



View of Lake Santeetlah. Photo courtesy www.santeetlahmarina.com



GRAHAM COUNTY OUTDOOR RECREATION

Economy-Building Strategy & Report

OCTOBER 2019

Facilitated by Rural Economic Development Division, NC Department of Commerce



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Graham County Outdoor Recreation

Economy-Building Strategy & Report

PURPOSE OF THE STRATEGIC PLAN

The purpose of this strategic planning exercise is to increase the economic impact from appropriate, asset-based, outdoor recreation in Graham County. This is not an exhaustive economic analysis, but instead a collection of local knowledge with user input, to provide some guidance and direction to local leaders. The work plan outlined is for the coming three to five years only, although the information collected will underpin any further plans well into the future.



What Is Outdoor Recreation?

For the purposes of this strategic planning activity, only non-motorized (human-powered) recreation, that is dependent on conditions of the natural environment for its experience and enjoyment, is considered. Priority is given to those activities which appreciate, maintain and even preserve or restore qualities of nature and natural communities—diversity, topography, geology, smells, sounds.

Outdoor Recreation is already a critical component of the existing Graham County economy—the lakes and forests are the reason for tourism—other than visiting family! The 2018 report on Economic Impact of Travel on NC Counties shows \$29.4M in visitor expenditures in Graham County. That is up almost 4.5 percent from 2017. 280 people were employed in tourism with a total payroll in Graham County at about \$5.4M. Local tax receipts from this activity amounted to \$1.98M with an estimated tax savings per capita of \$382.60. These numbers were prepared for Visit NC (Economic Development Partnership) by the US Travel Association.

The strategic planning process engaged a team of very knowledgeable, local outdoor recreation and tourism professionals who met for two hours, five times between January and May 2019. During these meetings, the group defined assets, strengths, weaknesses, opportunities and threats revolving around Graham County's current recreation & outdoor offerings. The April meeting included input from recreation and resource experts of the Nantahala/Pisgah Forest Partnership and a visit from Governor Roy Cooper.

2018 VISITOR IMPACTS TO GRAHAM COUNTY

- \$29.4 Million in Visitor Expenditures.
- A 4.5 % Increase over 2017.
- 280 People Employed in Tourism Industry with payroll at \$5.4 Million.
- \$1.98 Million in Local Tax Receipts from Tourism.
- \$382.60 Estimated Tax Savings per Capita.

Information courtesy of Economic Impact of Travel on NC Counties report by US Travel Association for Visit N.C.

STRATEGIC PLANNING PROCESS

With facilitation from the ARC/NC Commerce Main Street and Rural Planning team, the group moved through a strategic planning process that included:

- Inventory of Graham County's many **assets** – natural, built, human, institutional... identified as they support outdoor recreation
- **Mapping** of those assets – the exhaustive inventory map will be shared at the Visitor Center
- Discussions about **condition, quality** of experience and **quantity** of assets as well as **target markets** for them. The local team are experts and information is very detailed!
- **SWOT** (Strengths, Weaknesses, Opportunities, Threats) exercise – This is a brief summary that gives insight for action planning.
 - **Strengths/Opportunities**
 - Remoteness – getting away to unplug and unwind, maintaining remote feeling while being relatively easy to access
 - Diversity of possible outdoor activity
 - Connectivity – conundrum – locals need more to live, visitors pay to unplug
 - Education – building/sharing an understanding and respect for our very biodiverse environment
 - Robbinsville revitalization and beautification
 - Sustainable forestry as management and income tool
 - Re-open/improve some existing under-utilized facilities
 - Also better manage most spectacular of the dispersed campsites
 - Tourism focus on creating longer experiences and more events (competitions)
 - **The major threats were:**
 - Road-related actions:
 - Corridor K alignment ruining views, wilderness, silence
 - Insistence on all paved roads vs some gravel that feel more 'remote'
 - Extended road closures (USFS) shortening the season
 - Motorcycle noise
 - USFS management:
 - Shrinking budget with growing fire control costs
 - Total reliance on (aging) volunteers for facility maintenance + development
 - Inability to use (limited) motors + tech for maintenance
 - Hospitality limitations
 - No Beer + Wine or Liquor by the Drink – limited local revenue collected, limits development investment and local restaurant incomes, doesn't support the active outdoor lifestyle
 - Cost and availability of rescue/medical services



The local work group discussing asset mapping of current outdoor recreation opportunities in Graham County.

BASIC STRUCTURE FOR MOVING AHEAD

The Graham County Outdoor Recreation Experience

The diversity of possible outdoor activities in Graham County is tremendous! Knowing that staff, time and funding is limited the challenge is to focus resources where there is the greatest return. Understanding what Graham county is already known for, building on and ensuring the on-going quality of those experiences is vital to building an economy around them. Because the purpose of this work is to increase the economic impact from outdoor recreation, it is proposed that the strengths and challenges be interpreted and considered in that way—

What is ‘the Graham County experience’ that is most unique in the western NC region?

- 1) Graham County’s two primary and distinguishing resources are its people and the natural landscape.
- 2) The *protected and ecologically diverse ecosystems* are the underlying key to Graham County’s unique outdoor recreation experience. The general public seems mostly unaware of the diversity of native plants, animals and ecosystems in relatively pristine condition, existing throughout the county. Discovery, understanding and appreciation of these natural communities is a quiet but primary recreational activity—and one with participants willing to pay for unique and authentic experiences.
- 3) Robbinsville and Graham County are remote, and access is limited because of the terrain. One of the primary attractions is the *feeling of wildness and ability to escape into uncrowded nature*. Visitors must consciously choose to visit Graham County—there is no pass thru, ‘impulse shopping’ for a Graham County experience!
- 4) The Cheoah river, Calderwood lake and Joyce Kilmer/Slickrock Wilderness offer some of the greatest East Coast *opportunities for retreat and personal, physical challenge in nature*.



The Joyce Kilmer Memorial Forest (above) & the Cheoah River (below) are huge assets to Graham Co. Outdoor Recreation.



How does this translate into economic strategy?

This experience and these supporting conditions suggest consideration of the scarcity of the Graham experience in evaluation of future recreation development project proposals. These considerations will require additional local deliberation but establish the foundation for an economic approach to recreation development.

- Preservation and conservation of quality of life and landscape - Graham is not a huge county with unlimited territory. There is a need to **establish and recognize a carrying capacity** of the land and water to maintain the unique quality of experience only Graham County can offer. Visitors should feel some exclusivity and pride of

accomplishment after a visit. Developed areas around the towns can be targeted for less challenging activities and larger numbers while visitor access to remote natural areas is more controlled. The packaging of the experiences, creation of different levels of challenge or combinations of activities and the type of information offered can help to control where human traffic is heaviest.

