned New York City as a world port and America's financial capital.

By creating the connection between New York and New Orleans, the Ohio & Erie Canal helped people and products flow across America — fueling westward expansion, a national market economy and burgeoning regional industrial might. It nurtured the state's economy — taking Ohio from near bankruptcy to the third most economically prosperous State in the Union in just 20 years.

Over its history, the canal path defined the settlement of numerous towns, villages and cities along its course. It attracted businesses to its flanks, providing a viable transportation route for emerging industries. They included coal, farm implements, clay products, roller bearings, matches, steel and rubber.

“Spotlight” Project – The Towpath Trail

The Towpath Trail is an iconic Ohio & Erie Canalway travel asset. Working collaboratively, the NHA has put 85+ miles of Towpath Trail in place to date, drawing 2.5-million Towpath travelers each year. Highlights include:

- *Scranton Flats/Cleveland - Canalway Partners RiverSweep volunteers clear blighted areas for future trails. In 2014, a \$9M park & Towpath section opened on a 2011 RiverSweep site, instantly activating health & wellness and tourism usage along the Cuyahoga River.*
- *iTowpath/Akron - The Ohio & Erie Canalway Coalition is collaborating with the City of Akron and Knight Foundation, through a \$750,000 grant award, to enhance and activate the Towpath Trail through improved signage, archways and connections to area attractions and neighborhoods, with the goal of making the city more bike and pedestrian friendly and stimulating community and economic development.*
- *Towpath Bridge Building/Zoar - Local residents and businesses helped the Ohio & Erie Canalway Coalition with the construction of boardwalks over protected wetlands along the Towpath.*

One of the early pioneers of the rubber and tire industry, Dr. Benjamin Goodrich, relocated to Akron, Ohio, to establish The B.F. Goodrich Rubber Company. Other entrepreneurs followed, including Harvey Firestone, Frank A. Seiberling and William F. O'Neil to establish tire and rubber manufacturing factories.

As the Canal Era gave way to railroads, America's Gilded Age followed, fueled by a new entrepreneurial spirit. In Cleveland, it found roots in and around the Canal Basin — where the Ohio & Erie Canal connected with eastbound shipping via the Cuyahoga River and Lake Erie.

John Rockefeller, Henry Flagler and their compatriots settled here, Henry Sherwin and his business partner Edward Williams followed, plying their American ingenuity to once again change the world. In fact, the wealth earned by industrialists in the Ohio & Erie Canalway nurtured a cultural and social philanthropy that led to many of the Canalway's treasured museums, parks and historic spaces. Among those legacies: Cleveland Metroparks, Akron Civic Theatre, Stark County Park District, United Way, Zoar Village, Fort Laurens, Cleveland Foundation, Stan Hywet, Playhouse Square, Summit County Metro Parks, Cleveland Art Museum, Cleveland's Mall Plan, Canton Palace Theater, and the Cleveland Orchestra.

Today, the Ohio & Erie Canalway National Heritage Area not only preserves and celebrates the canal's origin story but also tracks its impact forward along four key pillars — Culture, History, Recreation, and Nature.

Annually, millions of NHA visitors and residents explore American culture and canal-era history and find recreation amidst natural wonders along three celebrated routes — the Ohio & Erie Canal Towpath Trail (85+ miles), the Cuyahoga Valley Scenic Railroad (26 miles through CVNP into Akron and Canton), and along the nationally designated America's Byway. In fact, more than 2.5 million Americans visit the Towpath Trail annually, voted the 2015 "Best of Ohio" Bike Trail by Ohio Magazine readers.³⁰

The NHA's two Founding Organizations — Canalway Partners (working in Cuyahoga County) and the Ohio & Erie Canalway Coalition (working in Summit, Stark, and Tuscarawas Counties) — collaborate with 58 communities, four counties, four regional park districts, many non-profit organizations, and Cuyahoga Valley National Park to build and enhance the visitor components and travel routes.

