

Visitor Analysis and Marketing Plan for the Chester County Heritage Tourism Plan

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**In Association with:
Heritage Strategies**

**Prepared for:
Chester County, PA**

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EXECUTIVE SUMMARY

Chester County retained Heritage Strategies to prepare a Heritage Tourism Plan. ConsultEcon is supporting the development of the plan with a supplemental report with a Visitor Analysis & Marketing Plan that evaluates recommendations in the Heritage Tourism Plan. Implementation of the plan will be undertaken by Chester County through the Chester County America250 PA Commission (CC250), and Chester County Tourism over the next few years and in the next 5 years will focus on two initiatives: (1) interpretation of the primary theme The Philadelphia Campaign as part of the 250 celebrations of the United States founding and (2) implementation of the “Base Program.” These initiatives are described further in the Heritage Tourism Plan. The Visitor Analysis & Marketing Plan analyzes economic and community benefits and provides recommendations for marketing of these two initiatives.

CHESTER COUNTY HERITAGE TOURISM

Based on the directory prepared for the Heritage Tourism Plan, there are 92 heritage sites in Chester County that include a mix of 21 public sites, 65 non-profit sites and 6 others (e.g., private businesses, individuals). Heritage sites in Chester County are more than historic sites and museums. They encompass natural and cultural landscapes, parks and trails, historic villages, and downtowns. Phoenixville, West Chester, and Kennett Square with their historic downtowns provide visitors options for shopping and dining. Visitors to heritage sites in walkable and historic downtowns and villages have better access to hospitality, services, amenities, and other attractions so that they offer a more complete visitor experience than those sites that are remote. Therefore, they are more gain visibility from nearby visitor activity and create the best opportunity for spillover visitation.

Heritage sites are spread throughout Chester County but there are several distinctive zones of concentration in the southern and northern parts of the county. In the south, the Brandywine Valley heritage sites are clustered along Route 1 and focused on the scenic byway. Chester County’s Brandywine Valley provides website branding for the county’s destination marketing organization, Chester County Tourism, in recognition of the area’s importance as a destination in the county.

Total heritage site visitation is over 6.4 million. The largest and most popular attractions by far are Longwood Gardens, Valley Forge National Historical Park, and French Creek State Park. Together, these attractions account for 63 percent of all heritage site visitation in the county. They also account for most of the economic impact in the county because of the scale of their visitation, staff, and operating budgets. These attractions also draw the most visitors from outside of the county. Valley Forge drew 1.6 million visitors in 2022 and was up over 2 million visitors in 2020 at the height of pandemic when people were seeking outdoor recreational opportunities. Longwood Gardens typically attracts 1.6 million people annually and French Creek State Park attracts over 800,000 visitors annually.

Chester County has 48 accommodations properties with over 4,900 rooms in four major clusters: Exton/Downingtown, Kennett Square, West Chester, and 202 Corridor. In the north, Valley Forge, Phoenixville and French Creek State Park form an axis of activity that offers a visitor experience that is different and distinctive from the Brandywine Valley. Given the county's emphasis of the Brandywine Valley through its tourism marketing, there is an opportunity to build up the tourism branding in northern part of the county and its attractions. The heritage sites in remote locations nonetheless offer an attractive visitor experience due to their very remote nature. Chester County's agriculture, food and land conservation are an important differentiator from other counties in the region—no other county has preserved as much land as Chester County. The county therefore can leverage these heritage assets in new and compelling ways to sightseers, outdoor recreationalists, and food and beverage tourists.

RESIDENT MARKETS

The primary market segments for heritage tourism and visitation to heritage sites include resident and tourist markets. The following are key population trends and demographic characteristics in Chester County and the Resident Market Area, defined as the area within a 50-mile radius.

- ◆ Within a 50-mile radius, there is an estimated population of approximately 8.2 million in 2022.
- ◆ The distribution of the population between age groups in the Resident Market Area is similar to that of the U.S. as a whole. The median age within the 50-mile radius is 39.9 – slightly younger than that of Chester County at 40.7, but slightly older than in the U.S. as a whole at 38.9 years old.
- ◆ There were approximately 1.3 million school-age children (ages 5 to 17) within the 50-Mile radius in 2022. The population of school-age children within the 50-mile radius is projected to decrease slightly by 2027, by 2.8 percent.
- ◆ Approximately 61.7 percent of the adult population have educational attainment above high school graduation within the 50-mile radius. This level of educational attainment is lower than that in Chester County at 75 percent, slightly higher than the difference between Chester County and the 50-mile radius at 60.8 percent, and slightly higher than in the U.S. as a whole at 62.9 percent.
- ◆ The average household size of 2.53 persons within the 50-mile radius, which is slightly lower than that of Chester County at 2.64 persons and similar to the difference between Chester County and the 50-mile radius and the U.S. as a whole at 2.52 and 2.55 respectively.
- ◆ The percentage of households comprised of “families” is 64.4 percent within the 50-mile radius, similar to the difference from Chester County to the 50-mile radius at 64.1 percent and the United States as a whole at 64.8 percent; however, the Chester County percentage of families at 68.2 percent is greater than those other areas.

- ◆ Chester County households have the highest incomes compared to the other market areas. Median household income within the 50-mile radius at \$79,000 is significantly lower than Chester County at \$111,000 but only slightly higher than the United States as a whole at \$72,000.
- ◆ Chester County residents are more likely to participate in an arts, cultural, heritage and travel activities. Participation in all of these activities exceeded the national average for both residents within the 50-mile radius and Chester County residents. These resident market behaviors demonstrate that the local residents appreciate and allocate excess funds to leisure activities particularly those related to arts and culture.

TOURIST MARKETS

Chester County attracted 2.6 million day and overnight visitors, 93 percent of 2019 visitation levels.¹ There were 1.45 million day and 1.11 million overnight visitors to Chester County in 2022. Visitor spending reached \$766 million in 2022, growing more than \$100 million over the prior year and reaching 89 percent of pre-pandemic levels. The direct visitor spending impact of \$766 million generated a total economic impact of \$1.4 billion in Chester County in 2022 including indirect and induced impacts. This total economic impact sustained 12,764 jobs and generated \$95 million in state and local tax revenues in 2022. Direct visitor spending is forecasted to surpass pre-pandemic levels in 2024, resulting in a growth in direct tourism employment and will support a nearly full recovery of direct tourism employment by 2025.

Chester County has a strong domestic and international tourism market, which is continuing to rebound, as demonstrated by STR data and lodging recovery projections. Lodging demand in Chester County is about to recover to pre-pandemic levels and forecasted to recover by 2024. According to Tourism Economics, Chester County's hotel demand has steadily increased since 2020 and had recovered to 87 percent of 2019 levels in 2022. By 2024, the hotel demand will fully recover and will exceed to 102 percent of 2019 levels by 2025.

Heritage tourism activities like historic sites, museums, gardens, and outdoor activities appeal heavily to travelers to Chester County. However, Chester County travelers were less likely to have visited these attractions on their trip demonstrating an opportunity to nurture heritage tourists to the county. Historic sites, museums, and gardens / farms had the highest appeal to future Chester County visitors at approximately 78 percent, 70 percent, and 58 percent respectively. Yet only 42 percent visited historic sites, 41 percent to museums, and 48 percent went to gardens / farms. Interest in heritage sites is already high amongst future visitors to the region, but a county-wide heritage tourism plan will likely address barriers to visitation. This provides an opportunity to extend the length of visitors' stays through the Heritage Tourism Plan that addresses visitation barriers to heritage attractions that already appeal to visitors.

¹ Tourism Economics, "The Brandywine Valley Visitor Economy 2022," 5.

MARKETING PLAN RECOMMENDATIONS

For these plan initiatives to be successful and have maximum impact once they are implemented, they need to be supported with marketing, programming, and events that contribute to increased heritage tourism activity. The core partners leading the marketing efforts for the plan will be Chester County America250 PA Commission (CC250), Chester County Tourism, and the Chester County Planning Commission.

The heritage tourism marketing plan encompasses several areas of activity, all of which require staff and financial capacity to implement that has yet to be determined including:

- ◆ **New visitor-ready tourism product** needs to be created through coordinated thematic presentations linking sites and experiences. Rather than marketing individual sites piecemeal, market the larger thematic experience, identifying sites where outstanding experiences are offered and can be enjoyed and appreciated.
- ◆ **Raise the quality** of the tourism product/presentation to the level necessary for it to become a bone fide visitor attraction that visitors are impressed with, will return to, and will recommend to others.
- ◆ **Site based improvements** are necessary to raise the level of preservation and offer new visitor experiences (tourism product) that are cause for marketing and promotion. Key national attractions Longwood Gardens and Brandywine Museum of Art are expanding, implementing long range plans, marketing and fundraising campaigns that will increase tourism in Chester County. The Heritage Tourism Plan and its initial initiatives to include the Philadelphia campaign and base program are a cause for marketing and promotion.
- ◆ **Special and community events** that support heritage tourism need to be promoted. A calendar of events needs to be maintained and promoted through organizational and consumer channels (e.g. website, social media, advertising, public relations/media).
- ◆ **Advertising** on the web will be a core activity for heritage tourism marketing. There is some limited use of traditional print and billboard advertising among heritage attractions, but it is generally too costly to invest in. Most heritage sites and tourists use websites to communicate, and social media platforms are important for engaging new audiences and keeping costs low.
- ◆ **Marketing support services** can provide a conduit for communications and build the knowledge base and capacity in the heritage and tourism sectors. Support services include regular topical workshops in marketing and programming, mini grants for cooperative programs and events, establishing a visitor tracking system that leverages new tools available to Chester County Tourism such as Arrivalist and other location-based data about visitor mobility patterns, visitor demographics and spending.
- ◆ **Tourism Readiness Self-Assessments** provide a way to develop heritage site partnership marketing activities. Tourism readiness, when a heritage site is regularly

open to the public and accessible, was frequently identified by study participants as a barrier to increased heritage tourism. Interested tourists were less likely to visit heritage sites due to limited public hours, physical accessibility, or a lack of wayfinding. Because visitation is low in many places, the investment in infrastructure will have the greatest impact in places that support higher levels of visitation. Many sites are not ready to support tourist visitation. For those that are and those that aspire to be, a tourism readiness self-assessment can help heritage sites evaluate how ready for tourism they are and how they can make changes to improve tourist visitation. In addition, it can help Chester County identify heritage sites that are interested in developing heritage tourism and evaluate potential investments in those sites.

Capacity Building

Dedicated staffing will be required to implement the heritage tourism marketing plan. However, given nature of the partners, marketing and promotional activities may be the purview of multiple agencies. Heritage tourism marketing and promotion requires coordination among key partners whose staff may be assigned to other activities. Therefore, it is recommended that the 250 Commission and its partners coordinate marketing plan implementation. An important first step is for partners to determine roles and responsibilities, who is doing what and with what resources are available (e.g. % of staff time, funding support, for how long). The degree of resources available at organizations is to be determined. While staff capacity can vary depending on the organization, managerial responsibilities, decision making authority, and position description, at least one full time dedicated staff member is needed to implement heritage tourism marketing on an ongoing basis when the plan has been fully implemented. Two staff members would be better and three staff members ideal. These marketing professionals would most likely be housed at Chester County Tourism. Developing over time the marketing budget should be targeted to \$300,000 to \$600,000 including personnel and non-personnel costs would be required for the marketing and promotional function (assuming the staff are housed in an organization that can absorb administrative, overhead, and fundraising costs) to be effective in marketing to all audiences and building partnership model embedded in this marketing plan for the long-term.

ECONOMIC AND COMMUNITY BENEFITS

Given the proposed facilities and unique heritage offerings in Chester County, the Heritage Tourism Plan implementation will help to attract new visitors to Chester County who would otherwise not visit, contributes to longer stays in the area, and retains leisure expenditures of residents and tourists that may otherwise be made elsewhere. Visitors spend on admissions, goods, and services at heritage sites and at other dining, retail, recreation, and entertainment establishments during day or overnight trips. In this regard, the Heritage Tourism Plan will contribute to the local economy by providing new destinations for residents and visitors that supports business activity.

Current Tourism Impacts

The visitor volume and spending in Chester County is the baseline of the analysis of the plan impacts. An estimated 2.56 million day and overnight visitors generated a total visitor spending of \$766 million, averaging \$299 per visitor.

Increased Impacts due to the Heritage Tourism Plan

The planned investments are estimated to increase the tourism impacts an estimated 4 to 8 percent with a mid-range increase of 6 percent within 5 years based the available markets, trends, and factors identified in the report. The mid-range new tourism impacts due to the plan include 154,000 new visitors with \$50.0 million in new visitor spending. In turn, this visitor spending generates multiplier effects that result in total impacts of \$86.9 million, 766 jobs, \$34.2 million in labor income, \$5.7 million in state and local taxed and \$300,000 in lodging taxes.

Community Benefits

The proposed Heritage Tourism Plan generates economic and community benefits in addition to the spending, jobs, and fiscal revenues identified above. A successful heritage tourism development program will have the following community benefits:

- ◆ Enhance the competitive position of Chester County as a tourist destination (people will be attracted to the area and will visit there instead of some other place)
- ◆ Optimize the use of existing assets for tourism development (heritage assets are invariably local community resources)
- ◆ Invest in and build new audiences and public support for community treasures and heritage organizations
- ◆ Develop new opportunities to expand visitation / tourist expenditures (building a heritage tourism infrastructure will add to the overall tourism system in Chester County)
- ◆ Stimulate spin-off secondary public and private sector economic / business development in the community (i.e., development of commercial enterprises that provide hospitality and other amenities needed to serve visitors)
- ◆ Enrich the quality of life for area residents (the cultural, recreational, educational, and aesthetic resources that visitors enjoy are utilized by residents as well -- especially in the off-season)
- ◆ Strengthen education programming throughout Chester County through additional venues for delivery and partnerships with local school systems and educational organizations
- ◆ Bring more heritage programs to larger and more diverse audiences through partnerships with organizations working with them

- ◆ Expand public awareness of the locale and community pride through marketing, events and programming
- ◆ Improve community health and wellness due to recreation and nature-based activities that capitalize on the area's natural and cultural assets

Section I

INTRODUCTION AND ASSUMPTIONS

Chester County retained Heritage Strategies to prepare a Heritage Tourism Plan. ConsultEcon is supporting the development of the plan with a supplemental report with this Visitor Analysis & Marketing Plan.

Implementation Strategy

Implementation of the Heritage Tourism Plan and responsibility for marketing heritage tourism will be undertaken by Chester County through the CC250 and Chester County Tourism over the next 5 years will focus on two initiatives: (1) interpretation of the primary theme The Philadelphia Campaign as part of the 250 celebrations of the United States founding and (2) implementation of the “Base Program” that is implemented at heritage sites and in Chester County’s historic villages and downtowns. These initiatives are described further in the Heritage Tourism Plan. The Visitor Analysis & Marketing Plan analyzes economic and community benefits and provides recommendations for marketing of these two initiatives.

Philadelphia Campaign

The Philadelphia Campaign interpretive plans describe a system of Gateways, Heritage Centers, Interpretive Sites, Trails, and Viewing Corridors through which interpretation is implemented. To date, interpretation of the Battle of Brandywine, a part of the Philadelphia Campaign, has been planned but not implemented. CC250 intends to implement the interpretive plans over the next few years, further developing them as necessary. Because the Brandywine Battlefield is a suburban residential landscape, the interpretation is to be personal, small-scale, and non-intrusive. There will be no large bus tours driving the battlefield (though large busses can be accommodated at the Brandywine Battlefield Park on Route 1, Valley Forge NHP, and a few other sites). Rather, small buses and vans, individual automobiles, hiking, and biking will be the means of movement from site to site. Use of a

cutting-edge mobile app (or mobile enabled website) is envisioned for self-guided touring and linkages to online marketing/social media. A system of Step-on Guides is also envisioned for personal experiences, both for individual automobiles and for small buses and vans. (See Chapters 3, 4, and 6 of the Chester County Heritage Tourism Plan.) Chapter 6 outlines a suggested \$6 million effort for the interpretive presentation, which needs to be of high quality in order to become a bone fide attraction to visitors from outside of the county.

The interpretive system established for Brandywine will then be extended northward to interpret the entire Philadelphia Campaign from Brandywine to Valley Forge, encompassing a variety of new sites and including the Iron & Steel region of northern Chester County.

Base Program

The Base Program focuses on outdoor, self-guided interpretation of communities and sites throughout the county, making them visitor-ready and adding substantially to the number of sites that may be visited and themes that may be presented. Interpretation of these new, self-guided sites would be coordinated with each other as well as with existing heritage sites listed in the Heritage Sites Directory. The Base Program focuses specifically on the Outdoor Exhibit Program, Community Interpretive Program, and Public Art Program described in Chapter 4 of the Heritage Tourism Plan. Implementation is assumed to be of high quality and a substantial number of potential new sites have been implemented over a period of five years.

Assumptions

In preparing this report, the following assumptions were made. This study is qualified in its entirety by these assumptions.

1. Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. from its independent research efforts, general knowledge of the industry, and consultations with the client. No responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study. No warranty or representation is made that any of the projected values or results contained in this

study will actually be achieved. There will usually be differences between forecasted or projected results and actual results because events and circumstances usually do not occur as expected. Other factors not considered in the study may influence actual results.

2. This report was prepared during April through November 2023. It represents data available at that time.

Section II

PROFILE OF HERITAGE ATTRACTIONS AND LOCATIONAL ANALYSIS

This section provides an overview of the heritage attractions in Chester County and their attendance trends and patterns. It also includes a locational analysis using maps of the locational analysis facilitates understanding of the local area context for heritage attractions, showing geographic concentrations of attractions and relationship to hospitality, recreation, entertainment, dining, and shopping infrastructure in Chester County.

PROFILE OF HERITAGE ATTRACTIONS

The profile of heritage attraction attendance and distribution of visitation patterns throughout Chester County establishes a baseline for the evaluation of the potential for proposed plan initiatives to enhance visitation to existing attractions. The analysis is based on the Heritage Site Directory prepared by Heritage Strategies for the Heritage Tourism Plan and is supplemented by additional research and interviews with selected heritage attractions (see **Appendix A**) to better understand the existing audience demographics, programs, and marketing, recent impacts from COVID, as well as future plans.

Heritage Attractions Profile

There are 92 heritage sites in Chester County that include a mix of 21 public sites, 65 non-profit sites and 6 others (e.g., private businesses, individuals). The type of governance of heritage sites is shown in **Table II-1**.

Table II-1
Heritage Sites by Governance Type
Chester County, PA

Governance Type	Historic Resource/ Interpretive Site	Percent to Total
Private nonprofit	65	70.7%
Public	21	22.8%
Other	6	6.5%
Total	92	100.0%

Source: Heritage Strategies and ConsultEcon, Inc.

Location of Attractions

Figure II-1 is a map that shows the distribution of attractions throughout Chester County. They are clustered in three different zones. The southern part of the county, the Brandywine Valley, is anchored by Longwood Gardens and encompassing primary historic downtowns Kennett Square and West Chester and an historic village—Marshallton Village. The northern part of the county is between Valley Forge and Hopewell Furnace / French Creek State Park and also includes the historic downtown of Phoenixville and St. Peters Village.

Type of Attraction

Data in **Table II-2** show the directory of heritage sites by the type of attraction, including visitation. Total heritage site visitation is over 6.4 million. The largest and most popular attractions by far are Longwood Gardens, Valley Forge National Historical Park, and French Creek State Park. Together, these attractions account for 63 percent of all heritage visitation in the county. They also account for most of the economic impact in the county because of the scale of their visitation, staff, and operating budgets. These attractions also draw the most visitors from outside of the county. Valley Forge drew 1.6 million visitors last year and was up over 2 million visitors in 2020 at the height of pandemic when people were seeking outdoor recreational opportunities. Longwood Gardens attracts 1.6 million people and French Creek State Park attracts over 800,000 visitors. See **Figure II-2** for a visual representation of visitation patterns to Chester County heritage sites.

**Table II-2
 Heritage Sites by Attraction Type,
 Sites with Reported Visitation and Total Visitation
 Chester County, PA**

Destination Type	Sites	Percent to Total	Sites with Visitation	Percent to Total	Total Visitation	Percent to Total
National Attraction	9	10%	4	9%	3,290,619	51%
State Parks	2	2%	2	4%	1,171,161	18%
Regional Trails	4	4%	3	7%	765,643	12%
County Parks	7	8%	7	16%	692,601	11%
Regional Non-Profit Preserves	20	22%	10	22%	235,900	4%
Historic Theater	2	2%	1	2%	149,148	2%
Regional Attraction	15	16%	12	27%	91,350	1%
Community Attraction	31	34%	5	11%	23,650	0%
Historic Railroad	2	2%	1	2%	20,000	0%
Total	92	100%	45	100%	6,440,072	100%

Source: Heritage Strategies and ConsultEcon, Inc.

heritage in natural and cultural landscapes that are dotted with historic resources and interpretive sites.

Many outdoor recreational visitors are local and there is a higher proportion of repeat visitation in this audience. Local visitation, from Chester County and from surrounding counties, accounts for 80 percent of visitation to Valley Forge and non-local or tourist visitation from more than 50 miles accounts for an additional 20 percent. Many of these tourists are visiting due to their interest in history and are frequently touring other heritage sites in the Philadelphia region.

As reported by study participants, regional and community attraction and county park and trail visitors tend to be much more local than Valley Forge, but they do draw tourists. There is no existing hard data that confirms this anecdotal evidence. County parks use electric beam counters in main parking lots but do not capture counts in parking in other areas, so the total county park visitation may be higher than what is reported.

Private Non-Profit Organizations

Longwood Gardens is by far the largest of the non-profit attractions, drawing 1.6 million visitors annually. The next highest reported attendance is at the Colonial Theatre in Phoenixville with almost 150,000 visits. The Brandywine Museum of Art attracts 56,000 visitors and the Chester County History Center attracts 30,000 visitors. Thirty-one community attractions account for 1/3 of all sites but less than 1 percent of visitation because visitation is captured at only five sites that average 4,700.

Visitation Breakdown

Data in **Table II-3** break down the heritage sites by visitation range and by governance. About 4 in 5 heritage sites reported attendance less than 100,000 visitors and half of those, or 2 in 5, reported attendance of fewer than 10,000 visitors and. In general, public sites, mostly geared towards outdoor recreation, drew more visitors than private non-profit sites. See **Figure II-3** for map of heritage attractions in Chester County by type.

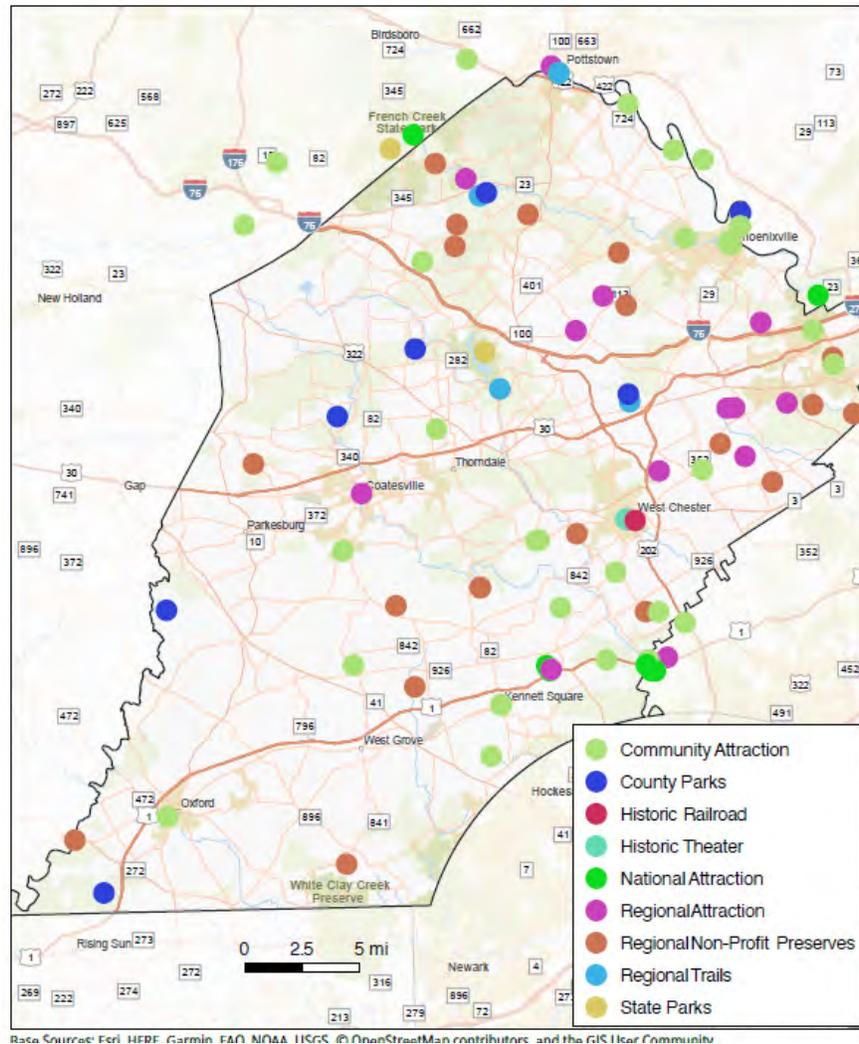
**Table II-3
Heritage Sites and Visitation by
Range of Visitation and by Governance
Chester County, PA**

Visitation Range	Directory Sites by Governance				Visitation by Governance				Average Site Visitation
	Public	Private		Total	Public	Private		Total	
		Nonprofit	Other			Nonprofit	Other		
0 to 9,999	1	14	2	17	5,000	27,300	1,500	33,800	1,988
10,000 to 24,999	1	6	0	7	20,000	98,500	0	118,500	16,929
25,000 to 50,000	3	2	0	5	120,921	63,000	0	183,921	36,784
50,000 to 99,999	3	3	0	6	189,073	211,386	0	400,459	66,743
100,000 to 249,999	2	2	0	4	395,272	294,452	0	689,724	172,431
250,000 to 499,999	3	0	0	3	978,668	0	0	978,668	326,223
500,000 and over	2	1	0	3	2,435,000	1,600,000	0	4,035,000	1,345,000
Total Sites with Visitation	15	28	2	45	4,143,934	2,294,638	1,500	6,440,072	143,113

Visitation Range	Percent to Directory Sites by Governance				Percent to Visitation by Governance			
	Public	Private		Total	Public	Private		Total
		Nonprofit	Other			Nonprofit	Other	
0 to 9,999	6.7%	50.0%	100.0%	37.8%	0.1%	1.2%	100.0%	0.5%
10,000 to 24,999	6.7%	21.4%	0.0%	15.6%	0.5%	4.3%	0.0%	1.8%
25,000 to 50,000	20.0%	7.1%	0.0%	11.1%	2.9%	2.7%	0.0%	2.9%
50,000 to 99,999	20.0%	10.7%	0.0%	13.3%	4.6%	9.2%	0.0%	6.2%
100,000 to 249,999	13.3%	7.1%	0.0%	8.9%	9.5%	12.8%	0.0%	10.7%
250,000 to 499,999	20.0%	0.0%	0.0%	6.7%	23.6%	0.0%	0.0%	15.2%
500,000 and over	13.3%	3.6%	0.0%	6.7%	58.8%	69.7%	0.0%	62.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Other includes churches, private forprofit.
Source: Heritage Strategies and ConsultEcon, Inc.

Figure II-3
Attractions by Type



Tourist Visitation to Heritage Sites

Many of the small heritage sites struggle to track attendance let alone collect information on the origin of their visitors, based on interviews with a handful of heritage sites. Many park, preserves, trails, and heritage sites with publicly accessible grounds are not staffed with visitor facing personnel and therefore the self-guided experiences are largely passive. There is not the capacity of the mechanism to capture visitation counts, let alone visitor origin data.

Onsite and Offsite Programs

Data in **Table II-4** show the on-site and off-site programs offered by heritage sites. Core programs offered by heritage sites include guided and self-guided tours. Seasonal events and festivals, other onsite programming, and lectures are also prevalent. One in three sites offer school programs and one in three have an indoor exhibit.

Table II-4
On-Site and Off-Site Programs Offered by Heritage Sites
Chester County, PA

	Number of Sites	Percent to All Sites
On-site Programs		
Self-Guided Tours	68	73.1%
Guided Tours	58	62.4%
Seasonal events & festivals	42	45.2%
Other On-site programming	41	44.1%
Lectures	40	43.0%
School Programs	33	35.5%
Internal Exhibit	29	31.2%
Workshops	18	19.4%
Off-site Programs		
Off-Site School Programs	12	12.9%
Adult programs/lectures via Zoom or other platforms	12	12.9%
Educational Video on-demand on website	12	12.9%
Other Off-site activities	13	14.0%

Source: Heritage Strategies and ConsultEcon, Inc.

Visitor Services Amenities

Data in **Table II-5** show visitor services amenities available at heritage sites. Most sites (83%) of sites have visitor parking. About half of the sites have restrooms, ADA access to grounds, and bus access and parking. Only 1 in 5 sites have gift shops.

Table II-5
Visitor Services Available at Heritage Sites
Chester County, PA

Visitor Services	Number of Sites	Percent to All Sites
Visitor Parking	77	82.8%
Restrooms	52	55.9%
ADA Access to Grounds	50	53.8%
Bus Access & Parking	42	45.2%
ADA Accessibility to Building(s)	38	40.9%
Gift Shop	17	18.3%

Source: Heritage Strategies and ConsultEcon, Inc.

Staffing / Operations

Organizational capacity and visitation for the non-profit sites varies considerably, and the sector must be considered when removing the budgetary outlier, Longwood Gardens. Like all non-profit organizations, small non-profits must supplement any income they may earn from visitors with fundraising. Many of these non-profits are volunteer run with small or non-existent operating budgets, as shown in **Table II-6**. Most fundraising is directed to programs rather than to general operating support based on donor interest. Therefore, programs and events are infrequent.

Table II-6
Type of Staff at Heritage Sites
Chester County, PA

Type of Staff	Number of Sites	Percent to All Sites
Paid Staff	60	65.2%
Volunteers	26	28.3%
Paid Staff and Volunteers	6	6.5%
Total	92	100.0%

Source: Heritage Strategies and ConsultEcon, Inc.

Table II-7
Private Nonprofit Heritage Sites by Operating Expense Range
Chester County, PA

Expense Range	Sites	Percent to Total	Expenses	Percent to Total Expenses	Average Expenses
\$0 to \$100,000	16	41.0%	\$717,004	0.5%	\$44,813
\$100,000 to 499,999	6	15.4%	1,436,882	1.1%	239,480
\$500,000 to \$1 million	6	15.4%	4,003,892	3.1%	667,315
\$1 to \$5 million	8	20.5%	15,909,870	12.1%	1,988,734
\$5 to \$20 million	2	5.1%	23,643,949	18.0%	11,821,975
More than \$20 million	1	2.6%	85,425,209	65.1%	85,425,209
Total Heritage Site Expenditures	39	100.0%	\$131,136,806	100.0%	\$3,362,482
Total Sites, without Longwood Gardens			\$45,711,597	34.9%	

Note: Sites like Natural Lands have multiple sites and not all in Chester County.

Source: Heritage Strategies and ConsultEcon, Inc.

Table II-8
Private Nonprofit Heritage Attractions Salaries and Wages by Salary and Wage Range
Chester County, PA

Payroll range Range	Sites	Percent to Total	Salaries and Wages	Percent to	Average Expenses
				Total Expenses	
\$0	2	6.9%	\$0	0.0%	\$0
\$1 to \$100,000	9	31.0%	\$333,873	0.6%	\$37,097
\$100,000 to 499,999	9	31.0%	\$2,517,011	4.9%	279,668
\$500,000 to \$1 million	5	17.2%	\$3,572,464	6.9%	714,493
\$1 to \$5 million	1	3.4%	\$1,571,878	3.0%	1,571,878
\$5 to \$20 million	2	6.9%	\$11,936,148	23.0%	5,968,074
More than \$10 million	1	3.4%	\$31,965,569	61.6%	31,965,569
Total Heritage Site Expenditures	29	100.0%	\$51,896,943	100.0%	\$1,789,550
Total Sites, without Longwood Gardens			\$19,931,374	38.4%	

Note: Sites like Natural Lands have multiple sites and not all in Chester County.

