

CHAPTER 11: ECONOMY

BACKGROUND

The economy of the past relied heavily on the extraction of natural resources and manufacturing-based industry. While timber harvesting and coal mining still exist in Clearfield County today, these industries are not flourishing as they once did; however, they still play an important role in the local economy.

Today's local economy follows the same trend that is occurring across the state of Pennsylvania: a movement from manufacturing based economy to a service-based economy which typically is known for having lower paying wages. High unemployment, which has plagued the County over the past few decades, is also of great concern to the residents of Clearfield County.

Due to our working class population leaving the County for better employment, the County is left with an ever-growing aging sector of the population. With this aging population base comes the need to provide increased services for the elderly.

Rural areas tend to have significantly higher unemployment rates. Possible reasons for this have been presented, such as the reliance on cyclical industries, which are booming one decade and severely declining the next. Another possible reason presented is the overall education levels which are higher in more urban areas. This gives the employee the advantage of holding on to their jobs during a downturn and shortens their search for new employment. This need for education was discussed at many of the stakeholder roundtables sponsored by the County during this update to the County's comprehensive plan.

Top Employing Industries (1990 vs. 2003)	
1990	2003
1. Retail Trade	1. Healthcare & Social Assistance
2. Manufacturing	2. Retail Trade
3. Health Services	3. Manufacturing
4. Construction	4. Transportation & Warehousing
5. Educational Services	5. Accommodations & Food Service
6. Mining	6. Other Services (except public administration)

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Chapter 11 Economic Recovery & Strategic Plan

ECONOMIC RECOVERY & STRATEGY ACTION PLAN

Back in 2002, the County hired consultant, S. Patz & Associates, Inc., to prepare an Economic Recovery & Strategy Action Plan. The primary effort of the strategy and action plan was to identify various growth opportunities and list the steps that should be taken for implementation. The report emphasized industrial park development since it attracted the most interest from public officials and county economic development staff. One key element that was identified was the need to diversify the economic base of the County and to recognize that current industrial park development has satisfied the current land needs of the County. A second item identified was the need for more county involvement in controlling attractive available sites. Thirdly, it was recommended that a “one stop” shop should be established to coordinate all economic activities.

The Strategic Action Plan highlighted the importance of revamping the County’s image, tarnished by recent and past plant closings and large blighted vacant industrial properties. One step to achieve this goal is to support the demolition of blighted industrial properties. The plan identified three priority properties for demolition and redevelopment, which are listed below.

Potential Demolition and Redevelopment Sites

1. The former Crescent Brick Property located along SR 879 and South Second St. in Lawrence Twp.
2. The Cresswood Company located along US Rte. 322 and SR 879 in Lawrence Twp.
3. The former North American Refractories Property located along SR 879 in Pike Township

A second action item identified for improving the County image was implementing “curb appeal”. When marketing potential development properties, it is imperative that they are attractive and welcoming. Factors such as professional landscaping, lawn maintenance and signage identify parcels as being actively marketed.

An implementation plan was also laid out with ten specific priorities being provided and listed below.

1. Firemen's Industrial Park. Ownership of this park needs to be transferred to CCEDC/CCIDA so that improvements can be made and better marketing initiated. This will require action by the County Commissioners and Lawrence Township Supervisors. It is the first step towards organizing countywide economic development.

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2. Purchase of Key Properties. CCEDC/CCIDA needs to apply for funds to purchase the following properties in the order shown:
 - Crescent Brick
 - North American Refractories
 - Woodland
 - Cresswood
3. Master Plan the Former Crescent Brick Company Property for a residential subdivision of a mix of housing types. This does not mean simply to engineer the site. The suggestion here is to hire a landscape architect to prepare an attractive master plan for mixed-use development and then to subdivide the property into at least three pads-single family, townhouse, and multifamily. Some additional research may be needed to identify the magnitude of development for each housing type and to prepare a strategy for development.

That strategy could entail: (1) CCEDC/CCIDA developing the pads and selling lots to homebuilders or homebuyers; or (2) selling finished pads to homebuilders. The expectation is for the sale of the land to be sufficient (in time) to pay for the cost of the site acquisition and development. If a grant is secured from the State, it is possible that land sales can flow to the CCEDC/CCIDA budget for future development. Hopefully, marketing of lots for new homes can commence by Spring 2004. The goal should be to develop lots/homes as soon as the market allows. It is imperative that, if developed, this be a fully landscaped and attractive property that sets the image for future residential development.

A pad refers to a section of the property that will be developed for single-family lots, townhouse lots, or multifamily sites. It is likely that the site will be divided into several "pads" for single family, given the expected annual level of home sales.

