Tourism and Extension:
Current Snapshot and Future Opportunity

Presented at NACDEP Annual Conference
Cleveland, OH, June 2018

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• Stephan Goetz, PhD PSU, NERCRD
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Presentation Outline

● Why are we here
● Recreation and Tourism trends and impacts in the U.S.
● Recreation and Tourism and Extension
● Where do we go from here

This presentation draws on work underway or completed under various USDA/NIFA-funded grants. The work would not be possible without the funding, which is greatly appreciated.
The next conference is planned for
Tuesday – Thursday, October 8-10, 2019 on the coast in Astoria, Oregon
Additional conference activities may be available before and after these dates.
Note: Exact location is not yet finalized but will be in or close to Astoria.
The Regional Rural Development Centers link the research and educational outreach capacity of the nation's public universities with communities, local decision-makers, entrepreneurs, families, and farmers and ranchers to help address a wide range of community and economic development issues.

https://nifa.usda.gov/regional-rural-development-centers
Recreation Economy Resource Guide

For USDA Forest Service, Rural Development and National Institute for Food and Agriculture Field Staff

Photos courtesy of Christine Stevenson, USDA Rural Development, Lance Cheung, USDA Photography and USDA Forest Service.
Monday, June 11

Concurrent Session Block I - MONDAY - 9:00-10:30 am

101 Economic Development – BLOSSOM (Fourth Floor) - Moderator: Bruce Schwartau
  - Michael Darger - Business Retention & Expansion (BRE): What's Data Got to Do With It?
  - Rebecca Dunning, Tres Magner, Robin Smith & Grace Tuscheck - Food Hubs as Drivers of Community Economic Development, a Case Study from a Small North Carolina Mountain Town
  - Kyle White & John Mann - Small Business Innovation Research Grants -- What Are They and How Can My Constituents Get One?

102 Tourism – HOPKINS (Fourth Floor) - Moderator: Jon Wolseth
  - Doug Arbogast, Daniel Eades, Stephan J. Goetz & Yicheol Han - Tourism and Economic Development: Capacity and Opportunities for Cooperative Extension
  - Neil Reid - Craft Breweries and Urban Tourism
  - Heidi Mouillesseaux-Kunzman & Shorna Alred - Community Development as Resiliency Strategy: A Deep Dive into the Social Aspects of Community Resiliency

103 Human Capacity Building – GARFIELD (Fourth Floor) - Moderator: Gary Kuhn
  - Kenneth Sherin & Cheryl Burkhart-Kriesel - Reframing Cooperative Extension’s Contribution to Workforce Development: Name it and Claim It
  - Deborah Tootle & Brian Perry - Integrating Research and Outreach: The Case of Community Leadership and Engagement
  - Anne Johnson, Kori Montgomery & Myra Wilson - Do What You Do Best

104 Community Resilience & Sustainability – HALLE (Fourth Floor) - Moderator: Courtney Long
  - Holly Madill - Using Design Thinking and Collaboration to Conquer Conflict and Transform Communities
  - Nadine Sigle & Jaime Menon- Rock Your Community with Comprehensive Community Planning
  - Michael Wilcox, Annie Cruz-Porter, Indraneel Kuman, Melinda Grismer & Bo Beaulieu - Perspectives on Rural Housing Issues: A Continuum Approach

105 Infrastructure: Community Health – HOLDEN (Fourth Floor) - Moderator: Tony Michael
  - Luis Cruz, Cintia Aguilar & Susan Jakes - Latino Farmworker Health and Safety: Finding the Win-Win
  - Karen Fawcett, Heather Kinney, Dan Kahl & Jayoung Koo - Rocking Healthy Community Connections
  - Amanda Osborne - Partnering for Community Health: Produce Prescription Hypertension in Cleveland, Ohio
95% of New Jobs in U.S. in SERVICES

Rural recreation county population grew in the early 2000s but leveled off after the Great Recession.

Note: Values for all years reflect classification of counties in 2015 ERS. Source: USDA, Economic Research Service using county population data from Census Bureau.

Rural median household incomes were highest in recreation counties.