The NHA leads a collaboration with these many partners to package the Canalway experience to attract tourists to the region's offerings by building regional marketing platforms through a dedicated visitor web site (ohioanderiecanalway.com), a Visitor's Guide, cross-promotional marketing and other social media strategies. They continue to support economic investment to the region. By doing so, the Ohio & Erie Canalway also has helped spur a sustainable approach to these connected communities within the footprint of the Canalway.

Cuyahoga Valley National Park, the Cuyahoga Valley Scenic Railroad, the County Park Districts of Cuyahoga, Summit, Stark, and Tuscarawas Counties, and sites along the nationally designated America's Byway work with the Canalway to give residents and visitors the opportunity to further experience the natural beauty and recreational resources of the area, while coming to better understand the culture and history of the National Heritage Area.

30. Ohio Magazine. "Best of Ohio 2015." http://www.ohiomagazine.com/Main/Articles/Best_of_Ohio_2015_5067.aspx. January 2015.

The Ohio & Erie Canalway NHA adds significant quality of life/quality of place features to the region through its continued focus of developing a linear greenway anchored by a trail system that includes and extends from the Towpath Trail. The length of improved Towpath Trail has now exceeded 85 miles with many hundreds of acres of conserved natural landscapes. These added greenspaces address a host of relevant issues such as flooding and habitat restoration. Their presence adds measurable value to adjacent and nearby properties.

Since receiving its National Heritage Area designation in 1996, the Ohio & Erie Canalway NHA has directed most of its federal funding into grants that develop sites and amenities that add value to the region. The Ohio & Erie Canalway has been able to leverage \$350 million in Federal, State, Local, and Private investments throughout the region. For example, the NHA has worked with partners to expand the Towpath Trail and create more connector trails between the Towpath and various towns and communities. It has opened new residential options to the local communities. As visitors to the Towpath Trail grows, communities along the trail have benefited greatly from the growing business and tourism that has followed.

As the Ohio & Erie Canalway NHA fosters connections among partners and communities, the NHA also creates ways for residents and visitors to become more connected to the sites, history, and offerings of the heritage area. Social media has served as important marketing tool and method for the Ohio & Erie Canalway to reach its audience, making them aware of events taking place in the NHA. The Ohio & Erie Canalway sees the importance of allowing visitors to stay connected to the heritage area; using online platforms to activate real-world experiences, allowing users to learn of opportunities and ways to experience the Canalway's rich history.

The Ohio & Erie Canal served as an important asset to the nation in the early 1800s, becoming an economic resource to the nation. Today, that impact continues. Whether biking on the Towpath Trail, traveling by rail on the Cuyahoga Valley Scenic Railroad, or visiting the various parks and museums on drives along the nationally designated America's Byway, the Ohio & Erie Canalway NHA adds significantly to the quality of life in the region.

Just as the Ohio & Erie Canal helped spur economic development and the growth of communities and towns along the canal, the NHA is charting a new course to connect communities to the natural, cultural, historic and recreational resources of the region. The regional Vision of the Ohio & Erie Canalway has been integrated into local plans and projects. As the Ohio & Erie Canalway NHA continues to expand its partnerships, sites, and ability to reach users through regional marketing and social media, the NHA is poised to continue leveraging funding, having an even greater impact on preserving the area's culture, history, recreation and natural beauty – and furthering the economic development of the region.