- Activities to be further developed should provide a **good return on investment without impacting the authenticity** of the place or for some, the ability to feel removed from civilization. Primary to increasing financial return is keeping recreators overnight. The development of a critical mass of facilities for an activity will make Graham County a destination for that activity. The number and variety of trails/experiences will keep them several nights and coming back for return visits. Participants in some activities tend to spend more money than others. It was also noted during the process that there are facilities that are unused or not fully developed and would require less “start-up” investment.
- **Carefully select target markets** and disseminate information directly via their primary sources of information rather than blanket marketing campaigns to the general public. Crowds on the lakes and in the forest are not the desired goal—and an experience easily found in other counties. The team felt strongly that visitors who come with respect for, and seeking understanding of, the environment are preferred. The challenge is to create the kinds of experience packages and support services that these visitors are looking for, will pay for and come back repeatedly to enjoy.
- **Consider the natural landscape as infrastructure.** Infrastructure requires investment and although the land is publicly owned, it is worth pursuing a more formal partnership that would give Graham County both more responsibility and input into the development and management of economic opportunities based on access to the natural landscapes.

Foundational Actions:

- 1) **Establish/Appoint an outdoor recreation economic development team and leader.**
- 2) **Work with USFS, TVA and major landholders regarding “infrastructure” management and development plans.**

COMPONENTS OF THE OUTDOOR RECREATION ECONOMY

The team generated an “Economic Positioning statement” that outlines an overarching structure for creating a generally more robust outdoor recreation economy. This statement is broader in scope and intended to guide work planning into the coming years. It establishes three critical components and goal areas. These components need additional definition as they are adopted and adapted throughout the local economy. For example, the Health Department, Parks Department or Public Schools may partner to create a program to get kids into the forest or out on the lake. The Library may develop a lending library of recreational equipment and the Small Business Center may assist with developing a program or special fund for new recreation businesses.



“Graham County stewards the natural environment as infrastructure and a platform for a wide variety of outdoor, nature-based recreation activities, opportunities for improved mental and physical health and a sustainable community economy. The natural environment/infrastructure is preserved and conserved as a critical economic asset to be used wisely.”

From this statement are three primary areas of work:

1. **Infrastructure for Outdoor, Nature-based Recreation** – including land conservation, facility development, training and support services, packaging and marketing
2. **Opportunities for Mental and Physical Health/Healthy lifestyles** – this includes not only the ability of visitors to “get away” but also opportunities for local residents to enjoy the natural environment and activities that visitors come to experience
3. **Sustainable Community Economy** – including the hospitality and support businesses, increasing entrepreneurial opportunities for local residents and possibly attracting or developing retail and manufacturing of recreation equipment

IMMEDIATE WORK PRIORITIES

Based on the three areas defined above, the working group developed a list of tasks that they saw as both immediately critical to the future of the outdoor recreation economy and as priorities for action in the coming three to five years. These tasks will require empowered **leadership and coordination** to accomplish.

1) **Facility Development** – *Re-open and Expand existing Facilities*

Partners – USFS, Travel and Tourism, TDAs, EBCI, Non-Profit organizations – especially Friends of Joyce Kilmer, Nantahala/Pisgah Forest Partners

Resources – Volunteers, partner organizations, Federal support + NCFS and Elected officials, funding

Actions:

- a. Santeetlah Lake Trail as outlined on the Partners plan
- b. Meetinghouse Mountain trails – open and safe for mountain biking, hiking and horseback riding
- c. Frisbee Golf – Fontana Village + develop one other or more courses for synergy, competitions
- d. Connections between trails to form loops of specifically designed varying difficulties
- e. Campground on Wolf Laurel Road with access via the logging road
- f. Bog Creek – create safe pull-off, trail connection and parking
- g. Improve attractiveness and accessibility of all existing facilities
- h. Initiate and implement new recreation development proposals as feasible

2) **Improve recreation infrastructure (land) maintenance and management-** *Preserve and Steward the natural environment that underpins the economy*

Partners – County Government take lead, USFS, Forest Partner organizations, NC Wildlife, Friends of Joyce Kilmer, GREAT/non-profits, Federal Elected officials, Funders

Resources – Staff and leadership/personnel, policy guidance, communication/collaboration, funding

Timeline – after completion of USFS Management planning process

Actions:

- a. Better manage dispersed campsites on river – keep open longer using Forest Service access roads, enforce camping time limits, allow reservations for the most outstanding sites
- b. Generally, keep forest roads open longer and in winter – especially around Lake Santeetlah
- c. Increase USFS capacity to manage and maintain land and facilities
 - i. Separate fire fund from general operating budget
 - ii. Lobby US legislature for more funding
 - iii. Develop alternative funding strategy
- d. Develop more transparent fee structures for use of USFS land and facilities

- i. Earmark fees to be used directly for facility maintenance and development
 - ii. Maintain affordability for local residents – local passports program
 - iii. Expand \$15/year hunting/fishing user fee to other activities or remove
- e. Negotiate for local Forest personnel to have increased decision-making powers
 - i. Make it easier for volunteers to assist with maintenance and development
- f. County build relationships with recreation user organizations
 - i. Define mutual benefits
 - ii. Cooperative agreements
- g. Improve coordination and communication between trail user groups (esp. hunters/mtn bikers)

3) **Develop new, coordinated and expanded Programming and Activities**

Partners – Travel and Tourism, Town TDAs, Outdoor Recreation/Forest Partner organizations, EBCI, Schools, County Recreation Department, REVVED UP

Resources – Support from partner organizations, technical expertise, staff time, funding

Actions:

- a. Revitalized downtown and Legal alcohol for post-recreation gathering and unwind – affordable beer in a social environment - Consider target market’s lifestyle preferences in hospitality development
- b. Develop indoor/virtual versions of outdoor recreation experiences (for rainy days and training purposes)
- c. Expand youth outdoor recreation sports – create the future workforce, establish local user base, develop recreation supporters and volunteers, improve health, have fun
- d. Expose local residents to recreation facilities and activities – try, enjoy and understand why people visit, develop recreation supporters and volunteers, improve local quality of life and health
- e. Expand Azalea Festival tours to include Swan Meadows and other significant ecosystem hikes for an entire weekend of activity
- f. Celebrate wild strawberries

4) **Expand Marketing and Promotional efforts- Develop & Market longer stay experiences**

Partners – Travel and Tourism, Town TDAs, Outdoor Recreation Forest Partner organizations, GREAT, Accommodations partners, others...