Note: Medians show that half of those who live in a type of county are in a county with a lower median household income, and the other half are in a county with a higher median household income. Values are in constant 2014 dollars, deflated by Consumer Price Index. Source: USDA, Economic Research Service estimates based on Small Area income and Poverty Estimates data sets.
Recreation counties, 2015 edition

Share of County Employment in Recreation

Recreation counties determined by a weighted index of three measures: 1) job following: entertainment, recreation, accommodations, eating/drinking places; 2) the share of vacant housing units intended for seasonal/occasional use. Recount those with a score more than one deviation above the mean. Note that county for the recreation counties only. Map revised May 2017; see errata for details. Source: USDA, Economic Research Service using data from Bureau of Economic Analysis, U.S. Census Bureau.
## Agritourism

### Table 1. Agritourism and Direct Marketing Income Reported in the 2002, 2007, and 2012 Censuses of Agriculture

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td></td>
<td>2012</td>
<td>2007</td>
<td></td>
</tr>
<tr>
<td><strong>MIDWEST</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Total Agritourism Sales</td>
<td>417.8</td>
<td>397.4</td>
<td>236.8</td>
</tr>
<tr>
<td>Agri-tourism and Recreational Services</td>
<td>111.2</td>
<td>96.7</td>
<td>29.2</td>
</tr>
<tr>
<td>Direct Marketing</td>
<td>306.6</td>
<td>300.8</td>
<td>207.6</td>
</tr>
<tr>
<td><strong>NORTHEAST</strong></td>
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<tr>
<td>Total Agritourism Sales</td>
<td>481.8</td>
<td>395.9</td>
<td>225.4</td>
</tr>
<tr>
<td>Agri-tourism and Recreational Services</td>
<td>104.7</td>
<td>77.0</td>
<td>9.5</td>
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<tr>
<td>Direct Marketing</td>
<td>377.1</td>
<td>318.9</td>
<td>216.0</td>
</tr>
<tr>
<td><strong>SOUTH</strong></td>
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<tr>
<td>Total Agritourism Sales</td>
<td>549.6</td>
<td>467.1</td>
<td>277.4</td>
</tr>
<tr>
<td>Agri-tourism and Recreational Services</td>
<td>274.6</td>
<td>251.1</td>
<td>160.9</td>
</tr>
<tr>
<td>Direct Marketing</td>
<td>275.0</td>
<td>216.0</td>
<td>107.5</td>
</tr>
<tr>
<td><strong>WEST</strong></td>
<td></td>
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<tr>
<td>Total Agritourism Sales</td>
<td>564.7</td>
<td>517.7</td>
<td>274.8</td>
</tr>
<tr>
<td>Agri-tourism and Recreational Services</td>
<td>213.6</td>
<td>177.1</td>
<td>47.1</td>
</tr>
<tr>
<td>Direct Marketing</td>
<td>351.1</td>
<td>340.5</td>
<td>227.7</td>
</tr>
<tr>
<td><strong>UNITED STATES</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total Agritourism Sales</td>
<td>2,013.9</td>
<td>1,778.1</td>
<td>1,014.4</td>
</tr>
<tr>
<td>Agri-tourism and Recreational Services</td>
<td>704.0</td>
<td>566.8</td>
<td>202.2</td>
</tr>
<tr>
<td>Direct Marketing</td>
<td>1,309.8</td>
<td>1,211.3</td>
<td>812.2</td>
</tr>
</tbody>
</table>

### Figure 2. Five Categories of Agritourism including Direct Sales, Education, Hospitality, Outdoor Recreation, and Entertainment, and Examples of Core vs. Peripheral Activities

Federal Lands

Federal Outdoor Recreation Trends: Effects on Economic Opportunities
National Center for Natural Resources Economic Research (NCNRER)
NCNRER Working Paper Number 1
October 2014
Eric M. White¹, J. M. Bowker², Ashley E. Askew³, Linda L. Langner⁴, J. Ross Arnold⁵, Donald B. English⁶

Table 7. 2012 Economic contributions of visitor spending for recreation on federal lands and waters (2012 dollars).

<table>
<thead>
<tr>
<th>Agency</th>
<th>Recreation Visitation (millions)</th>
<th>Visitor Spending (billion $)</th>
<th>Jobs (thousands)</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Park Service</td>
<td>283</td>
<td>15</td>
<td>243</td>
</tr>
<tr>
<td>Bureau of Land Management</td>
<td>59</td>
<td>3</td>
<td>58</td>
</tr>
<tr>
<td>U.S. Fish and Wildlife Service</td>
<td>47</td>
<td>2</td>
<td>37</td>
</tr>
<tr>
<td>Bureau of Reclamation</td>
<td>28</td>
<td>1</td>
<td>26</td>
</tr>
<tr>
<td>Forest Service</td>
<td>161</td>
<td>11</td>
<td>104</td>
</tr>
<tr>
<td>National Oceanic and Atmospheric Administration</td>
<td>NR¹</td>
<td>5</td>
<td>135</td>
</tr>
<tr>
<td>U.S. Army Corps of Engineers</td>
<td>360</td>
<td>13</td>
<td>187</td>
</tr>
</tbody>
</table>

All FICOR Agencies | 938 | 51 | 880

¹ NR = not reported
Source: English 2014

In 2017:

- 331 million park visits
- $18.2 billion is local gateway spending
- $35.8 billion in economic output
- 306,000 jobs
- $11.9 billion in labor income
- $20.3 billion in VA