4. Market New Industrial Properties. The Woodland site and the former North American Refractories property represent key industrial sites in addition to Firemen's Industrial Park. These sites should be made available for sale/development. The Woodland property can be very attractive for new large users who will not pay industrial park prices for large sites. The North American Refractories site will provide readily available land in the Curwensville area.
5. Complete Ongoing Projects. There are two infrastructure/site development proposals in DuBois/Sandy Township. Both will open up attractive sites that will improve development opportunities.

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6. Marketing Budget. The County's marketing efforts need to be revised, as noted above. The revisions need to be done in two steps. First is to make changes that reflect the results of the strategic plan and concentrate on marketing property that is readily available. Second is to have a new marketing package once new sites are under the control of CCEDC/CCIDA.
7. Tourism Plans. Before local money is committed to tourist projects, a tourism plan needs to be prepared. That plan should be prepared in conjunction with current area tourist related proposals.
8. Proactive Planning. The CCEDC/CCIDA staff must be more proactive in planning. That means that the staff must ensure that future projects are properly conceived and attractively developed. As an example, if a new prison is to be built in the Moshannon Valley area, the project should be planned with county staff direction. It should have housing sites nearby. This and other large proposals need to be analyzed for all environmental issues and good design issues. All new development needs to be attractive additions to the County.
9. County's Master Plan. A new master plan is being proposed. This master plan must identify future development sites on or near Corridor O interchanges, as noted above.
10. Covington Township Industrial Park. Enroll the 83 acres into the Commonwealth's Keystone Opportunity Zone Program.

ECONOMIC ANALYSIS OF THE COUNTY

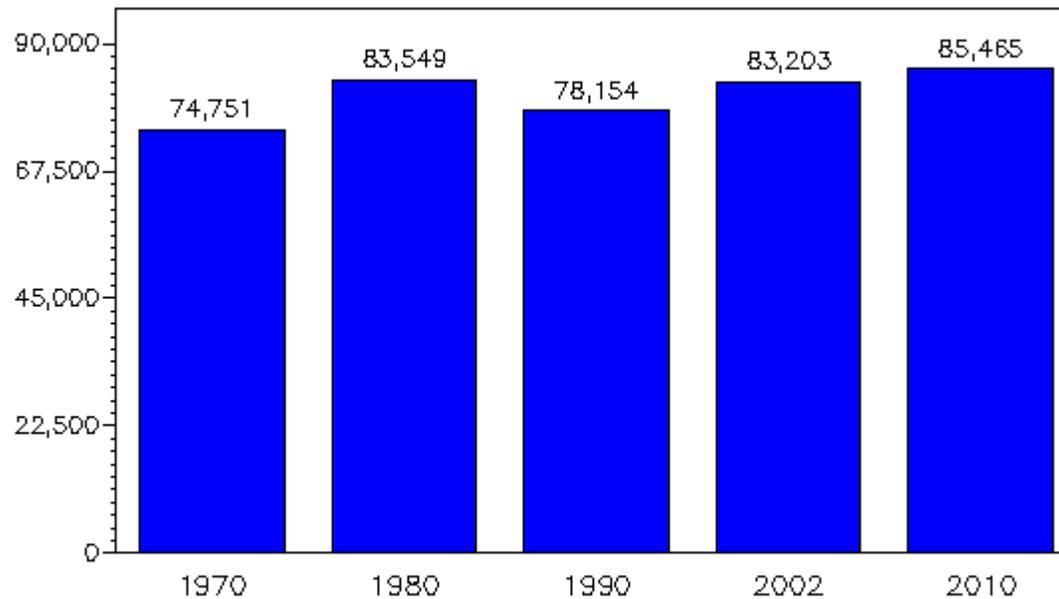
Population is a very important factor in determining the economic well being of a community. The population trends in the County have been cyclical over the past 20+ years which correlates with the up and downs of the local economy which relies heavily on a manufacturing base. Residents come and go depending on the job opportunities available in the area. As these work-force aged residents leave, an aging population is left behind. This is evident by the high percentage of which this age cohort represents in the County.

These trends are not simply just a local issue. Our neighboring counties, who also rely heavily on manufacturing, experience the same trends. Stagnant or declining populations are signs of weaker economies. In the case of Clearfield County, population has fluctuated up and down over the past few decades indicating a need for stabilization of the local economy. If population increases are a sign of an improving economy, then the Woods & Poole population forecast for Clearfield County during the year 2010 of 85,465 is a positive sign of a stronger economy. Although this is only a 2.7% increase from 2002 population figures, it is higher than the expected statewide growth of 2.3%

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Economic Analysis of the County**

County Population: 1970 – 2010



Source: US Census Bureau and Penn State Cooperative Extension

Historically, high unemployment numbers have unfortunately been a reality for the County over the past few decades. The current economy is service based which generally offers low wage jobs, creating higher poverty levels.