Source: Heritage Strategies and ConsultEcon, Inc.

Advertising / Web Presence

Few heritage sites have large marketing budgets. Most rely on maintaining an online presence through websites and social media. Having an online presence is important for all attractions because it is a primary tool for visitors to plan their trip and obtain information. Social media is increasingly becoming an important part of heritage site marketing because it is affordable. Small and mid-sized non-profit organizations have no or very limited budgets for traditional advertising. All the heritage directory sites have a website, 78 percent have a presence on Facebook, 50 percent on Instagram, and 45 percent on X (formerly Twitter).

Heritage Site Visitation by Interpretive Theme

The Heritage Tourism Plan groups heritage sites into one of six interpretive themes, as outlined below. Summaries and details of the interpretive themes can be found in the Heritage Tourism Plan. See **Figures II-4 through 9** for maps of the heritage sites by interpretive theme.

The themes include:

- ◆ Theme 1 - Natural Landscape: Chester County's Natural Resources Shaped its History & Development
- ◆ Theme 2 - Cultural Landscape: History Remains Visible Throughout Chester County
- ◆ Theme 3 - Evolving Values
- ◆ Theme 4 - Iron & Steel
- ◆ Theme 5 - Philadelphia Campaign
- ◆ Theme 6 - Creative Expression

Data in **Table II-9** show the heritage site visitation by interpretive theme. Because of their outsized impact on visitation to the county, Longwood Gardens, Valley Forge and French Creek State Park are outliers and removed from total visitation estimates to better compare the relative visitation levels of the interpretive themes. The most popular themes in the county are natural and cultural landscapes because there are more parks, trails, and preserve sites that in general have higher visitation than other types of sites.

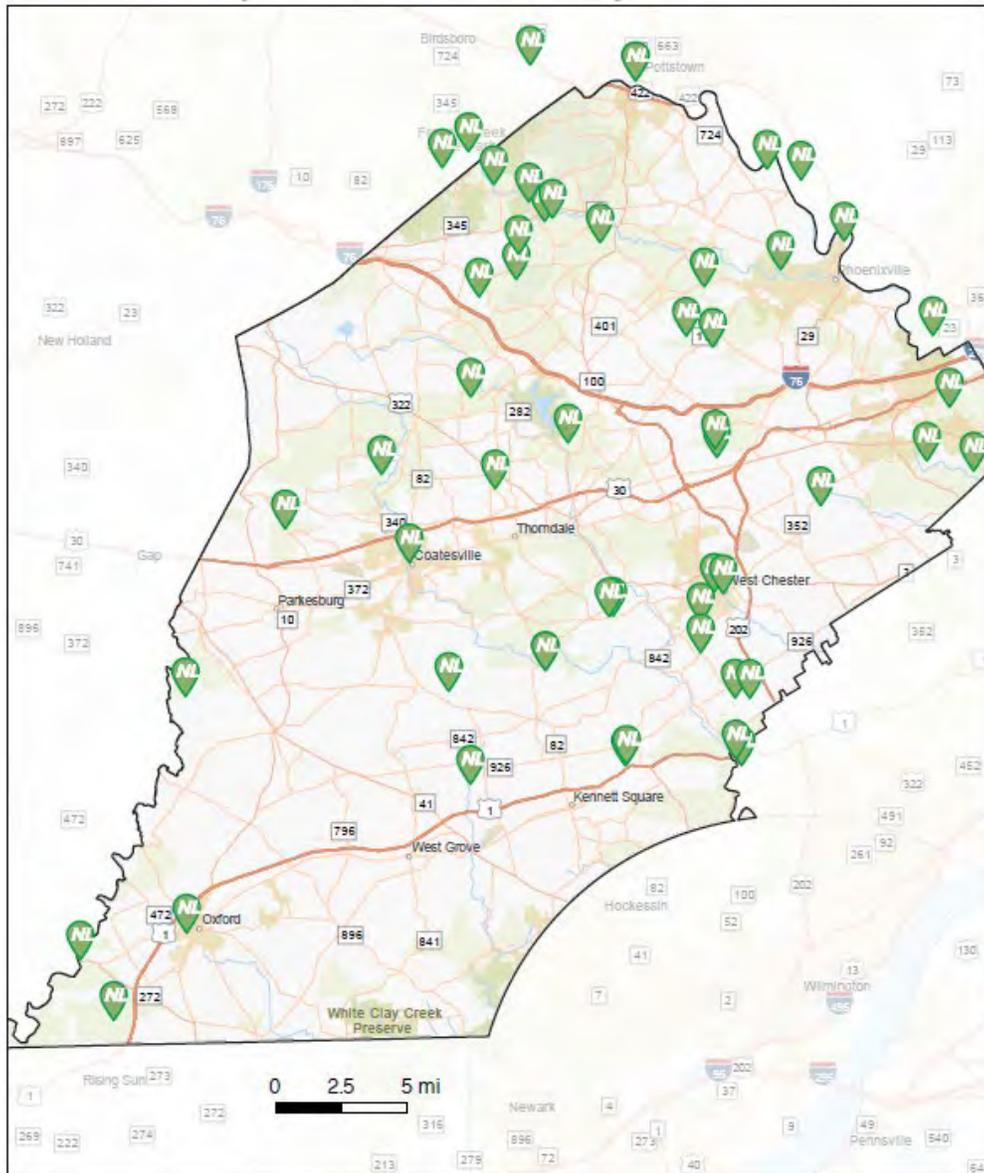
Table II-9
Heritage Sites by Interpretive Theme
Chester County, PA

Interpretive themes	All Sites	Percent Sites		Total Visitation	Percent of Total Visitation	Total Visitation, No Outliers ^{1/}	Percent of Total Visitation, No Outliers
		Sites with Visitation	with Visitation				
#1 - Natural Landscape	54	27	50.0%	4,188,677	65%	1,753,677	73%
#2 - Cultural Landscape	76	35	46.1%	5,433,901	84%	2,233,901	93%
#3 - Evolving Values	21	12	57.1%	2,099,244	33%	499,244	21%
#4 - Iron & Steel	31	17	54.8%	3,380,641	52%	945,641	39%
#5 - Philadelphia Campaign	26	16	61.5%	3,400,947	53%	965,947	40%
#6 - Creative Expression	13	9	69.2%	324,904	5%	324,904	14%

^{1/} Outliers include Longwood Gardens, Valley Forge and French Creek State Park.
 Source: Heritage Strategies and ConsultEcon, Inc.

The sites for **Figure II-4** are from the Heritage Site Directory. The theme originates from the Heritage Tourism Plan.

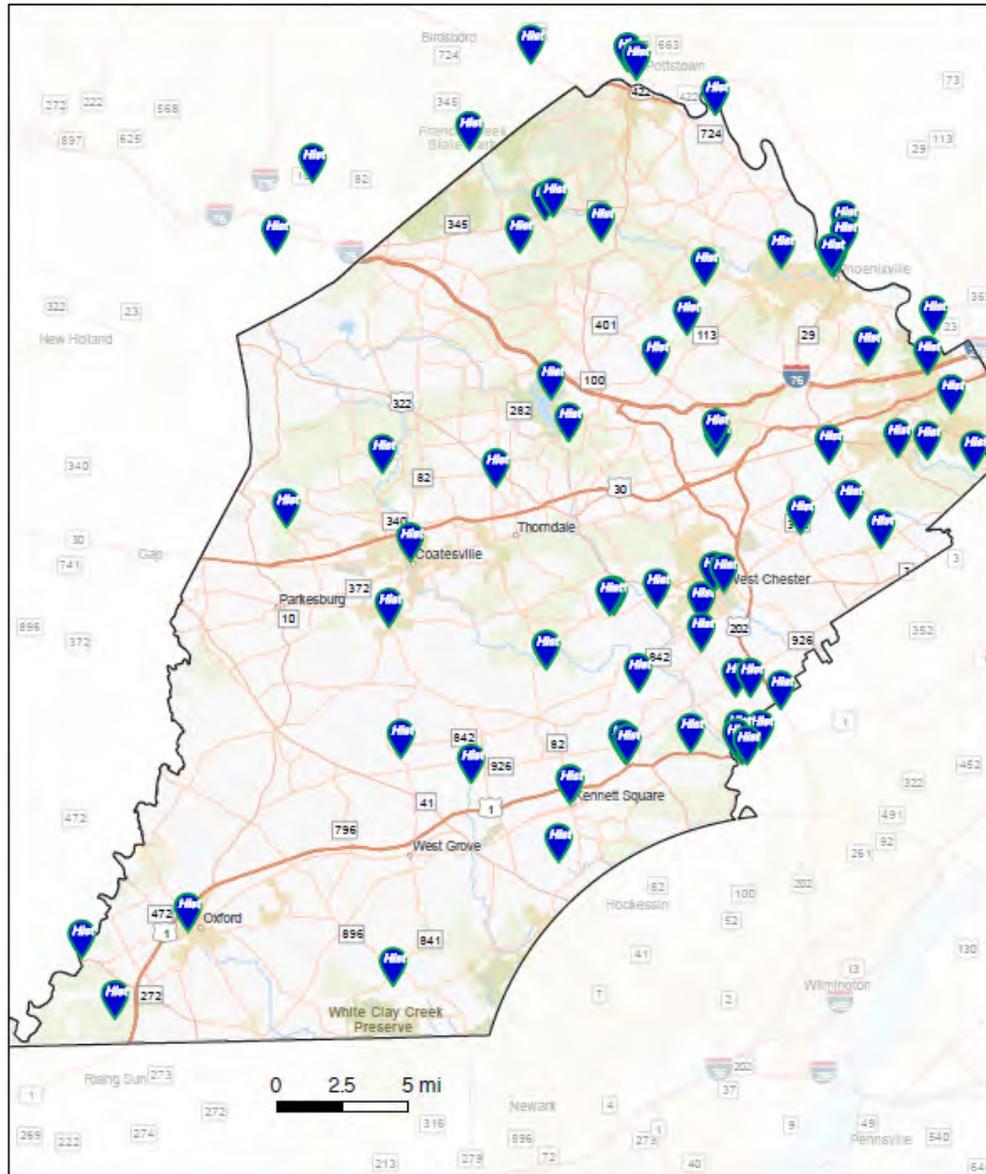
Figure II-4
Theme 1: Natural Landscape: Chester County's Natural Resources Shaped its History and Development



Source: Heritage Strategies and ConsultEcon, Inc.

The sites for **Figure II-5** are from the Heritage Site Directory. The theme originates from the Heritage Tourism Plan.

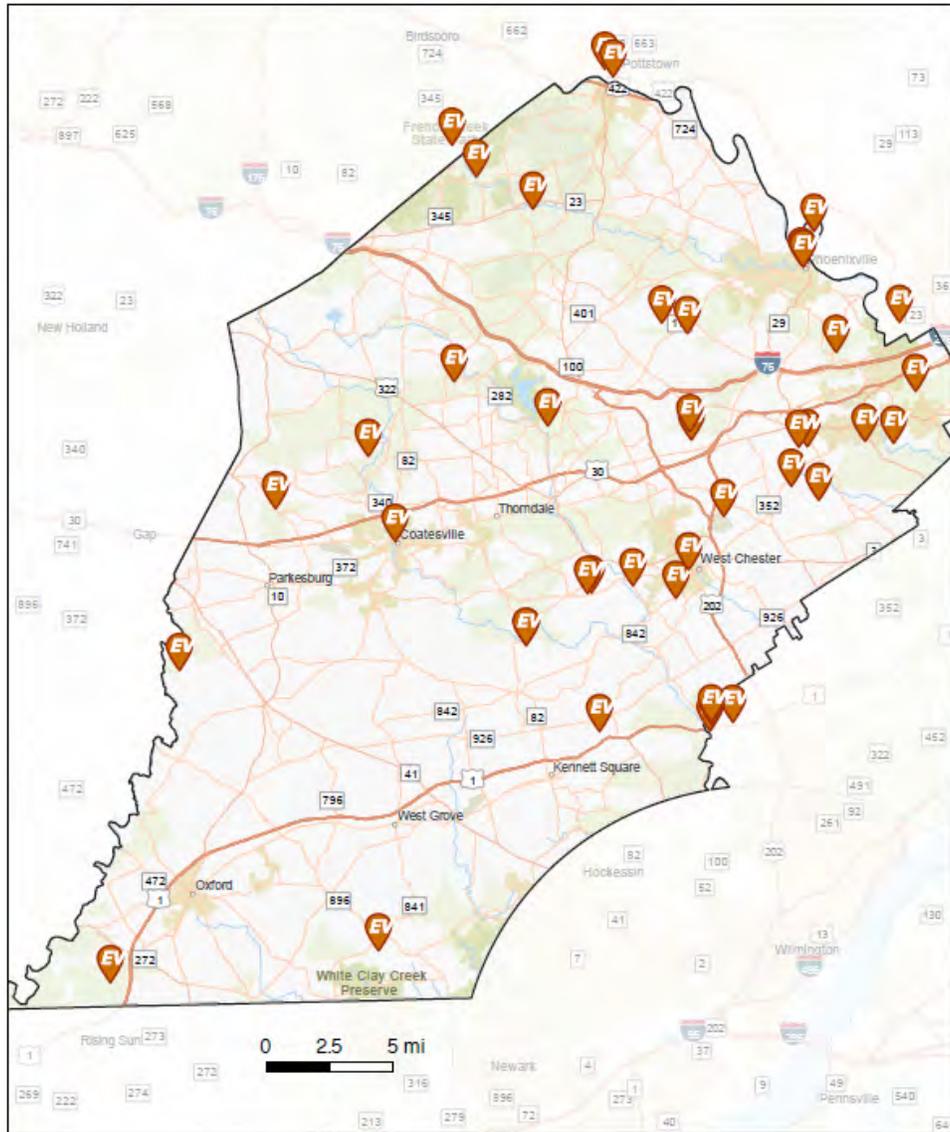
Figure II-5
Theme 2: Cultural Landscape: History Remains Visible throughout Chester County



Source: Heritage Strategies and ConsultEcon, Inc.

The sites for **Figure II-6** are from the Heritage Site Directory. The theme originates from the Heritage Tourism Plan.

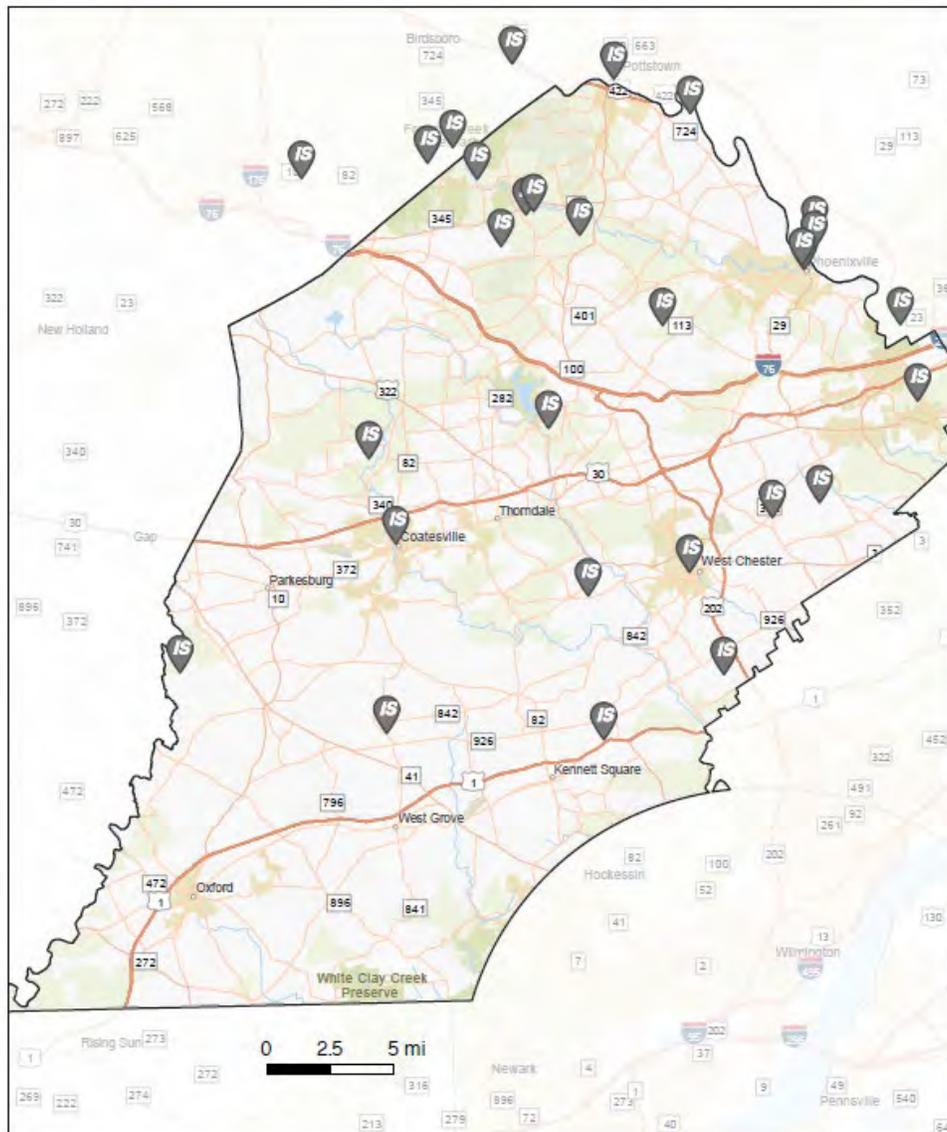
Figure II-6
Theme 3: Evolving Values



Source: Heritage Strategies and ConsultEcon, Inc.

The sites for **Figure II-7** are from the Heritage Site Directory. The theme originates from the Heritage Tourism Plan.

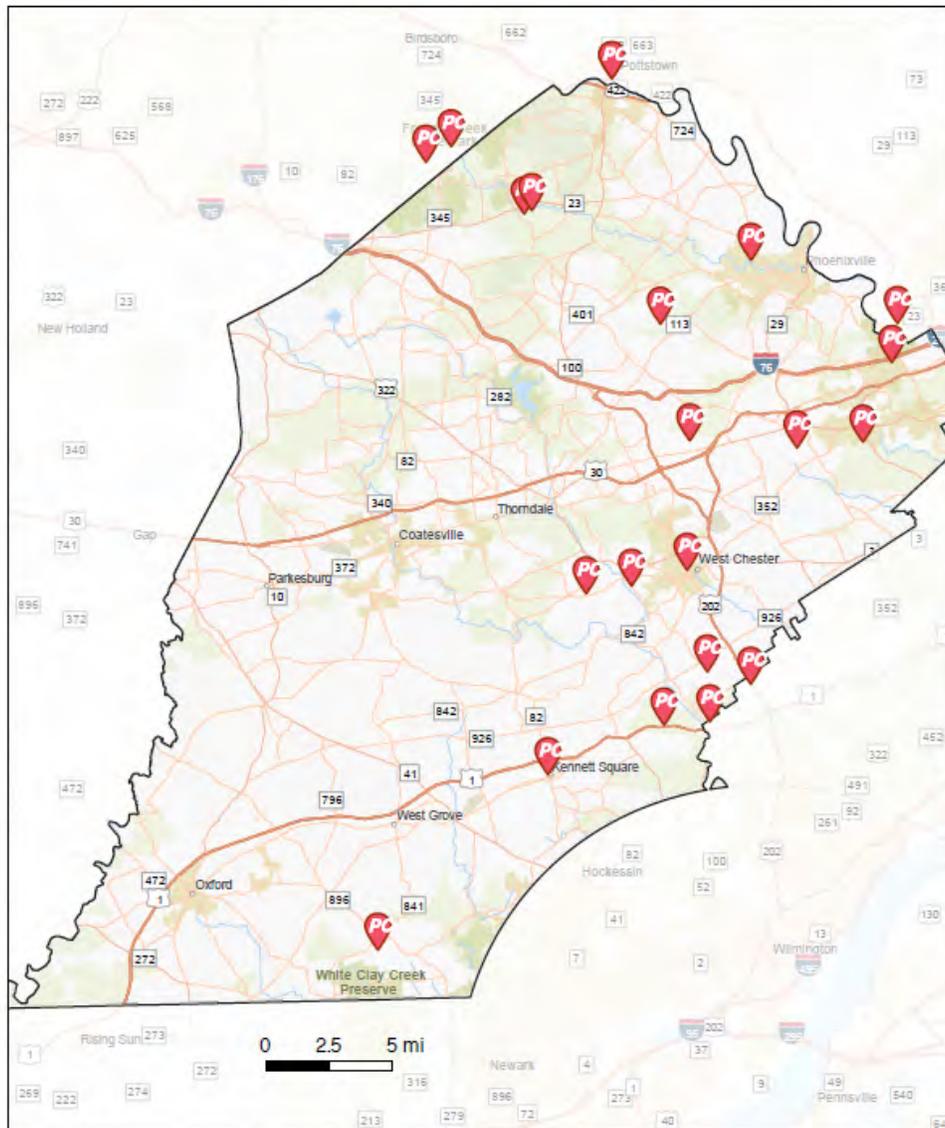
Figure II-7
Theme 4: Iron and Steel



Source: Heritage Strategies and ConsultEcon, Inc.

The sites for **Figure II-8** are from the Heritage Site Directory. The theme originates from the Heritage Tourism Plan.

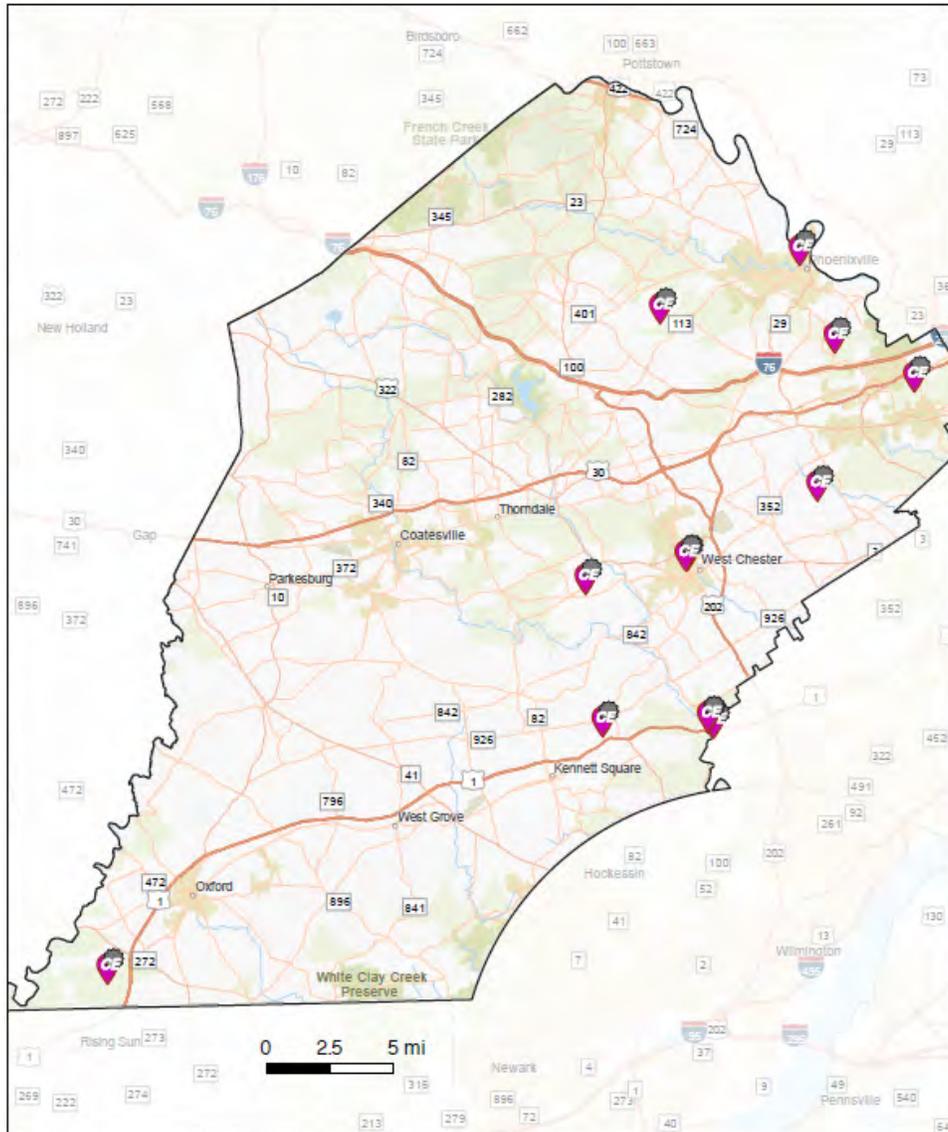
Figure II-8
Theme 5: Philadelphia Campaign



Source: Heritage Strategies and ConsultEcon, Inc.

The sites for **Figure II-9** are from the Heritage Site Directory. The theme originates from the Heritage Tourism Plan.

Figure II-9
Theme 6: Creative Expression



Source: Heritage Strategies and ConsultEcon, Inc.

LOCATIONAL ANALYSIS

This location analysis presents a series of maps to understand the geography of heritage sites, their visitation, and location in relation to the region's scenic byways, multi-use trail system, and visitor services. **Figures II-10 through 13** are from Chester County.

Figure II-10
Heritage Sites with Surface Trails, Future Circuit Trail, Horse-Shoe Trail, and the Brandywine Scenic Byway