Source: https://www.nps.gov/subjects/socialscience/vse.htm
Outdoor Recreation Employment and Comparable Industries, 2016

Thousands of jobs

U.S. Bureau of Economic Analysis (BEA)
Outdoor Recreation as a Percent of GDP with Comparable Industries, 2016

Source: US Bureau of Economic Analysis and authors’ calculations
Performing arts, spectator sports 2001
Performing arts, spectator sports 2016

[Map of the United States showing data distribution for performing arts and spectator sports in 2016.]
Museums, historical sites 2001
Museums, historical sites 2016
Amusement, gambling 2001
Accommodation, food services 2001
Accommodation, food services 2016
National Extension Tourism survey

- the “pulse” of tourism programs in Extension
- distributed online through Qualtrics
- NET Design Team contact list
- NERC RD contact list
- NACDEP facebook
- eXtension CLRFS CoP
- Penn State AE/ECD & Community / Urban Forestry Teams
- Johns Hopkins Food Policy Council Network
- snowballing technique
- 116 responses
Not shown are the two responses from Canada and one response from a national U. S. organization.
Q3 - What is your percent Extension appointment?

- 91-100%: 67.54%
- 81-90%: 2.63%
- 71-80%: 1.75%
- 61-70%: 5.26%
- 51-60%: 5.26%
- 31-40%: 4.39%
- 21-30%: 10.53%
Percentage of time allocated to tourism related work.
Please indicate the topical area related to the tourism programs you offer or participate in:

- Agritourism, Local Foods, Farmers Markets, Culinary Tourism: 22.53%
- Community and Regional Planning and Development: 10.99%
- Nature-Based Tourism: Ecotourism, Wildlife Watching: 9.07%
- Marketing and Promotion: 7.69%
- Economic, Environmental, and Social Impacts of Tourism and...: 7.69%
- Tourism Education, Training, and Certification Programs: 7.42%
- Cultural Heritage Tourism: 6.59%
- Community Tourism Assessments: 6.59%
- Tourism Research and Evaluation: 6.59%
- Placemaking: 5.77%
- The Shared Economy: 2.75%

Select an option or list additional topics if not identified above.
National Extension Tourism Survey
Community Tourism Assessments
Program Present
Extension Tourism program directory

Alabama

Agritourism: Local Foods, Farmers Markets, Culinary Tourism, Farm Stays
Community and Regional Planning and Development
Cultural-Heritage Tourism
Economic, Environmental, and Social Impacts of Tourism and Recreation
Marketing and Promotion
Nature-based Tourism: Ecotourism, Wildlife Watching, and Adventure Tourism
Placemaking
"Mississippi-Tennessee-Alabama Rural Tourism Conference—Tri state annual tourism conference that rotates between states. The main focus is educational programming and idea sharing for rural communities.
Picks County Tourism Association—Quarterly meetings that focus on promoting local tourism efforts"
"A nature-based tourism program focusing on natural resources within the county. Our program highlights hatchet creek, birding trails and hiking opportunities within the county. In addition, we have an agricultural tour called "The Way" - What Agriculture has to offer you. This tour highlights community gardens and Market Day in the county.
Speak to local civic clubs about tourism and recreation.
"Partnership with Auburn/Opelika Tourism where we provide a wine tour. Secondly we are expanding the agritourism website that is maintained through Tourism, Extension helps identify new producers.
We are also working on a deal with Chewacla State Park on a partnership with Tourism/4-H on providing Archery on-site.
Agricultor in Southeast Alabama
Conewah Sausage store is a popular stop off of I-65. I have met several groups as an ACEs ambassador
I assist with the administration and marketing of the local Farmers Market. I also am an officer of the County Historical Society where members are active in preserving the heritage of the county and state’s rich history.

Farmer’s Market Development
We work with our local tourism office to showcase agriculture in our County. At our local tourism office we have raised beds with crops grown locally. We also have a permanent kiosk with some educational information about the crops.
We also offer farm tours to students at our local schools, to any guests that may want to see agriculture in Colbert County.
"Monthly Birding Educational programs in one elementary school to establish and appreciation of birding and eco-tourism"

Apache Trail: Highlands Birding Trail promotion

Tour East Alabama: membership and guidance
Leadership Cleburne County: two eco tourism days/year
Accelerate Cleburne and Main Street program in county seat-Serve as Co Chairman of Accelerate Cleburne

WILD Wednesdays with USFS and Helpin PARD- eco tourism
County Farmers Market and County Fair- "Eco tourism"

Alaska

Agritourism: Local Foods, Farmers Markets, Culinary Tourism, Farm Stays
Cultural-Heritage Tourism
Nature-Based Tourism: Ecotourism, Wildlife Watching, and Adventure Tourism
Primarily high altitude agritourism and natural resources.
Introduction to Alaska Agriculture tours/presentations
Wilderness tours