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MAJOR EMPLOYERS BY INDUSTRY

Major Employers *	Industry Sector
Wal-Mart Associates, Inc.	Transportation and Warehousing
DuBois Regional Medical Center	Health Care and Social Assistance
Clearfield Hospital	Health Care and Social Assistance
Appalachian Wood Products, Inc.	Manufacturing
DuBois Area School District	Educational Services
Penn Traffic Company	Management of Companies and Enterprises
Clearfield Area School District	Educational Services
Cen-Clear Child Services	Health Care and Social Assistance
Christ the King Manor	Health Care and Social Assistance
Central Intermediate Unit	Educational Services
* 2nd Quarter of 2005	Source: PA Department of Labor & Industry

COUNTY INCOME ANALYSIS

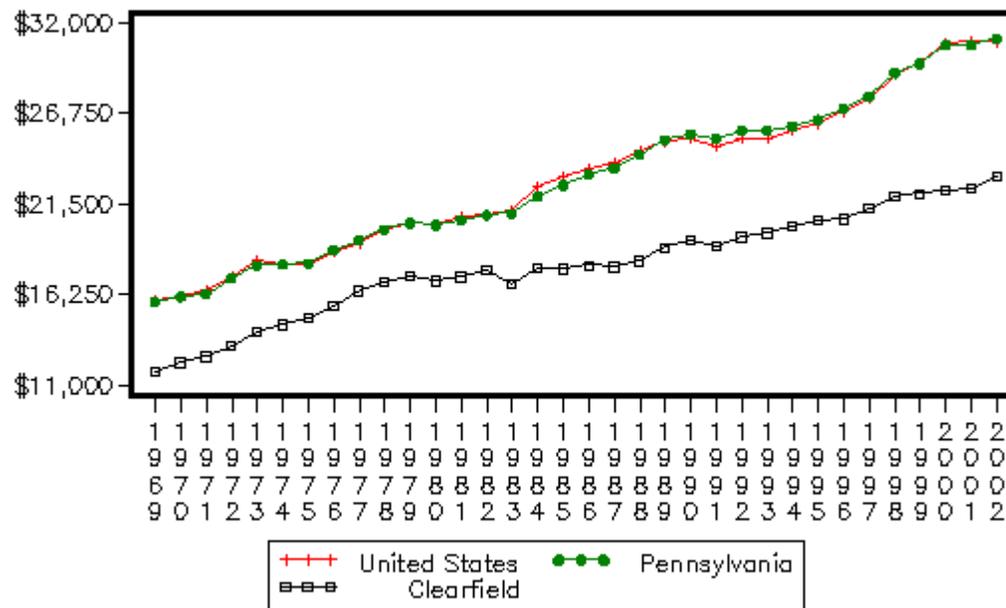
Another tool widely used to determine the health of the local economy is the per capita income. In 2002, Clearfield County's per capita income was \$23,131. By comparison, per capita income in Pennsylvania was \$31,116 and the U.S. average was \$30,906.

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In the chart below, we see how per capita income in the County has fared since 1969 (adjusted for inflation).

County Per Capita Income (Inflation Adjusted)



Source: BEA-REIS and Penn State Cooperative Extension

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Chapter 11 Labor Force Characteristics

Personal income consists of three main components: 1) earnings and proprietors' income; 2) dividend and interest income; and 3) transfer payments from both government and business (including income maintenance assistance and retirement payments). In most counties, employment earnings account for the largest share of local income. Over time, however, other sources have provided larger shares of local income. For example, as the local population ages, transfer payments such as social security have become a major source of local income.

Understanding the source of personal income is important to municipal government since it relies on such sources for its tax basis. As earnings incomes decrease, so do local tax revenues.

LABOR FORCE CHARACTERISTICS

The total civilian labor force in Clearfield County for December 2005 was 41,100 of which 38,800 were employed and 2,300 were unemployed. The unemployment rate was 5.6 percent.

The following is a list of the labor force, employment, and unemployment information for Clearfield County. These figures are for the December, 2005 time period. These figures are not seasonally adjusted.

Labor force, Employment and Unemployment Statistics

Area	Civilian Labor Force	Number Employed	Number Unemployed	Unemployment Rate	Preliminary Data
Clearfield County	41,100	38,800	2,300	5.6%	Yes
Pennsylvania	6,285,000	6,014,000	271,000	4.3%	No
United States	149,874,000	142,918,000	6,956,000	4.6%	No

Source: PA Dept of Labor and Industry

The average weekly wage for Clearfield County in 2002 was \$507. This would be equivalent to \$12.68 per hour or \$26,364 per year, assuming a 40-hour week worked the year around.