Resources – Social media support, coordination and cooperation, collaboration of all tourism organizations and partners, ideas + strategy (pulled together), definition of experiences and markets

Actions:

- a. Complete destination marketing program development – visual branding
- b. Develop targeted accommodations marketing tool that matches desired experiences, options and prices
- c. Market the variety of activities and services available – pull together into accessible packages targeted at families, singles, groups
- d. Determine best media to reach each targeted user group



Mike Belleme / Carolina Public Press



Graham County Outdoor Recreation Economy-Building Strategy

BACKGROUND & SUPPORTING MATERIALS

As stated, the purpose of this strategic planning effort is to define the niche for Graham County in the growing regional outdoor and nature-based recreation economy and outline the actions that will guide and coordinate the efforts of local officials, economic and business developers, entrepreneurs and investors for greatest appropriate economic impact. Our goal is to increase the economic impact from the outdoor recreation activity in Graham County. This is not an exhaustive economic data analysis exercise but instead a collection of local knowledge with user input, to provide some guidance and direction.

Our Graham County Outdoor Recreation Team (GCORT):

Sophia Paulos (Graham County Economic Development), Dick Evans + Jim Kriner (Friends of Joyce Kilmer), Kim Hainge (Azalea Festival/naturalist), Robin Turner (resort properties), Robert Rankin (Snowbird Lodge), Dale Wiggins (Chairman of the Graham County Board of Commissioners), Daniel Allison (Graham County Travel and Tourism), Thomas Dillon Slaughter (Town of Fontana Dam + Fontana Village Resort), Rick Davis (GREAT, fisherman), Aron Wehr (Wehrloom Honey, mtn biker), Roger Carlton (Town of Lake Santeetlah), Mary Griffin (Graham County Public Library), Bob Wehr (Santeetlah + GREAT), Brian Johnson (Robbinsville Alderman + Robbinsville Travel & Tourism), Chelsea + Hunter Turner (Little River Creative)

At the April team meeting we were joined by outdoor recreation experts who have been participating with the National Forest Service in the creation of their new management plans for the Pisgah and Nantahala Forests (NPPF/Forest Partners). Economic Development Director, Sophia Paulos has been serving with the Forest Partnership as a representative of local economic development interests. The visiting experts included Noah Wilson from the Growing Outdoors Project—a three year ARC POWER project to expand WNC outdoor industry jobs and businesses; Tom Sauret with SORBA (Southern Off-

Road Bicycle Association) , Julie White with IMBA (International Mountain Biking Association), Kevin Colburn from American Whitewater and Sam Evans from the Southern Environment Law Center.

And—The Honorable Roy Cooper, Governor of North Carolina, paid a brief visit to encourage the coordinated work on developing the recreation industry in WNC. Robbi Pounds from the Graham Star was also in attendance at this meeting.



Timeline: The team gathered first in January 2019, meeting for two hours each month for five total meetings including the April meeting with Nantahala-Pisgah Forest Partners and Governor Cooper. Notes from each of these meetings can be found behind this support section.

Process: The process was coordinated by three members of the ARC/Main Street and Rural Planning staff from the NC Department of Commerce, Rural Economic Development Division. That staff included: Ann Bass, ARC Community Economic Development Planner for the Western region; Wesley Barker, ARC Community Economic Development Planner for the Northwest region and Glen Locascio, GIS and Data Specialist.

The Main Street and Rural Planning Center employs a process that is asset-based for a sustainable and unique local economy. The local (GCORT) team did asset identification and mapping, conditions reporting, review of current practices, a SWOT analysis and discussion of the economic drivers and activity centers around which the outdoor recreation economy can be grown. Data was generated from ESRI as well as BEA (Bureau of Economic Analysis) and various studies from the National Forest Service, recreation interest groups and NC Travel and Tourism at the Economic Development Partnership of North Carolina (EDPNC). Staff had conversations with Forest Service staff, Conservation Fund and other organizations with expertise especially in management of the resource base for resource protection as well as economic benefit. A fairly long survey documenting the preferences of a limited number of the Forest Partner representatives, practicing their activities in the region, was conducted in August 2019. Responses are used as enlightening, but anecdotal, user information.

AN OVERVIEW OF OUTDOOR RECREATION IN THE ECONOMY

Increased national recognition of the importance of outdoor recreation as an economic sector is shown by creation of the Outdoor Recreation Satellite Account at the US Bureau of Economic Analysis (BEA) in response to the requirements of the Outdoor Recreation Jobs and Economic Impact Act of 2016. The first economic report that was issued February 14, 2018 showed that in 2016 Outdoor Recreation accounted for \$412 billion in GDP making up 2.2 percent of US economy and was growing at a rate of 3.8 percent while the overall economy grew at 2.8 percent. Employment in the outdoor recreation economy was 4.28M. Nationally, consumers spend almost double on outdoor recreation what they do for pharmaceuticals!

The Outdoor Industry Association has broken the BEA reported impacts from outdoor recreation down by state. In North Carolina outdoor recreation generates more consumer spending than the insurance and financial services industries combined! 56 percent of North Carolinians participate in outdoor recreation each year. These outdoor recreation activities generate \$8.3 Billion in wages and salaries for 260,000 people and \$1.3 billion in state and local taxes.

An economy is served by many industries

The significance of the new analysis is the understanding of outdoor recreation as an economy—encompassing not only the long-accepted tourism aspects but also recognizing the range of goods and services necessary to support participation in an outdoor activity.

A quick and cursory listing by the Graham County Outdoor Recreation Team (GCORT) noted that:

A person going fishing requires:

- Information – website, guidebook, waterproof Map
- Lodging
- Fishing Guide and Fish cleaner
- Food + Beer
- Transportation – car/truck, boat, gas...
- Education, practice
- Marina
- Fishing License
- Docks or access areas with parking
- Taxidermist
- Bait, stocked stream
- LUCK!
- Equipment:

*-R & D, design, Manufacturing, retail, marketing...
-Rod & reel, flies
-Waders
-Proper Shoes, hat, shirt with pockets, vest*

*-Sunglasses
-Sunscreen
-Creel
-Frying pan*



The BEA developed a process to determine the value-added impact of outdoor recreation both by industry (NAICS category) and activity. These numbers capture the amount of GDP within an industry that is caused by participation in the outdoor recreation economy. Nationally, Retail Trade saw \$81.7 billion in output due to outdoor recreation activities. Accommodations and Food Services realized \$55.7B and Manufacturing \$51.3B from outdoor recreation equipment and activity. These industry groups alone account for more than half of the outdoor recreation economic activity and we have not yet considered the traditional industry category of Arts, Entertainment and Recreation—24.7 percent of output in this category is attributed to outdoor recreation (\$47.4B). This percentage is impressive considering the level of financing involved in the entertainment industry!