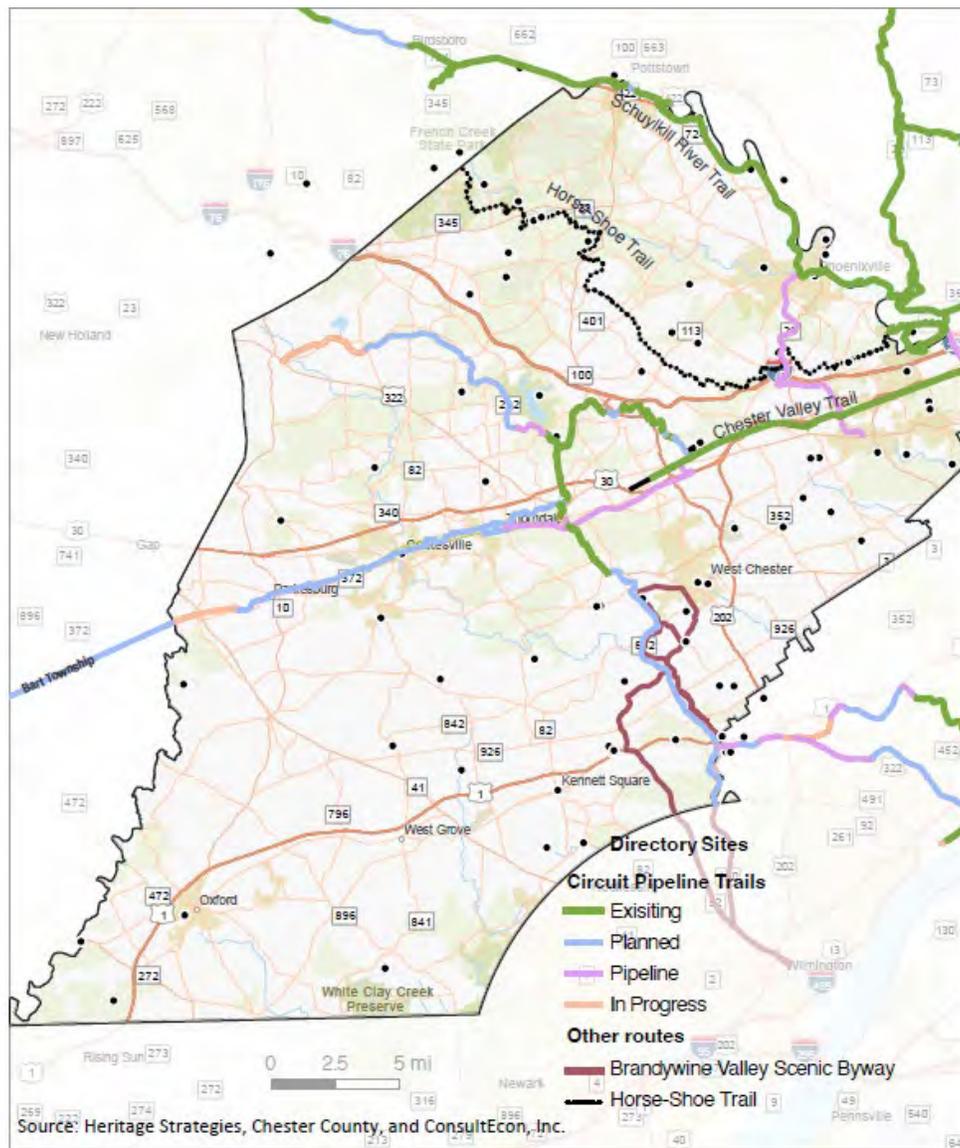


Figure II-11
Heritage sites with Landscape3 Development Patterns

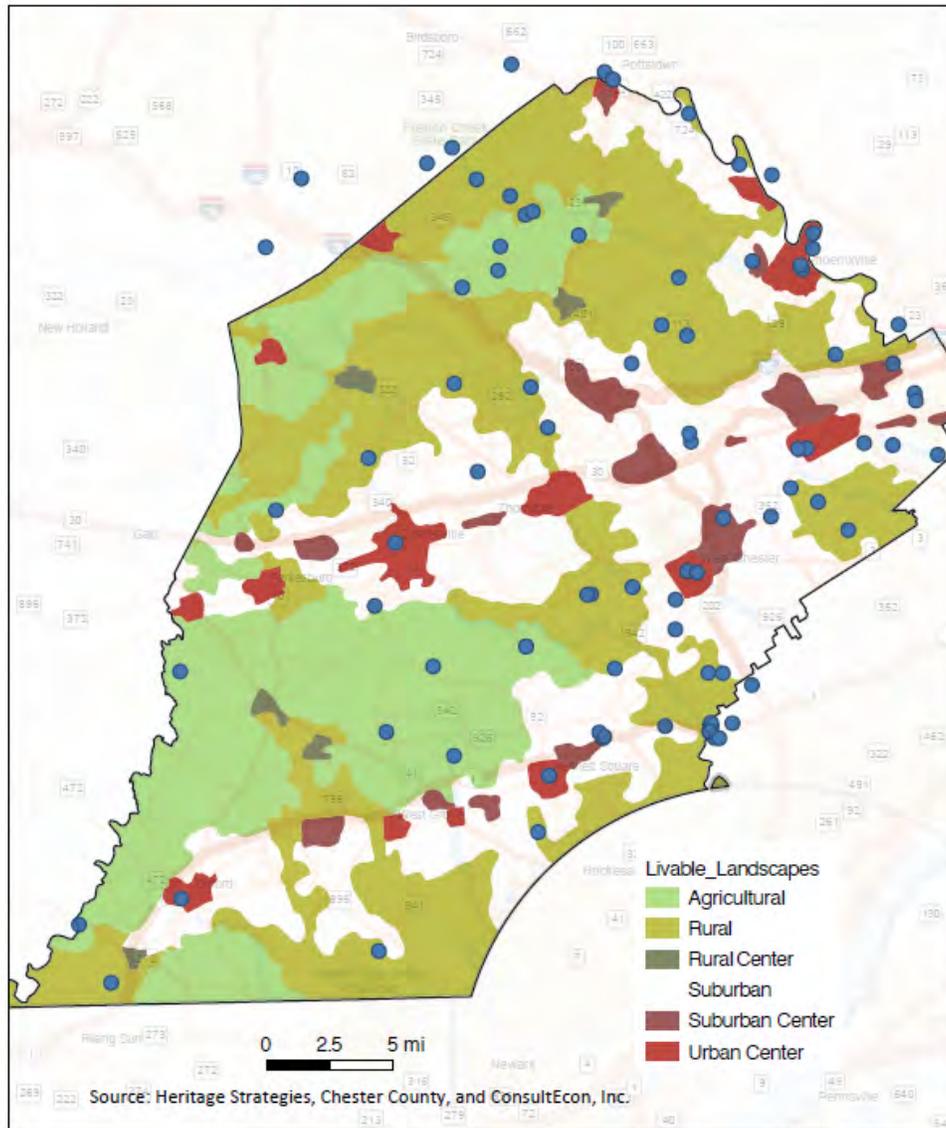


Figure II-12
Hotels, B&B's, and Restaurants

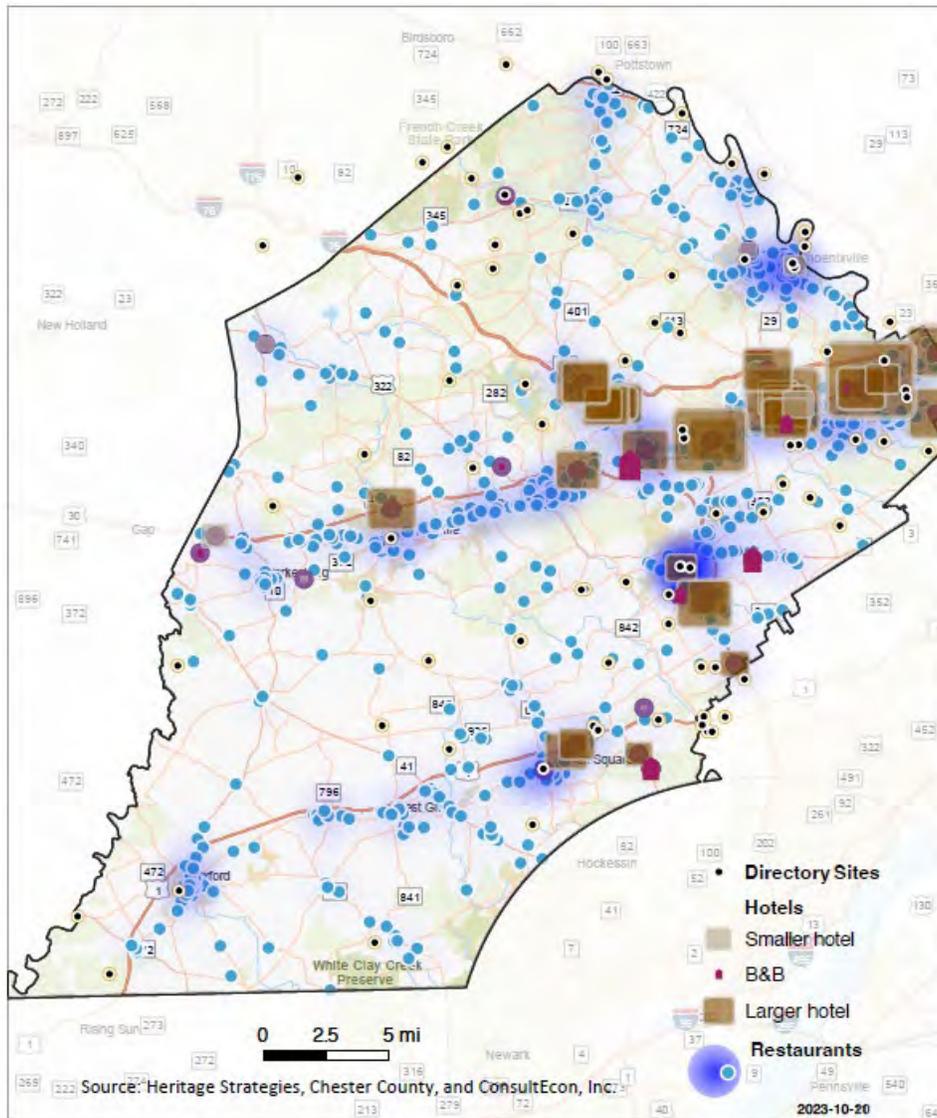
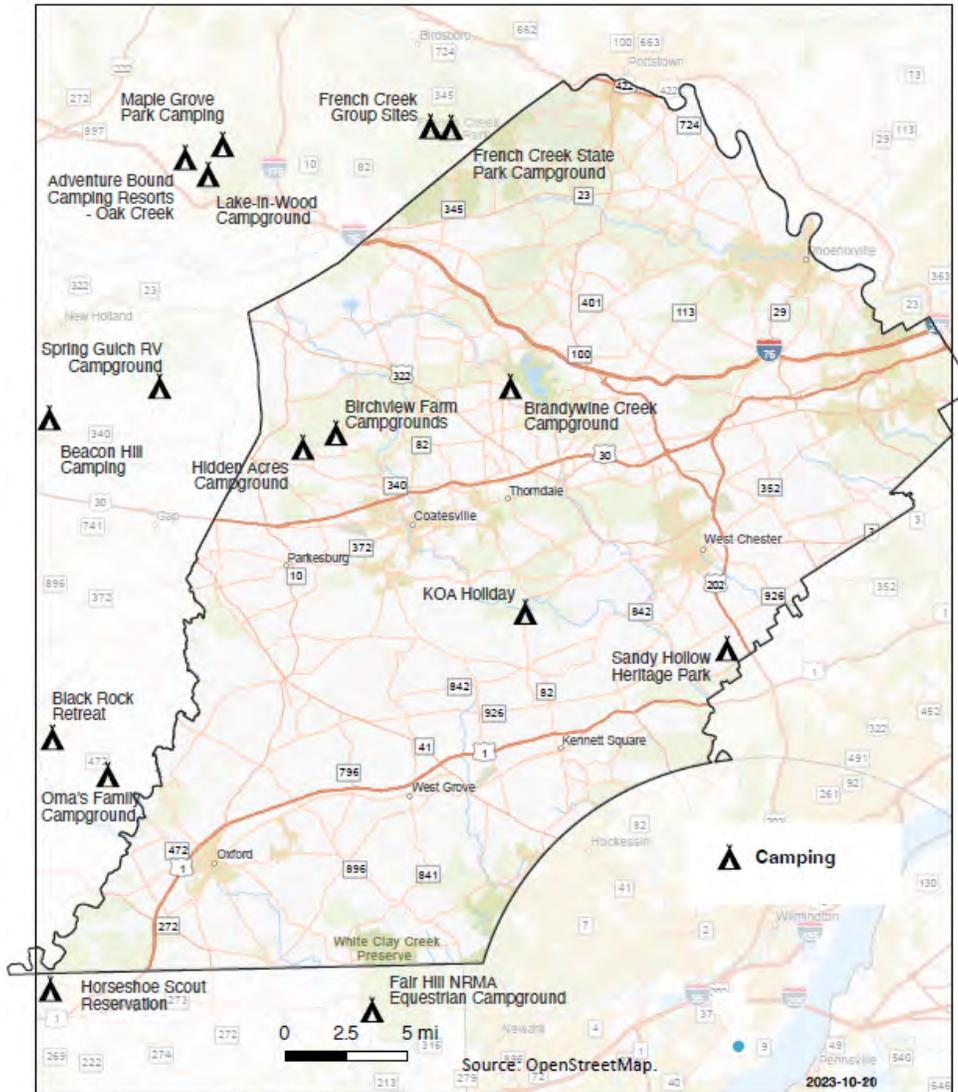
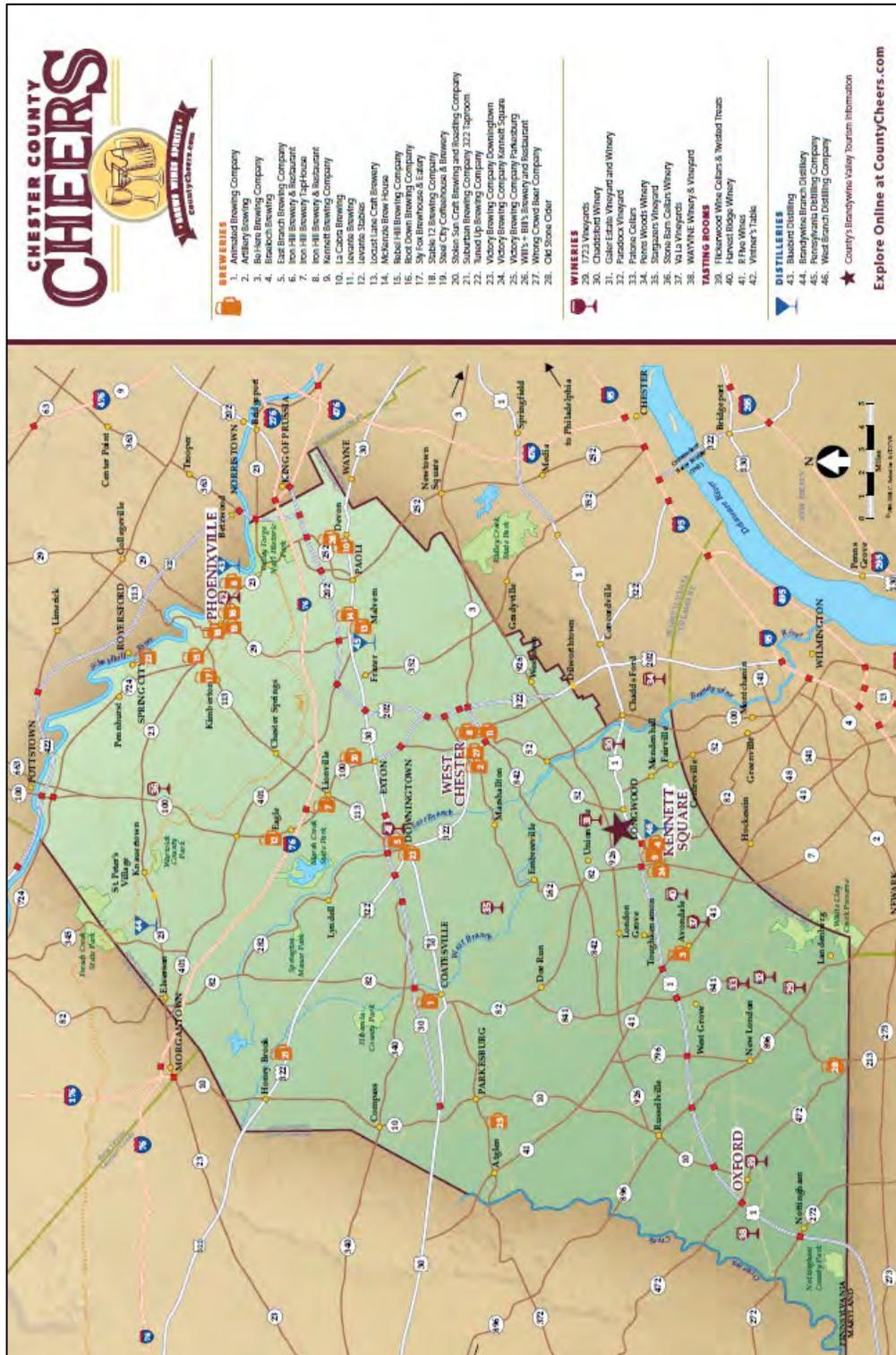


Figure II-13
Camping Grounds



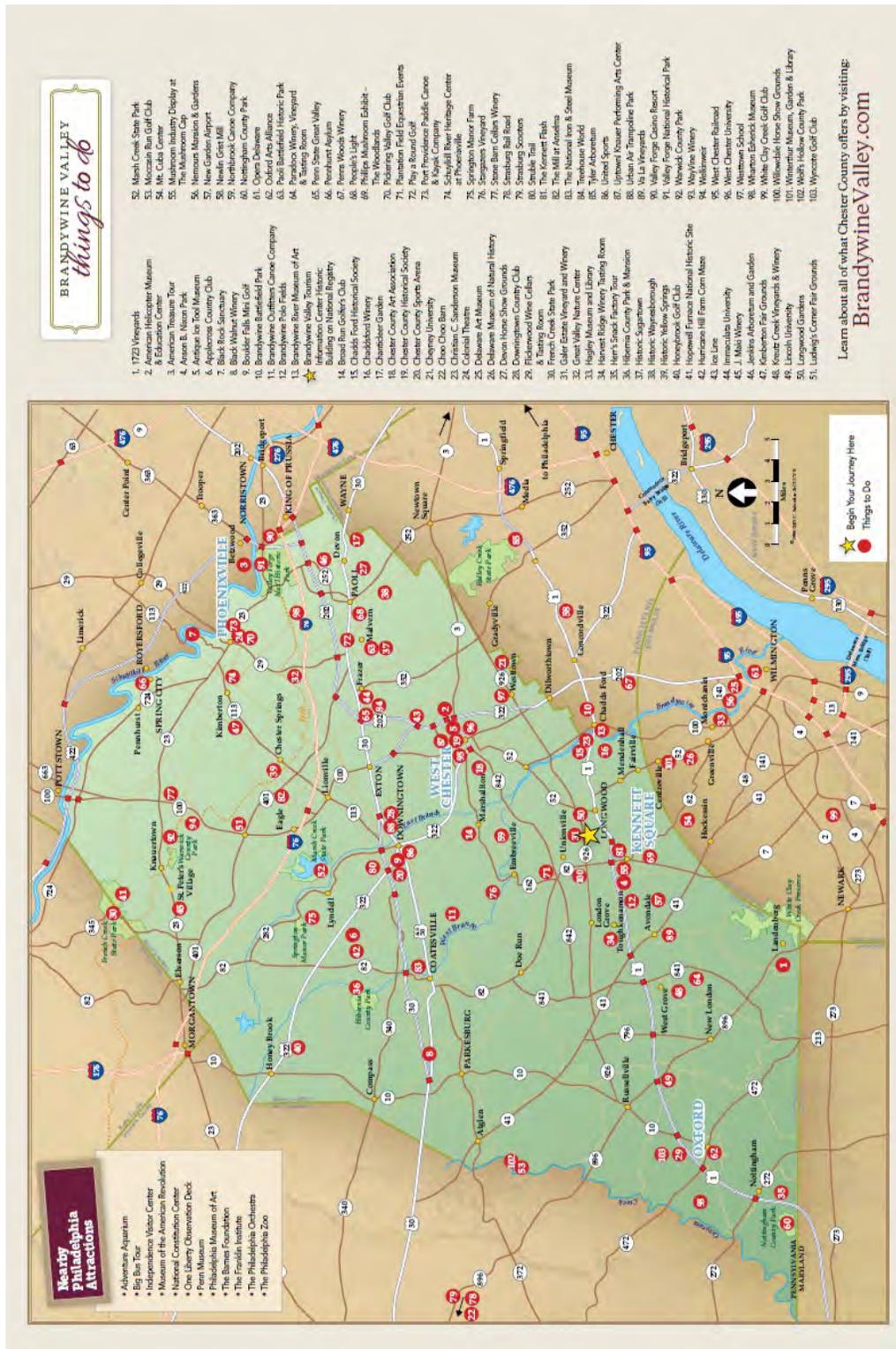
Source: Heritage Strategies and ConsultEcon, Inc.

Figure II-14
 Wine and Beer Tourism in Chester County



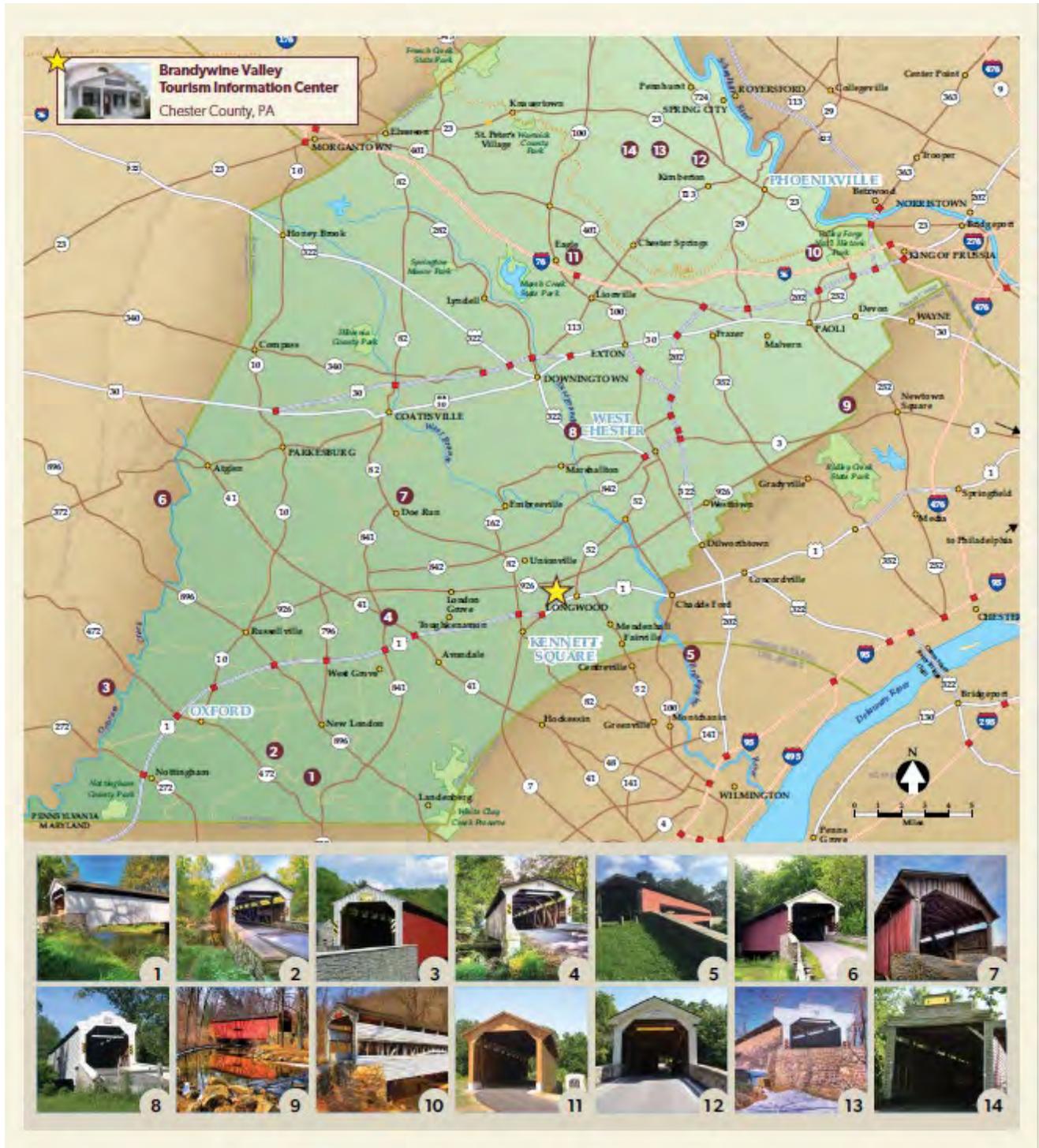
Source: Chester County's Brandywine Valley

Figure II-15
Tourism Attractions in Chester County



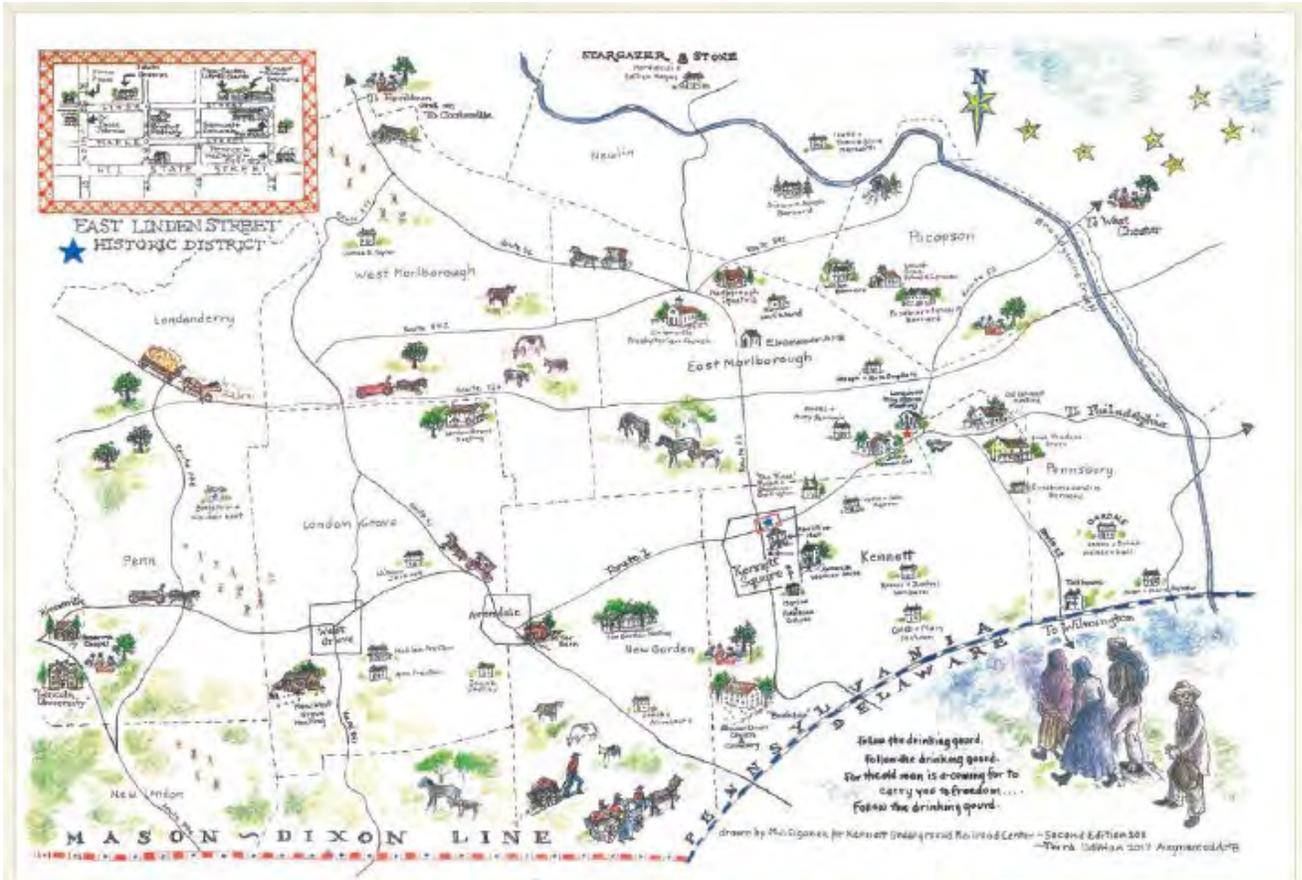
Source: Chester County's Brandywine Valley

Figure II-16
Chester County's Covered Bridges



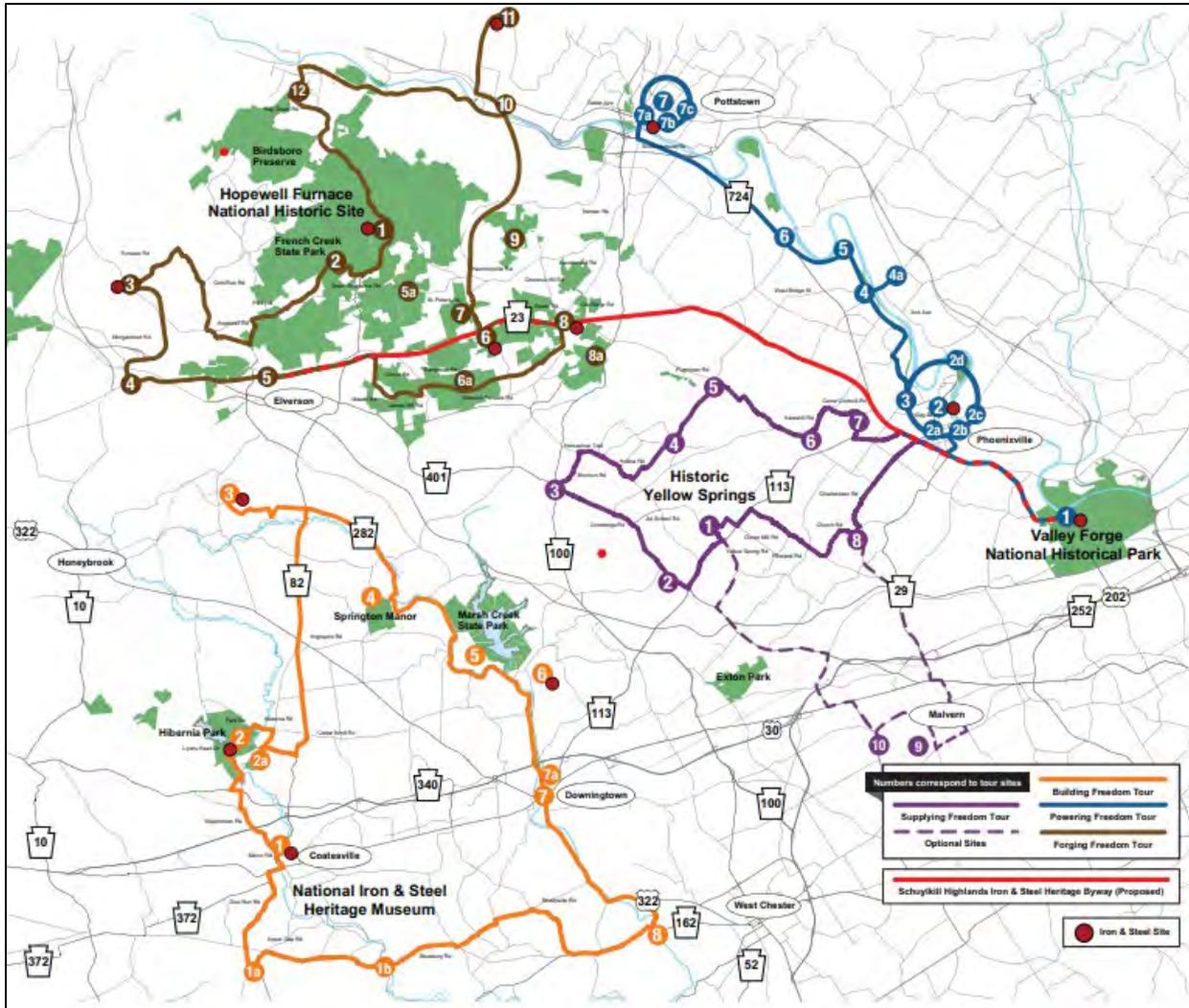
Source: Chester County's Brandywine Valley

Figure II-17
Underground Railroad of the Kennett Region in Chester County



Source: The Kennett Underground Railroad Center

Figure II-18
Iron and Steel Tours



Source: Iron & Steel Heritage Partnership

Summary Findings

Based on the directory prepared for the Heritage Tourism Plan, there are 92 heritage sites in Chester County that include a mix of 21 public sites, 65 non-profit sites and 6 others (e.g., private businesses, individuals). Heritage sites in Chester County are more than historic sites and museums. They encompass natural and cultural landscapes, parks and trails, historic villages, and downtowns. Phoenixville, West Chester, and Kennett Square with their historic downtowns provide visitors options for shopping and dining. Visitors to heritage sites in

walkable and historic downtowns and villages have better access to hospitality, services, amenities, and other attractions so that they offer a more complete visitor experience than those sites that are remote. Therefore, they are more gain visibility from nearby visitor activity and create the best opportunity for spillover visitation.

Heritage sites are spread throughout Chester County but there are several distinctive zones of concentration in the southern and northern parts of the county. In the south, the Brandywine Valley heritage sites are clustered along Route 1 and focused on the scenic byway. Chester County's Brandywine Valley provides website branding for the county's destination marketing organization, Chester County Tourism, in recognition of the area's importance as a destination in the county.

Total heritage site visitation is over 6.4 million. The largest and most popular attractions by far are Longwood Gardens, Valley Forge National Historical Park, and French Creek State Park. Together, these attractions account for 63 percent of all heritage site visitation in the county. They also account for most of the economic impact in the county because of the scale of their visitation, staff, and operating budgets. These attractions also draw the most visitors from outside of the county. Valley Forge drew 1.6 million visitors in 2022 and was up over 2 million visitors in 2020 at the height of pandemic when people were seeking outdoor recreational opportunities. Longwood Gardens typically attracts 1.6 million people annually and French Creek State Park attracts over 800,000 visitors annually.

Chester County has 48 accommodations properties with over 4,900 rooms in four major clusters: Exton/Downingtown, Kennett Square, West Chester, and 202 Corridor. In the north, Valley Forge, Phoenixville and French Creek State Park form an axis of activity that offers a visitor experience that is different and distinctive from the Brandywine Valley. Given the county's emphasis of the Brandywine Valley through its tourism marketing, there is an opportunity to build up the tourism branding in northern part of the county and its attractions. The heritage sites in remote locations nonetheless offer an attractive visitor experience due to their very remote nature. Chester County's agriculture, food and land conservation are an important differentiator from other counties in the region—no other

county has preserved as much land as Chester County. The county therefore can leverage these heritage assets in new and compelling ways to sightseers, outdoor recreationalists, and food and beverage tourists.

Section III

RESIDENT MARKETS

This section reviews the resident markets available to heritage sites and attractions in Chester County.

Resident and Tourist Market Segments

Markets for attractions are split broadly into tourist and resident markets, which are reviewed in turn. A review of the resident market is important for two reasons, both related to the nature of tourist markets. First, an important segment of the tourist market is people visiting friends and relatives in the area. Residents and their awareness of leisure time opportunities available locally help to determine what activities these tourists engage in. Second, tourist data are available primarily at the metropolitan level and include people from the metropolitan area. Therefore, the resident market and tourist market information overlap slightly, with the tourist data focusing on the travel market and the resident data focusing on the in-place market. The experience of most tourist attractions indicates that they draw a larger share of their audience from populations closer to the attraction than from further away. In other words, the closer someone lives to an attraction, the more likely they are to visit it. Moreover, an attraction that increases visitor spending of Chester region residents (i.e., non-residents of Chester County) in Chester County contributes to the local economy and achieves economic development objectives.

Market Area Definition

The Resident Market Area for Chester County is defined as the area in which residents would visit the county's heritage attractions as a primary purpose or as an important part of a day trip. Resident markets for tourist attractions like those in Chester County are defined using a "gravity model" approach, where those living closer to an attraction are more likely to visit than those living farther away. On its periphery, the resident market changes over into the tourist market, which is profiled in the next section of this report. This market area also

applies to other businesses in the broader heritage tourism ecosystem, including the County's Main Streets, hotels, restaurants and shopping destinations regional recreation, parks and trails, arts, cultural and entertainment attractions. Commercial activity at historic downtowns, villages, Main Line corridors are important heritage assets because their historic qualities contribute to the overall heritage experience offered by Chester County and provide lodging, dining, and shopping experience within this historic context that is more walkable and bikeable than suburban auto-oriented development. Auto touring, however, is an important part of the experience as well with natural landscapes are the motivating feature for scenic drives and bike rides.