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The following is a list of average weekly wage information for Clearfield County. These figures are for the 4th Quarter, 2002 time period.

Average Weekly Wage Statistics

Area	Average Weekly Wage
Clearfield County	\$507
Pennsylvania	\$716

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As mentioned earlier, a cyclical population is a sign of an economy that is need of stability. In the past, the County relied on industry sectors that fluctuated greatly in response to the national economy. Two such industry sectors are manufacturing and mining.

County Employment by Industry: 2000

Sector	Employment	Percent of County total	Percent change since 1990	Industry's share of state total
Farm	569	1.3%	6.2%	1.2%
Ag, For. & Fish	343	0.8%	40.6%	1.0%
Mining	788	1.9%	(53.4%)	0.4%
Construction	2,175	5.2%	12.6%	5.4%
Manufacturing	5,830	13.8%	15.9%	13.6%
Trans. & Utilities	2,467	5.8%	(6.0%)	5.0%
Wholesale Trade	1,286	3.0%	9.1%	4.3%
Retail Trade	9,743	23.1%	26.6%	16.8%
Fin., Insur. and Real Est	2,114	5.0%	35.9%	7.5%
Services	11,648	27.6%	24.8%	33.6%
Local Govt	3,005	7.1%	13.6%	6.5%
Other Govt (Fed & State)	2,215	5.3%	33.9%	4.6%
TOTAL	42,183	.	16.8%	.

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The decline in manufacturing is a national issue which cannot be “fixed” by local economic development efforts. With that being said, manufacturing provided a major share of the jobs in the region. With all the counties in our region offering the same incentives to attract new business, what stands one county apart from another? Focusing on growth of local businesses becomes key then to growing new jobs in the County. The need to develop from within, a diversified economy, is required.

An extremely important factor in not only improving our local economic well being, but also the overall quality of life for County residents is education. The more educated our residents are the better quality of life they can obtain. Statistics show that those living in poverty, those unemployed, those lacking health insurance, and those not owning their own home typically have lower educationally levels. At every public participation forum offered during the development of this comprehensive plan update, education was indicated as a barrier to a better quality of life. Education needs to begin with our youth. They need to know what job opportunities are available for them after they graduate. Just because a student is not college bound does not mean that they do not have equal or even better job opportunities if they attend a local trade school. Today’s “skilled workers” are in great demand and are sometimes offered financial incentive packages from prospective employers. Students should be given the opportunity to explore not only the opportunities for employment elsewhere but also those available here in their hometowns.

A new way of thinking about economic development must take place. We need to think regionally. All of us competing for the same limited dollars is not productive. Any job creation in the region is a plus for our county. Just looking at out of county work migration numbers is evidence that we work beyond county boundary lines. Just from 1990 to 2000, commuters were traveling to 56% more locations outside of Clearfield County to get to work. Almost a third of the commuting population was travelling outside of the County in 2000.

The significant large scale manufacturing loss in Clearfield County, such as the recent losses of the electronics and textile industries, are prime examples of how large the impacts are to a community when so many rely on a single employer. This experience has taught local leaders that having all of your “eggs in one basket” is no longer the desired type of economic development. Diversifying the economy, creating 10-20 jobs here and there, is the new strategy. Therefore, if a business closes its doors, only a few jobs are lost unlike the large scale loss if a manufacturing plant was to close.

If you take a look at the type of industries that are growing and those which offer family sustaining wages, you will find that such industries are referred to as part of a “knowledge based” economy or those sectors which attract the “creative class” of worker. Today’s economy is shifting to an industry which requires talented or “creative” employees--those who are innovative thinkers. Those creative workers are attracted to regions where their innovative thinking is encouraged and fostered, where ethnic diversity is embraced, and where they can enjoy a high quality of living. Such rural areas as ours do not typically offer such an environment. Although, rural folks are well known for their hospitality, they are usually

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resistant to change and live an “isolated” existence. The same mind set and procedures that were used 50+ years ago are still in existence today which is not conducive to innovating thinking.

With that being said, it does not mean that Clearfield County does not have great opportunities to pursue these “knowledge based” industries. After a conducting a visioning session in 2005 at the DuBois High School, it was apparent that our youth understand the need for diversity and change. In fact, many indicated they would leave the area upon graduation to seek employment in more progressive diversified communities. This shows that our younger generation is in tune with the importance of diversity. Another factor in our favor for attracting “knowledge based” businesses is our close proximity to a research and development educational institution, the Pennsylvania State University. Combined with our convenient east coast location including five exits from Interstate 80, one of the most widely use national highways, our abundant natural resources and outdoor recreational opportunities and our available lands, we have great potential to attract this industry sector. A key to such success will require community support and cooperation.