The real US outdoor recreation gross output by activity shows that in 2016 these conventional outdoor recreation (OR) activities by visitors travelling over 50 miles generated:

Bicycling	\$ 3,416 M	Canoeing and Kayaking	\$ 638 M
Fishing	\$ 6,090 M	Climbing/Hiking/Tent camping	\$ 7,558 M
Equestrian	\$ 10,638 M	Hunting/Trapping	\$ 7,606 M
RVing	\$ 30,034 M	Shooting/Archery	\$ 6,290 M
Other water rec/rafting	\$ 1,689 M	Birding/Sightseeing/Other air/land rec	\$ 16,823 M
Apparel/Accessories	\$ 83,285 M	OR Travel + Tourism (50+ mi)	\$ 233,070 M
Local OR trips	\$ 74,544 M		



Outdoor Recreation is a dynamic economic sector and one of the first to have the influence to require this new analysis and approach to understanding impacts beyond the trails and boat ramps. Sadly, such numbers are not yet available at the local level. Many user or activity organizations (fly fishing, mountain biking, etc.) have done their own impact studies. Although interesting, it is not possible to know how many of

the people who came to kayak are also hiking, swimming and biking so the numbers cannot be summed into a single impact number. Cheoah River releases, the Appalachian Trail and Joyce Kilmer give Graham County a name and define the County in the minds of serious outdoor adventurers.

However, participation in the heart-pounding, outdoor sports do not account for all the outdoor recreation activity in Graham County. Nature-based activities often require fewer facilities but in some cases increased stewardship of the environment and ecosystems.

The

birders, families swimming at Lake Santeetlah, those staying in rental cabins and at campsites are also critical to Graham County's economy. Most visitors participate in multiple activities during their stay and come with friends and family who may prefer less strenuous activity while the expert is so engaged.



FACILITIES AND ACTIVITIES

What outdoor recreation activities occur in Graham County?

Hiking	Swimming
Camping – Tent and RV	Rock Climbing
Fishing – lake and stream	Hammocking
Kayaking – flat and whitewater	Moonshine Distillation
Canoeing	Motorcycling – on and off road
Mountain biking	Scenic Driving
Limited road Biking	Yoga and Meditation
Geocaching	Tubing
Photography	Gem Mining
Birding	Paddle boarding
Hunting	Shooting
Horseback trail riding	Trail Building
Foraging	Plein Aire Landscape Painting
Wildflower & native plant observation	Salamander watching
Frisbee golf	Stargazing

Potential for: Sculling/rowing on Lake Santeetlah, Ziplining, Archery, Riding Gravel Roads, Trail running, Canyoneering...

This was a quick listing of the activities the GCORT enjoys in Graham County. It is not exhaustive, although extensive. The broad variety of activities supported by facilities and natural conditions in Graham County can confuse anyone attempting to set priorities on where to start with expanding the economic impact. With limited resources—human and financial, it becomes critical to set priorities and identify areas of initial focus.

As part of this project, a map of the known and managed recreation facilities in the County was generated. A much larger version of that map can be seen at the Visitor Center. A smaller version of the map is attached in the appendix. It is believed that such a map had not existed, making it difficult to analyze the enormity of the maintenance and management tasks associated with range of recreation facilities.

Most renown existing experiences and facilities

Meeting notes from February 2019 include a listing of facilities and assets, conditions of the facilities as well as general suitability for different activities. The list can be overwhelming, especially when considering that the development and upkeep falls largely to volunteers. In moving ahead, it is important to select a few facilities and key activities to focus on at

the beginning. The improvements should help to create a critical mass of purpose-designed facilities supporting a target activity to 1) put Graham County on the map with those user groups and 2) support longer stays and return visits.

Most notably Graham County boasts:

- Remoteness (forests) but with services and relatively easy access
- Three large lakes with access to a fourth – Lake Santeetlah is recognized as one of the cleanest lakes in the US
- Cheoah River releases are the most challenging whitewater experiences in NC
- Best hiking and backpacking on the East Coast – bar none!
- Three Audubon Important Bird Areas and several Natural Heritage areas
- Some of the highest biodiversity in the SE US
- Ten weeks of spring wildflowers in bloom including a native Azalea (and festival!)

These activities appeal to different populations. One of the first exercises is to create experience packages that help visitors know when, where and how to enjoy them—as well as what to do afterward and where they might like to stay. To heighten the attraction, Graham County can coordinate and cross-market with similar facilities in the WNC region to create a critical mass of activity and include Graham County on the map. Cross marketing to the same target market will increase the visibility of the experiences available and increase the likelihood of return visits.

GREATEST ECONOMIC RETURN

Graham County is not a large county with unlimited wilderness and backcountry opportunities. To remain a premier destination for outdoor enthusiasts, it is essential that Graham County manage experiences and activities in a way that avoids destroying the characteristics of “the perfect trip” for each activity. Decisions about the investment of time and funds may prioritize activities that:

- 1) Most respect and preserve the natural environment and biodiversity and cause the least visual, noise and physical impact
- 2) Make the greatest economic impact while visiting – leave the most \$\$ behind – support local businesses and even create a need for new businesses.

2018 NC Regional Visitor Profile for the Mountain Region shows average expenditures per trip as approximately \$211 for a daytrip and \$678 for overnight visitors. Considering this difference in economic impact and the distances travelled from central and eastern NC, as well as primary tourist markets in Georgia, South Carolina, Florida, Tennessee and Virginia, it is reasonable to work hardest to expand overnight visits. Currently an average visit is calculated at 2.9 nights.

Participants in some activities do spend more while enjoying their activity. The rather dated chart below gives an idea of typical 2006 expenditures by USFS visitors. These rankings echo the observations of the GCORT. Within each activity there will be variations by age, group size, gender and personal preference. It is possible that a “glamper” would prefer to “hike” to an antique store or bicycle between pie shops.

The US Forest Service found generally that non-local hikers and bicyclists who stay overnight generate the most local income. Those participating in birding, wildflower viewing, nature photography and other nature-based activities rank second in the benefit to the local economy. Local hoteliers also report that fly-fisherman tend to enjoy more of the local community offerings while visiting. Hunting appears to currently be a local activity in Graham County—local residents do

not stay overnight in hotels or cabins or eat more often in restaurants, lessening the new money economic impact—but--are keeping their money in Graham County.