B. OVERALL ECONOMIC IMPACT

The economic impact of the Ohio & Erie Canalway National Heritage Area is **\$408.1 million annually**. This economic impact consists of four main components: tourism (\$387.2 million), operations (\$1.8 million), grantmaking (\$142,000), and capital expenditures (close to \$19 million).³¹ See Figure 1. The Metroparks of the Ohio & Erie Canalway National Heritage Area also bring millions of local residents and non-local residents to the NHA. The direct impact of all Metropark users is **\$24.0 million**.³²

FIGURE 11: OVERALL ECONOMIC IMPACT OF OHIO & ERIE CANALWAY NHA

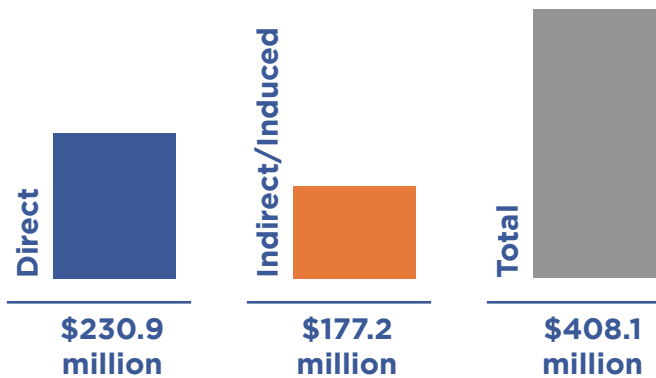


TABLE 44: OHIO & ERIE CANALWAY NHA - OVERALL ECONOMIC IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Economic Impact	\$230,910,077	\$94,459,602	\$82,767,490	\$408,137,169
<i>Tourism</i>	\$219,054,862	\$90,094,594	\$78,066,840	\$387,216,261
<i>Operations</i>	\$1,047,835	\$267,633	\$497,973	\$1,813,440
<i>Grantmaking</i>	\$0	\$0	\$142,416	\$142,416
<i>Capital Projects</i>	\$10,807,416	\$4,097,375	\$4,060,261	\$18,965,052

The table below shows the top 10 sectors in the NHA region impacted by Ohio & Erie's activities and visitor (See Table 45).

TABLE 45: OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA TOP 10 ECONOMIC IMPACT SECTORS

Industry	Economic Output
Limited-service restaurants	\$82,275,912
Hotels and motels, including casino hotels	\$71,702,480
Museums, historical sites, zoos, and parks	\$28,177,439
Real estate	\$22,490,676
Retail - Miscellaneous store retailers	\$20,158,103
Construction of other new nonresidential structures	\$10,807,416
Owner-occupied dwellings	\$9,450,316
Wholesale trade	\$9,077,507
Retail - Food and beverage stores	\$8,906,344
Transit and ground passenger transportation	\$7,914,574

31. Data used to calculate impacts was based on three-year averages - 2012, 2013, and 2014.

32. Ohio & Erie Canalway NHA Metroparks impact was calculated based only on direct use value of visitors using three-year averages.

C. TOURISM IMPACT

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 and encouraging tourism within their regions. Tourism numbers are calculated by Ohio & Erie Canalway's regional partners. The three-year average total of visitors and tourists to Ohio & Erie Canalway region (with the exclusion of Metroparks) is 7,534,913 visitors. 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, \$408.1 million in economic benefit was supported annually within the region and state.

TABLE 46: OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA ANNUAL ECONOMIC IMPACT OF TOURISM AND VISITATION

Visitor Segment	% of Total Visitation ³³	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Local Day	60%	\$58,092,907	\$24,178,996	\$21,527,429	\$103,779,332
Non-Local Day	20%	\$22,689,831	\$9,670,360	\$8,642,647	\$41,002,838
Overnight	20%	\$138,272,088	\$56,245,238	\$47,896,763	\$ 242,414,090
Total	100%	\$219,054,826	\$90,094,594	\$78,066,840	\$387,216,261

The Ohio & Erie Canalway includes major parks and trails which are managed by Cleveland Metroparks, Summit Metro Parks, Stark Parks, and Tuscarawas County Park Department. These units annually draw 8,584,621 local visitors and tourists. The IMPLAN methodology cannot accurately incorporate their economic impact. However, a separate local study by TPL has concluded that these parks/trails provide a direct use value to local visitors, based on a "willingness to pay" scenario. When that formula is applied to these Ohio & Erie Canalway Metroparks visitors, it calculates an additional **\$24 million** direct impact.³⁴