Core “Knowledge Based” Industries

Research & Development	Advertising
Publishing	Architecture
Software	Performing Arts
TV & Radio	Crafts
Design	Video Games
Music	Fashion
Film	Art
Toys & Games	

Just because manufacturing is declining nationally does not necessarily mean that there aren’t any viable opportunities for our area. In fact, some manufacturing industries, such as the powdered metals industry, are thriving in our region.

Overall, manufacturing, although declining in job numbers, is still the third largest industry in PA and provides 18% of all jobs in rural PA. Unfortunately, it is the most susceptible to downturns due to the national economy. Factors cited for those declines are job losses to overseas producers and increased worker productivity.

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If local economic development agencies choose to seek such manufacturing businesses, they should utilize a tool called the location quotient which is used to determine if certain manufacturing businesses have an advantage in our region. Location quotient is a measure of an industry's concentration in an area relative to the rest of the nation. Location quotient compares an industry's share of local employment with its share of national employment. A location quotient greater than 1.00 indicates a "trade cluster" — an industry that exports the majority of its goods and services to other areas. The converse is a "local cluster" — where the majority of its goods or services are consumed by the local market. Industries with location quotients above 1.00 are considered competitive.

A key to developing effective economic development strategies is to understand the current and historical performance of the local economy. By understanding the past and current trends of economic activity in the County, we are in a better position to identify the opportunities that exist for economic development. For example, some industries are growing fast in the State as well as in the County such as health care services. This industry, which requires many skilled employees and typically offers competitive wages, is one in which efforts can be taken to foster future growth. However, some growing industries generate low wages and may not be the type of economic base the County wants to spend a great deal of time fostering. Although these industries, such as food services, are needed, especially if you are enhancing your tourism industry base, they typically do not provide family sustaining wages.

Analyzing the current employing sectors, it is apparent that Clearfield County is mirroring the same trends seen statewide in that services and retail trade are the prevalent industries at this time, while manufacturing trails in third place.

Many of the past economic development efforts have been to develop industrial parks for new companies and local expansion. While in theory this strategy makes sense, in reality it has not fully worked. Almost all-new employment growth in the County has come from local companies. Attracting new companies is highly competitive both regionally and nationally. Most all counties in the region have the same amenities to offer a prospective company, therefore growing from within can be very beneficial.

INVENTORY OF INDUSTRIAL, COMMERCIAL AND TRADE ESTABLISHMENTS

The most current statistics available on county business patterns are from 2003. During the week of March 12, 2003, there were 25,207 employees working in Clearfield County at 1,954 establishments. Top employing industries were Healthcare and Social Assistance, Retail Trade, Manufacturing, Transportation & Warehousing, and Accommodation & Food Services. Looking at which of these industries had the largest payrolls, topping the list was the Health care & Social Assistance sector followed by Transportation & Warehousing and Manufacturing. As expected, we see that one of the largest employing sectors, Accommodations & Food Services, ranked low for its annual payroll since service-related jobs tend to pay lower wages.

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Inventory of Industrial, Commercial & Trade Establishments**

Clearfield County Business Patterns for 2003

Industry Code Description	Number of Employees for week including March 12	Payroll (\$1,000)		Total Establishments
		1st Quarter	Annual	
Total	25207	143255	610757	1954
Forestry, fishing, hunting, and agriculture support	36	151	702	14
Mining	677	7181	26171	40
Utilities	205	2213	9265	18
Construction	734	4409	22568	170
Manufacturing	3524	22894	96970	116
Wholesale trade	621	4673	19905	73
Retail trade	4366	18115	77080	366
Transportation & warehousing	3348	24961	105138	150
Information	454	2650	10435	30
Finance & insurance	746	5306	21249	98
Real estate & rental & leasing	180	981	4793	35
Professional, scientific & technical services	566	3416	13425	105
Management of companies & enterprises	180	1975	8010	10
Admin, support, waste mgt, remediation services	751	2266	9924	60
Educational services	195	887	3651	9
Health care and social assistance	4898	31256	137887	215
Arts, entertainment & recreation	107	385	1937	20
Accommodation & food services	2204	4484	20013	163
Other services (except public administration)	1412	5045	21577	256
Unclassified establishments	3	7	57	6

Source: US Census Bureau

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**Chapter 11
Undeveloped Industrial & Commercial Areas**

UNDEVELOPED INDUSTRIAL AND COMMERCIAL AREAS

An inventory of available industrial and commercial areas was conducted back in 2002 by the County’s consultant, S. Patz & Associates, Inc., and reported in a separate study entitled Market Analysis: Economic Recovery Strategy & Action Plan. An analysis was first done on the existing seven industrial parks that existed in the County. Of these parks, 461 acres were available for development.