National Forest Visitor Spending in NC				
<i>Average spending by party \$2006 - for comparison purposes only -</i>				
<i>Spending Profiles for National Forest Recreation Visitors by Activity - Stynes and White , February 1, 2006</i>				
Activity	Day trip/ Overnight	Local Visitors	Non-Local visitors	rank
Hunting	DT	\$ 50.74	\$ 79.72	
	ON	\$ 151.27	\$ 221.27	3
Angling	DT	\$ 41.65	\$ 42.14	
	ON	\$ 120.48	\$ 220.39	4
Nature-related activities	DT	\$ 26.99	\$ 52.10	
	ON	\$ 129.23	\$ 223.46	2
Driving	DT	\$ 23.68	\$ 37.22	
	ON	\$ 103.84	\$ 173.07	
Camping	Primitive	\$ 94.07	\$ 104.68	
	Developed	\$ 127.87	\$ 141.29	
Hiking/Biking	DT	\$ 20.15	\$ 36.66	
	ON	\$ 86.67	\$ 245.66	1
Other activities	DT	\$ 35.74	\$ 123.15	
	ON	\$ 49.72	\$ 196.78	5

Non-Local includes visitors coming from 50+ miles away.

This is not a prescription but merely information to inform priorities for facility development and land management. If an investment is to be made, a return on that investment should be expected. Knowing the limited capacity that will still support a quality experience, it makes sense to accommodate those activities that tend to have the greatest local economic impact.

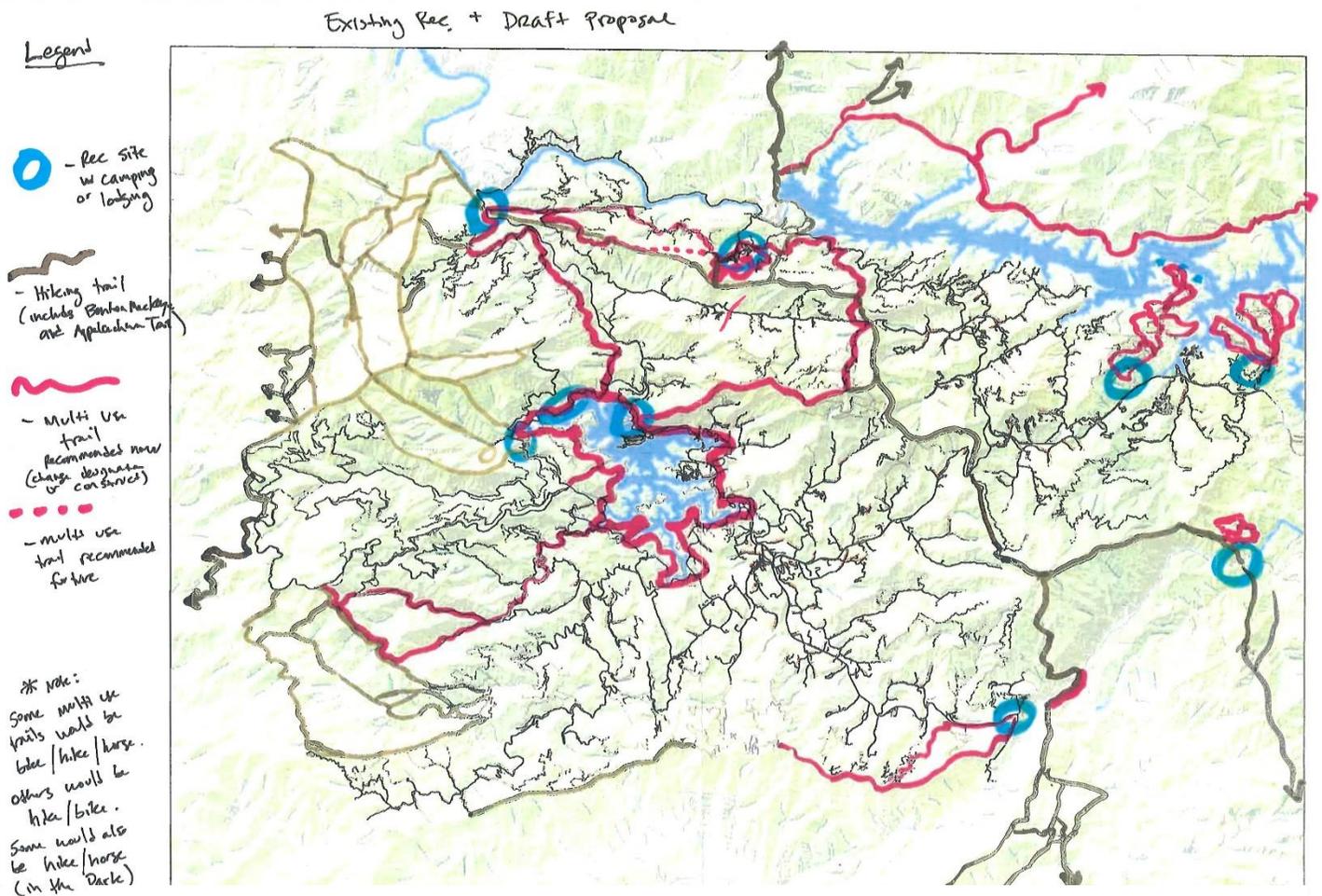
Low hanging fruit for immediate impact

During the inventory process, it was discovered that many facilities had been developed but then perhaps forgotten, were never completed, remain unconnected or were never mapped and marketed for public use. For example—development of a 100-mile network of trails was planned and started back in the 1970s. Review of that plan would be useful now to evaluate and choose if/where to start for the hiking and biking experiences desired by users today. Another discovery was that despite the strong desire of horseback riders to ride Graham County trails there are few parking and no overnight accommodations for horses—except that there is already a stable at Fontana Village and it is currently unused. Horseback riders now stay in the Asheville area and only trailer into Graham County for a day ride, resulting in minimal local income from food or accommodation.

Graham County already hosts a wide variety of accommodations from an Appalachian Trail shelter to a USFS remote campsite on a private island to a 1950s motel and luxury resorts. Cabin rentals are increasingly popular on the lakes. Unique locally-owned accommodations offer greater local return and should be further encouraged. Some conversation about motorized activity and density on Santeetlah will someday become necessary to ensure a quality Graham County experience different from other more densely developed lakes in the state.

The lack of legal sale of alcohol has stymied growth in the restaurant and hospitality sector. It keeps visitors eating only at their resorts instead of exploring Robbinsville and sends the most active outdoor recreators into neighboring counties for overnight stays. Good quality local beer and fine wine is part of the outdoor lifestyle that includes the farm-to-table food expected by discerning guests enjoying local, natural diversity. These are all business and income opportunities for local farmers, chefs and brewers. Communities that have gone through the legalization process report an immediate opening of new restaurants—especially increasing quality and diversity.