TABLE 47: OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA DIRECT ECONOMIC IMPACT OF METROPARKS

Visitor Segment	% of Total Visitation	Direct Effect
General Park Users	95.2%	\$22,304,621
Special Park Users	4.8%	\$1,678,441
Total	100%	\$23,983,062

33. Visitation percentages for the Ohio & Erie Canalway were based on visitation statistics provided by Ohio Tourism in 2014 to better reflect visitation patterns for the Ohio & Erie Canalway NHA. For additional information, visit: <http://www.ohio.org/about-tourism-ohio>.

34. The Metroparks of the Ohio & Erie Canalway NHA were calculated separately from the total economic impact and measuring only the direct impact of the parks. Visitor percentages and spending patterns (ranging from \$2.73 to \$4.05 per day) were based off of "The Economic Benefits of Cleveland Metroparks," produced by the Trust for Public Land, October 2013. For additional information, visit page 20 of the report: <https://www.tpl.org/sites/default/files/local-cleveland-econbenefits.pdf>.

D. OPERATIONAL IMPACT

In addition to attracting visitors and promoting tourism in the region, the analysis quantifies the economic benefit of the Ohio & Erie Canalway NHA 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.

**TABLE 48: OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF OPERATIONS**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Operations	\$1,047,835	\$267,633	\$497,973	\$1,813,440

E. GRANTMAKING

The Ohio & Erie Canalway NHA is active in the region with its partners through grantmaking efforts that support projects and programs that are aligned with the educational, cultural, 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 the NHA. For the purposes of this study, grants are quantified as increased salary provided by the NHA within their region.

**TABLE 49: OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF GRANTMAKING**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Grantmaking	\$0	\$0	\$142,416	\$142,416

The grantmaking activities of the Ohio & Erie Canalway NHA attract other organizations and funders in the region to also monetarily support the development of programs and projects that support the overall mission of the NHA. While not accounted for in the overall economic impact of the NHA, the grantmaking of the Ohio & Erie Canalway NHA allowed for leveraged funding for projects and initiatives, contributing an **additional \$869,286 in economic impact**.

F. CAPITAL PROJECTS

Capital investment of the Ohio & Erie Canalway supports the creation of projects and sites within the NHA that allow for the further development of opportunities and mission expansion of the NHA. Similar to how tourism and operations support economic activity within the region, capital expenditures provide an infusion of funds to assist with the development of buildings, sites, and projects within the NHA.

**TABLE 50: OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA
ANNUAL ECONOMIC IMPACT OF CAPITAL PROJECTS**

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Capital Projects	\$10,807,416	\$4,097,375	\$4,060,261	\$18,965,052

G. OVERALL EMPLOYMENT IMPACT

The Ohio & Erie Canalway NHA supports a substantial number of jobs in the region. The total employment impact is **4,200 jobs** (3,026 direct jobs and 1,174 indirect/induced 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.