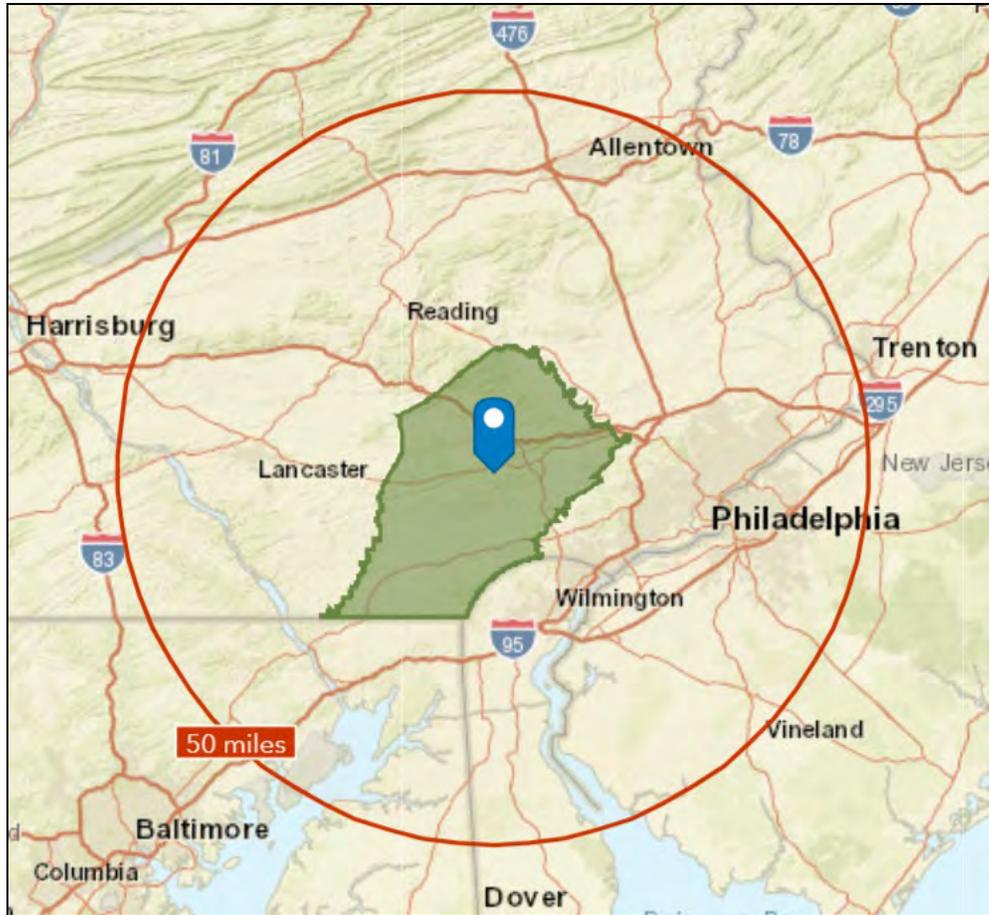
Regional Drive Time Area Population

The Resident Market Area definition is based on the travel times and distances in the region and the available tourism data on visitors to Chester County. This report defines tourists as those traveling more than 50 miles to Chester County on a day trip or spending the night in the county. For the purposes of this analysis, the Resident Market Area is aligned with this definition, capturing residents that live within a 50-mile drive of Chester County, and is further segmented as follows:

- ◆ **Chester County**
- ◆ **Chester County to 50-Mile Radius**– the area between Chester County and a 50-mile radius. The center of the 50-mile radius is in Downingtown in the center of the county.

Figure III-1 is a map of Chester County and the 50-mile radius.

Figure III-1
Resident Market Area Map of Chester County and 50-Mile Radius



Source: ESRI and ConsultEcon, Inc.

Resident Market Area Characteristics

The following tables provide detailed characteristics of the population within the 50-mile radius. For comparison, the demographic profiles also include data for the U.S. as a whole. For comparison purposes, similar data are included the U.S. as a whole.

Population

Data in **Table III-1** show the population trends in the Resident Market Area, based on the 2020 census, population estimates for 2022 and population projections for 2027.

Table III-1
Resident Market Area Population Trend, 2020, 2022, 2027

Market Area	2020	2022	2027	Percent Change, 2022-2027	2022 Percent to Total Resident Market Area
Chester County	534,413	542,230	553,727	2.1%	6.6%
Chester County to 50-Mile Radius	7,559,340	7,612,202	7,634,546	0.3%	93.4%
50-Mile Radius	8,093,753	8,154,432	8,188,273	0.4%	100.0%
<i>United States</i>	<i>331,449,281</i>	<i>335,707,897</i>	<i>339,902,796</i>	<i>1.2%</i>	

Source: U.S. Census Bureau, Census 2020 Data; Esri forecasts for 2022 and 2027; and ConsultEcon, Inc.

Within a 50-mile radius, there is an estimated population of approximately 8.2 million in 2022. This population is projected remain fairly stable, showing just a 0.4 percent increase over the period through 2027, a rate similar to the difference between Chester County and the 50-mile radius at 0.3 percent, but is lower than Chester County at 2.1 percent and the United States as a whole at 1.2 percent.

Age Profile

As an attraction primarily focused on recreation and education, heritage sites in Chester County have broad appeal to multiple age segments, including school-age children and families with children. Data in **Table III-2** show the median age and age groups for the population living within the 50-mile radius.

**Table III-2
 Resident Market Area Age Profile, 2022**

Market Area	Median Age	0 to 17	18 to 24	25 to 34	35 to 54	55+
Chester County	40.7	22.7%	8.7%	11.3%	25.6%	31.6%
Chester County to 50-Mile Radius	NA	21.2%	8.8%	13.6%	24.8%	31.6%
50-Mile Radius	39.9	21.3%	8.8%	13.5%	24.8%	31.6%
United States	38.9	21.9%	9.0%	14.0%	24.9%	30.3%

Source: ESRI and ConsultEcon, Inc.

The distribution of the population between age groups in the Resident Market Area is similar to that of the U.S. as a whole. The median age within the 50-mile radius is 39.9 – slightly younger than that of Chester County at 40.7, but slightly older than in the U.S. as a whole at 38.9 years old.

School-Age Children

School-age children are an important segment of visitation to attractions like the Chester County Heritage sites, both as a part of school groups and together with their families. School groups are an important component of visitation, particularly during off-peak periods and on weekdays when general visitation numbers are lower. Visits to the heritage sites by children in school groups can also result in word-of-mouth advertising to friends and family. This in turn leads to both repeat visitation and new visitation. While there are challenges to school group visitation due to bus shortages, more time devoted to standardized testing and preparation, and school reduced budgets, some heritage sites are seeing growth due to homeschooling, parochial schools, and private education institutions.

Data in **Table III-3** provide a detailed breakdown by age category of the population of school-age children living within the Resident Market Area.

**Table III-3
Resident Market Area School-Age Children, 2022 and 2027**

	K-5th Grade: Ages 5-10	6th Grade- 8th Grade: Ages 11-13	9th Grade-12th Grade: Ages 14- 17	Total K-12th Grades: Ages 5-17
<u>2022</u>				
Chester County	41,263	22,409	30,032	93,704
Chester County to 50-Mile Radius	538,530	280,036	380,345	1,198,911
50-Mile Radius	579,793	302,445	410,377	1,292,615
United States	24,579,424	12,503,815	16,801,475	53,884,715
<u>2027</u>				
Chester County	40,755	21,359	29,203	91,317
Chester County to 50-Mile Radius	521,390	271,846	371,653	1,164,889
50-Mile Radius	562,145	293,205	400,856	1,256,206
United States	24,317,191	12,495,523	16,717,177	53,529,891
<u>% Change 2022-2027</u>				
Chester County	-1.2%	-4.7%	-2.8%	-2.5%
Chester County to 50-Mile Radius	-3.2%	-2.9%	-2.3%	-2.8%
50-Mile Radius	-3.0%	-3.1%	-2.3%	-2.8%
United States	-1.1%	-0.1%	-0.5%	-0.7%

Source: Esri forecasts for 2022 and 2027; and ConsultEcon, Inc.

There were approximately 1.3 million school-age children (ages 5 to 17) within the 50-Mile radius in 2022. The population of school-age children within the 50-mile radius is projected to decrease slightly by 2027, by 2.8 percent - which is similar to the difference between Chester County and the 50-mile radius at -2.8 percent, slightly greater than Chester County at -2.5 percent, and a significantly greater decrease than the United States a whole at -0.7 percent.

Educational Attainment

Educational attainment is correlated with attendance at visitor attractions – numerous national consumer surveys over the years have found that respondents with higher educational attainment are more interested, as a group, in such attractions. Data in **Table III-4** show the highest level of educational attainment for the adult population over 25 years old within a 50-mile radius.

**Table III-4
 Resident Market Area Adult (25+) Educational Attainment, 2022**

Market Area	High School			Associate's Degree	Bachelor's Degree	Graduate / Professional Degree
	No High School Diploma	Diploma / Alternative Credential	Some College			
Chester County	5.2%	19.8%	11.9%	6.9%	33.6%	22.6%
Chester County to 50-Mile Radius	8.7%	30.5%	15.1%	8.3%	22.5%	14.9%
50-Mile Radius	8.5%	29.8%	14.9%	8.2%	23.2%	15.4%
United States	10.0%	27.1%	18.3%	9.4%	21.7%	13.4%

Note: Percentages reflect the highest level of education attainment reached by adult populations (Age 25 and older) in the Resident Market Areas.

Sources: ESRI and ConsultEcon, Inc.

Approximately 61.7 percent of the adult population have educational attainment above high school graduation within the 50-mile radius. This level of educational attainment is lower than that in Chester County at 75 percent, slightly higher than the difference between Chester County and the 50-mile radius at 60.8 percent, and slightly higher than in the U.S. as a whole at 62.9 percent.

Households

An analysis of households in the Resident Market Area is helpful to determine household sizes and make-up with regards to potential families and children available to visit the Chester County Heritage sites. Larger household sizes often reflect the presence of children in the household. Data in **Table III-5** show characteristics of households within the 50-mile radius.

Table III-5
Resident Market Area Household Profile, 2022

	Estimated Number of Households	Estimated Number of Family Households ^{1/}	Percent of Families to Total Households	Average Household Size
Chester County	200,342	136,721	68.2%	2.64
Chester County to 50-Mile Radius	2,945,246	1,888,447	64.1%	2.52
50-Mile Radius	3,145,588	2,025,168	64.4%	2.53
United States	128,657,669	83,407,414	64.8%	2.55

1/ Family Households are defined by ESRI as households in which one or more persons in the household are related to the head of household by birth, marriage, or adoption.

Source: ESRI and ConsultEcon, Inc.

The average household size of 2.53 persons within the 50-mile radius, which is slightly lower than that of Chester County at 2.64 persons and similar to the difference between Chester County and the 50-mile radius and the U.S. as a whole at 2.52 and 2.55 respectively. The percentage of households comprised of “families”³ is 64.4 percent within the 50-mile radius, similar to the difference from Chester County to the 50-mile radius at 64.1 percent and the United States as a whole at 64.8 percent; however, the Chester County percentage of families at 68.2 percent is greater than those other areas.

³ Family households are defined by ESRI as households in which one or more persons in the household are related to the head of the household by birth, marriage, or adoption.

Household Income

Higher incomes are associated with visitation to attractions such as Chester Heritage sites, both with regard to the availability of disposable income, transportation, and leisure time as well as the desire to visit, as higher incomes frequently reflect higher educational attainment. Data in **Table III-6** show household income distribution within the 50-mile radius.

Table III-6
Resident Market Area Household Income Profile, 2022

	Median Household Income	Less than \$50,000	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$149,999	\$150,000+
Chester County	\$111,286	19.0%	13.9%	11.5%	18.5%	37.1%
Chester County to 50-Mile Radius	NA	32.1%	15.9%	13.2%	17.8%	21.0%
50-Mile Radius	\$79,470	31.3%	15.8%	13.0%	17.9%	22.0%
United States	\$72,414	34.4%	16.9%	13.2%	17.2%	18.3%

Source: ESRI and ConsultEcon, Inc.

Median household income within the 50-mile radius at \$79,000 is significantly lower than Chester County at \$111,000 but only slightly higher than the United States as a whole at \$72,000.⁴ Chester County households have the highest incomes compared to the other market areas.

Resident Market Behaviors

Resident market behaviors such as using the internet for travel related activities, dining out, taking a trip, and visiting cultural attractions like aquariums and museums indicate excess income available for leisure activities and interest in travel and the arts. Data in **Table III-7** show resident market behaviors related to leisure and cultural interests and activities within a 50-mile radius and in Chester County. The Market Potential Index (MPI) shows the

⁴ Median household income data reflect gross income, and do not account for personal tax and non-tax payments such as personal income taxes and personal contributions to social insurance. Further, the cost of living in a given area affects disposable income.

likelihood of adults or households to exhibit certain consumer behavior compared to the United States or purchasing patterns with an MPI of 100 representing the United States average.

**Table III-7
Resident Market Behaviors, 2022**

Activities/Behaviors	0-50 Mile Radius			Chester County		
	Expected Number of Adults or Households	Percent of Total Population	MPI ^{1/}	Expected Number of Adults or Households	Percent of Total Population	MPI ^{1/}
Internet in the last 30 days, 2022						
Internet Use: Made Travel Plans	1,161,907	18.1%	106	94,414	22.5%	133
Social Media: Follow Travel-Related Groups	625,281	9.7%	103	42,951	10.2%	108
Restaurant						
Spent at Fine Dining Last 30 Days: \$1-\$100	211,219	3.3%	109	15,297	3.6%	121
Spent at Fine Dining Last 30 Days: \$101+	286,299	4.5%	119	23,681	5.6%	151
Retail						
Took Domestic Trip in Continental US Last 12 Months	3,534,048	55.0%	103	255,195	60.90%	114
Took Foreign Trip (including Alaska and Hawaii) in Last 3 Years	2,294,008	35.7%	107	175,350	41.80%	126
Took Cruise of More than One Day in Last 3 Years	760,185	11.8%	110	57,677	13.80%	127
Sports and Leisure						
Visited an Aquarium in Last 12 Months	366,806	5.7%	107	24,753	5.90%	110
Went to Art Gallery in Last 12 Months	491,942	7.7%	113	36,768	8.80%	130
Went to Museum in Last 12 Months	904,731	14.1%	112	68,233	16.30%	129
Went to Live Theater in Last 12 Months	726,840	11.3%	112	56,706	13.50%	134

^{1/} An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior compared to the U.S. or purchasing patterns. An MPI of 100 represents the U.S. average.

Source: ESRI and ConsultEcon, Inc.

Internet use related to making travel plans and following travel related groups on social media were both above the U.S. average for residents within the 50-mile radius and within Chester County demonstrating an interest in travel. Further, residents within the 50-mile radius and within Chester County were above the national average in taking domestic, foreign, or cruise trips. Taking domestic trips within the last 12 months was the most popular in 2022 for both resident groups with 55 percent of the population within the 50-mile radius and 60.9 percent of the Chester County population. Residents within the 50-mile radius and in Chester County also have an interest in fine dining with both exceeding the national average in spending \$1-\$100 and spending \$101 or more at a fine dining establishment within the last 30 days in 2022. Residents within a 50-mile radius had high rates of participation in cultural pastime like visiting an aquarium (5.7%), art gallery (7.7%), museum (14.1%), or live theater (11.3%). These resident market behaviors demonstrate that the local residents appreciate and allocate excess funds to leisure activities particularly those related to arts, culture, and heritage.

Resident Market Summary

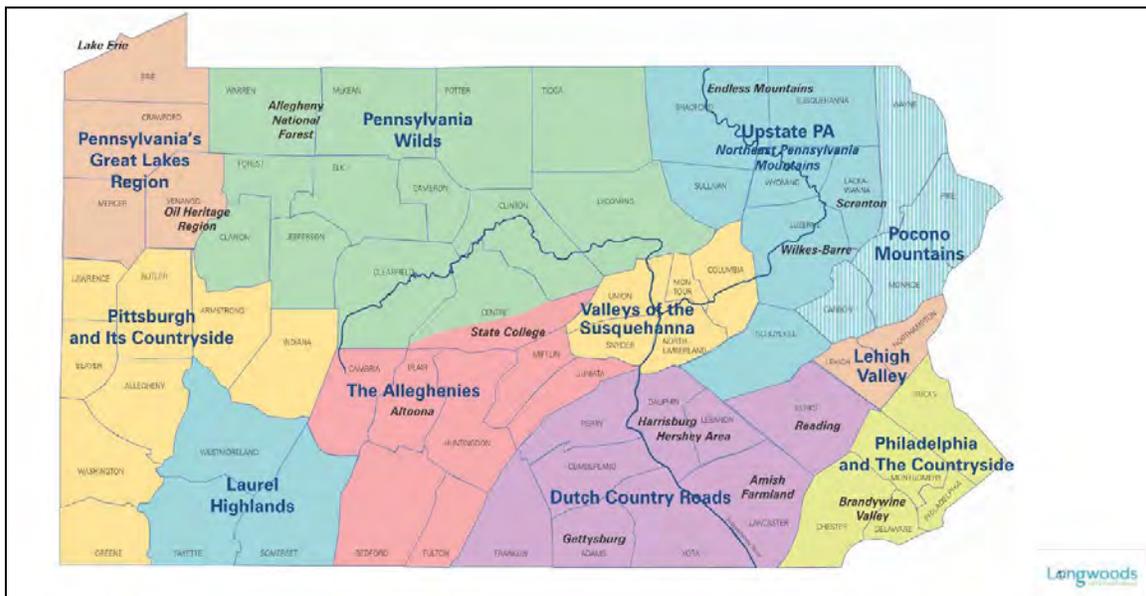
The primary market segments for heritage tourism and visitation to heritage sites include resident and tourist markets. The following are key population trends and demographic characteristics in Chester County and the Resident Market Area, defined as the area within a 50-mile radius.

- ◆ Within a 50-mile radius, there is an estimated population of approximately 8.2 million in 2022.
- ◆ The distribution of the population between age groups in the Resident Market Area is similar to that of the U.S. as a whole. The median age within the 50-mile radius is 39.9 – slightly younger than that of Chester County at 40.7, but slightly older than in the U.S. as a whole at 38.9 years old.
- ◆ There were approximately 1.3 million school-age children (ages 5 to 17) within the 50-Mile radius in 2022. The population of school-age children within the 50-mile radius is projected to decrease slightly by 2027, by 2.8 percent.
- ◆ Approximately 61.7 percent of the adult population have educational attainment above high school graduation within the 50-mile radius. This level of educational attainment is lower than that in Chester County at 75 percent, slightly higher than the difference between Chester County and the 50-mile radius at 60.8 percent, and slightly higher than in the U.S. as a whole at 62.9 percent.
- ◆ The average household size of 2.53 persons within the 50-mile radius, which is slightly lower than that of Chester County at 2.64 persons and similar to the difference between Chester County and the 50-mile radius and the U.S. as a whole at 2.52 and 2.55 respectively.
- ◆ The percentage of households comprised of “families” is 64.4 percent within the 50-mile radius, similar to the difference from Chester County to the 50-mile radius at 64.1 percent and the United States as a whole at 64.8 percent; however, the Chester County percentage of families at 68.2 percent is greater than those other areas.
- ◆ Chester County households have the highest incomes compared to the other market areas. Median household income within the 50-mile radius at \$79,000 is significantly lower than Chester County at \$111,000 but only slightly higher than the United States as a whole at \$72,000.
- ◆ Chester County residents are more likely to participate in an arts, cultural, heritage and travel activities. Participation in all of these activities exceeded the national average for both residents within the 50-mile radius and Chester County residents. These resident market behaviors demonstrate that the local residents appreciate and allocate excess funds to leisure activities particularly those related to arts and culture.

Section IV TOURIST MARKETS

This section reviews available data on tourism in Chester County and the Philadelphia region. Chester County is part of the Philadelphia and the Countryside tourism region which is defined by the Commonwealth of Pennsylvania as Chester, Bucks, Delaware, Montgomery, and Philadelphia counties. See **Figure IV-1** for a map of the state of Pennsylvania divided into regions.

**Figure IV-1
Regional Map of Pennsylvania**



Source: Longwoods Travel USA Visitor Profile Pennsylvania, 2021

Regional Travel Economic Impacts

Visit Philadelphia reported that domestic visitors spent \$7.1 billion in spending across the 5-county region, with over \$3.9 billion directly spent in Philadelphia in 2022 (up 47% from 2021). Visitor spending generated \$11.6 billion in economic impact in the 5-country region, including \$6.02 billion in Philadelphia (up 45% from 2021). 89,480 jobs were directly supported by visitor spending throughout the region. \$940 million in tax revenue

was generated across the 5-counties (up 28% vs 2021), with \$335 million in Philadelphia (up 15% from 2021).⁵

County Travel Economic Impacts

In 2022, Chester County visitors spent \$766 million. The county visitor spending trend remained consistent from 2015 to 2022 with a range of 7.9 to 10.8 percent of the total visitor spending in the region. Data in **Table IV-1** show the breakdown of regional and county visitor spending and Chester County’s percentage of the total visitor spending for the region.

Table IV-1
Regional and County Visitor Spending, 2015-2022

Year	Regional Visitor Spending	County Visitor Spending	County Percent of Region
2015	\$9,378.10	\$760.10	8.1%
2016	\$9,689.50	\$772.60	8.0%
2017	\$10,013.50	\$800.20	8.0%
2018	\$10,550.90	\$847.20	8.0%
2019	\$10,895.30	\$865.20	7.9%
2020	\$5,626.10	\$510.50	9.1%
2021	\$7,620.90	\$650.10	8.5%
2022	\$7,100.00	\$766.00	10.8%

Note: Figures are in the millions.

Source: Tourism Economics Report 2021 & 2022 and Visit Philly Annual Report 2022

Visitor Spending by Category

In 2021, regional spending was primarily spent on transportation at 42 percent followed by food and beverages at 20 percent and lodging at 17 percent. Chester County visitor spending differed from the regional spending by category. Chester County visitors, or the County percent of the region, spent the most on recreation at 12.4 percent followed by retail at 10.7 percent, and food and beverages at 10.2 percent. Lodging and transportation were the lowest spending categories with 8.3 and 6.4 percent respectively. The data demonstrates that

⁵ Source: Visit Philly 2022 Annual Report.

Chester County visitors are already interested in recreation, which can be fostered further with the heritage tourism strategy. **Table IV-2** shows the visitor spending by category for the region, the county, and percent to totals for each.

Table IV-2
Visitor Spending by Category, 2021

Category	Regional Visitor Spending	Percent to Total	County Visitor Spending	Percent to Total	County Percent of Region
Lodging	\$1,268.60	17%	\$105.20	16.2%	8.3%
Food and Beverages	\$1,514.10	20%	\$155.10	23.9%	10.2%
Retail	\$987.90	13%	\$105.70	16.3%	10.7%
Recreation	\$638.80	8%	\$79.20	12.2%	12.4%
Transportation	\$3,211.50	42%	\$204.90	31.5%	6.4%
Total	\$7,620.90	100%	\$650.10	100.0%	8.5%

Note: Figures are in the millions.

Source: Tourism Economics Report 2021

DOMESTIC VISITORS

In 2022, Philadelphia and the Countryside welcomed 39.8 million domestic visitors to the 5-county region (Bucks, Chester, Delaware, Montgomery and Philadelphia Counties), with 24.3 million domestic visitors in Philadelphia alone (up 15% from 2021).⁶ Philadelphia and the Countryside’s total visitor volume was 36 million with 22-million-day person-trips and 14 million overnight person-trips in 2021.⁷

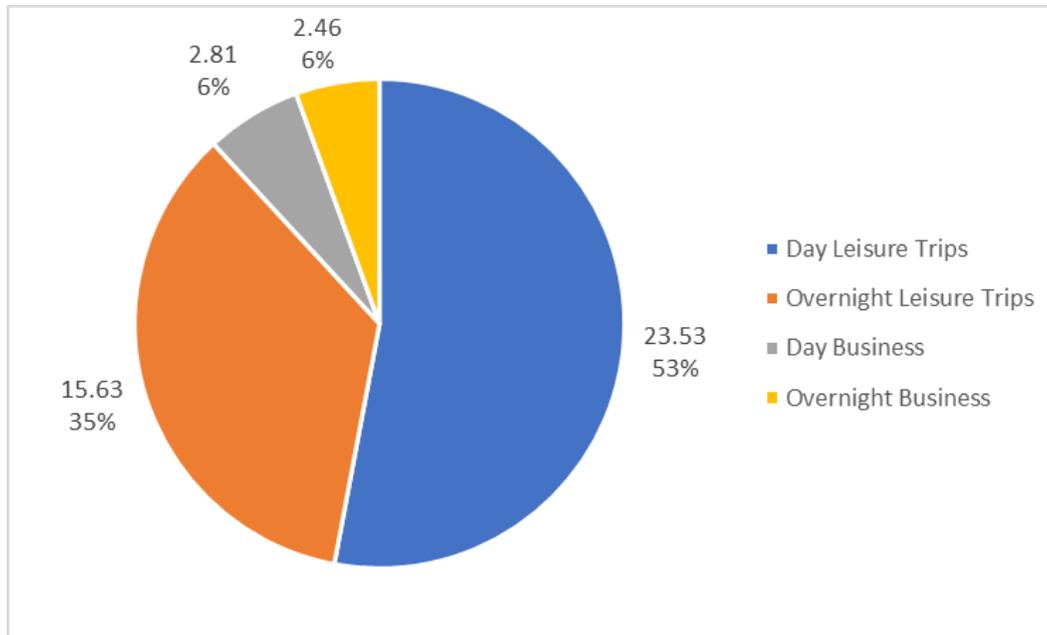
Domestic Visitor Volumes Since the Pandemic

The number of domestic visitors in 2022 was lower than 2019’s total of 44.43 million visitors. Key tourist segments are day and overnight leisure travelers and day and overnight business travelers. Eighty-eight percent of domestic visitors are traveling for leisure, including 53 percent day trips and 35 percent overnight trips. The region has a strong leisure visitor market, comprised of mostly day trippers, which has the potential to be expanded through heritage offerings that can extend visitors’ length of stays.

⁶ Ibid

⁷ Longwoods Travel USA Visitor Profile Pennsylvania 2021, 23 and 37.

Figure IV-2
Distribution of Regional Day and Overnight Leisure and Business Trips in Millions, 2019



Source: Visit Philadelphia, Greater Philadelphia Tourism: Visitation and Economic Impact 2021.

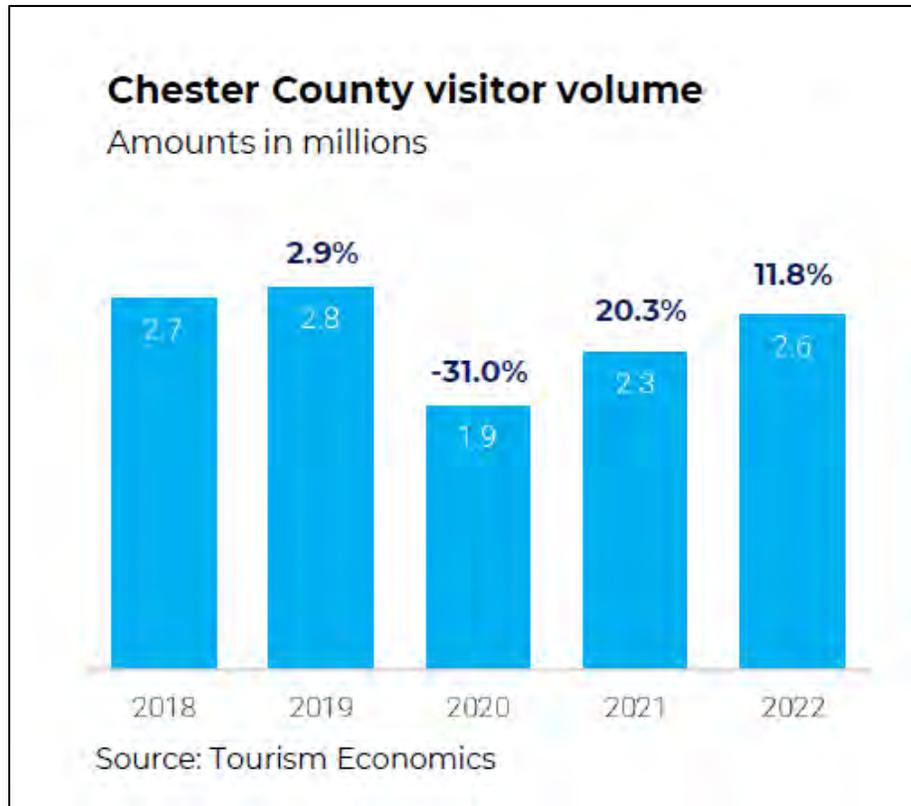
Chester County Tourism

The sources consulted for this report section include “The Brandywine Valley Visitor Economy 2022” by Tourism Economics, Chester County’s Brandywine Valley’s 2019 Annual Report, Chester County’s Brandywine Valley’s Strategic Plan 2020-2025, and “Can Travel Defy Economic Gravity?” by Tourism Economics.

Visitor Volume

In 2022, Chester County attracted 2.6 million day and overnight visitors, 93 percent of 2019 visitation levels. There were 1.45 million day and 1.11 million overnight visitors to Chester County in 2022. In 2019, Chester County had 2.8 million day and overnight visitors, with 1.5 million day trippers and 1.3 million overnight travelers. Data in **Figure IV-3** show the trend in visitor volume before and after the pandemic.

Figure IV-3
Trend in Chester County Visitor Volume



Tourism Impacts

Visitor spending in Chester County reached \$766 million in 2022, growing more than \$100 million over the prior year and reaching 89 percent of pre-pandemic levels. The direct visitor spending impact generated a total economic impact of \$1.4 billion in Chester County in 2022 including indirect and induced impacts. This total economic impact sustained 12,764 jobs and generated \$95 million in state and local tax revenues in 2022.⁸

Direct visitor spending is forecasted to surpass pre-pandemic levels in 2024 to \$877 million, which will result in a growth in direct tourism employment and will support a nearly full recovery of direct tourism employment by 2025. Data in **Figure IV-4** show the forecast of direct visitor spending and employment.

⁸ Ibid., 4.

Figure IV-4
Forecast of Direct Visitor Spending and Employment

Forecast of direct visitor spending and employment
Amounts in \$ millions, number of jobs

	2018	2019	2020	2021	2022	Forecast		
						2023	2024	2025
Total visitor spending	\$847	\$865	\$511	\$650	\$766	\$825	\$877	\$918
% change		2.1%	-41.0%	27.3%	17.9%	7.7%	6.3%	4.7%
Index (2019=100)		100.0%	59.0%	75.1%	88.6%	95.3%	101.4%	106.1%
Total direct employment	7,845	8,015	5,854	6,557	7,232	7,575	7,771	7,937
% change		2.2%	-27.0%	12.0%	10.3%	4.8%	2.6%	2.1%
Index (2019=100)		100.0%	73.0%	81.8%	90.2%	94.5%	97.0%	99.0%

Sources: Oxford Economics, Tourism Economics

Data in **Figure IV-5** show direct visitor spending by type in 2022. Transportation, Food and Beverage and Lodging were the top three spending categories.