Forest Partners are eager to help! The survey of Forest Partners asked specifically about a willingness to assist Graham County with the development of new, improved and expanded facilities. The hikers, horseback riders and mountain bikers are especially interested in hosting work trips to assist with the construction and maintenance of trails for their users. Kayakers are engaged in negotiations to increase and coordinate dam releases, eliminating duplication of days, that will help to extend and improve the paddling season. The appointed Graham County outdoor recreation economic development team and leader can make a big impact right away by working with these groups, coordinating across groups and teams to target priority facilities and trails.



Pictured above is a sketched map by the Forest Partners identifying current assets in the county and the new facilities proposed through the USFS management planning process (April 2019).

A physical plan for facility development was not created as part of this process. Instead the team was presented with a schematic plan (above) that is being negotiated as part of the US Forest Management Plan. Graham County is the first

county to receive this individual attention by the user organizations along with scientists and management specialists to help ensure that the Graham County experience remains intact. The priority is for an interconnected system of trails that creates multiple loop experiences of varying difficulty. Less strenuous, family-oriented and more concentrated activity is centered around Lake Santeetlah. Many trails were started in this area but now require updating, re-design for levels of experience and connection. Less strenuous, family-oriented and more concentrated activity is centered around Lake Santeetlah. The more remote trails shown are primarily connectors improving access and creating a wider variety of hiking/biking experiences.

CREATING THE EXPERIENCE AND CONTROLLING THE IMPACT

One of the best ways to immediately create and ensure the quality, as well as direct the quantity, of experiences in Graham County is to create ‘packages’ that help visitors know what to do, where to go and who can help them. One of the recommendations from the GCORT was to develop a series of adventures targeted to specific visitors—including birders, photographers, historians. Once the target market has been identified it is easier to know where to place ads and what kinds of services and accommodations they will expect. This is a way to guide the development of new businesses, identify

Forest Partners Survey

Please describe a perfect trip including your sport/activity:

Equestrian – Backcountry Horsemen

- Typical of our use would be a weekend at a Forest Service trail head, with 2-3 nights staying, places to high line the horses. We would plan to ride 2.5 days and carry equipment in to work on clearing trails. We would ride an average of 12 miles per day (6 miles on the 1/2 day)
- Quality parking lot for horse trailers at the trailhead. Areas of loop trails if 12 to 20 miles that are scenic and have a wilderness setting. Open areas off trails for overnight camping.
- A horse camp appropriate for horse trailers and areas to secure you horse or mule safely. A clean water sources. Stay time from 3 days to a week. Trails suitable for and designated for horse and mule use. Cell communication. WNC US forest and national park along with wilderness areas. Cost 10 to 25 dollars a night or free.

Mountain Biking – SORBA

- An ideal bicycling weekend would involve a bike-optimized trail system in a scenic area within easy driving distance of a town that offers amenities: food, lodging, camping. A trail system should offer a variety of challenge levels and trail experiences that allow multiple day rides without a user having to repeat trail sections. Coldwater Mountain, Anniston, Alabama; Brevard, NC; Bentonville, Arkansas are examples. The International Mountain Bicycling Association has a document that enumerates MTB destination critter. I will be happy to share that upon request.

Rock Climbing – Access Fund

- A weekend with my wife or a small group of friends where we camp or rent a cabin. We head out all day to climb, then come back and make our own food, or go out for one night. We might make group breakfast or grab breakfast out at a local spot. Then we head home late afternoon Sunday.

Whitewater Paddling – American Whitewater

- I think for a lot of paddlers camping on Lake Santeetlah with family and friends, paddling the Cheoah 1-2 days, maybe a mountain bike ride, and dinner out in town or at Tapoco Lodge. Hard to beat!

needed services and grow the numbers of visitors doing these selected activities that make little environmental but a larger economic impact.

Until recently, there seem to have been few guide materials developed for even some of the most basic activities—waterfall viewing, short or easy hikes. Such guide maps not only control where the most visitors go but will also expand a visitor’s understanding of what Graham County has to offer, what is unique and to be respected—and why they should stay longer or come back often.

It was stated before that the Forest Partner organizations represent serious recreators. They may not be “average” visitors, but each group expressed a willingness to assist Graham County with development of state-of-the art facilities and especially experiences for their respective sports. The surveys they completed offer insight into the kinds of experiences desired by them and their colleagues. Excerpts from those surveys are in the box above. The Graham County Travel and Tourism staff have also studied the broader visitor base and can add nuance to these “perfect trips” to ensure that there is something for family members and other more relaxed visitors as well.

Hospitality

The working GCORT generally felt that the range of accommodations in the County was good. There are some specific calls for improvements at certain less-maintained campgrounds to lessen impact and improve experiences. Noting that Graham County is within easy driving distance of several major cities, it makes sense to accommodate urban adventurers by making it possible for urban visitors pay a fee to reserve an ideal campsites before driving hours to reach the Forest to find them occupied. These requests are basic to increasing income from the best of Graham County’s natural assets.

A limited survey of outdoor recreation organization members shows...most of the “hardcore” outdoor crowd preferred to camp and either bring their own food or eat at farm-to-table or ethnic restaurants with a good beer. The horsemen participating are seeking a backcountry experience with mules or horses and pack animals, but they may like a soft bed with a hot shower to send them off or get them cleaned up for the drive home.

Forest Partners Survey

Selection of Destination for Preferred Activity/Sport	Very Important	Important	Somewhat Important	Not Important
Ease of Access	H, H	H	K, K, R, B	
Affordability		H, K, B	H, R	H
Scenic Beauty	H, H, K, B	H, R		K
Feeling of Wilderness	H, B	H, H, K	R	K
Quiet/Solitude	B	H, H, K	H, R	K
Expert Guidance		K	H, B	H, H, K, R
Great Food & Drink		K, B	H, K	H, H, R
Quality Accommodations	H, K	K, B	H	H, R
Other Activities to do		K, K, B	H, H, H, R	
Entertainment		K	H, B	H, H, K, R
Social Environment		H, B	H, K, K	H, R
Family Activities		H, B	H, H, K, R	

Safety/Emergency Services	B	H, H, H, K	K, R	
Cell Service		H, K	H, H, K, R, B	
Internet Service			H, H, K, B	H, K, R

H - Equestrian - backcountry, trails

B - Mountain biking

K-Kayaking, whitewater paddling

R- Rock climbing

Additional query into the preferences of other recreators is needed before any decisions are made and final priorities for accommodations development or recruitment are established. The Santeetlah Lake area is outlined as a target for families and perhaps more casual recreators—i.e. flat water paddling instead of whitewater. The desires of some traditional users may favor amenities not seen as important in the survey results above.