FIGURE 12: OVERALL EMPLOYMENT IMPACT OF OHIO & ERIE CANALWAY NHA

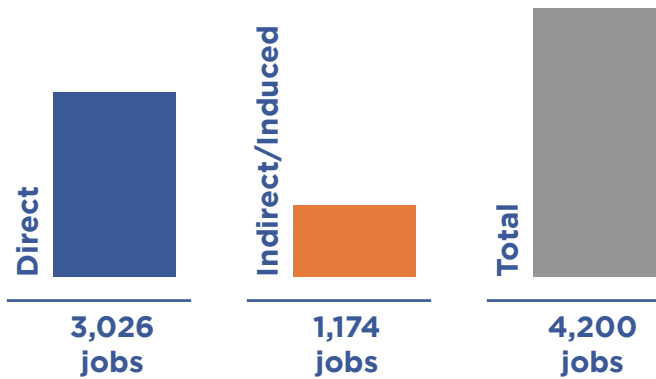


TABLE 51: OHIO & ERIE CANALWAY NHA - OVERALL EMPLOYMENT IMPACT

	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Employment Impact	3,026 jobs	571 jobs	603 jobs	4,200 jobs
<i>Tourism</i>	2,945 jobs	544 jobs	569 jobs	4,058 jobs
<i>Operations</i>	9 jobs	2 jobs	4 jobs	15 jobs
<i>Capital Projects</i>	72 jobs	24 jobs	30 jobs	127 jobs

**Leveraged grantmaking contributes an additional 6 jobs to regional employment.*

The “Top Employment Sectors” table below illustrates the sectors with the largest number of jobs (includes direct, indirect and induced) supported by the Ohio & Erie Canalway 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 the Ohio & Erie Canalway NHA.

TABLE 52: OHIO & ERIE CANALWAY NATIONAL HERITAGE AREA TOP 10 EMPLOYMENT IMPACT SECTORS

Industry	Jobs
Limited-service restaurants	1,111 jobs
Hotels and motel, including casino hotels	739 jobs
Retail - Miscellaneous store retailers	523 jobs
Museums, historical sites, zoos, and parks	328 jobs
Retail - Food and beverage stores	144 jobs
Transit and ground passenger transportation	112 jobs
Real estate	79 jobs
Retail - Gasoline stores	77 jobs
Construction of other new nonresidential structures	72 jobs
Full-service restaurants	44 jobs

H. GOVERNMENT REVENUE IMPACT

NHAs also support state and local governments with the generation of government revenue or tax revenue. As a result of the Ohio & Erie Canalway's attraction of visitors, operations, and capital activity, the NHA generates **\$34.7 million** in tax revenue annually (\$22.5 million direct taxes).

TABLE 53: OHIO & ERIE CANALWAY NHA - STATE AND LOCAL TAX IMPACT

Description	Employee Compensation	Tax on Production and Imports	Households	Corporations
Dividends				\$80,592
<i>Socials In Tax - Employee Contribution</i>	\$162,992			
<i>Social Ins Tax - Employer Contribution</i>	\$318,343			
<i>Tax on Production and Imports: Sales Tax</i>		\$14,491,765		
<i>Tax on Production and Imports: Property Tax</i>		\$11,280,935		
<i>Tax on Production and Imports: Motor Vehicle License</i>		\$287,402		
<i>Tax on Production and Imports: Severance Tax</i>		\$7,678		
<i>Tax on Production and Imports: Other Taxes</i>		\$2,633,439		
<i>Tax on Production and Imports: S/L NonTaxes</i>		\$201,742		
<i>Corporate Profits Tax</i>				\$239,274
<i>Personal Tax: Income Tax</i>			\$4,107,095	
<i>Personal Tax: NonTaxes</i>			\$567,990	
<i>Personal Tax: Motor Vehicle License</i>			\$183,775	
<i>Personal Tax: Property Taxes</i>			\$71,323	
<i>Personal Tax: Other Tax (Fish/Hunt)</i>			\$54,131	
Total	\$481,335	\$28,902,961	\$4,984,314	\$319,867

OVERALL IMPACT: \$34,688,477

I. VOLUNTEER IMPACT

It is estimated that volunteers at sites throughout the NHA generate over **\$250,000** annually as a result of their volunteer services.³⁵ Volunteers at the Ohio & Erie Canalway NHA give their time to helping to keep the canal clean by collecting trash from various sites along the canalway, helping with the construction of the Towpath trail extension, and giving their time to various NHA sponsored events throughout the year. These benefits are in addition to the **\$408.1 million** annual impact generated by the NHA.

35. Primary data about number of volunteers and hours volunteered was provided to Tripp Umbach by the Ohio & Erie Canalway NHA. A conservative assumption of \$22.14 per hour was used to calculate the value of volunteer services. This amount was calculated independently by the Points of Light Foundation.