Figure IV-5
Visitor Spending by Type in Chester County, 2022



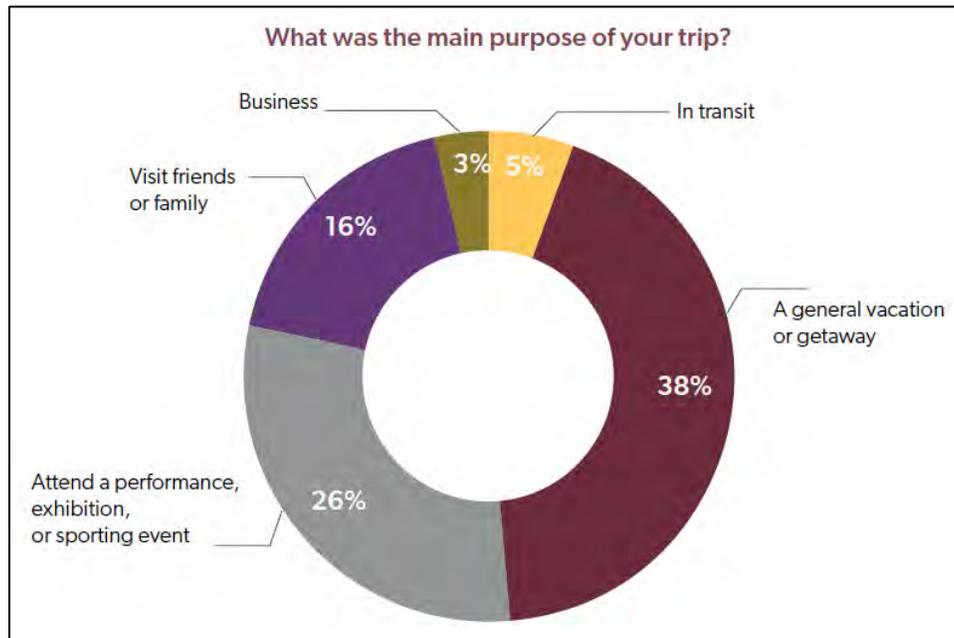
Travel Party Composition

In 2019, 56 percent of travel groups were composed of a spouse or significant other followed by lone travelers at 16 percent, traveling with friends at 14 percent, and traveling as a family with children at 10 percent.⁹

Purpose of Trip

According to the online survey created by ESI on behalf of the Chester County Tourism, the main trip purpose for visitors was predominately leisure as a vacation at 38 percent or to attend a leisure or recreational event at 26 percent in 2019. The least common trip purpose was for business at only 3 percent. **Figure IV-6** shows the main purpose of travelers to Chester County in 2019.

Figure IV-6
Chester County Traveler Trip Purpose, 2019



Source: Chester County's Brandywine Valley's Strategic Plan 2020-2025

⁹ Chester County's Brandywine Valley's Strategic Plan 2020-2025, XXXV

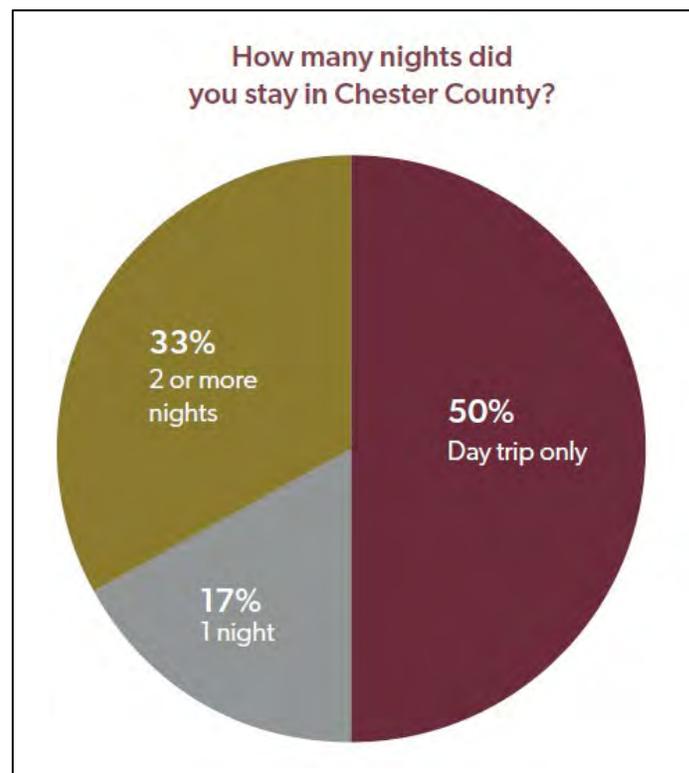
Visitor Origin

84 percent of visitation to Chester County in 2019 originated from the mid-Atlantic states (New York, New Jersey, Pennsylvania, Delaware, Maryland, Virginia, and the District of Columbia). The top city markets were Philadelphia, New York, and Washington, D.C.¹⁰

Length of Stay

According to the ESI survey, half of visitors to Chester County are day-trippers. The second most common length of stay was 2 or more nights at 33 percent followed by 1 night at 17 percent. This provides an opportunity to extend the length of visitors' stays through the Heritage Tourism Plan. **Figure IV-7** shows the length of visitors' stays according to the ESI survey in 2019.

Figure IV-7
Length of Stay, 2019



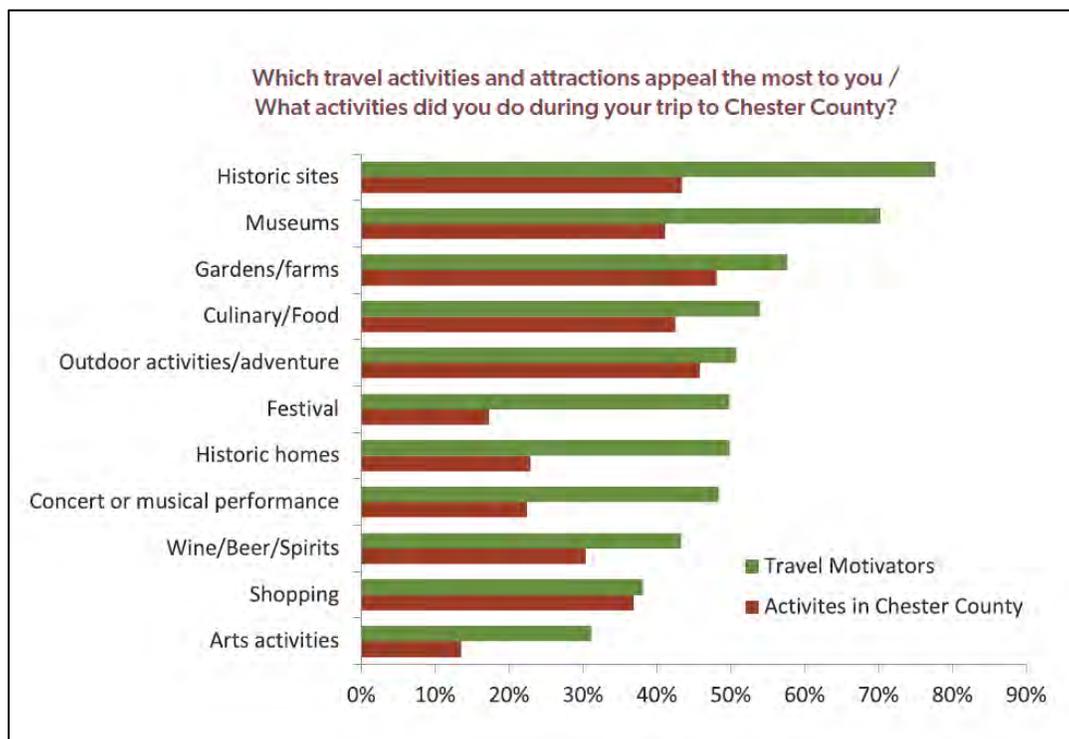
Source: Chester County's Brandywine Valley's Strategic Plan 2020-2025

¹⁰ Chester County's Brandywine Valley's Strategic Plan 2020-2025, 21

Trip Activities

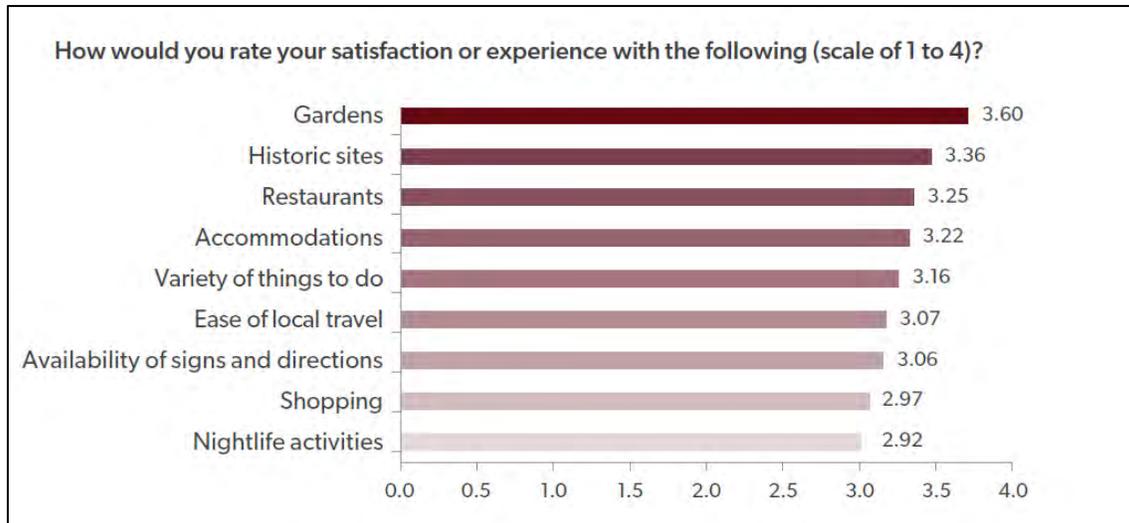
Heritage tourism activities like historic sites, museums, gardens, and outdoor activities appeal heavily to travelers to Chester County. However, Chester County travelers were less likely to actually have visited these attractions on their trip demonstrating an opportunity to nurture heritage tourists to the county. Historic sites, museums, and gardens/farms had the highest appeal to future Chester County visitors at approximately 78 percent, 70 percent, and 58 percent respectively. Yet only 42 percent visited historic sites, 41 percent to museums, and 48 percent to gardens/farms. Interest in heritage sites is already high amongst future visitors to the region, but a county-wide heritage tourism plan will likely address barriers to visitation. **Figure IV-8** shows which attractions appealed to Chester County visitors and if the visitor visited said attractions. However, Chester County’s gardens and historic sites had the top 2 highest ratings of satisfaction of 3.60 and 3.36 out of 4 respectively. **Figure IV-9** shows the level of satisfaction of visitors to various Chester County attractions.

Figure IV-8
Travel Motivators and Activities in Chester County, 2019



Source: Chester County’s Brandywine Valley’s Strategic Plan 2020-2025

Figure IV-9
Chester County Visitor Satisfaction, 2019



Source: Chester County's Brandywine Valley's Strategic Plan 2020-2025

INTERNATIONAL VISITORS

The UK and India currently represent the largest share of overseas visitors to Chester County, with more than 10,000 visits each in 2018. Visitation from India is expected to surpass that of the UK in 2022. South Korea is also expected to see large gains in visitation over the next decade, with an increase of 266 percent between 2016 and 2027. While European visitation is growing more slowly, visits and visitor spending from Europe still make up a substantial portion of tourism activity in Chester County.¹¹ **Figure IV-10** shows the top 15 overseas countries of origin of Chester County visitors.

¹¹ Chester County's Brandywine Valley's Strategic Plan 2020-2025, 17.

Figure IV-10
Top 15 Overseas Countries of Origin of Chester County Visitors

Top 15 Overseas Countries of Origin for Visitors to Chester County

Rank	2015 Country	2017 Country	2018 Country	2022 Country	2027 Country
1	United Kingdom	United Kingdom	United Kingdom	India	India
2	India	India	India	United Kingdom	United Kingdom
3	Germany	Germany	Germany	China	China
4	China	China	China	Germany	Germany
5	France	Ireland	Ireland	Ireland	Ireland
6	Mexico	France	France	France	France
7	Brazil	Mexico	Mexico	Mexico	Mexico
8	Ireland	Netherlands	Netherlands	Netherlands	South Korea
9	Netherlands	Italy	South Korea	South Korea	Netherlands
10	Italy	Japan	Japan	Switzerland	Switzerland
11	Japan	South Korea	Brazil	Japan	Brazil
12	South Korea	Brazil	Switzerland	Brazil	Japan
13	Spain	Sweden	Italy	Italy	Italy
14	Sweden	Switzerland	Spain	Spain	Sweden
15	Switzerland	Spain	Sweden	Sweden	Spain

Source: Tourism Economics (2019)

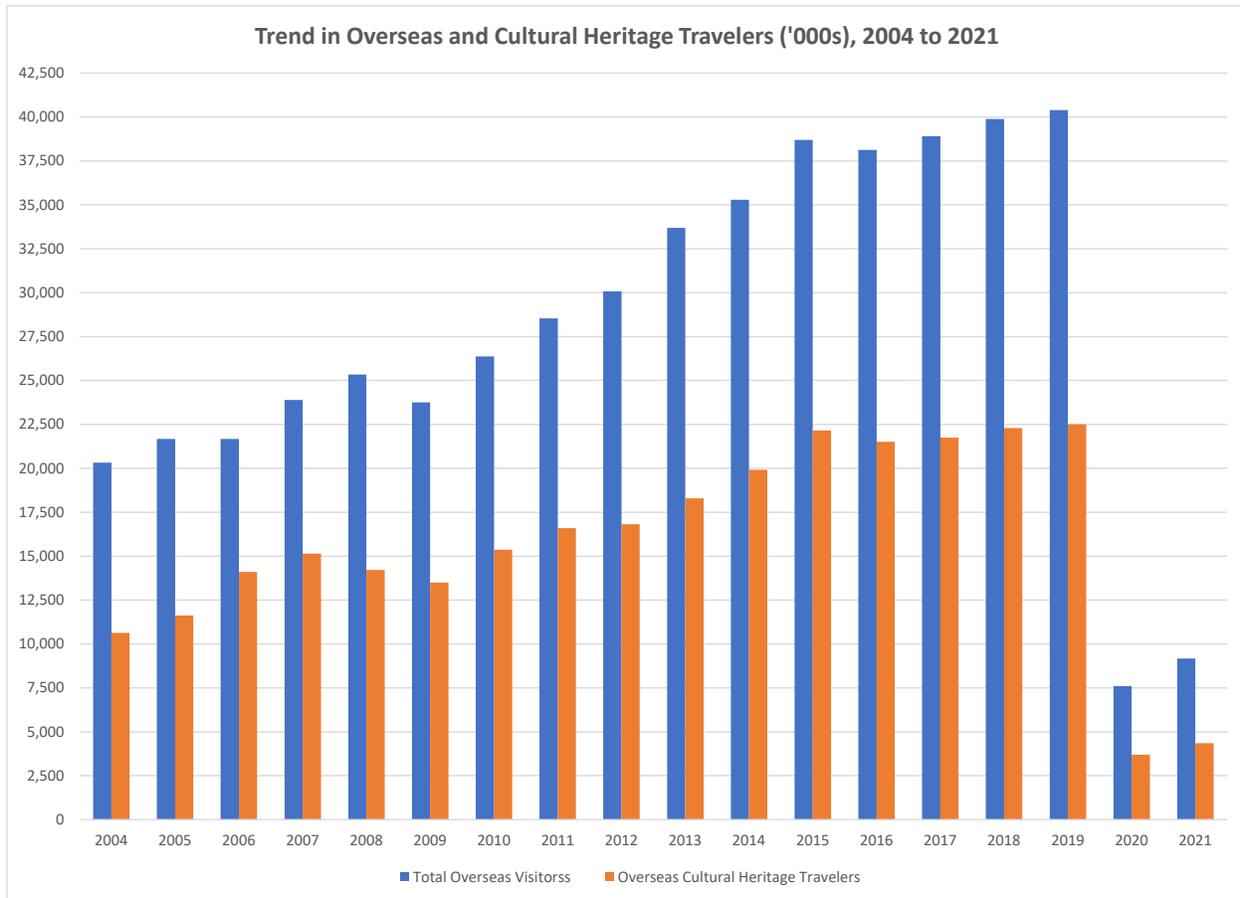
Overseas Travelers

In 2021, 9.2 million overseas travelers visited the United States, and the number has recovered significantly since 2020 with a percentage of 21 percent over the past year. However, the overseas travel market has not fully recovered with 2021 only seeing 22.7 percent of the total overseas visitation from 2019.

Since 2004, the U.S. Department of Commerce’s Office of Travel and Tourism Industries has been tracking the number of overseas visitors whom it considers to be cultural heritage travelers. The office defines a cultural heritage traveler as someone who goes to one or more of the following places during a visit to the U.S.: art gallery/museum, concert/play/musical, cultural heritage site, ethnic heritage site, American Indian community, historical place, or national park.

Figure IV-11 shows the growth in cultural heritage visitors from overseas compared with total overseas travelers. In every year from 2004 to 2021, approximately half of all overseas visitors engaged in cultural heritage activities while in the United States.

Figure IV-11
Overseas Visitors and Cultural Heritage Travelers to the United States



Sources: U.S. Department of Commerce, International Trade Association, Office of Travel & Tourism Industries and ConsultEcon Inc.

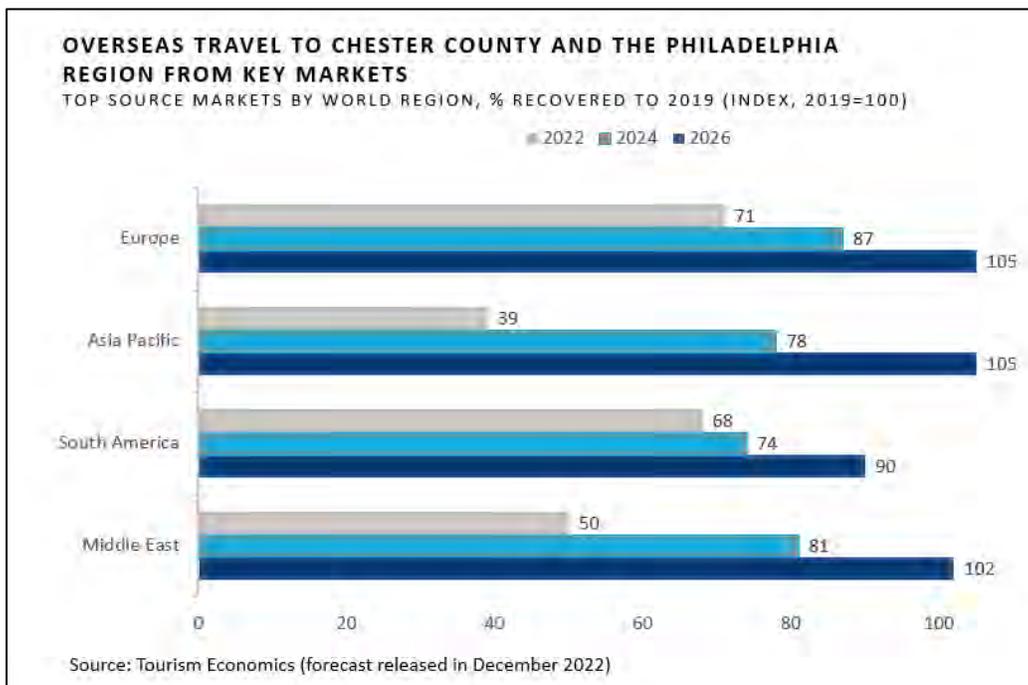
Philadelphia faces a challenge in attracting these individuals because it is not a primary port of entry. In recent years, the region has not kept pace with the growth in overseas visitors to the United States. The number of overseas visitors to Philadelphia peaked in 2008 at 710,000 and then declined in 2013 to 673,000.ⁱ Overseas visitation began to slowly rise again with 685,000 visitors in 2015 but visitation never rose back to 2013 levels. In 2019, there were 702,800 overseas visitors and only 117,400 visitors as a result of the pandemic.¹²

¹² U.S. Department of Commerce, International Trade Association, Office of Travel & Tourism Industries.

International Visitation Recovery

International visitors are expected to recover to 71 percent of 2019 levels in 2022 with 908,000 visitors to Chester County and the Philadelphia region. Top overseas markets in 2023 are anticipated to be the United Kingdom, Germany, and India. Europe is forecasted to lead the recovery of international travel reaching 87 percent of 2019 levels by 2024. **Figure IV-12** shows how international travel has recovered in comparison to 2019 levels.

Figure IV-12
International Travel Recovery to Chester County and the Philadelphia Region



Source: Tourism Economics

LODGING

Chester County has 48 accommodations properties with over 4,900 rooms in four major clusters: Exton/Downingtown, Kennett Square, West Chester, and 202 Corridor. Chester County's Brandywine Valley created the graphic shown below as **Figure IV-13**. (See also Figure II-12.)

Figure IV-13
Chester County Accommodations Clusters



Source: Chester County's Brandywine Valley's Strategic Plan 2020-2025

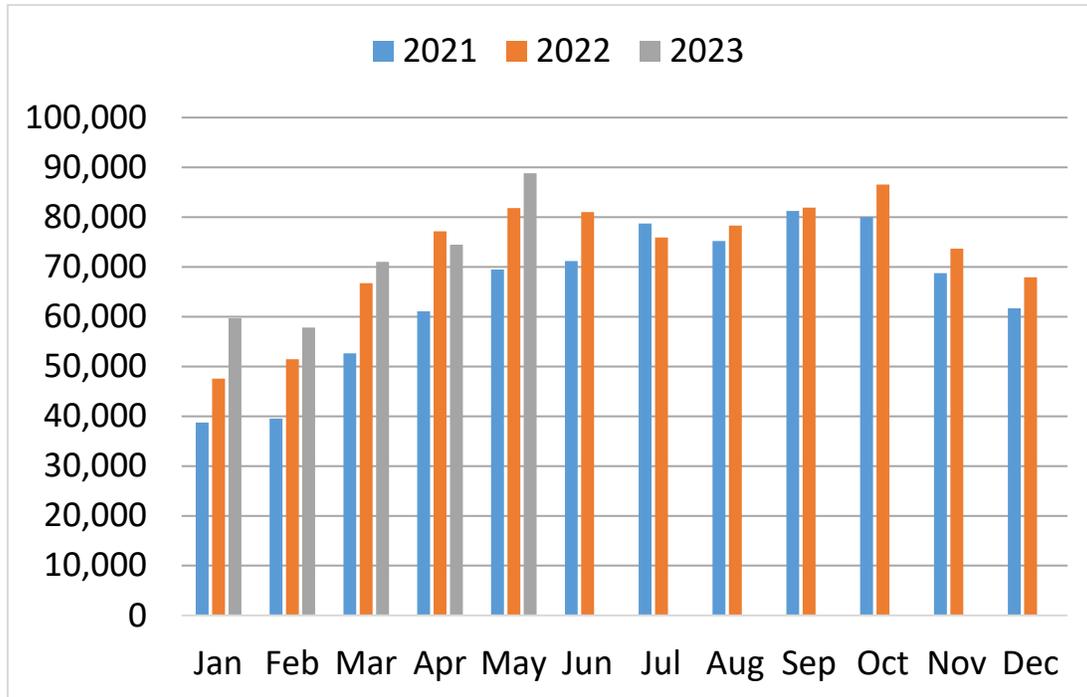
Annual Trends in Demand and Supply

For 2023 (12 months ending in May) available room supply was 1.5 million. Room demand was 897,000 occupied room nights, an average annual occupancy rate of 58 percent.

Monthly Trends

Monthly room nights varied from approximately 60,000 in December 2022 and January 2023 to almost 93,000 rooms higher than October 2022. September and October have been the most popular months to visit and overnight lodging demand is relatively strong from April through October. Data in **Figure IV-14** show the monthly room nights by demand for Chester County from 2021 through May 2023.

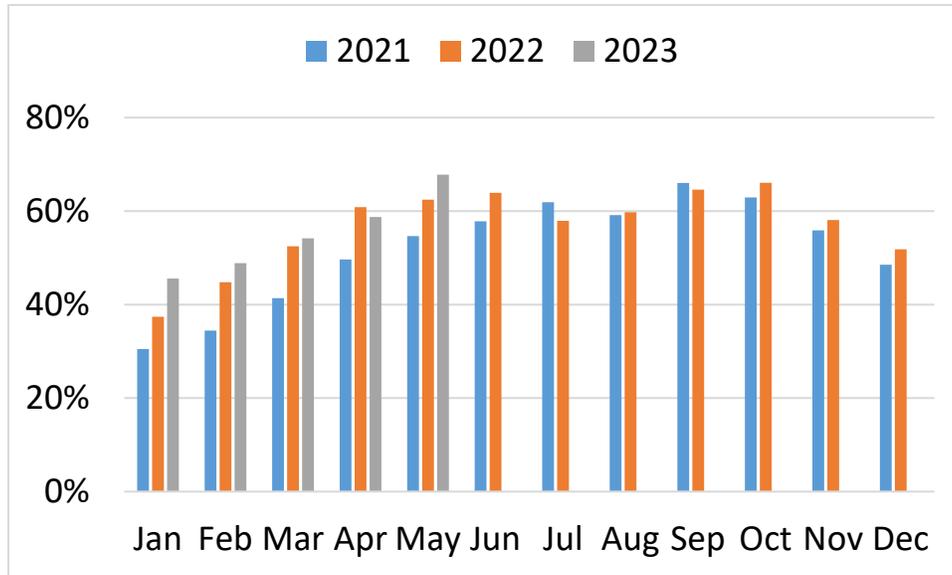
Figure IV-14
Monthly Room Nights (Demand) in Chester County, 2021 to 2023 through May



Source: STR and ConsultEcon, Inc.

Monthly occupancy rates varied from 30 percent in January to 66 percent in September for 2021, 37 percent in January to 66 percent in October in 2022, and 46 percent in January to 68 percent in 2023 through May. January remained consistently the month with lowest occupancy rate from 2021 to 2023. Occupancy rates were at their highest in September and October of 2021 and 2022 respectively. Yet, the data trends show a consistent increase in occupancy that follows the seasonality of 2021 and 2022 suggesting that September and October are most likely to be the months with the highest occupancy rates for Chester County in 2023. **Figure IV-15** shows the monthly occupancy rate in Chester County from 2021 through May 2023.

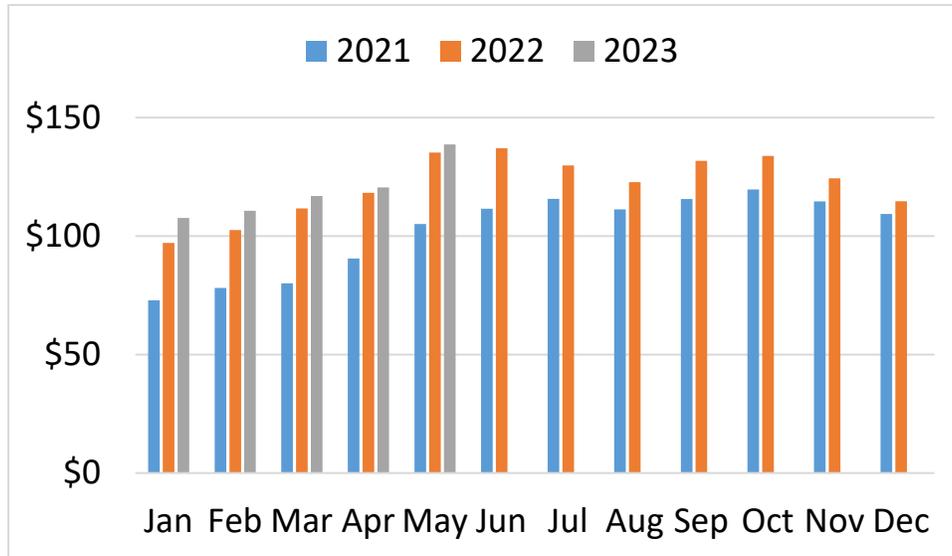
Figure IV-15
Monthly Occupancy Rate in Chester County, 2021 to 2023 through May



Source: STR and ConsultEcon, Inc.

The average daily rate for travelers was at its lowest in January for 2021 through 2023 and at its highest in October 2021, June 2022, and May 2023. The average daily rate prices ranged from \$73 to \$120 in 2021, \$97 to \$137, and \$108 to \$139 in 2023 through May. **Figure IV-16** shows the monthly average daily rate in Chester County from 2021 through May 2023.

Figure IV-16
Monthly Average Daily Rate in Chester County, 2021 to 2023 through May



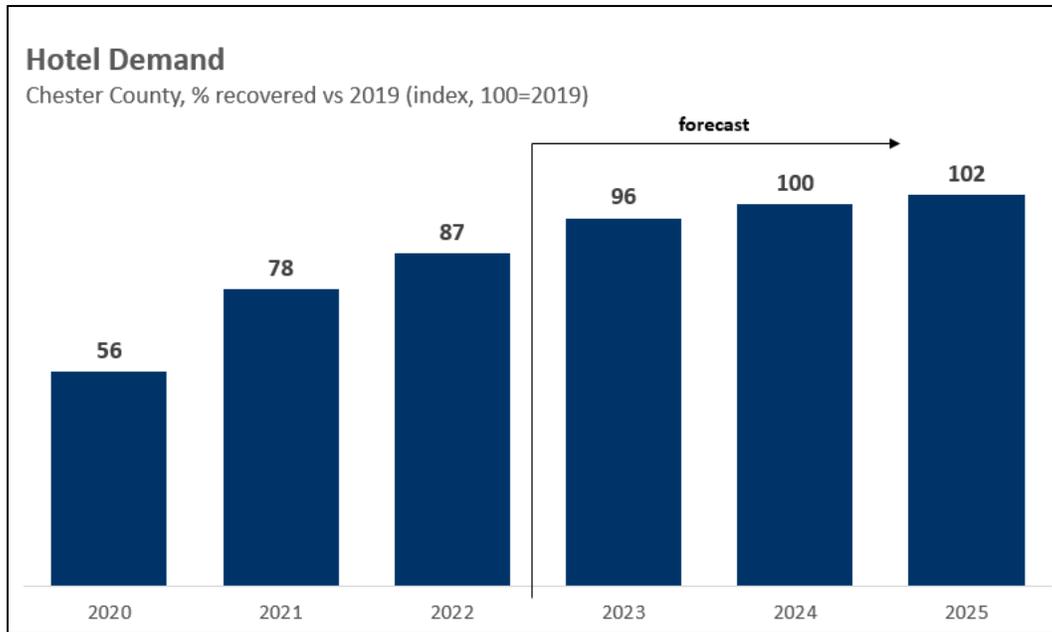
Source: STR and ConsultEcon, Inc.

Lodging Recovery

Lodging demand in Chester County is about to recover to pre-pandemic levels and forecasted to recover by 2024. According to Tourism Economics, Chester County’s hotel demand has steadily increased since 2020 and had recovered to 87 percent of 2019 levels in 2022. By 2024, the hotel demand will fully recover and will exceed to 102 percent of 2019 levels by 2025.¹³ **Figure IV-17** shows the hotel demand in Chester County in comparison to 2019.

¹³ Tourism Economics, “Can Travel Defy Economic Gravity?,”21.

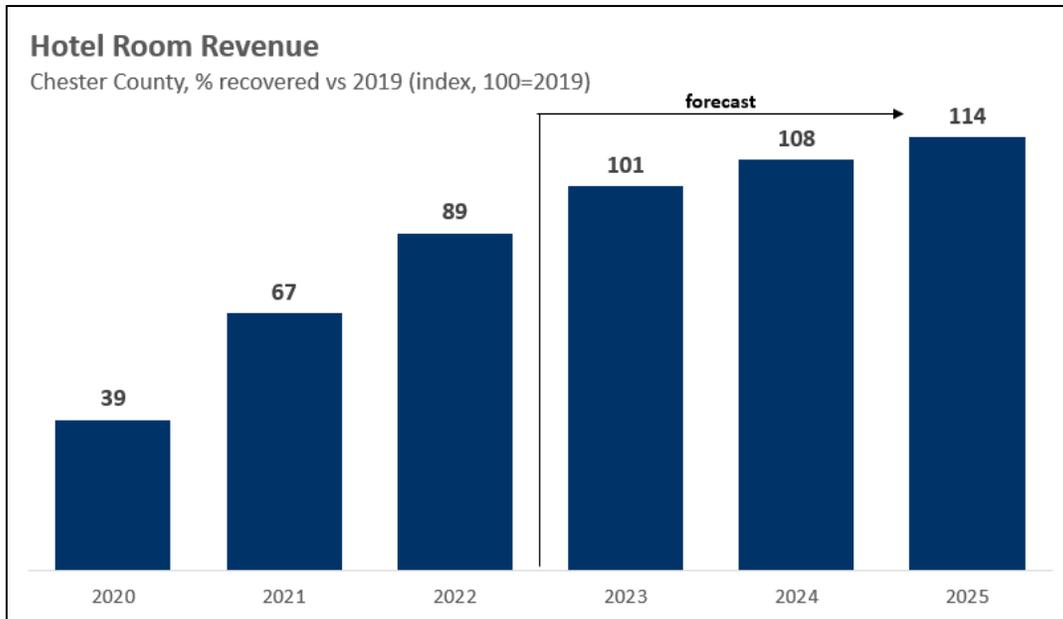
Figure IV-17
Chester County, Post-Pandemic Hotel Recovery



Source: Tourism Economics

Hotel room revenue in Chester County will recover more quickly than hotel demand due to strong rates. Tourism Economics predicts that room revenue will fully recover and exceed 2019 levels at 101 percent. By 2025, hotel room revenue is projected to rise as high as 114 percent of pre-pandemic levels. **Figure IV-18** shows Chester County room revenue recovery post-pandemic.