Characteristics of Industrial Parks By Submarket Area, Clearfield County, 2002

	Date Opened	Total Acres	Available Acres
Clearfield Borough			
Clearfield Firemen's Ind. Park	1986/87	195	140
CCTP	2002	<u>44</u>	<u>30</u> 1/
(Subtotal) 3/		(239)	(170)
DuBois/Sandy Township			
Sandy Township Developac Ind. Park	1997/98	240	222
DuBois Railroad Ind. Park	1997	9	0
DuBois Beaver Meadows	--	<u>20</u>	<u>15</u>
(Subtotal)		(269)	(237)
Other County			
Curwensville Ind. Park 2/	1990	46	0 1/
Covington Township Ind. Park 4/	2003	<u>83</u>	<u>58</u> 1/
(Subtotal)		<u>129</u>	<u>(58)</u>
Total		637	465

Notes: 1/Includes property under contract, 2/Includes two adjacent parcels outside of industrial park, 3/Excludes: (1) Crescent Brook property-54 acres; (2) Woodland Industrial property-100± acres, 4/CCIDA owner property that has not yet started.
(Source: S. Patz and Associates, Inc. Field Survey)

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In addition to the above-identified industrial parks, several other privately owned properties were identified as having potential for industrial development and are listed in the following table.

Properties w/ Potential for Development

1. The former Crescent Brick Property on SR 879 in Lawrence Township which includes 54 acres
2. A 100 acre parcel on Doe Hill Road, Woodland, Bradford Township
3. The former Bayer Clothing site on Coal Hill Rd. in Lawrence Township which includes 75 acres.
4. The Cresswood Company site at I-80 & SR 879 in Lawrence Township which include 36+ acres
5. The County's Professional Office park on Leonard Street in Lawrence Township

The consultant also identified vacant industrial building that would be available for occupancy, which are listed below.

Vacant Industrial Buildings, Clearfield County, 2002

	Building Size (in sq. ft.)	Site Size (in sq. ft.)
Cresswood Co. I	10,000	36.0
Cresswood Co. II	14,000	2.5
Bayer Clothing	88,000	75.0
Crescent Brook	85,000	54.0
Bayer Clothing	72,000	3.3
Clearfield Riverside	20,500	2.2
Erie Bearings	12,000	5.0
Kent II	16,500	0.5
Robert-Bryce	33,000	13.7
Target Sportswear	50,000	6.4
M & M Enterprises	<u>21,300</u>	<u>7.1</u>
Total	422,300	205.7
Source: CCEDC		

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Chapter 11 Tourism & Recreation

TOURISM & RECREATION

Clearfield County is home to some of the State's most prized recreational lands and waterways. Over 122,332 acres of State forest and games lands, 70 miles of fishing streams and approximately 75 acres of lake fishing exist within our borders.

The natural, heritage, and recreational resources within a community contribute to quality of life for its citizens. Communities such as ours who have lost many traditional industries are in need of assistance in sustaining those that remain as well as developing new ones to grow their employment base and improve the quality of life of their residents. With our abundance of public lands, recreational activities, and rich heritage, the opportunity to build an economy upon these assets has never been riper.

Although tourism holds great potential for Clearfield County, it can have negative impact if planning and intergovernmental coordination is not utilized to ensure that both the resources that we promote and the quality of life for our residents are protected. Tourism does come with some potential harm, such as the impacts from a large influx of visitors. A prime example of such an impact is the explosion of elk-watching tourism in the small town of Benezette in neighboring Elk County. Lack of planning, infrastructure, and education have lead to negative impacts upon the quality of life for the local residents of Benezette.

Prior to full-scale tourism promotion, it is imperative that Clearfield County prepare and implement a tourism plan that incorporates critical planning measures and provides education and training to its local municipalities so that tourism is a positive experience for us and not a negative one. Such a tourism plan was recommended in the County's 2002 Economic Recovery & Strategy Action Plan.

One of the State's goals which is just as important to Clearfield County is to create recreational and educational connections with the outdoors by improving visitor experiences and increasing awareness of what is available. We must also expand and target educational messages to help people make lifestyle decisions that will enhance and protect natural resources.

Tourism involving overnight travel or travel of more than 50 miles one-way, is the State's second largest industry and pays economic dividends particularly when travelers stay overnight for multiple days and spend money on accommodations, food, services and other goods in the community.