Arizona

Arkansas

Agritourism: Local Foods, Farmers Markets, Culinary Tourism, Farm Stays
Community and Regional Planning and Development
Cultural-Heritage Tourism
Economic, Environmental, and Social Impacts of Tourism and Recreation
Marketing and Promotion
Nature-Based Tourism: Ecotourism, Wildlife Watching, and Adventure Tourism
Placemaking
Tourism Education, Training, and Certification Programs
Tourism Research and Evaluation
I coordinate UC Cooperative Extension agritourism outreach and education for farmers and ranchers statewide primarily through competitive grant-funded programs, participate in agritourism research with California and other state’s extension people, and manage a visitor-serving agritourism directory and calendar.
http://www.callagtour.org
http://kfp.ucdavis.edu/agritourism/
http://esi.ucdavis.edu/programs/sacrp/research-initiatives/fs/agritourism-1/agritourism

Colorado
Are there tourism programs that are needed/demanded/requested in your state/region that you are unable to offer but wish you could?

- Food/Agritourism: 23
- No: 10
- Hospitality/Guide/Event Training: 7
- Other: 5
- Nature: 5
- Rural/Urban: 4

PennState  NE RCRD  West Virginia University
What challenges or constraints do you face in being able to provide services to support tourism in your state/region?
What challenges or constraints do you face in being able to provide services to support tourism in your state/region?

- The need is far greater than the capacity
- Our programs are in high demand but our staffing capacity does not allow us to fully meet the demand.
- Educator capacity and administrative program focus.
- Endorsement and support at the state level is needed
- Competing programs!
- Extension is not always seen as a key asset by state tourism office
- At the moment tourism isn’t a recognized CE program
- In our state there is not a lot of overlap between Tourism and Community Development programs and the culture of these organizations is very different. This leads to missed opportunities for co-promotion and sharing of mutually beneficial data.
- We have a great tourism agency in our county. I think the biggest thing is determining each others strengths and combining resources.
- We need better communication between all parties
Recent Efforts

NERCRD grants
First Impressions
Trail Towns
AFRI grant proposal
Recreation
Agritourism
2018 NACDEP Conference
2019 NACDEP and NET conferences
Survey Identified Challenges:

- Admin Support
- Capacity
- Funding
- Regulatory / Risk Management Issues
- Common Language and Semantic Development
- Champions Needed
- Creation of Tourism as a focal point for multiple stakeholders
- Changing funding streams
- Document Impact, get past grant dependence
- Where to plug in? Create models, TtT
Rural-urban continuum codes

Classification based on pop size and adjacency to metro
Metro: 1,000,000
250,000-1mn
<250,000
Non-metro: 20,000+
2,500-20,000
less than 2,500
And metro adjacent or not

Data source: USDA ERS, Rural-Urban Continuum Codes, 1974
Rural-urban continuum codes

Data source: USDA ERS, Rural-Urban Continuum Codes, 2013
Community-based Food System

SUPPORT SYSTEM
- Community Viability
- Farmland Protection
- Growing Food
- Farm Viability
- Waste Disposal
- Food Security
- Process
- Prepare
- Retailing

Jobs
Community Advocates
Trade Associations
Funder & Lenders
Educators & Researchers
Policy-Makers
Government Agencies
Technical Service Providers

Adopted from CS Mott Group at MSU
National Extension Tourism (NET) Systems Model

- NET?
- Extension
- Sector Impacts
- External Partners

PennState

NERCRD

West Virginia University
National Extension Tourism (NET) Systems Model

- Agriculture (all)
- Community Development
- Economic Development
- Family, Youth & Health
- Food & Nutrition
- Natural Resource Mgmt
- eXtension CoP
- Research
- Student Engagement
National Extension Tourism (NET) Systems Model

- Entrepreneurship
- Economic Development
- Workforce Development
- Community Vitality
- Ecosystem Stewardship
- Smart Growth
- Rural / Urban Linkages
- Research
- Placemaking
National Extension Tourism (NET) Systems Model

- Community Members
- Funders
- Policy Makers
- Government Agencies
- Municipal Officials
- Business Owners
- Tourism Boards
- Developers
- Philanthropy
- Outdoor Recreation Companies
Save the Date

Presented by:
National Extension & Sea Grant Tourism Network (NET)
http://extensiontourism.net

Join colleagues including University Extension and Sea Grant professionals, other faculty, agency, students and industry representatives working on tourism and outdoor recreation. Present and learn about research, case studies, sustainability and funding modes, educational program materials etc. Open to all interested individuals. Mobile presentations will visit coastal community projects and environments.

See you on the Oregon Coast!

Astoria, OR | October 8-10, 2019
Thank you!

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