Figure IV-18
Chester County Hotel Revenue Recovery



Source: Tourism Economics

Airbnb and Private Home-Sharing Short Term Rentals

Airbnb and other private home-sharing platforms have increased in popularity and usage in the past few years. These platforms like Airbnb, VRBO and HomeAway, amongst others, connect travelers with privately owned rooms for rent in people’s homes or an entire house/apartment. As of 2016, a reported 11 percent of American adults have used the Airbnb platform to arrange travel accommodations.¹⁴ While this may seem like a moderate share of Americans, Airbnb’s has experienced rapid growth. It has accommodations in 34,000 cities throughout 110 countries worldwide. Airbnb and other home-sharing platforms are already impacting how the hotel, tourism, and housing industry function. It is still to be determined what the full effect may be on these industries and what is motivating travelers to opt for Airbnb or similar platforms over traditional hotels.

¹⁴ Source: Smith, A. (2016). *The New Digital Economy*; Pew Research Center

The peer-to-peer short term rental service industry, like Airbnb, has market segmentation of consumers and variations on what draws them to the service. A survey found five common motivators include price (perceived economic benefits), household amenities and space, authenticity, interaction with locals or social benefits.¹⁵

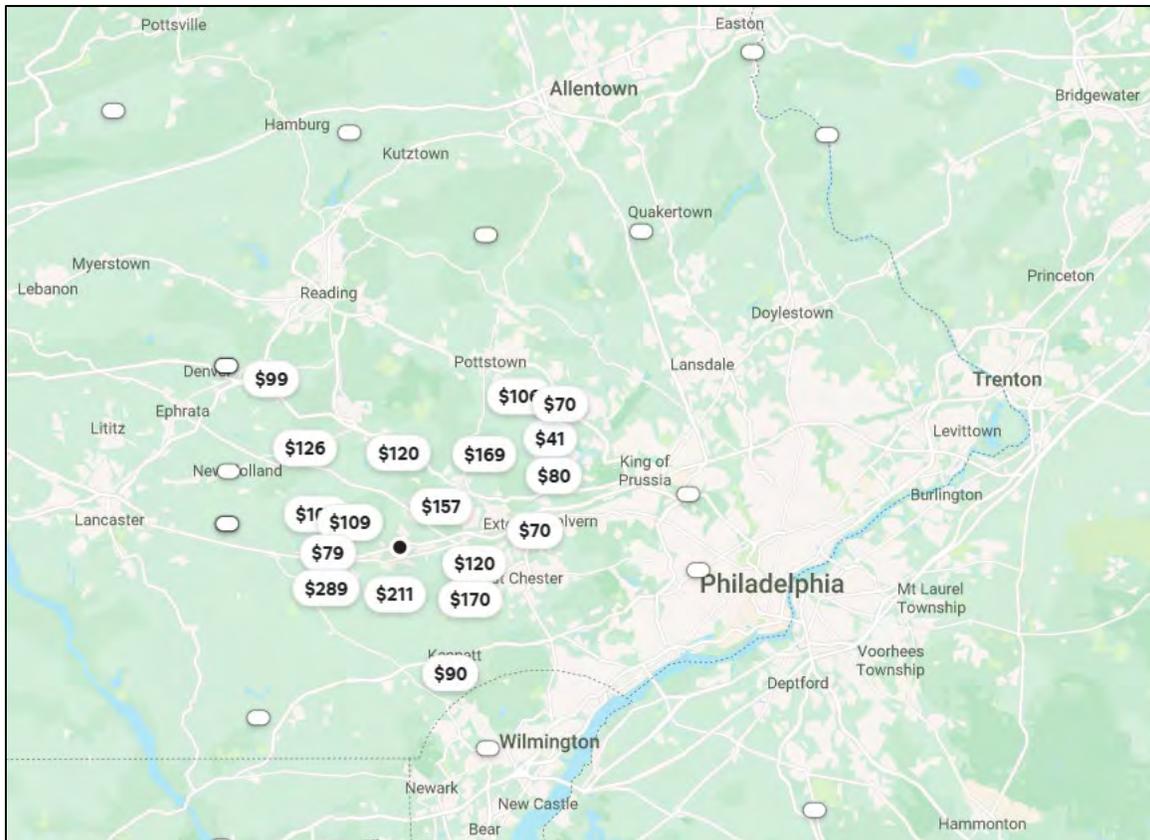
Household amenities and space could be a significant motivator—Airbnb provides a number of amenities that traditional hotel accommodations typically do not offer. Airbnb often has more flexible check-in and check-out timing, access to kitchen and living space, more space—with the ability to rent an entire house or multiple rooms. A primary amenity is that Airbnbs are commonly located in central neighborhoods or downtown areas. Because of differences in commercial and residential zoning, Airbnbs can be in many neighborhoods with residences whereas hotels are limited to commercial areas.

The Airbnb rental trend is visible in Chester County where short-term, private room and home rentals are increasingly common with over 270 listings. Some homeowners are reportedly earning supplementary income by renting rooms and apartments, while meeting demand for accommodations. Airbnb and other short-term peer to peer rentals can increase the supply of rooms available to visitors coming into Chester County. These private, short-term rentals are not subject to the same taxes as traditional hotels and motels and could be potential competitors to the traditional hotels and motels. The map in **Figure IV-19** shows a sample of private rentals on Airbnb. The average daily rate of advertised Airbnbs in Chester County from \$70 to \$289 per night.¹⁶

¹⁵ Source: Guttentag D., Smith, S., Potwarka, L. (2017) *Why Tourists Choose Airbnb: A Motivation-Based Segmentation Theory*. Sage Journal

¹⁶ Airbnb website

Figure IV-19
Location of Selected Airbnb Rentals Accommodations in Chester County



Source: Airbnb and ConsultEcon, Inc.

SUMMARY

Chester County attracted 2.6 million day and overnight visitors, 93 percent of 2019 visitation levels.¹⁷ There were 1.45 million day and 1.11 million overnight visitors to Chester County in 2022. Visitor spending reached \$766 million in 2022, growing more than \$100 million over the prior year and reaching 89 percent of pre-pandemic levels. The direct visitor spending impact of \$766 million generated a total economic impact of \$1.4 billion in Chester County in 2022 including indirect and induced impacts. This total economic impact sustained 12,764 jobs and generated \$95 million in state and local tax revenues in 2022. Direct visitor spending is forecasted to surpass pre-pandemic levels in 2024, resulting in a growth in direct tourism employment and will support a nearly full recovery of direct tourism employment by 2025.

¹⁷ Tourism Economics, "The Brandywine Valley Visitor Economy 2022," 5.

Chester County has a strong domestic and international tourism market, which is continuing to rebound, as demonstrated by STR data and lodging recovery projections. Lodging demand in Chester County is about to recover to pre-pandemic levels and forecasted to recover by 2024. According to Tourism Economics, Chester County's hotel demand has steadily increased since 2020 and had recovered to 87 percent of 2019 levels in 2022. By 2024, the hotel demand will fully recover and will exceed to 102 percent of 2019 levels by 2025.

Heritage tourism activities like historic sites, museums, gardens, and outdoor activities appeal heavily to travelers to Chester County. However, Chester County travelers were less likely to have visited these attractions on their trip demonstrating an opportunity to nurture heritage tourists to the county. Historic sites, museums, and gardens / farms had the highest appeal to future Chester County visitors at approximately 78 percent, 70 percent, and 58 percent respectively. Yet only 42 percent visited historic sites, 41 percent to museums, and 48 percent went to gardens / farms. Interest in heritage sites is already high amongst future visitors to the region, but a county-wide heritage tourism plan will likely address barriers to visitation. This provides an opportunity to extend the length of visitors' stays through the Heritage Tourism Plan that addresses visitation barriers to heritage attractions that already appeal to visitors.

Section V

HERITAGE TOURISM AND NICHE MARKETS

This section reviews the niche markets that exist in the Chester County tourism industry. Heritage tourists are only one niche among other complementary niche markets that are important audiences for Chester County's heritage sites, such as outdoor recreation, public gardens, agritourism and culinary tourism,

HERITAGE TOURISM

Heritage tourism is an important market for many destinations. According to the National Trust for Historic Preservation, heritage tourism is traveling to experience the places, artifacts, and activities that authentically represent the stories and people of the past and present.¹⁸ Many cities and regions have invested heavily in heritage-based tourism and have seen significant economic returns. Destinations such as Boston and Charleston, SC, for instance, base a significant part of their marketing on appealing to this market. The National Heritage Area program managed by the National Park Service has recently seen a significant increase in the number of Congressionally designated, national heritage areas, indicating a widespread interest in the development and promotion of regional historic, natural, and cultural assets as tourism products. Some states such as New York State and the Commonwealth of Pennsylvania have heritage area programs to support regional coordination of heritage tourism efforts.

Historic and cultural travelers tend to be older, Baby Boomer households that are more educated and affluent than the average U.S. traveler. A trip by historic and cultural travelers is more likely to include a stay in paid accommodations, these stays are longer, and the overall trip expenditures are higher than the average.

¹⁸ Advisory Council on Historic Preservation, Heritage Tourism.

Heritage Tourism in Pennsylvania

The Pennsylvania Department of Conservation and Natural Resources' Pennsylvania Heritage Areas Program is a multi-region asset-based economic development program rooted in the Commonwealth's natural, cultural, and industrial history. Pennsylvania has 12 state-designated Heritage Areas and 5 of these sites have national designation through the National Park Service: Delaware and Lehigh National Heritage Corridor, Lackawanna Heritage Valley, Oil Region Alliance, Rivers of Steel National Heritage Area, Schuylkill River Greenways National Heritage Area¹⁹, which is partially in Chester County along its northern edge, and the Susquehanna National Heritage Area.²⁰ The 12 Heritage Areas cover over 80 percent of the Commonwealth in 57 of its 67 counties. All but Lackawanna Heritage Valley operate as nonprofit, 501(c)(3) organizations.²¹ In 1995, the Heritage Areas developed a statewide nonprofit association, now known as Heritage PA. While the Heritage Areas are managed separately Heritage PA provides a broader voice for Pennsylvania's Heritage Areas as a whole. Heritage PA sites the positive impact of Heritage Areas on the Commonwealth's economy and quality of life:

1. According to a 2009 report, Pennsylvania is the fourth leading state attracting cultural heritage visitors.
2. In 2014, tourists spent an estimated 7.5 million days and nights in Pennsylvania's Heritage Areas, purchasing more than \$2 billion worth of goods and services. Seventy percent (70%) of this spending is purely reliant on heritage-related attractions. The average spending per visit was \$267. The total contribution of Heritage visitor spending to the state economy was 25,708 jobs and \$798 million in labor income.

The Pennsylvania Historical and Museum Commission (PHMC) also has a non-profit partner, Pennsylvania Heritage Foundation (PHF), to preserve the Commonwealth's rich heritage through charitable funding, membership, grant management, and community engagement. Through private contributions, PHF has helped PHMC protect and provide access to PHMC's 24 historic sites and museums, 5 million objects, and 237 million archival items. PHF curates heritage tourism through the Pennsylvania Trails of History program where visitors can auto

¹⁹ There will be more detail on the Schuylkill River Greenways National Heritage Area later in this section.

²⁰ Pennsylvania Department of Conservation and Natural Resources, Pennsylvania Heritage Areas Program.

²¹ Pennsylvania's Heritage Areas Program: The Next Five Years A Strategic Plan for 2015-2020, 1.

tour the region. The trails include the Military History Trail that includes Chester County’s Brandywine Battlefield Park, Historic Homes Trail, the Industrial Heritage Trail, and the Rural Farm and Village History Trail. Visitors can plan their journey through the PA History 2 Go! Program, which has short videos to virtually introduce the visitors to the commonwealth’s history.²²

Cultural and Heritage Travel Among U.S. Leisure Travelers

A 2013 survey of domestic leisure travelers by Mandala Research LLC estimated that approximately 170.4 million people, or 71 percent of the U.S. adult population, travel for leisure. According to the survey, 76 percent of leisure travelers can be considered cultural and heritage travelers; the research did not produce a number for those interested purely in history. Cultural and heritage travelers were segmented into subcategories by the degree of influence that cultural and heritage activities had on their travel decisions.

Only 13 percent of all leisure travelers were considered “passionate” cultural and heritage travelers—people for whom cultural and heritage activities drove their choice of destination and who participated extensively in those activities. An additional 14 percent were categorized as “well-rounded/active” cultural and heritage travelers who participated in a wide range of activities, including cultural and heritage activities. The rest wanted to engage in cultural and heritage activities but had limited experience in doing so; might participate in such activities if they came across them; or were drawn primarily to activities they perceived as fun.

Five percent of the cultural and heritage travelers who were surveyed reported visiting Philadelphia, the same as the percentage for Boston, indicating that Philadelphia is one of the most popular destinations for cultural and heritage tourism.

On their trips, these tourists engaged in a number of different activities, 51 in all. As shown in Figure 1, eight history and heritage activities ranked in the top 10: taking a scenic drive (2),

²² Pennsylvania Historical & Museum Commission, “Pennsylvania Trails of History.”

explored small towns (3), shopped for items by local artisans and craftspeople (4), walked self-guided tour (5), visiting art museums and/or galleries (7), visiting heritage/historical buildings (8), historic sites (9), and state/national parks (10). Other activities ranked lower.

Figure V-1
Traveler Participation in Selected Heritage Tourism Activities During Last Trip or in Past Three Years

Ranking	Activity	Percent Participating in Activity
1	Shopped general not locally made crafts/memorabilia	37%
2	Took a scenic drive	33%
3	Explored small towns	30%
4	Shopped for items made by local artisans and craftspeople	27%
5	Self-guided walking tour	27%
6	Visited beaches/waterfronts	27%
7	Visited art museums/galleries	26%
8	Visited heritage buildings historical buildings	24%
9	Visited heritage buildings historical buildings	24%
10	Visited historic sites	24%
11	Visited state/national parks	24%
12	Experienced local or regional cuisine for a unique and memorable experience not fine dining	23%
13	Went to a fine dining restaurant for a unique and memorable experience	23%
14	Attended an art/craft fair or festival	22%
15	Visited a local farmers market	22%
20	Visited history museums centers	19%
24	Sampled traditional artisan products eggs, cheeses, candies, jams, etc.	18%
30	Visited farms and ranches	15%
31	Toured wineries or breweries Tasting locally made wines/brewed beers	15%
33	Shopped for gourmet food and wine	15%
35	Attended cultural and/or heritage fair or festival	13%
36	Took a tour focusing on local architecture	13%
37	Attended a food/wine fair or festival	13%
42	Participated in an organized tour of local history or culture	11%
43	Visited living history museums	11%
48	Attended historical reenactments	10%

Source: Mandala Research, LLC and ConsultEcon, Inc.

PUBLIC GARDENS

A public garden is defined by the American Public Gardens Association as an institution that maintains plants for the sake of enjoyment, public education, research, conservation, and higher learning.²³ According to the American Public Gardens Association’s 2022 member survey, its members employ over 13,000 full, part-time, and seasonal jobs nationally and internationally. The gardens attracted over 120 million visitors and served 2.1 million K-12 students through educational programming and over 180,000 participants through health and wellness programs.²⁴

APGA / Passport / America’s Garden Capital

Philadelphia’s moniker is the America’s Garden Capital with 38 member gardens within 30 miles of the city.²⁵ Over 4 million people visit Pennsylvania gardens annually, which also employ almost 2,000 full-time employees and collectively provide over \$500 million per year in economic impact throughout Pennsylvania. The gardens generate substantial benefits for the region with more than 1,500 jobs, support to local businesses, increasing nearby property values, and a collective economic impact of about \$256 million per year.²⁶

Longwood Gardens²⁷

The pandemic impacted Longwood Gardens’ operations considerably. On March 13 (2020), Longwood Gardens employed 1,521 staff and 780 volunteers. By May 1, the paid staff was reduced to 244, and all part-time employees, students and seasonal employees were furloughed. COVID-19’s impact was also seen on its grounds: because of staff layoffs, over 300,000 flowering bulbs had to be sent to the compost. Longwood became the first public

²³ American Public Gardens Association, “What is a Public Garden?”

²⁴ American Public Gardens Association, *Collective Impact: Public Gardens and their Communities.*”

²⁵ Americas Garden Capital.

²⁶ <https://www.pottsmmerc.com/2021/04/23/lawmakers-longwood-gardens-hearing-public-gardens-create-jobs-help-economy/> The Mercury, “Lawmakers’ Longwood Gardens hearing: Public gardens create jobs, help economy,” April 23, 2021.

²⁷ Chester County Press, Richard Gaw, “Longwood Gardens: Reimagining its Future Beyond the Pandemic.”

garden in the world to offer virtual live learning opportunities for children and provided free horticultural education for 23,000 K-12 students around the world.

Longwood has rebounded from the pandemic and had record attendance with 1.6 million visitors last year. The garden has 69,000 member households. Their members are from 47 states with most of them having connections to Chester County. 52 percent of their visitor volume is from members alone. They expect that to continue to grow, although modestly, as their member base continues to grow. More than half of their visitors were from attending evening events with 15,000 visitors daily for the holiday display. The organization has also launched the Longwood Reimagined project, a \$240 million investment, which will have residual impact on the local economy by generating as many as 4,000 jobs between now and 2024 when the project is anticipated to be completed. Longwood anticipates 1.8 million visitors following the expansion.

OUTDOOR RECREATION AND TRAILS

National Parks

Outdoor recreation and trails are substantial tourism generators. National parks are among the most popular and draw national and international audiences. In 2022, 7.6 million park visitors spent an estimated \$385 million in local gateway regions while visiting National Park Service lands in Pennsylvania. These expenditures supported a total of 5,740 jobs, \$228 million in labor income, \$345 million in value added, and \$603 million in economic output in the Pennsylvania economy.²⁸

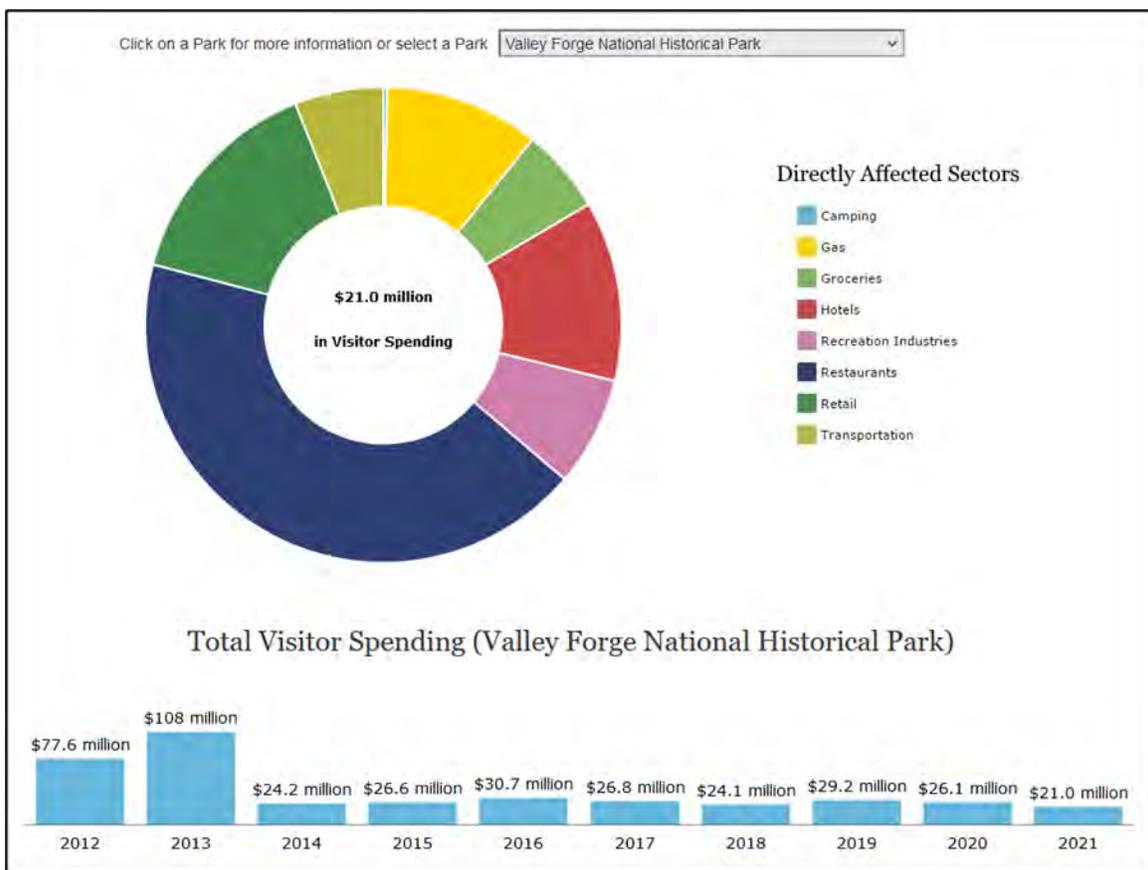
Valley Forge National Historical Park

The national park in Chester County is Valley Forge National Historical Park has 3,500 acres of monuments, meadows, and woodlands. In 2021, 1.5 million park visitors spent an estimated \$21.0 million in local gateway regions while visiting Valley Forge National Historical Park. These expenditures supported 324 jobs, \$12.9 million in labor income, \$20.2 million in value

²⁸ National Park Service, "Economic Contributions to the Pennsylvania Economy."

added, and \$34.7 million in economic output in local gateway economies surrounding Valley Forge Historical National Park. ²⁹ The largest visitor spending categories for 2021 were restaurants followed by retail and hotels. 46.3 percent of visitor spending was from non-local visitors at Valley Forge in 2021. **Figure V-2** shows the visitor spending by category for visitors to Valley Forge and a trend of total visitor spending from 2012 to 2021.

Figure V-2
Valley Forge National Historical Park Visitor Spending, 2021



Source: National Parks Service, Social Science.

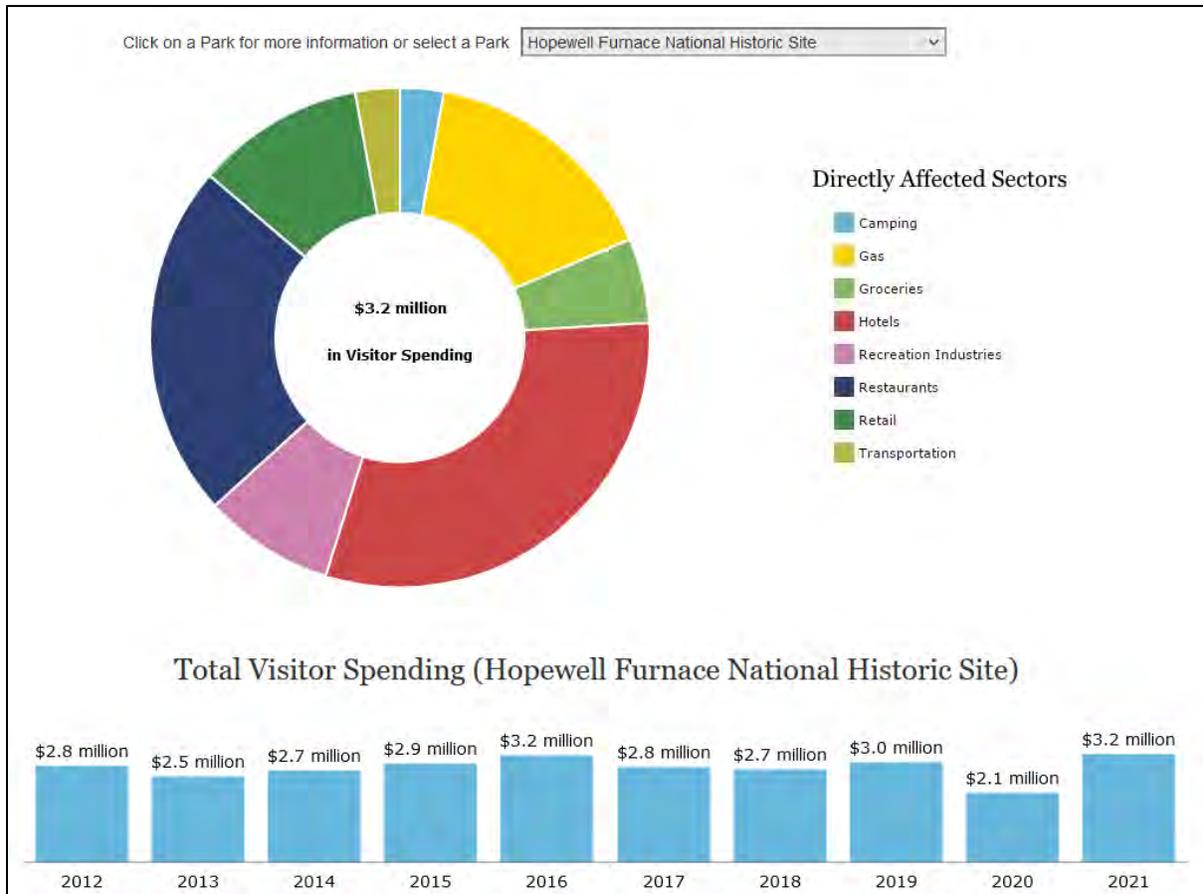
²⁹ National Park Service, "Visitor Spending Effects - Economic Contributions of National Park Visitor Spending."

Hopewell Furnace National Historic Site

In 2021, 49,200 park visitors spent an estimated \$3.2 million in local gateway regions while visiting Hopewell Furnace National Historic Site. These expenditures supported 45 jobs, \$1.9 million in labor income, \$3.0 million in value added, and \$5.1 million in economic output local gateway economies surrounding Hopewell Furnace National Historic Site.³⁰ The largest visitor spending categories for 2021 were hotels followed by restaurants and gas. 95.6 percent of visitor spending was from non-local visitors at Hopewell Furnace. Total visitor spending to Valley Forge National Historical Park from 2012 to 2021 ranged from \$2.1 million to \$3.2 million with visitor spending at its highest in 2016 and 2021. **Figure V-3** shows the visitor spending by category for visitors to Hopewell Furnace and a trend of total visitor spending from 2012 to 2021.

³⁰ National Park Service, "Visitor Spending Effects - Economic Contributions of National Park Visitor Spending."

**Figure V-3
 Hopewell Furnace National Historic Site Visitor Spending, 2021**



Source: National Parks Service, Social Science.

SCHUYLKILL RIVER GREENWAYS NATIONAL HERITAGE AREA

Schuylkill River Greenways National Heritage Area (NHA) – The Schuylkill River Greenway NHA spans five counties in southeastern PA including parts of Chester County. Its focus is on preserving the cultural and history of the region and is known for its connections to the American Revolution, Industrial Revolution and Industrial Revolution. These thematic areas overlap and are consistent with the themes identified for the Chester County Heritage Tourism Plan and therefore they are an important partner in promoting the area’s heritage to visitors that would benefit Chester County. An important focus of the NHA is to improve the water quality of the Schuylkill River and manage the Schuylkill River Trail, a 75-mile multi-use trail that connects Philadelphia to Reading including communities in Chester County.

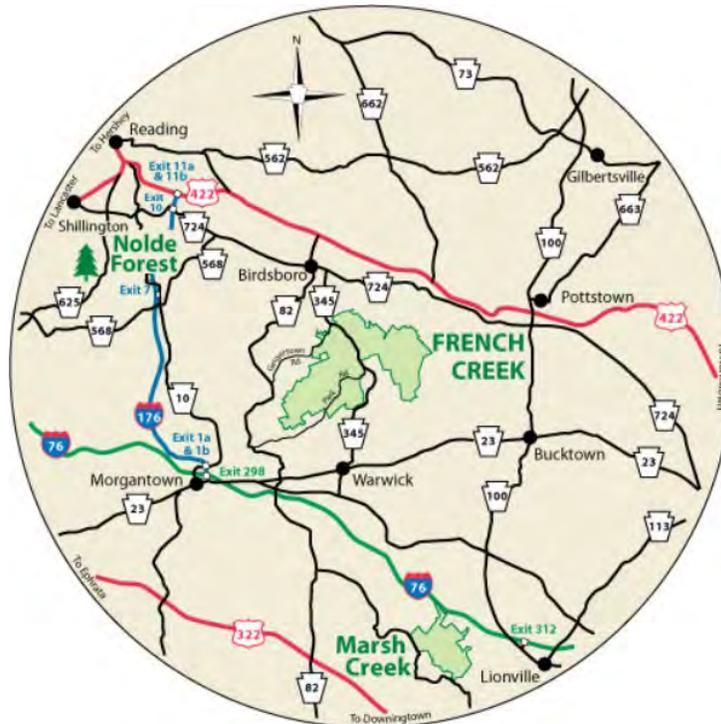
A 2015 economic impact study indicates that over 2 million visitors use the trail and support the economic development in communities that surround it. According to the study, “With the improved image of the river and development of the trail, the riverfront has increasingly served to bolster community 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.”

The total economic impact of the NHA was estimated to be \$589.9 million with direct spending of \$338.9 million, most of which was related to visitor spending in the area. There were an estimated 7.8 million visitors to the region, with 19 percent local day visitors, 41 percent non-local day visitors and 40 percent overnight visitors. Overnight visitors accounted for the lion’s share of impact at 80 percent of the total. The state and local tax impact of this economic activity was \$37.7 million. These data indicate that 3.1 million overnight visitors had an average trip spending of \$89, 3.2 million day non-local visitors averaged \$15 in trip spending and 1.5 million local visitors averaged \$10.

State Parks

The Pennsylvania Department of Conservation and Natural Resources’ Bureau of State Parks manages 124 state parks with more than 300,000 acres. The two state parks in Chester County are French Creek and Marsh Creek State Parks. French Creek State Park is a 7,730-acre park located in Berks and Chester Counties, and it is the largest block of contiguous forest between Washington D.C. and New York City. As shown by data in **Table V-1**, French Creek State Park had 271,400 total party days and nights and total park spending was \$18.4 million with day users spending \$16.1 million and overnight visitors spending \$2.4 million. Marsh Creek State Park had 336,200 total party days and nights and total park spending was \$17.2 million with all its visitor spending originating from day visitors. **Figure V-4** shows a map of French Creek and Marsh Creek State Parks.