Adult Beverages

Legal Alcohol sales was raised at every meeting and in conversations with groups involved in any kind of redevelopment, economic growth or quality of life. From an economic point of view offering the legal sale of alcohol:

- Allows resorts to use any underutilized club facilities for expansion of their overnight offerings (new NC legislation interpretation pending) resulting in immediate investment with property valuation increases as well as increased visitation, bed tax income and support for broader local businesses. It would be easier for resort visitors to wander outside the confines of the resort for a variety of food and potentially longer stay.
- Anecdotally, spurs an almost immediate investment in 2 or 3 new eating and drinking establishments for increased property, sales and new alcohol tax income to the town/county after legalization.
- Supports restaurants and grocery stores – According to Bloomberg Businessweek, most restaurants try to make alcohol sales account for around 30 percent of their revenue. Grocery stores see similar income levels. The income from alcohol sales makes the restaurant industry a bit less risky and more stable as alcohol sales remain high through recession. In a small community trying to provide a convenient level of goods and services to the population, an additional thirty percent income has a huge impact on success!
- Appeal to the adrenalin-seeking outdoor crowd that works hard, plays hard and expects high-quality down time that includes craft beer, wine, unique carbonated sodas and distilled beverages. Young professionals name the ability to meet at a brewery and enjoy a drink with friends as pivotal to any decision to return to and invest in Graham County.

Outdoor Recreation Events

Events are best used to establish the image that Graham County wishes the public to hold. Graham County and Robbinsville already present several events—some targeted mostly to the local population and some aimed at the greater region and specific interest groups—like the Trail of Tears walk and Azalea Festival. The GCORT had some suggestions on especially expanding the Azalea Festival to include another natural area walk and maybe a celebration of wild strawberries. Events take a lot of organizing time and volunteer effort. If additional events are desired it may be possible to partner with special interest groups to organize as well as market and recruit their membership.

Events may include education and training, competitions and prizes or just good food and fun. The survey of Forest Partners included several questions about whether their organizations presented events. It was a bit surprising and probably indicative of the targeted participants but the events they described were primarily work trips! The GCORT and especially maybe the Friends of Joyce Kilmer could take on the coordination of these work trips to direct willing workers to high priority areas.

Wilderness training is a possible service but also destination activity or event. The Friends of Joyce Kilmer currently offer most of the training, but they and the Forest Service agree there could be more. This might be an income opportunity – advertising and coordinating a series of general back country safety activities that will make Robbinsville the base camp or adventure portal for anyone thinking of going into the wilderness. If not developed from scratch there are several renown groups in the area who might run an event that simply needs more promotion—coordinate with the Friends of Joyce Kilmer, NC Horse Council and Back Country Horsemen, Southwestern Community College’s Outdoor Leadership program, the WCU Parks and Recreation Management program and of course participation by the local USFS staff.

Competitions and Organized Rides/Walks/Climbs are offered by many of the Forest Partner organizations. Graham County may help to promote, supplement the activity with food and entertainment that keep the participants longer with more opportunities to spend money. SORBA has a youth program that trains new riders and sponsors the National Interscholastic Cycling Association competition between High School mountain bike teams. This would be an easy win.

Nature appreciation and education – Snowbird Lodge currently organizes very successful programs with renowned guides to interpret natural phenomena in the County. This might be expanded to include weekend programs with a natural theme and local guides to identify and interpret the landscapes and species.

2019 was the first Trail of Tears event. It is easy to see an appetite for better understanding of the Cherokee history in Graham County.

OUTDOOR RECREATION BEYOND THE TOURISM INDUSTRY

Thus far we have considered mostly the visitor or tourism aspect of the Outdoor Recreation economy. As the US Bureau of Economic Analysis economic analysis outlined earlier shows, outdoor recreation affects the local economy in many other ways. Here are a few of the suggestions made.

Retail and Service Businesses

There is a need for more recreation support services and equipment access in Graham County. Some mentioned included: access to appropriate clothing and footwear (retail), equipment repair services, outfitting + equipment rental, teaching + training, guides. The local population cannot support each of these as a stand-alone business, but existing businesses may stock additional items needed by recreators to which knowledgeable locals can refer them. Any business will need to do some market analysis and work with outdoor recreation organizers to identify the right gear and help build a critical mass of activity needed to support the business. When Travel and Tourism does more survey and market targeting work, they will also identify gaps in the retail and services that will round out a visitor experience.

Sector development is an evolving method of economic development that is being demonstrated in WNC especially by the craft beer, local food and outdoor recreation sectors. They have grown the number of businesses engaged and spurred the investment in new support or ancillary services simply by networking. Graham County may start by getting the existing outdoor recreation-related businesses together once or twice a year to meet, discuss common issues and challenges and help each other out...some also work in but don’t live in Graham County and can offer additional insight and connections.

The US Forest Service offers opportunities for local residents to provide services at Forest facilities. This is an income area that can possibly be negotiated and expanded as a trade for assistance with facility maintenance and development investment by the County. To offer services in the Forest (campground hosts, food trucks, etc.) follow this link:

<https://amga.com/wp-content/uploads/2018/08/2-002-Guide-USA-Forest-Service-Recreation-Special-Uses- v-1.3.pdf>

A quick note on coordination with Robbinsville...

The lack of a quaint and vibrant downtown was repeated often as a missing component of the outdoor recreation experience. Currently there are few shopping opportunities for visitors to leave their money behind. Simultaneous to the development of this plan was the undertaking by REVVED UP to define the economic future for Main Street in Robbinsville. The economic niche identified by that group is:

Main Street Robbinsville NC: The Adventure Portal to Outdoor Recreation, Connector of Physical, Social and Cultural Adventures and a Pulsing Center of Entrepreneurship.

Clearly these two groups are of like mind! Robbinsville is ready to anchor outdoor recreation in Graham County. They seek to participate in outfitting, training, hosting recreation events, providing support services like guides, retail, repair. The Adventure Portal would be where recreators pass through and possibly transform on their way into the wilderness—or relaxation!

Quality of Life as a Business/Investment Attractor

Graham County is on the right economic track with outdoor recreation development. In January of 2019 Headwaters Economics released a study “Recreation Counties Attracting New Residents and Higher Incomes” with the byline-- *Recreation, especially in non-metro places, draws new residents, higher incomes, and faster earnings growth than places without recreation.* Recreation is quality of life. The article can be found at: <https://headwaterseconomics.org/wp-content/uploads/recreation-counties-attract-report.pdf>

Youth involvement was mentioned repeatedly. It is unfortunate when local youth cannot afford to participate in and appreciate the experiences that visitors come to enjoy. Some outdoor recreation requires equipment that can be too expensive to just try. The survey showed that rock climbers may have \$1,000 invested in their gear, mountain bikers easily \$3,000 – 5,000, paddlers \$3,000+ and horseback riding can require over \$100,000 in equipment for hauling horses to trail adventures. The Southern Off-Road Bicycle Association (SORBA) has a program specifically for youth that is proving very popular in other counties. 4-H and Junior NC Horse Council also help to train young people to ride. More discussion is needed on this topic.