CONCLUSION

The case studies presented demonstrate that NHAs are valuable economic contributors to the local regions and states where they operate. The partnerships they create and facilitate and the efforts put forth by each organization truly make a difference in their communities. The six NHAs in this study serve as vital parts of the local and regional economy contributing millions of dollars annually and sustaining jobs.

- Erie Canalway National Heritage Corridor (NY) generates **\$307.7 million** in economic impact, supports **3,240 jobs**, and generates **\$34.9 million** in tax revenue.
- The Journey Through Hallowed Ground National Heritage Area (MD, PA, VA, and WV) generates **\$703.0 million** in economic impact, supports 8,401 jobs, and generates **\$51.1 million** in tax revenue.
- Schuylkill River National Heritage Area (PA) generates **\$589.9 million** in economic impact, supports **6,154 jobs**, and generates **\$37.7 million** in tax revenue.
- Upper Housatonic Valley National Heritage Area (CT and MA) generates **\$169.9 million** in economic impact, supports **1,944 jobs**, and generates **\$15.0 million** in tax revenue.
- MotorCities National Heritage Area (MI) generates **\$410.4 million** in economic impact, supports **4,560 jobs**, and generates **\$35.4 million** in tax revenue.
- Ohio & Erie Canalway National Heritage Area (OH) generates **\$408.1 million** in economic impact, supports **4,200 jobs**, and generates **\$34.7 million** in tax revenue. The Metroparks of the Ohio & Erie Canalway NHA generate an additional direct impact of **\$24.0 million**.

APPENDIX A: GLOSSARY OF TERMS

Study Year	Three Year Average of 2012, 2013, and 2014.
Total Economic Impact	The total economic impact of an NHA includes the direct, indirect, and induced impact generated in the economy as a result of the institution's presence.
Direct Economic Impact	<p>Direct impact includes items such as operational spending, spending by visitors to the NHA, and grantmaking/capital expenditures.</p> <p>For example, the economic impact of visitors to NHAs is the primary source of economic benefit to the regions in which NHA operates. The direct consequence of travel expenditures become business receipts which in turn are used to pay wages and salaries and taxes.</p>
Indirect Economic Impact	<p>Indirect impact, also known as the multiplier effect, includes the re-spending of dollars within the local economy by vendors and suppliers.</p> <p>For example, indirect impacts are related 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 multiplier effect of economic activity attributed to visitor spending to NHAs. Each level of impact creates salaries, employment, and tax revenues.</p>
Induced Economic Impact	Induced impact measure the effects of the changes in household income. For example, this impact includes the household spending of the wage and salary income generated by the visitors to the NHA. Induced effects refer to money recirculated through the economy as a result of household spending patterns generating further economic activity.
Direct Employment	Total number of jobs created in the economy as a result of operations, tourist spending and grantmaking activities.
Indirect Employment	Indirect employment is the additional jobs created as a result of the institution's economic impact. Local companies that provide goods and services to an institution increase their number of employees as purchasing increases, thus creating an employment multiplier.
Multiplier Effect	The multiplier effect is the additional economic impact created as a result of the NHA's direct economic impact. Local companies that provide goods and services to an institution increase their purchasing by creating a multiplier. Multipliers in this study are derived through IMPLAN.
Government Revenue Impact	Government revenue that is collected by governmental units in addition to those paid directly by an institution, including taxes paid directly by employees of the institution, visitors to the institution and vendors who sell products to the institution.

APPENDIX B: RESEARCH METHODOLOGY

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 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 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. Ohio & Erie Canalway NHA also utilized visitor count information from Ohio Tourism 2014 figures.

A three-year average of visitor counts to the NHA regions was utilized to provide a data-driven estimate of the annual number of visitors and accounts for spikes in visitor activity that can occur due to special circumstances. 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. 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.