Figure V-4
French Creek and Marsh Creek State Parks



Source: Pennsylvania Department of Conservation and Natural Resources

Table V-1
French Creek and Marsh Creek State Parks Total Party Days/Nights and User Spending
(Spending in thousands), 2010

Park	Tourism Region	State Park Region	Total party days/nights	Spending Category	Day Users Spending	ON Users Spending	Total Park Spending	Signif. of Sales	Signif. of Jobs	Impact of Sales	Impact of Jobs
FRENCH CREEK	Philadelphia	4	271389	Three	16056	2367	18423	19503	237	13236	158
MARSH CREEK	Philadelphia	4	336161	Two	17184	0	17184	18015	222	11307	138

Source: *The Economic Significance and Impact of Pennsylvania State Parks: An Updated Assessment of 2010 Park Visitor Spending on the State and Local Economy*, Department of Conservation and Natural Resources, Commonwealth of Pennsylvania and Department of Recreation, Park and Tourism Management, The Pennsylvania State University, February 2012.

County Parks

Chester County Parks and Recreation manages 6 county parks or over 3,100 acres and 3 trails with about 31 miles cumulatively. In 2021, Chester County parks had 553,000 visitors with the individual parks having attendance ranges from 42,000 to 265,100 visitors. **Table V-2** shows the attendance at each Chester County Park in 2021. Chester County Trails had a total attendance of 896,000 in 2021. The individual trails' attendances ranged from 68,200 to 477,100 visitors. **Table V-3** breaks down the attendance figures for Chester County trails in 2021.

**Table V-2
 Chester County Park Visitation, 2021**

Chester County Park	2021 Total Visitation	Percent to Total
Hibernia County Park	265,142	48%
Black Rock Sanctuary	75,898	14%
Warwick County Park	66,446	12%
Wolfs Hollow County Park	53,887	10%
Nottingham County Park	49,486	9%
Springton Manor Farm	41,661	8%
Parks Grand Total	552,520	100%

Source: Chester County Parks and Preservation and ConsultEcon, Inc.

**Table V-3
 Chester County Trails Visitation, 2021**

Trail	2021 Total Visitation	Percent to Total
Chester Valley Trail	477,092	53%
Struble Trail	350,713	39%
Schuylkill River Trail	68,225	8%
Trail Grand Total	896,030	100%

Source: Chester County Parks and Preservation and ConsultEcon, Inc.

AGRICULTURAL/CULINARY TOURISM

The U.S. Department of Agriculture defines agritourism as a type of commercial enterprise, which connects agricultural production and/or processing with tourism. The purpose is to attract visitors to a farm, ranch, or other agricultural business to entertain or educate tourists, while generating revenue for the farm, ranch, or business owner.³¹ Examples of agritourism include pumpkin picking patches, corn mazes, U-Pick operations, hay rides, demonstration farms, agricultural museums, living history farms, on-farm farmer's markets, wine tasting and tours, and garden tours.³² Agritourism is an opportunity to combine the tourism and agriculture industries to provide numerous financial, educational, and social benefits to visitors, producers, and communities. It enables producers to generate additional income and to market directly with consumers, while it benefits the tourism industry as visitor volumes increase and visitors stay for longer lengths of time. Communities also benefit from an increase in local tax bases and new employment opportunities. While increased revenue and visitation is important, agritourism also has educational benefits related to conservation and the environment.

There has been an increasing trend of agritourism and direct sales of agricultural products according to the U.S. Department of Agriculture with farm agritourism revenue more than tripling between 2002 and 2017. Adjusted for inflation, agritourism revenue grew from \$704 million in 2012 to almost \$950 million in 2017. The 2017 data excluded wineries, although they were included in the 2002, 2007, and 2012 data, which suggests agritourism revenue growth may have been even greater during that period.³³ Further, the 2017 Census of Agriculture showed that 28,575 farms offered agritourism and recreational services resulting in \$949 million in sales. In addition, direct-to-consumer sales brought in \$2.8 billion in sales

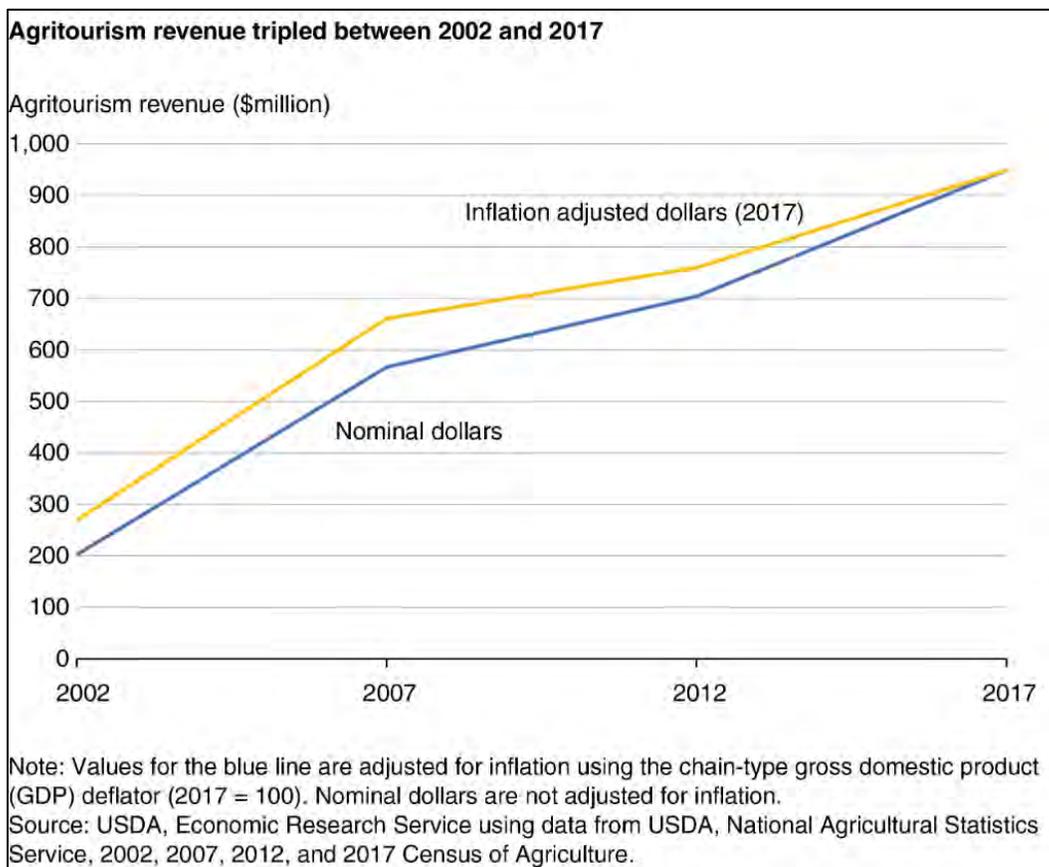
³¹ U.S. Department of Agriculture's National Agricultural Library, "AgriTourism," <https://www.nal.usda.gov/human-nutrition-and-food-safety/local-foods-and-communities/agritourism>.

³² The National Agricultural Law Center, "Agritourism-An Overview," <https://nationalaglawcenter.org/overview/agritourism/>.

³³ Whitt, Christine, Sarah A. Low, and Anders Van Sandt at the U.S. Department of Agriculture Economic Research Service, "Agritourism Allows Farms To Diversify and Has Potential Benefits for Rural Communities," November 4, 2019, <https://www.ers.usda.gov/amber-waves/2019/november/agritourism-allows-farms-to-diversify-and-has-potential-benefits-for-rural-communities>.

for 130,056 farms. The next Census of Agriculture will be performed in 2022.³⁴ The world of agritourism has grown extensively, which is reflected in the development of professional organizations such as Agricultural Tour Operators International, The Dude Rancher’s Association and online agritourism travel guides such as Farmstay, Great Ranches of North America, and the Pick Your Own directory. **Figure V-5** shows the agritourism revenue trend from 2002 to 2017.

Figure V-5
Agritourism Revenue, 2002-2017



³⁴ Agricultural Marketing Resource Center, “Agritourism,” <https://www.agmrc.org/commodities-products/agritourism>.

State of Pennsylvania

While the 2017 U.S. Census of Agriculture reported a continued increase in agritourism revenue nationally, the number of farm operators reporting agritourism activities in Pennsylvania decrease slightly since 2012. The number of Pennsylvania farms generating agritourism income decreased from 729 in 2012 to 711 in 2017. However, the average income from agritourism per operation of \$38,261 in Pennsylvania was still slightly higher than the U.S. average of \$33,222. Pennsylvania's agritourism is a national asset as it ranks 12th in the country in the number of agritourism operators. Further, the concentration of agritourism activities is in Southeast Pennsylvania with Lancaster County having the most farms with agritourism operations at 77, followed by Chester County with 40. However, Chester County was only fifth in agritourism revenue at \$1,028,000 in 2017 and saw the second largest decrease in agritourism operations—decreasing from 56 in 2012 to 40 in 2017. This trend demonstrates a need to foster Chester County's agritourism assets to compete with the growing market within the state and to keep its position as the second largest concentration of agritourist activity in the region.³⁵

Chester County

In 2021, Agricultural and Community Development Services (ACDS), LLC prepared the Chester County Agricultural Economic Development Strategy Plan, which focused on six strategic areas: Agricultural Markets, Business & Financing, Education & Outreach, Labor & Workforce, Land Access, and Zoning & Land Use and provided recommendations to enhance agriculture in Chester County. The strategies also align with five fundamental goals: mitigating issues that limit industry growth, harnessing opportunities that grow the agricultural economy, increasing employment opportunities at all skill levels, remaining a top agricultural-producing county in Pennsylvania for years to come, and maximizing county, local, and regional resources to support industry growth. The recommendations for agricultural markets include supporting the Center for Sustainable Agriculture and Food

³⁵ Penn State Extension, "Agritourism in Pennsylvania 2019 Update," September 10, 2019, <https://extension.psu.edu/agritourism-in-pennsylvania-2019-update>.

Security, supporting the expansion of pasture-raised and grass-fed operations, enhancing marketing infrastructure, catalyzing the industrial hemp sector, preparing farms for traceability and carbon credit markets, developing biomass energy and biochar use, supporting growth of urban agriculture, and to augment agritourism activity. The recommendations for Business and Financing are to expand and enhance business technical assistance, support the development of food system infrastructure, create funding, incentives, and financing targeted at AFB sectors, support municipal-level agribusiness retention, expansion, and recruitment, and to develop an agricultural innovation center. The Plan recommendations for Education and Outreach are to educate the public about agriculture, educate public officials about agriculture, create opportunities for engagement around local food, and to increase awareness of local foods and agricultural products. Recommendations for the Labor and Workforce are preparing the industry for future workforce needs, enhancing owner-operator capacity, developing jobs in key support service sectors, preparing industry adopting automation, and addressing agricultural labor availability. Land Access recommendations include supporting access to farm and forest land, developing tools to assist municipal officials and land management goals, demonstrating positive environmental externalities of agriculture, examining innovative financial options for land access, and shifting land management toward higher value uses. Lastly, Zoning and Land Use recommendations are to encourage ag-friendly development policies, encourage ag-friendly zoning appropriate for the community context, incentivize inter-jurisdictional collaboration, recognize managed forests as an agricultural land use, and to improve road conditions. Recognizing the magnitude of this Plan, priority levels and success metrics were assigned to provide a sequence for the county as they enacted the Plan's objectives for enhancing agriculture in Chester County.

In 2019, Crane Communications developed an Agritourism Product Development Research Study to assess Chester County's agritourism assets and to provide strategies and recommendations to drive future overnight visitation to the county.³⁶ These

³⁶ Crane Communications, "Agritourism Product Development research Report: October 2019," 11.

recommendations were organized into three categories: organizational opportunities, leisure market focused initiatives, and sales marketing initiatives.

The first suggested organizational opportunity is to collaborate with Chester County Agricultural Development Council by the CCCVB hosting an annual workshop for interested county farmers who would like to work with the CCCVB to attract more consumers to their farm, events, or to purchase more of their products. The goal is to have a shared understanding between the CCCVB and the local farmers and to support the agricultural industry with a shared goal to increase visitors and economic impact. A second organizational opportunity is to collaborate with Octorara Area School District's Area Career & Technical Education program as they expand their agricultural programs such as the Animal and Plant Sciences Technology Tech Program into other county high schools. Their mission is to provide quality career and technical education opportunities for students through integrated academic and technical experiences to develop 21st century skills that connect life, work, and career goals necessary to compete in a global economy. The CCCVB can offer to be an advisor and speak to the schools once a year on how tourism can be a revenue source for them as they continue their careers into farming. The CCCVB can also begin a scholarship program to fund student travel to conferences or events. The goal is to build relationships with county farmers who will then see the CCCVB as an advocate ensuring the continued health of the farming community by educating the next generation.

Leisure market focused initiatives would include working with an established event producer to organize monthly agritourism weekends in specific regions of the County. Farmers from each region would be invited to participate on a specific weekend to open their farm to visitors and offer an educational and entertainment experience. The CCCVB would then market these through advertising and marketing channels like social media and e-newsletters both as individual events and as a seasonal series. The report revealed there are farmers who wish they had time to engage in agritourism, but balancing farm duties and visitor access to their particular farm can be an issue. The CCCVB should also continue to market BVBrewScene through media relations and advertising. In addition, the CCCVB should work

with an established tour company to sell an organized education-based beer experience. Other regional CVBs are promoting self-driving tours focused on tastings. The goal is to continue the momentum of the 2018 launched BVBrewScene and make the connections to the land, water and air of the County that makes the beer brewed here better. Also, the CCCVB can look for opportunities to work with farmers who have identified an interest in sharing their knowledge with adults and/or children as a way to share the culture and heritage of Chester County. This can be done both as a passive or active experience such as a “Meet a Farmer” article in the CCCVB’s Visitors Guide or blogs on BrandywineValley.com, speaking engagements at established events. The goal of this initiative is to connect the land and its people with a visitor to shine a light on the culture and heritage of Chester County’s agriculture industry. The CCCVB can also work with the Chester County Parks & Recreation Department to further explore and identify nature-based tourism activities to promote to out-of-county residents. The goal of this initiative is to highlight only in Chester Country experiences to drive visitation to the region. Lastly, many visitors choose to vacation in Lancaster County so they can experience and learn about the culture and heritage of the Amish. Chester County also has Amish residents, but the CCCVB must be respectful of the community if they decide to pursue this marketing strategy. The initiative’s goal is to economically support the Amish community and expand visitor awareness of Chester County’s culture and heritage.

The Agritourism Product Development Research Study also suggested sales market focused initiatives such as inviting and offering incentives to county farmers to bring their associations, clubs or hobby-related groups to Chester County. The goal is to increase hotel room nights and event space bookings, while farmers can be proud to host their professional groups in their backyard. The report also suggests working with farmers to identify if they may be interested in employing their unused grazing or crop lands for sports-related events. This initiative’s goal is to support farmers with rental income while also booking overnight business for Chester County accommodations.

Chester County's current agritourism and culinary offerings range from visitors sampling and celebrating local agricultural products like the Mushroom Festival and wine tastings to local events and farmer's markets that support the agricultural community writ large.

Mushroom Festival

Mushrooms are the number 1 cash crop in the state of Pennsylvania with more than 50 commercial mushroom farms growing over 500 million pounds of mushrooms per year.³⁷ Chester County is considered to be the Mushroom Capital of the World with its history of mushroom production dating back to the late nineteenth century. The Mushroom Festival is held annually one September weekend to celebrate the crop, educate visitors, and to support local growers. Revenue from the festival goes towards grants that provide funds to local non-profits in Kennett Square. The event includes parades, music, food vendors, cooking demonstrations, a growers' exhibit, and competitions. To date, the Mushroom Festival has awarded more than \$1.1 million to local non-profits and supported research on the health benefits of mushrooms. The event's attendance reached 100,000 visitors over the two-day event demonstrating the interest and support of local agriculture.

Wineries/Breweries/Beer Gardens

Beer and wine tourism has grown as breweries and vineyards have become local destinations for tourists. While breweries have been a staple of tourism throughout Europe, beer tourism has become a burgeoning market in the United States over the last decade. In 2015, Travelocity conducted a survey of 1,003 people where more than three-quarters of respondents stated they would like to go on a trip where they visited craft breweries and sampled local beer. As a result, the travel company enlisted the Brewer's Association to create the first Beer Tourism Index.³⁸ Destinations, suppliers, and breweries recognized the potential of the beer tourism market and created curated beer trails, beer-centric culinary

³⁷ Mushroom Festival, "All About Mushrooms," <https://mushroomfestival.org/about-mushrooms>.

³⁸ Craft Brewing Business, Chris Crowell, "The top beer destinations in the country ranked (should you be on the list? Tell us)," October 24, 2016, <https://www.craftbrewingbusiness.com/news/top-beer-destinations-in-the-country-ranked>.

experiences, and brewery-backed hotels to cater to the increased demand for “beercations.”³⁹ In 1978, there were fewer than 100 brewing locations in the U.S., according to Julia Herz, the craft beer program director for the national Brewers Association. By 2007, there were 1,450 breweries across the country, and today there are more than 8,000 breweries nationwide. Craft beer tourism is believed by industry experts to have greater potential amongst tourist, particularly younger audiences, as they can get an opportunity to witness barley or hops fields, and craft breweries are generally in more urban areas, which are naturally more accessible to travelers. Cities have seen positive economic impacts from brewery tourism; more than 25 percent of Asheville’s tourists visited a brewery and 14 percent reported that Asheville’s beer scene was a primary reason for their visit.

Chester County has the opportunity to celebrate its local heritage through beer and wine tourism. According to Chester County’s Brandywine Valley’s the county already has 28 local craft breweries, 10 wineries, and 4 distilleries. See Figure II-14 for a map of Chester County’s wine and beer offerings.

Farm to Table

Farm to table meals serve as a way for consumers to experience locally grown food, while also supporting local businesses. Tourists are increasingly interested in experiences as they are traveling, which typically includes restaurants. However, tourists can learn more about a destination’s heritage through its locally grown products and recipes. Due to the growing popularity of this restaurant genre, Visit Pennsylvania recently published an article with the top 49 farm to table restaurants. Chester County was represented twice on this list—the Slow Hand in West Chester and the White Dog Café in several locations including Chester Springs.⁴⁰ Chester County has the opportunity to utilize its rural setting by complementing the desire for fresh foods and local cuisine with opportunities to support local growers.

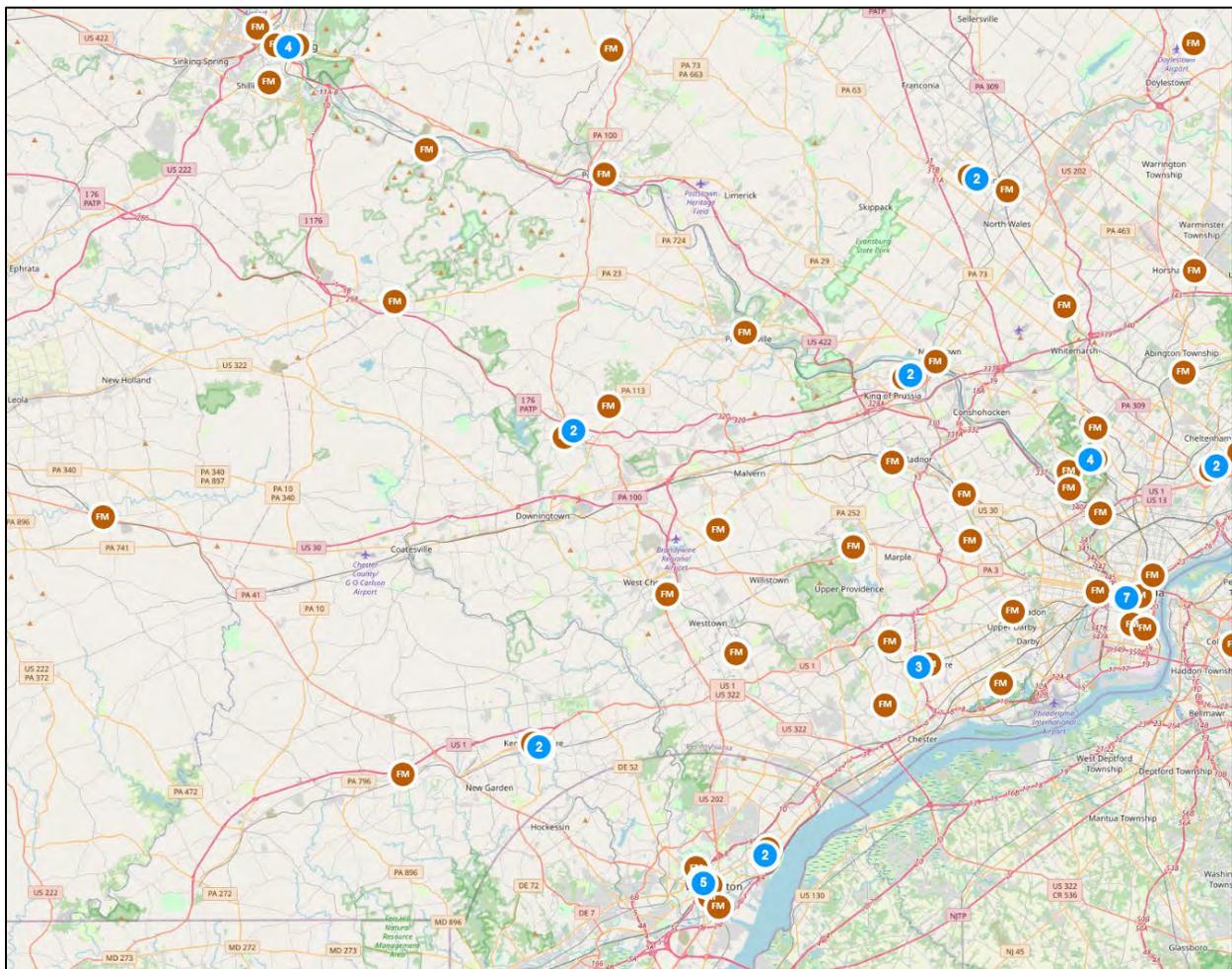
³⁹ Travel Weekly, Michelle Baran, “Tourism on tap: Beer-related travel,” April 26, 2017, <https://www.travelweekly.com/North-America-Travel/Tourism-on-tap-Beer-related-travel>.

⁴⁰ Visit Pennsylvania, “49 Farm-to-Table Restaurants Across PA,” August 15, 2023.

Agriculture Co-Op Community Events

Chester County's agricultural community has an established co-op network with locations like Artisan Exchange, numerous weekend town & village farmer's markets, in addition to their individual farm stands and stores. **Figure V-6** shows the locations of farmers markets in the region.

Figure V-6
Chester County and Regional Farmers Market Locations



Source: <https://www.usdalocalfoodportal.com/fe/fdirectory farmersmarket/>

AUTO AND MOTORCYCLE TOURISM

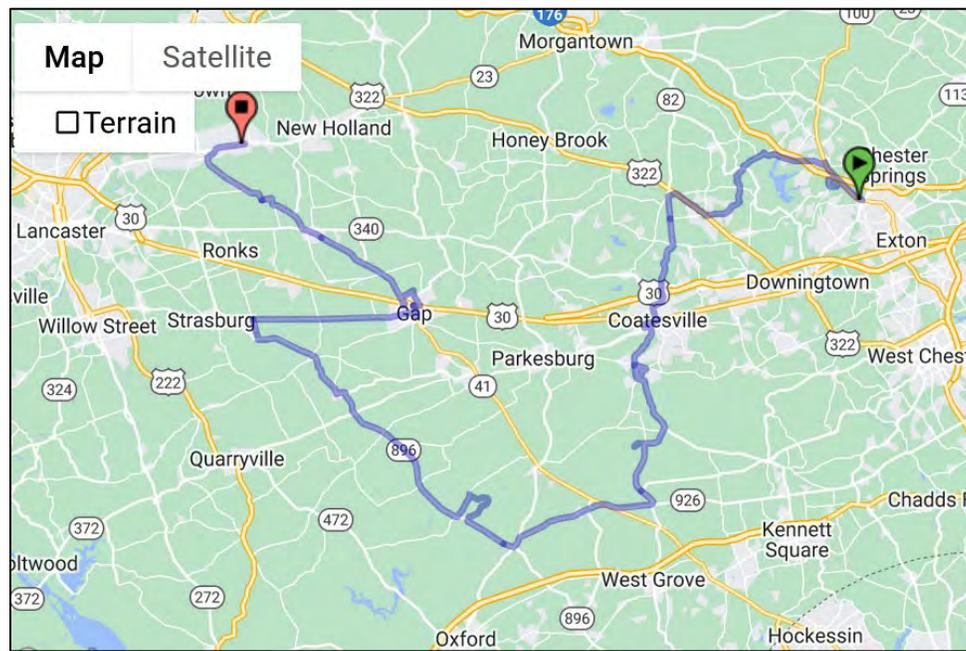
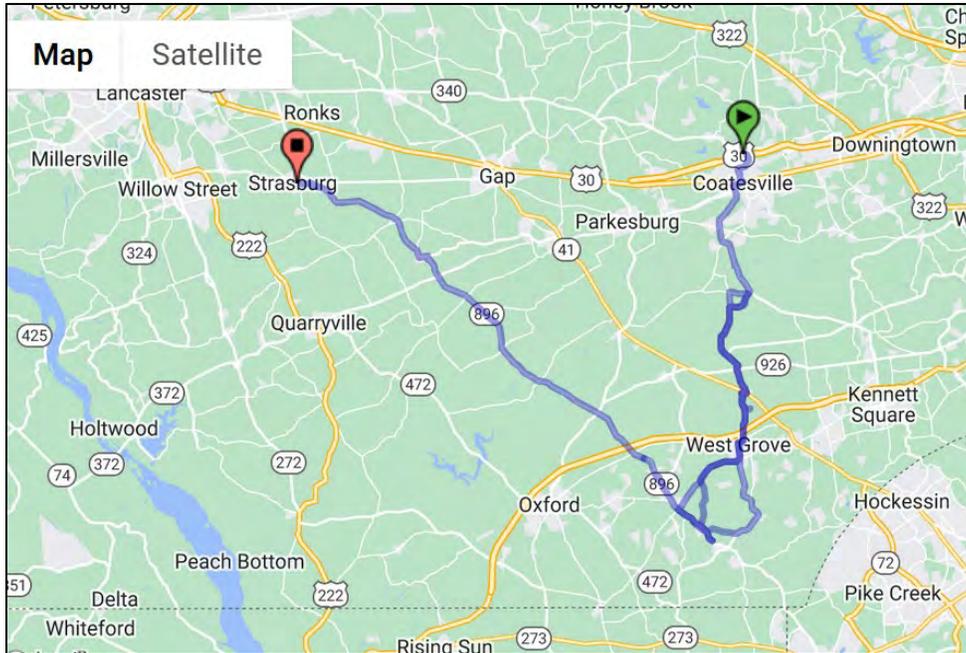
Chester’s main and back country roads are scenic and ripe for touring with automobiles and motorcycles, not to mention biking and hiking considered part of outdoor recreation niche. The Brandywine Valley National Scenic Byway is composed of about 25 miles worth of historical roads along Route 52. Visit Pennsylvania suggests a three-day auto tour of the Byway with 19 stops covering Chadds Ford to Kennett Square to West Chester.⁴¹ It is unknown how many people are traveling the byway, which also spans into the state of Delaware. Nonetheless, the byway gives access and exposure to an important cluster of Chester destinations and an example of partnerships supporting heritage tourism.

Motorcycle touring is also popular, and Chester County has several routes that show up on motorcycle enthusiast websites that compile motorcycle maps for sharing, as shown by examples in **Figure V-7**. Research indicates “that the experience during a motorcycle trip is as exciting as the destination itself, transforming a journey into a destination on the move. The main interests of motorcycle tourists include the natural environment and the local culture.”⁴² Therefore, Chester County is well positioned to target motorcycle tour enthusiasts.

⁴¹ Visit Pennsylvania, “Brandywine Valley Scenic Byway: Philadelphia & The Countryside,” <https://www.visitpa.com/trip-itinerary/beautiful-byways-philadelphia-countryside>.

⁴² Carlos Eduardo Almeida Ramoa, “MOTORCYCLE TOURISM AND NATURE: An Analysis of Motorcyclists’ Motivations to Travel.”

Figure V-7
Examples of Motorcycle Routes in Chester County



Source: <http://www.openroadjourney.com/rides-and-roads/>

WEDDINGS, CORPORATE, AND SOCIAL

According to the Key Trends in Wedding Tourism report in 2019, 'wedding tourism', 'marriage tourism' and 'destinations weddings' are a fast-growing phenomenon that refers to tourists traveling for the purpose of getting married or venturing to a destination for the wedding of a friend, relative or acquaintance. Regardless of sex, gender, sexual orientation, religion, and ethnicity, the weddings industry is an aspect of contemporary society that will always bring people together. Tourists now aspire to seek any opportunity to travel that they can and as a result of this 25% of weddings are now classified as destination weddings.

Destinations throughout the Caribbean, Asia and Europe are some of the most dependent on wedding tourism attracting couples and families worldwide. An iconic wedding destination can vastly benefit the local community including hotels, infrastructure, transport, retail and relevant stakeholders. Wedding cruises have grown in popularity over recent years as they offer travelers the opportunity to venture to multiple destinations, combining wedding and honeymoon into one.⁴³

While corporate travel has not fully recovered since the pandemic, a full recovery to 2019 spend volume appears likely for late 2024 or early 2025.⁴⁴ However, corporate travel will mostly likely be smaller than prior to the pandemic due to adaptive technologies, evolving work styles such as flexible work schedules, and adjusting for lost growth and inflation. Live-event attendance appears poised to be a big growth driver, leapfrogging from the fifth biggest trigger for increased spend in 2022 to the top spot in 2023. More than half of travel managers in both the United States and Europe expect industry events to spur travel growth this year. Also, international trips continue to grow with United States' respondents to Deloitte's 2023 Corporate Travel study stating that they expect international's share of travel costs to jump from 21% in 2022 to 33% in 2023. European respondents expect 32% of 2023 spending to go to international trips within the continent, and 28% beyond. Corporate travel will not look

⁴³ Research and Markets, Global Trends in Wedding Tourism, 2019: Key Destinations, Traveler Types and Market Opportunities.

⁴⁴ Peter Caputo, Matt Soderberg, Eileen Crowley, Michael Daher, Maggie Rauch, Bryan Terry, Scott A. Rosenberger, and Upsana Naik, "Navigating toward a New Normal: 2023 Deloitte Corporate Travel Study," April 10, 2023.

the same as the climate prior to the pandemic, but it will continue to rebound and be shaped by technology, new approaches to work, and the desire for live events after years in quarantine.

SPORTS TOURISM

Sports tourism refers to visitors who are willing to travel to participate or to watch a sporting event. According to the United World Tourism Agency, sports tourism is one of the fastest growing sectors of tourism currently. According to the Sports Events and Tourism Association (SETA), sports tourism generated over \$90 billion dollars in economic impact across the U.S. in 2021. Sports tourism refers to travel for sporting events to either participate in or observe. This can vary from little league games to the Super Bowl, but the market is mostly comprised of amateur or young athletes traveling to sports events. Across the nation, sports tourism provides communities big and small millions of dollars in economic impact each year.⁴⁵ By attracting visitors to your community, additional tax revenues are generated from hotel occupancy, food and beverage sales and hospitality services. In return, communities can keep taxes low for their residents and provide additional streams of income for city infrastructure improvements. Being that parks and recreation is subsidized by local taxes, the community often wants to see the benefit of their dollars at work. Oftentimes, sports infrastructure lies dormant on the weekends and gets very little use. Parks and city officials are now taking advantage of their community assets to generate additional streams of revenue.

Sports tourism assets in Chester County include Chester County Sports Commission, United Sports in Downingtown, Devon Horse Show and Country Fairgrounds, Brandywine Polo Fields and Club, Ludwig's Corner Show Grounds, and the Campus Chester County sports facility. The Chester County Sports Commission is a division of Chester County Brandywine Valley that attracts and promotes athletic events. The County has two major sports facilities in the region United Sports in Downingtown and Campus Chester County. United Sports in

⁴⁵ National Recreation and Park Association, Chandler Nobles, "Sports Tourism: What Does It Mean for You and Your Community?," March 13, 2023.