In 2000, domestic and international travelers spent an estimated \$21.4 billion in Pennsylvania. This spending supported about 386,590 full and part-time jobs for Pennsylvanians, making it the third largest employment sector in the State's economy. While overall business travel is still down after September 11, 2001 and the economic downturn, leisure travel to the State has rebounded and is up over 13 percent from 2000 levels.

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Leisure travel to the State is projected to continue to rise as travelers increasingly look for the safety and security of travel by car to regional destinations that are within a day's drive.

The Department of Conservation & Natural Resources (DCNR) 's " Shaping a Sustainable Pennsylvania: Blueprint for Action" listed the following advantages that counties such as ours have when it comes to development of our tourism and recreation industry sector.

1. Growing popularity of nature-based and heritage tourism
2. Pennsylvania's extensive system of public lands
3. Our rich heritage
4. Location near major population centers
5. Our wide array of natural assets

The quality of Pennsylvania's natural resources is the foundation of its eco-tourism effort; therefore, proper stewardship of these important economic resources must remain at all times, a high priority.

With the recent tourism initiatives such as the Lumber Heritage Region, the Elk Watching and Nature Based Tourism Plan, and the PA Wilds, it is a prime time for Clearfield County to focus on the development of its tourism and recreation economic base.

Lumber Heritage Region

In 2001, the Lumber Heritage Region, which consists of 15 counties, including Clearfield County, was designated as one of Pennsylvania's twelve Heritage Areas. The Lumber Heritage Region of Pennsylvania (LHR) is a local grassroots project with the purpose of highlighting and interpreting the rich cultural, historic, natural, and recreational resources of Pennsylvania's forests.

The Lumber Heritage Region:

1. provides technical, educational, and financial assistance to communities, local governments, business institutions, and the general public;
2. coordinates programs which interpret the region's unique lumber history, celebrates its living heritage, and fosters a greater understanding of the contemporary lumber and forest products industry and rural life;
3. works to enhance the region's economy by providing forest management education; conserving and interpreting historic, natural, and recreational resources; and enhancing tourism in cooperation with local communities to make the region a better place to live, work and visit.

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Elk Watching & Nature Tourism

In August of 2002, the North Central Planning & Development Commission oversaw the development of an Elk Watching and Nature Tourism plan prepared by Fermata, a nature tourism consulting firm from Texas. This plan was a direct spin off from the Lumber Heritage Region Management plan.

The main objective of the project was to develop a five-year plan for elk viewing and other nature-related tourism that would:

Provide recommendations to improve visitor services and guide the development of appropriate infrastructure;

- Support the long-term ecological needs of an expanded wild elk herd;
- Stimulate economic benefits for local communities and minimize conflicts with private landowners and other forest users throughout the elk range with partner agencies, the public, and local and county government;
- Educate tourists and residents about responsible stewardship of the elk herd and the region's other natural resources;
- Protect the natural integrity of the region; and
- Promote elk watching and other nature and tourism activities.

The plan detailed two specific findings which are described as follows.

FINDING # 1

The elk range is well positioned to capitalize on the economic growth opportunities associated with the growing market for nature tourism.

There is considerable potential market opportunity for various private services including:

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guides, outfitters and accommodations in the region. Improvements in lodging, dining, and entertainment could make the region an overnight destination of choice

According to the plan, there are at least 46 million people who reside in the urban and suburban areas within a 6-hour drive of our region.

Data provided in this plan, taken from research conducted by the Travel Industry Association of America in 1998, show that the most prominent adventure travel activities were camping, hiking, biking and wildlife watching.

FINDING # 2

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

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

The plan included a listing of seven recommendations, which are described below.

RECOMMENDATION # 1

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

RECOMMENDATION # 2

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

RECOMMENDATION # 3

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

RECOMMENDATION # 4

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

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RECOMMENDATION # 5

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

RECOMMENDATION # 6

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

RECOMMENDATION # 7

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

This recommendation has the most impact to Clearfield County since the visitor center on I-80 was recommended at the intersection of Exit 111 of I-80 (Penfield) and SR 153 near the Moshannon State Forest District office and S.B. Elliott State Park.

One of the recommendations made was to establish a regional marketing initiative. The consultant, Fermata, also provided a listing of the action items needed to be taken to implement a marketing strategy, which follows.

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

ECONOMY

PA Wilds Initiative

Another spin off, in this case from the Elk & Nature Tourism Plan, was a marketing initiative called the PA Wilds. Within our 12 county region are some of the most wild and scenic areas in the northeast which include more than two million acres of public lands set aside for the public's enjoyment and is teeming with wildlife and unlimited recreational opportunities.