Youth involvement is also important because this is the local workforce! For outdoor recreation to thrive, people with skills, understanding and a passion for nature and recreation are critical to either start or work for supportive businesses. A healthy competition across county lines would cement outdoor recreation activities as local sport.

Transylvania Economic Development Alliance has created a recruitment video that highlights outdoor recreation as quality of life and targets the kinds of entrepreneurs and workers who may work in an outdoor business or choose to start a business in a place where they can enjoy their sport and lifestyle. The link is: https://www.youtube.com/watch?v=Dc5i_Dc9bGE

Other Entrepreneurial Opportunities - Manufacturing

Outdoor recreation tourism is place-based, dependent entirely on local assets—natural, developed and human-- however other aspects of outdoor recreation like manufacturing can occur anywhere. For Graham County to attract manufacturing it must have the environment that lures the people who run the businesses...as well as having available buildings, capable workforce and access to ship goods out. These conditions apply to most manufacturing, not just outdoor recreation equipment, and is a challenge to be mounted.

That said, there are opportunities that come through the outdoor recreation network that might be small now but could grow in time. At the 2018 WCU Outdoor Recreation Conference, the Diamond Brands COO announced from the podium that she would love to have a sewing cottage in every county. They and other equipment, clothing and fiber businesses need cut and sew support. Haywood Community College has a program specifically to train for industrial sewing. Perhaps if there was adequate interest, they would offer a special session. The Graham County Library is purchasing embroidery machines to train residents in that skill which is also part of this manufacturing sector.

CRITICAL NEEDS AND VITAL ISSUES

The advice to community leadership and staff from the GCORT is to start with these tasks:

- Resolve all issues with US Forest Service
 - Consider development of cooperative agreement between County and USFS to negotiate use of income generation for increased maintenance/management services. i.e. Wayne OH as best practice, Voluntary Surcharge, Pay for Success, other tools
- Immediately get the word out with specific hikes posted on the website for download
- Focus on development of trails in areas likely to be used most and that can handle additional traffic
- Find ways to build support and excitement for outdoor recreation in the local community
- Complete the establishment of the Destination Marketing strategy
- Continue to build relationships with Outdoor Recreation Partner organizations – use them wisely!
- Develop and market the wide array of activities available in Graham County as complete, quality experiences for individuals, families, experts and enthusiasts
- Bring first tier recreation facilities up to par - trailheads, signage, high use or probable high use campgrounds and amenities
- Adopt and implement the most feasible parts of recreation proposal from Forest Partners plan
- Adopt language supporting the Forest Partners who are advocating for development of additional recreation facilities in the forest
- Revitalize downtown Robbinsville as the Adventure Portal for social and recreation services

The first step must be to put someone in charge! A dedicated local Champion for the outdoor economy is needed. They must be passionate and empowered to organize and coordinate, with the ear of policy and decision makers.

The County should adopt the positioning statement and work plan from this dedicated team as a road map. The person in charge will define and orchestrate how other agencies can help to build out the pieces of this economy and coordinate their implementation. This report and meeting notes contain many lists of tasks and lots of ideas but now needs someone with the authority to bring the many players and partners in the outdoor recreation economy together and develop the buy-in and understanding to grow it as Graham County finds appropriate.

ADOPTING THE GRAHAM COUNTY OUTDOOR RECREATION LEADERSHIP MINDSET

Graham County leaders are encouraged to declare a strong commitment to the development of the outdoor and nature-based recreation economy as a primary industry. This commitment should inform the development of policies and investment decisions.

- 1) View the public lands, waterways, scenic views and roadways as primary economic infrastructure. As infrastructure these resources are to be maintained and employed in ways that preserve their integrity but also support the generation of income and development of appropriate businesses.
 - a. Consider forest and lakes to be the basis for growing the tax base. Maximize to support the community quality of life – water, sewer and roads are never free, and neither are the natural resources and scenic qualities.
- 2) Become proactive and lead an effort to create a working partnership that will not only maintain this “infrastructure” but ensure that it is done in a way that supports the needs of the local communities. Convene the land partners—County, USFS, TVA, Duke, Main Spring, etc. and organize as a cooperative for on-going resource management. Explore Special Assessment district and other funding mechanisms to start.
- 3) Target Quality when determining activities and services for public investment and development – prioritize those activities that respect and preserve or even improve the integrity of the landscape/resource base while providing a higher ROI directly and positive leveraged investment down the line. Price the use of them accordingly.
- 4) Adopt an entrepreneurial and business mindset. The resource base must not only generate the income necessary to maintain the facilities and ecosystems but also support small business development and a tax base.
 - a. Consider visits to Graham County and use of the land and facilities as a finite resource to be maximized. Sustainability and carrying capacity are key concepts. Develop the highest quality experiences for maximum return.
 - i. Identify the most special and spectacular offerings and develop user policies that generate additional income therefrom
 - ii. Allow reservations and restrictions on pristine/most spectacular sites and facilities that will allow/encourage access by users willing to pay higher fees
 - iii. Support Fees for use of facilities as necessary but targeted for specific maintenance, management and enforcement – local user fees perhaps negotiated at a special (local passport) rate
 - iv. In time—if necessary—consider limiting the number of permits to pristine areas to preserve the wilderness experience and manage demand
 - b. Prioritize activities for encouragement and approval by their ability to encourage and support other high quality and higher income businesses.
 - c. Enforce established policies and rules – cheating is theft from the community and erodes the ability of the County to support services and generate income
 - d. Adopt a priority of authenticity and honesty to keep Graham County unique and worth visiting often
- 5) Encourage local resident/youth participation in premier outdoor and nature-based recreation activities as Workforce Development – negotiate special resident fees for such access.
- 6) Invest in recreation facility development and expansion (as you would in a spec building or business park) but negotiate income-generating business opportunities to sustain them
- 7) Enact policies that support the lifestyle of outdoor recreators, showcase unique local resources and talents and allow local businesses to fully capture the benefits of their visits.
- 8) Be proud and brag about the County! More discerning people need to know about the Graham County experience.



Graham County Outdoor Recreation Economy-Building Strategy & Report

APPENDIX

Team Meeting Notes

January 17, 2019

February 8, 2019

March 15, 2019

April 12, 2019

(Session with Forest Partners, Growing Outdoors Project and Governor Cooper)

May 10, 2019

Recreation Asset Map

Forest Partners survey results – to be given to County staff