Downingtown is 127,000 square foot indoor sports facility that hosts sports leagues, tournaments, youth camps, clinics, and events. Opening in June 2022, the newest sports facility to Chester County is Campus Chester County, which includes 25,000 plus square feet of indoor space with a full sheet of ice, cafe, new locker rooms and event spaces. Outside, there is a new turf field, sport courts (basketball, volleyball, roller hockey) and 26 acres of Creekside Pennsylvania woodlands. Chester County also has a rich horse culture demonstrated in two athletic facilities related to horse sports—the Devon Horse Show and County Fair and the Brandywine Polo Fields and Club. The Devon Horse Show and Country Fairgrounds hosts the Devon Horse Show and Country Fair, which (DHSCF) is the oldest and largest outdoor multi-breed horse show in the United States. Brandywine Polo Fields and Club is the largest USPA club in the Eastern Circuit at 122 acres, and the Summer Polo season is a full 4 months with 10 competitive tournaments, coaching chukkers, polo lessons, weekly practices, and new for 2023, the Saturday Night "Starlight Polo" series. While the Ludwig's Corner Show Grounds is not exclusively an equestrian sports facility, its premiere event is the Ludwig's Corner Horse Show and County Fair typically held over Labor Day weekend.

MILLENNIALS AND GEN Z

According to the Pew Research Center, Millennials were the generation born between 1981 and 1996.⁴⁶ This generation values travel and are specifically looking for unique experiences that are adventurous, local, and personal.⁴⁷ According to an international study conducted by GfK in conjunction with Airbnb in September and October of 2016, the survey respondents stated they would prioritize travel over buying a home or paying off debt. Millennials generally value experiences over personal possessions. Furthermore, over 80% of millennials surveyed were seeking unique travel experiences and believe that the best way to learn about a new place is to live like the locals. Millennials are also choosing non-traditional accommodations with roughly 60 percent of all Airbnb guests being Millennials and the number of Millennials who booked on Airbnb had grown more than 120 percent from 2015 to

⁴⁶ Pew Research Center, Dimock, Michael, "Defining Generations: Where Millennials End and Generation Z Begins."

⁴⁷ Airbnb, "Airbnb and the Rise of Millennial Travel."

2016.⁴⁸ While Millennials are not considered digital natives, the generation did have technology integrated into their lives from an early age, so they rely on technology for information. The tourism market will have to accommodate Millennials' travel preferences by ensuring that all marketing and attractions materials are available online and to offer experience that are genuine to the region's local experience.

The Gen Z generation was born between 1996 and 2012. Gen Z are the first generation to be considered digital natives, which has made the use of devices widespread and raised expectations of affordable, seamless connectivity while traveling.⁴⁹ Due to this use of technology, this generation is hyper-connected and therefore hyperaware of human behavior, personal health, technology, and humankind's impact on the environment. Major issues that have grown in importance since the start of the 21st century, such as globalization, the 2008 financial crisis, terrorism, climate change, and technology have played a strong role in shaping Gen Z's attitude and beliefs, and by extension, their travel behavior. Inspired by Gen Zers such as Greta Thunberg, Gen Z grew up with an acute awareness of and their sense of responsibility towards global community and environment. In countries such as Germany and the UK, their attitudes around aviation tax and the future of mobility appear to differ sharply from their older counterparts. As Gen Z becomes more affluent and begins to travel, the tourism industry will need to ensure that marketing materials and attractions information are readily available on mobile devices. Further, Gen Z's consciousness of mental health and the environment will cause a shift in travel branding with a potential focus on sustainability and personal well-being as a part of a visitor's stay.

SUMMARY

Chester County has a variety of heritage attractions that appeal to cultural and heritage travelers' interests. A 2013 survey of domestic leisure travelers by Mandala Research LLC estimated that 76 percent of leisure travelers can be considered cultural and heritage travelers. Historic and cultural travelers tend to be older, Baby Boomer households that are

⁴⁸ Ibid.

⁴⁹ European Travel Commission, "Study on Generation Z Travellers,"8.

more educated and affluent than the average U.S. traveler. A trip by historic and cultural travelers is more likely to include a stay in paid accommodations, these stays are longer, and the overall trip expenditures are higher than the average. Cultural and heritage travelers were segmented into subcategories by the degree of influence that cultural and heritage activities had on their travel decisions.

Only 13 percent of all leisure travelers were considered “passionate” cultural and heritage travelers—people for whom cultural and heritage activities drove their choice of destination and who participated extensively in those activities. An additional 14 percent were categorized as “well-rounded / active” cultural and heritage travelers who participated in a wide range of activities, including cultural and heritage activities. The rest wanted to engage in cultural and heritage activities but had limited experience in doing so; might participate in such activities if they came across them; or were drawn primarily to activities they perceived as fun.

Heritage tourists engaged in a number of different activities, 51 in all. Eight history and heritage activities ranked in the top 10: taking a scenic drive (2), explored small towns (3), shopped for items by local artisans and craftspeople (4), walked self-guided tour (5), visiting art museums and/or galleries (7), visiting heritage/historical buildings (8), historic sites (9), and state/national parks (10).

Resident and tourist markets can also be segmented in other ways, which helps to illustrate both Chester County’s heritage assets and the widespread appeal of heritage activities if they can be packaged with other activities that might be non-heritage related. History and heritage attractions are motivators for a portion of the audience, although they can tap into other market segments with different travel motivators that are open to and appreciate history and heritage. The following other niche markets are reviewed in this report.

- ◆ **Public Gardens** – Longwood Gardens is the center of America’s Garden Capital which consists of 38 member gardens within 30 miles of the city of Philadelphia. Over 4 million people visit Pennsylvania gardens annually, which also employ almost 2,000 full-time employees and collectively provide over \$500 million per year in economic impact throughout Pennsylvania.

- ◆ **Outdoor Recreation** - Outdoor recreation, parks and trails are substantial tourism generators and an interest of cultural and heritage tourists. National parks are among the most popular and draw national and international audiences, while state and county parks draw substantial volumes of visitors that are local and non-local.
- ◆ **Agritourism** – Chester County is focused on preserving and sustaining its operating farms by building their markets with agritourism, which connects agricultural production and / or processing with tourism. Chester County’s current agritourism and culinary offerings range from visitors sampling and celebrating local agricultural products like the Mushroom Festival and wine tastings to events and farmer’s markets that support the agricultural community writ large.
- ◆ **Touring / Sightseeing** -Auto and motorcycle tours are also popular amongst cultural and heritage tourists. Chester’s main and back country roads are scenic and ripe for touring with automobiles and motorcycles, not to mention biking and hiking considered part of outdoor recreation niche.
- ◆ **Weddings / Events** - Other tourist segments that Chester County is well-positioned to capture are wedding and event tourists. An iconic wedding destination, such as natural and historic sites can benefit the local community including hotels, caterers, transport, retail, and other tourism businesses.
- ◆ **Sports Tourism** – Chester County also has assets that appeal to the growing sector of sports tourism (Chester County Sports Commission, United Sports in Downingtown, Devon Horse Show and Country Fairgrounds, Brandywine Polo Fields and Club, and the Campus Chester County sports facility).
- ◆ **Younger Audiences** - Two age segments that continue to grow in importance as the generations are Millennials and Generation Z. Millennials, born between 1981 and 1996,⁵⁰ value travel, specifically unique experiences that are adventurous, local, and personal.⁵¹ The Gen Z generation, born between 1996 and 2012, are the first generation to be considered digital natives, which has made the use of devices widespread and raised expectations of affordable, seamless connectivity while traveling.⁵²

⁵⁰ Pew Research Center, Dimock, Michael, “Defining Generations: Where Millennials End and Generation Z Begins.”

⁵¹ Airbnb, “Airbnb and the Rise of Millennial Travel.”

⁵² European Travel Commission, “Study on Generation Z Travellers,”8.

Section VI

MARKETING PLAN RECOMMENDATIONS AND CAPACITY BUILDING

This section identifies recommendations for the marketing plan of the Heritage Tourism Plan recognizing that marketing will not occur until the heritage tourism product has been developed and implemented. Chester County has a robust base of heritage sites that form the backbone of heritage tourism in the county, with a handful of major attractions that are tourism drivers and many small and mid-sized sites. The plan is designed to overcome the barriers to heritage tourism development and support increased tourist visitation to Chester County. The foundation of the plan are the two primary initiatives for implementation over the next five to six years and capitalize on the nation's 250th anniversary. For these initiatives to be successful and have maximum impact, the new heritage tourism products will need to be implemented. Then, they will need to be supported with marketing, programming, and events that contribute to increased heritage tourism activity.

Creative Tension: "Heritage" versus "Tourism"

A successful heritage tourism strategy requires a resourceful and productive relationship between heritage interests and tourism enterprises. "Heritage" interests and "Tourism" interests each have their own perspective of what it means to achieve "success." Said another way, the motivations that guide and drive good heritage development are not necessarily consistent with the motivations that guide and drive good tourism development.

Heritage development is generally driven by conservation and historic preservation. Tourism development is more market driven. While it may appear that these two activities could be at odds with one another, there are opportunities for creative thinking and action. For example, the opportunity to expand visitation at a historic site and, at the same time, preserve the site's authentic fabric; the opportunity to interpret historic sites in ways that are entertaining as well as educational; the opportunity to adapt unused historic structures

tastefully for office, retail, and entertainment uses. Successful heritage tourism destinations find that opportunities such as these benefit both historic preservation interests as well as tourism enterprises.

Key Marketing Partners / Audiences

Because of the decentralized nature of heritage tourism marketing, the Chester County America250 PA Commission (CC250) is taking the lead in the short term in convening and engaging heritage tourism partners towards common goals of amplifying heritage tourism messaging in Chester County among its residents and visitors alike. After the 250 celebration and its related initiatives have passed, the commission can serve as a model for and transition to a permanent heritage tourism entity to continue to implement the plan. The following identifies key partners in heritage tourism marketing and promotion.

Chester County America250 PA Commission

The Chester County America250 PA Commission (CC250) is the primary forum for partnership development focusing on the implementation of the celebration and commemoration of the county's founding. The Chester County Community Foundation is the managing entity for the CC250, which is funded by Chester County. Chester County current markets heritage programs and events through the planning commission, parks and preservation, public libraries, and the commissioner's public information office. The Chester County 250 Commission (CC250) could serve as the Implementing Entity during the first phase of the heritage tourism plan with the Chester County Community Foundation as the heritage tourism staff or the coordinators of necessary staff for the plan's implementation. CC250 can be the lead coordinator of heritage tourism programs and marketing, working with the public information office, parks and preservation and public libraries and would be the primary liaison to the Chester County Planning Commission, Chester County Tourism, and other heritage tourism partners, working to develop the network and build social capital in the industry. CC250 will work internally to promote heritage tourism programs and events to achieve maximum exposure for heritage tourism through the county's existing marketing, advertising, and communications channels. Maintaining social media accounts will be

important for attracting younger and more diverse audiences and taking advantage of low costs social media and online marketing offers.

Expanding marketing and communications will be coordinated through in early years of the Heritage Tourism Plan. The CC250 has a one-year strategic plan approved in June 2023 that includes a work plan for Communications and Marketing Committee, one of seven committees, including.

- ◆ Heritage Sites Legacy Projects Committee
- ◆ Regional 250 Opportunities Committee
- ◆ Education Committee
- ◆ Partnership Programs Committee
- ◆ Communications & Marketing Committee
- ◆ Fundraising Committee
- ◆ Nominating/Governance Committee

The overarching aim of the Communications & Marketing Committee is to prepare & distribute public communications on CC250 initiatives. In its function it is cross cutting in nature, supporting the work of other committees. This experience in marketing and communications will offer a framework for Heritage Tourism Plan marketing and communications in the future after the 250-anniversary period has concluded.

Chester County Tourism

Because the heritage in Chester County is a competitive advantage and a frequent visitor activity, heritage tourism marketing is embedded in the marketing campaigns undertaken for Chester County Tourism in general. Their expertise is invaluable and their role in heritage tourism marketing is pivotal. Continuing to incorporate heritage tourism themes, attractions and events into its existing marketing and promotion will be integral to successful heritage tourism marketing.

Chester County Tourism emphasizes Chester County's Brandywine Valley which covers only a portion of the county albeit the location of the county's largest and national attractions. Promoting heritage tourism countywide will require focus on building the identities of other areas of the county: natural and agricultural lands throughout the county and in the northern part of the county anchored by French Creek State Park and Valley Forge. How these areas relate to the Brandywine Valley is important because the areas offer distinctive experiences and a variety of potential audiences. For instance, the northern part of the county offers more adventure, parks, green and blue trails opportunities, catering to a younger audience than the Brandywine Valley cluster of historic and cultural attractions experience that appeals to a largely older and affluent audience.

Audiences for Heritage Tourism

External partners are important organizational audiences to build support for the Heritage Tourism Plan. Partners are integral in the implementation of the plan and ongoing marketing to Chester County residents and visitors from outside the area. Developing new partnerships and strengthening partnerships expands the awareness of the Heritage Tourism Plan among the heritage sites and other tourism partners. By leveraging the capacity of the whole, heritage sites can tap into new audiences that they wouldn't have otherwise been able to reach. For instance, history organizations can partner with natural conservation and recreation focused organizations, other heritage sites, and businesses and corporations to sponsor major events.

Heritage Sites and Attractions

Heritage sites and attractions will need to engage with the county to keep the county and tourism partners aware of exhibitions, programs, and events that they offer. The Heritage Site Directory is a building block for developing a calendar for the array of heritage events, that also can encompass art and cultural events, performances, public markets, food and community events and festivals. The 250 Commission will need to build ties with the largest and most popular attractions to leverage their marketing capacity (staff and funding) to

maximize impact, while also supporting smaller sites to assist them in building a program or event that supports heritage tourism.

Hospitality Businesses

Hotels, restaurants, retail stores, and entertainment venues stand to benefit from increased heritage tourism activity. In general, these businesses are not always aware of and / or engaged with community events and activities. The business network needs to be fostered through Chester County Tourism and local and regional chambers of commerce. Educating hospitality businesses, as well as heritage sites and attractions on what else there is to see and do in Chester County and building awareness and participation in heritage events through outreach, regular and special communications, and tourism “ambassador” programs for the hospitality workforce dealing directly with key tourist audiences.

Cities and Towns

Many cities in towns are actively engaged with the county through the Chester County Historic Preservation Network (CCHPN). While cities and towns vary in the degree of their marketing, they are always keen to point out community events and places that instill community pride. This existing channel of communications (CCHPN) offers the opportunity to build awareness and support of heritage tourism. Other possible means of communications include Parks and Recreation directors, public libraries, schools, and conservation commissions.

Visitor Segments

Marketing and promotional activities should ultimately be geared through partners towards visitor segments including Chester County residents, Philadelphia regional residents within 50 miles of the county, and general and heritage tourists. Visitor segments were reviewed in prior sections of the report and potential audiences are reflected in the Heritage Tourism Plan prepared by Heritage Strategies and marketing creative development prepared by SWELL.

Marketing Plan Activities

The heritage tourism marketing plan encompasses several areas of activity, all of which require staff and financial capacity to implement that has yet to be determined. Nonetheless, this section offers a framework for marketing activities that includes site-based improvements, special and community events, advertising,

- ◆ **New visitor-ready tourism product** needs to be created through coordinated thematic presentations linking sites and experiences. Rather than marketing individual sites piecemeal, market the larger thematic experience, identifying sites where outstanding experiences are offered and can be enjoyed and appreciated.
- ◆ **Raise the quality** of the tourism product/presentation to the level necessary for it to become a bone fide visitor attraction that visitors are impressed with, will return to, and will recommend to others.
- ◆ **Site based improvements** are necessary to raise the level of preservation and offer new visitor experiences (tourism product) that are cause for marketing and promotion. Key national attractions Longwood Gardens and Brandywine Museum of Art are expanding, implementing long range plans, marketing and fundraising campaigns that will increase tourism in Chester County. The Heritage Tourism Plan and its initial initiatives to include the Philadelphia campaign and base program are a cause for marketing and promotion.
- ◆ **Special and community events** that support heritage tourism need to be promoted. A calendar of events needs to be maintained and promoted through organizational and consumer channels (e.g. website, social media, advertising, public relations/media).
- ◆ **Advertising** on the web will be a core activity for heritage tourism marketing. There is some limited use of traditional print and billboard advertising among heritage attractions, but it is generally too costly to invest in. Most heritage sites and tourists use websites to communicate, and social media platforms are important for engaging new audiences and keeping costs low.
- ◆ **Marketing support services** can provide a conduit for communications and build the knowledge base and capacity in the heritage and tourism sectors. Support services include regular topical workshops in marketing and programming, mini grants for cooperative programs and events, establishing a visitor tracking system that leverages new tools available to Chester County Tourism such as Arrivalist and other location-based data about visitor mobility patterns, visitor demographics and spending.
- ◆ **Tourism Readiness Self-Assessments** provide a way to develop heritage site partnership marketing activities. Tourism readiness, when a heritage site is regularly open to the public and accessible, was frequently identified by study participants as a barrier to increased heritage tourism. Interested tourists were less likely to visit heritage sites due to limited public hours, physical accessibility, or a lack of wayfinding.

Because visitation is low in many places, the investment in infrastructure will have the greatest impact in places that support higher levels of visitation. Many sites are not ready to support tourist visitation. For those that are and those that aspire to be, a tourism readiness self-assessment can help heritage sites evaluate how ready for tourism they are and how they can make changes to improve tourist visitation. In addition, it can help Chester County identify heritage sites that are interested in developing heritage tourism and evaluate potential investments in those sites.

Marketing and Promotion Staff and Budget

Dedicated staffing will be required to implement the heritage tourism marketing plan. However, given nature of the partners, marketing and promotional activities may be the purview of multiple agencies. Heritage tourism marketing and promotion requires coordination among key partners whose staff may be assigned to other activities. Therefore, it is recommended that the CC250 and its partners coordinate marketing plan implementation. An important first step is for partners to determine roles and responsibilities, who is doing what and with what resources are available (e.g. % of staff time, funding support, for how long). The degree of resources available at organizations is to be determined. While staff capacity can vary depending on the organization, managerial responsibilities, decision making authority, and position description, at least one full time dedicated staff member is needed to implement heritage tourism marketing on an ongoing basis when the plan has been fully implemented. Two staff members would be better and three staff members ideal. These marketing professionals would most likely be housed at Chester County Tourism. Developing over time the marketing budget should be targeted to \$300,000 to \$600,000 including personnel and non-personnel costs would be required for the marketing and promotional function (assuming the staff are housed in an organization that can absorb administrative, overhead, and fundraising costs) to be effective in marketing to all audiences and building partnership model embedded in this marketing plan for the long-term.

SUMMARY

For these plan initiatives to be successful and have maximum impact once they are implemented, they need to be supported with marketing, programming, and events that contribute to increased heritage tourism activity. The core partners leading the marketing

efforts for the plan will be Chester County America250 PA Commission (CC250), Chester County Tourism, and the Chester County Planning Commission. The heritage tourism marketing plan encompasses several areas of activity, all of which require staff and financial capacity to implement that has yet to be determined. Dedicated staffing will be required to implement the heritage tourism marketing plan. While staff capacity can vary depending on the organization, managerial responsibilities, decision making authority, and position description, at least one full time dedicated staff member is needed to implement heritage tourism marketing on an ongoing basis after the plan has been implemented. Two staff members would be better and three staff members ideal. An annual budget of \$300,000 to \$600,000 including personnel and non-personnel costs would be required for the marketing and promotional function (assuming the staff are housed in an organization that can absorb administrative, overhead, and fundraising costs) to be effective in marketing to all audiences and building partnership model embedded in this marketing plan.

Section VII

HERITAGE TOURISM PLAN ECONOMIC IMPACTS AND COMMUNITY BENEFITS

This section evaluates the economic impacts and community benefits due to the implementation of the Heritage Tourism Plan. The investments proposed in the plan serve to strengthen Chester County's tourism infrastructure, improving the visitor experience, and expanding public awareness.

Philadelphia Campaign

The Philadelphia Campaign interpretive plans describe a system of Gateways, Heritage Centers, Interpretive Sites, Trails, and Viewing Corridors through which interpretation is implemented. To date, interpretation of the Battle of Brandywine, a part of the Philadelphia Campaign, has been planned but not implemented. The CC250 intends to implement the interpretive plans over the next few years, further developing them as necessary. Because the Brandywine Battlefield is a suburban residential landscape, the interpretation is to be personal, small-scale, and non-intrusive. There will be no large bus tours driving the battlefield (though large busses can be accommodated at the Brandywine Battlefield Park on Route 1, Valley Forge NHP, and a few other sites). Rather, small buses and vans, individual automobiles, hiking, and biking will be the means of movement from site to site. Use of a cutting-edge mobile app (or mobile enabled website) is envisioned for self-guided touring and linkages to online marketing/social media. A system of Step-on Guides is also envisioned for personal experiences, both for individual automobiles and for small buses and vans. (See Chapters 3, 4, and 6 of the Chester County Heritage Tourism Plan.) Chapter 6 outlines a suggested \$6 million effort for the interpretive presentation, which needs to be of high quality in order to become a bone fide attraction to visitors from outside of the county.

The interpretive system established for Brandywine will then be extended northward to interpret the entire Philadelphia Campaign from Brandywine to Valley Forge, encompassing a variety of new sites and including the Iron & Steel region of northern Chester County.

Base Program

The Base Program focuses on outdoor, self-guided interpretation of communities and sites throughout the county, making them visitor-ready and adding substantially to the number of sites that may be visited and themes that may be presented. Interpretation of these new, self-guided sites would be coordinated with each other as well as with existing heritage sites listed in the Heritage Sites Directory. The Base Program focuses specifically on the Outdoor Exhibit Program, Community Interpretive Program, and Public Art Program described in Chapter 4 of the Heritage Tourism Plan. Implementation is assumed to be of high quality and a substantial number of potential new sites have been implemented over a period of five to six years.

Baseline Tourism Impacts

For the purposes of this analysis, the visitor volume and spending in Chester County is the baseline of the analysis of the plan impacts. Data in **Table VII-1** show the 2022 tourism impacts in Chester County. An estimated 2.56 million day and overnight visitors generated a total visitor spending of \$766 million, averaging \$299 per visitor.

Table VII-1
Chester County Tourism Visitor Volume and Tourism Impact, 2022

	Visitor Volume, 2022	Percent to Total
Visitor Type		
Day	1,450,000	57%
Overnight	1,110,000	43%
Total Visitors	2,560,000	100%
	Tourism Impacts, 2022	Per Visitor
Type of Impacts		
Visitor Spending	\$766,300,000	\$299.34
Multiplier Effects	\$681,500,000	\$266.21
Total Impact	\$1,447,800,000	\$565.55
Jobs	12,764	
Labor Income	\$569,600,000	\$222.50
State and Local Taxes	\$95,480,000	\$37.30
Lodging Taxes	\$5,000,000	\$1.95
Source: Tourism Economics and ConsultEcon, Inc.		

Increased Impacts due to the Heritage Tourism Plan

Given the proposed facilities and unique heritage offerings in Chester County, the Heritage Tourism Plan implementation will help to attract new visitors to Chester County who would otherwise not visit, contributes to longer stays in the area, and retains leisure expenditures of residents and tourists that may otherwise be made elsewhere. Visitors spend on admissions, goods, and services at heritage sites and at other dining, retail, recreation and entertainment establishments during day or overnight trips. In this regard, the Heritage Tourism Plan will contribute to the local economy by providing new destinations for residents and visitors that supports business activity.

The planned investments are estimated to increase the tourism impacts an estimated 4 to 8 percent with a mid-range increase of 6 percent based on the following factors:

- ◆ Generation of new day and overnight tourist trips to Chester County.
- ◆ Improvement in the likelihood of extended stays or repeat trips to the county by existing visitors generates additional spending in the local economy.
- ◆ Full implementation of the planned investments over a period of 5 or 6 years.
- ◆ High quality and stimulating interpretation that enhances the visitor experience.
- ◆ Connecting local and tourist audiences with fun and entertaining experiences that are also educational.
- ◆ Supporting of heritage site and attractions investments, such as those planned at Longwood Gardens and Brandywine Museum of Art, to amplify their impact and increase public awareness.
- ◆ Reduction in barriers to visitation through new wayfinding and signage that improves accessibility and visibility to heritage sites. In turn this heightens site awareness in the marketplace and better the visitor experience.
- ◆ Improved and expanded historical interpretation and visitor information and orientation to create a cohesive physical and digital system of mutually supportive attractions and amenities that builds public awareness of things to do onsite and offsite.
- ◆ Supported by a comprehensive marketing campaign and branding developed as a part of the Heritage Tourism Plan and rolled out at first as part of the CC250's initiative.
- ◆ Integrated website that provides driving, walking, biking directions and itineraries to locals and tourists, as well as resources for heritage sites and other businesses.
- ◆ Expanded local and tourist knowledge and education programs that highlight the unique natural, cultural, and historical assets in Chester County.
- ◆ A robust calendar of heritage events at heritage sites, historic downtowns, villages and other places in Chester County where visitors are exposed to new physical investments in interpretation and information.

New Tourism Impacts

Data in **Table VII-2** show the range of potential tourism impacts due to the Heritage Tourism Plan. The mid-range new tourism impacts due to the plan include 154,000 new visitors with \$46.0 million in new visitor spending. In turn, this visitor spending generates multiplier

effects that result in total impacts of \$86.9 million, 766 jobs, \$34.2 million in labor income, \$5.7 million in state and local taxes and \$300,000 in lodging taxes.

Table VII-2
New Tourism Impacts due to the Heritage Tourism Plan

Impacts due to Heritage Tourism Plan	Percent Increase	New Visitors	New Visitor Spending
Low Range	4.0%	102,400	\$30,652,000
Mid Range	6.0%	153,600	\$45,978,000
High Range	8.0%	204,800	\$61,304,000
	Low Range Impacts	Mid Range Impacts	High Range Impacts
<i>Type of Impacts</i>			
Visitor Spending	\$30,700,000	\$46,000,000	\$61,300,000
Multiplier Effects	\$27,300,000	\$40,900,000	\$54,500,000
Total Impact	\$58,000,000	\$86,900,000	\$115,800,000
Jobs	511	766	1,021
Labor Income	\$22,800,000	\$34,200,000	\$45,600,000
State and Local Taxes	\$3,800,000	\$5,700,000	\$7,600,000
Lodging Taxes	\$200,000	\$300,000	\$400,000

Source: Tourism Economics and ConsultEcon, Inc.

It should be noted that these visitor spending estimates assume the full build out of the proposed plan investments, which will require a multiyear period to implement and are contingent upon available funding. In addition, this analysis does not reflect the spending, jobs and fiscal revenues that would occur due to construction and implementation of the investments.

Community Benefits of Heritage Tourism

The proposed Heritage Tourism Plan generates the following economic and community benefits in addition to the spending, jobs and fiscal revenues identified above. A successful heritage tourism development program will have the following benefits:

- ◆ Enhance the competitive position of Chester County as a tourist destination (people will be attracted to the area and will visit there instead of some other place)
- ◆ Optimize the use of existing assets for tourism development (heritage assets are invariably local community resources)
- ◆ Invest in and build new audiences and public support for community treasures and heritage organizations
- ◆ Develop new opportunities to expand visitation/tourist expenditures (building a heritage tourism infrastructure will add to the overall tourism system in Chester County)
- ◆ Stimulate spin-off secondary public and private sector economic/business development in the community (i.e., development of commercial enterprises that provide hospitality and other amenities needed to serve visitors)
- ◆ Enrich the quality of life for area residents (the cultural, recreational, educational, and aesthetic resources that visitors enjoy are utilized by residents as well -- especially in the off-season)
- ◆ Strengthen education programming throughout Chester County through additional venues for delivery and partnerships with local school systems and educational organizations including charter, public, and parochial schools and homeschooled children and their families
- ◆ Bring more heritage programs to larger and more diverse audiences through partnerships with organizations working with them
- ◆ Expand public awareness of the locale and community pride through marketing, events and programming
- ◆ Improve community health and wellness due to recreation and nature-based activities that capitalize on the area's natural and cultural assets

SUMMARY

Given the proposed facilities and unique heritage offerings in Chester County, the Heritage Tourism Plan implementation will help to attract new visitors to Chester County who would otherwise not visit, contributes to longer stays in the area, and retains leisure expenditures of residents and tourists that may otherwise be made elsewhere. Visitors spend on admissions, goods, and services at heritage sites and at other dining, retail, recreation, and entertainment establishments during day or overnight trips. In this regard, the Heritage Tourism Plan will contribute to the local economy by providing new destinations for residents and visitors that supports business activity.

The planned investments are estimated to increase the tourism impacts an estimated 4 to 8 percent with a mid-range increase of 6 percent within 5 years based the available markets, trends, and factors identified in the report. The mid-range new tourism impacts due to the plan include 154,000 new visitors with \$50.0 million in new visitor spending. In turn, this visitor spending generates multiplier effects that result in total impacts of \$86.9 million, 766 jobs, \$34.2 million in labor income, \$5.7 million in state and local taxed and \$300,000 in lodging taxes.

The proposed Heritage Tourism Plan generates economic and community benefits in addition to the spending, jobs, and fiscal revenues identified above. A successful heritage tourism development program will have the following community benefits:

- ◆ Enhance the competitive position of Chester County as a tourist destination (people will be attracted to the area and will visit there instead of some other place)
- ◆ Optimize the use of existing assets for tourism development (heritage assets are invariably local community resources)
- ◆ Invest in and build new audiences and public support for community treasures and heritage organizations
- ◆ Develop new opportunities to expand visitation / tourist expenditures (building a heritage tourism infrastructure will add to the overall tourism system in Chester County)
- ◆ Stimulate spin-off secondary public and private sector economic / business development in the community (i.e., development of commercial enterprises that provide hospitality and other amenities needed to serve visitors)
- ◆ Enrich the quality of life for area residents (the cultural, recreational, educational, and aesthetic resources that visitors enjoy are utilized by residents as well -- especially in the off-season)
- ◆ Strengthen education programming throughout Chester County through additional venues for delivery and partnerships with local school systems and educational organizations
- ◆ Bring more heritage programs to larger and more diverse audiences through partnerships with organizations working with them
- ◆ Expand public awareness of the locale and community pride through marketing, events and programming

- ◆ Improve community health and wellness due to recreation and nature-based activities that capitalize on the area's natural and cultural assets.

APPENDIX A
LIST OF INTERVIEWEES

- ◆ Zack Biro, Executive Director; Historic Sugartown
- ◆ Tim Compton, Executive Director; Historic Yellow Springs
- ◆ Nick D’Addezio, Vice President, Marketing & Communications; Longwood Gardens
Conor Hepp, President; Chester County History Center
- ◆ Jay Erb, Park Ranger; Warwick County Park
- ◆ Adam Gresek, Director of Visitor and Community Engagement; Valley Forge National
Historical Park
- ◆ Jeff Jones, Site Manager; Hopewell Furnace National Historic Site
- ◆ Nicole Kindbeiter, Director of Marketing & Communications and Mary Cronin, Director
of Audience Engagement; Brandywine Conservancy and Museum of Art
- ◆ Elaine Paul Schaefer, Executive Director; Schuylkill River Greenways National Heritage
Area
- ◆ Mark Slouf, Vice President of the Friends of Martin’s Tavern; Marshallton Heritage
Center
- ◆ Kirsten Werner, Senior Director of Communications; Natural Lands
- ◆ James Ziegler, Executive Director; National Iron & Steel Heritage Museum