There are over 6.5 million acres of land in the PA Wilds region. Roughly 80 percent of that land, 5.2 million acres, is forestland. The 2.1 million acres of public land in the Pennsylvania Wilds is the largest block of public land between New York and Chicago. The southern portion of the Wilds is accessible from Interstate 80, the busiest east-west interstate in the United States.

The Commonwealth is developing a strategy to encourage the growth of tourism and related-businesses in Northcentral Pennsylvania based on these significant outdoor resources. The goal is to enhance the visitor experiences in this region while protecting and conserving these treasured natural resources. The focus includes improvements to the natural resources, infrastructure and visitor services of the region.

To help guide this strategy, in 2003, Governor Edward G. Rendell established a cabinet-level task force to coordinate State agency involvement in the Pennsylvania Wilds. The task force led by Department of Conservation and Natural Resources Secretary, Michael DiBerardinis, began a planning process to examine outdoor recreation resources, the region's lumber heritage, opportunities for private concessions to support tourism; public facilities and staffing needed to support the Pennsylvania Wilds; and opportunities to stimulate purchase of Pennsylvania wood products and other local goods and services through tourism.

One major component of this marketing initiative that was not getting the attention it deserved was planning. Therefore, the PA Wilds Planning Team was formed in 2005 at the recommendation of the Governor's PA Wilds Task Force recognizing the importance of connecting communities and community planning resources to this initiative.

The team is comprised of county planners and the directors of the local development districts in the region, along with representatives from the PA Wilds Corporation, the PA Association of Township Supervisors, the County Commissioners Association of PA, the Route 6 and Lumber Heritage regions, DCNR, and DCED.

A cooperative agreement was developed so these entities could more fully cooperate to address mutual planning issues and concerns related to implementation of the PA Wilds initiative. Specifically, the agreement outlines the team's role to:

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- Provide leadership to support appropriate planning in the PA Wilds region that helps communities take the best economic advantage of the initiative while retaining the character of the area;
- Be a conduit for interaction and communication with municipal officials;
- Identify impacted communities, their needs, and implementation strategies necessary to assist them in responding to the potential increased visitation and development that may result around DCNR investment areas; and
- Review current county planning documents and if necessary, provide advice and information for update of documents to address the potential opportunities and challenges for counties in the PA Wilds region.

All 12-counties in the Pennsylvania Wilds region agreed that planning was critical to the success of the PA Wilds initiative and as a result signed intergovernmental cooperation agreements entering into the largest geographic cooperative planning effort ever in the State of Pennsylvania.

In March of 2006, this Planning Team which prepared a list of critical planning objectives, was in the midst of preparing for the submittal of grant applications to the State for implementation funding.

ALTERNATIVE ENERGY DEVELOPMENT

Alternative energy is currently a much-discussed topic, with **two** proposed ethanol and one bio-diesel plants being proposed in the County, as well as one of our largest school districts, Clearfield Area, contemplating the purchase of a “biomass “ boiler. During a time of such extreme high pricing for traditional fossil fuels, companies, governments, and institutions are actively seeking alternative fuels. The current pricing of fossil fuels makes alternative fuels a viable option. Once, such alternatives were more costly than traditional fuels; but now, this is no longer the case.

Renewable energy sources like wind, solar, geothermal, hydrogen, and biomass play an important role in the future of our County, State, and Nation. Bio-energy technologies use renewable resources to produce an array of energy-related products including electricity, liquid, solid, and gaseous fuels, heat, chemicals, and other materials.

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The term "biomass" means any plant derived organic matter available on a renewable basis, including dedicated energy crops and trees, agricultural food and feed crops, agricultural crop wastes and residues, wood wastes and residues, aquatic plants, animal wastes, municipal wastes, and other waste materials.

Some alternative energy projects being proposed or on the radar screen of the County's Economic Development folks are as follows:

Alternative Energy Projects	
1	Sunny Side Ethanol Project- (Corn)
2	Swan Biomass Project (Ethanol- Waste Forest)
3	Bio Diesel- (Methanol)
4	Wood Pellet Technology
5	Wind Mill Technology

During our public participation process, we also received a letter from the Quehanna Industrial Development Corporation which outlined their interest in establishing windmill energy technologies within the Townships of Girard, Covington, and Karthaus.

COUNTY GOALS & IMPLEMENTATION STRATEGIES

During 2005, local economic development, tourism, and recreation stakeholders were invited to participate in two visioning sessions sponsored by the County Planning office, the purpose of which was to identify goals and objectives to be used in updating the County's comprehensive plan. Through those discussions, top goals were identified and a list of action items were offered for use in implementing those goals. These goals can be found in Chapter Three, entitled "County Goals & Objectives."