Tripp Umbach based visitor and general tourist spending patterns on National Park Visitor Spending estimates established in 2013.^{36,37} 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 2013 NPS spending amounts.

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. 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.

36. 2013 National Park Visitor Spending Effects, Economic Contributions to Local Communities, States, and the Nation. July 2014.

37. Visitation percentages for the Ohio & Erie Canalway were based on visitation statistics provided by Ohio Tourism in 2014 to better reflect visitation patterns for the Ohio & Erie Canalway NHA. For additional information, visit: <http://www.ohio.org/about-tourism-ohio>.

Economic Analysis Process

Tripp Umbach's methodology for calculating NHA economic benefits may be utilized 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.³⁸

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.³⁹

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.

38. 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>.

39. The analysis does not quantify the direct costs such as visitors utilizing a recreation area that requires expenditures to repair or maintain.

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.

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. Ohio & Erie Canalway NHA visitor data was also based on visitation statistics provided by Ohio Tourism 2014 to better reflect visitation patterns of the NHA.^{40, 41} 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 13: Visitor Spending by Segment.

TABLE 54: VISITOR SPENDING BY SEGMENT

Visitor Segment	% of Total Visitation*	% of Total Visitation for Ohio & Erie Canalway	Average Daily Spending
Local Day ⁴²	19%	60%	\$40.72
Non-Local Day ⁴³	41%	20%	\$64.79
Overnight ⁴⁴	40%	20%	\$276.66

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 2013 National Park Service (NPS) economic impact study.⁴⁵ 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.⁴⁶

40. 2013 National Park Visitor Spending Effects, Economic Contributions to Local Communities, States, and the Nation. July 2014.

41. For Ohio Tourism 2014 visitation data, please visit <http://www.ohio.org/about-tourism-ohio>.

42. 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.

43. 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.

44. 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.

45. 2013 National Park Visitor Spending Effects, Economic Contributions to Local Communities, States, and the Nation. July 2014.

46. The analysis acknowledges the possibility of average spending variance through the utilization of average spending derived from consumer choices, estimates, and average visitor counts.

TABLE 55: 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%	31.9%	11.2%	14.9%	21.5%	1.4%	19.2%
Non-local day-trip spending allocation	0.0%	0.0%	28.4%	13.5%	10.0%	27.0%	2.4%	18.8%
Overnight spending allocation	43.0%	0.1%	22.6%	7.5%	5.5%	8.2%	3.3%	9.8%

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 15: Spending Estimates by Sector Type. The Ohio & Erie Canalway NHA also utilized visitor count information from Ohio Tourism 2014 figures.

TABLE 56: SPENDING ESTIMATES BY SECTOR TYPE

IMPLAN Sector	Sector Name	Spending Type
400	Retail - Food and beverage stores	Groceries
402	Retail - Gasoline stores	Gas & oil
406	Retail - Miscellaneous store retailers	Retail Purchases
412	Transit and ground passenger transportation	Local transportation
493	Museums, historical sites, zoos, and parks	Amusements
499	Hotels and motels, including casino hotels	Motel, hotel, B&B
500	Other lodging accommodations	Camping fees
502	Limited-service restaurants	Restaurants & bars

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.⁴⁷

47. 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.

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 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 514, Grantmaking, Giving, and Social Advocacy Organization.

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.

Step Five - Capital Specific 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 58, 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.

APPENDIX C: 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 will hopefully be the trailblazers for additional sites.

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. The Ohio & Erie Canalway NHA also utilized visitor count information from Ohio Tourism 2014 figures.

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.⁴⁸ 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.⁴⁹ Finally, the report provides recommendations based on the current protocol as a means to seek to improve future analysis and development.⁵⁰

48. 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.

49. 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.

50. 2013 National Park Visitor Spending Effects, Economic Contributions to Local Communities, States, and the Nation. July 2014.

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