Potential Economic Impact of a National Park Service Unit in the Mobile-Tensaw Delta

Technical Report



Courtesy Five Rivers Delta Safaris

Prepared by
The Harbinger Consulting Group

for
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CONTENTS

Executive Summary 1

Introduction 3

Tourism in the Delta Region 3

Technical Background 7

Economic Impact Analysis Methods 7

Components Used in Estimating Future Economic Impacts 8

Economic Impact Projections 18

Distribution of Impacts across the Seven-County Region 19

Factors Likely to Influence Visitation and Economic Impact 19

Appendix A: Comparable NPS Sites 25

Appendix B: List of Research Interviewees 29

EXECUTIVE SUMMARY

The Mobile-Tensaw Delta and Bluffs sit at a crossroads of North America's natural diversity and human history. The Delta drains the nation's richest aquatic system and is surrounded by some of the world's richest temperate forests, supporting species found nowhere else. It has global significance, comparable in some ways to the most biologically diverse places on the planet.

The Delta figures centrally in the region's heritage, and in its appeal to residents. It is also a potentially valuable asset in attracting more tourists, greater investment, and new residents and businesses.

This analysis explores the potential economic impact of including a portion of the Delta and its surrounding bluffs in the National Park system. Its focus is a seven-county region (Baldwin, Clarke, Escambia, Mobile, Monroe, Washington, and Wilcox) in southwestern Alabama.

Creating a new National Park Service (NPS) unit such as a National Park and Preserve—which would allow hunting and fishing across much of the landscape—has been proposed as one strategy for enhancing conservation, coordination, visibility, and public access and education. Behind this proposal is the idea that enhanced recreational, educational, and research use of these lands would draw additional economic value from formally protecting more of the Delta and surrounding landscapes.

The study finds that the economic impact of a new NPS unit such as a National Park and Preserve in the Delta could vary widely. The magnitude of economic impact will largely be driven by the number of visitors to the park and preserve, how long they stay in the area, and the importance of the park and preserve in visitors' decisions to travel to the Delta region.

The region's communities, working in conjunction with the National Park Service, can influence several factors that could affect the appeal of an NPS unit to visitors and the ability of the park and the surrounding region to attract and maximize visitor spending. These factors include the nature of the protected landscape and the facilities and services available; how the region develops its nature and cultural tourism opportunities, businesses, and infrastructure; the development of annual events and facilities to accommodate special events; and how the region and park are branded and promoted.

After ten years of operation, the National Park and Preserve's economic impact in the seven-county Delta region could vary widely, from a low of $24 million in local

sales and 302 jobs to a high estimate of $81 million in local sales and 1,028 jobs. The study finds that Year 10 impacts are likely to be in the higher end of that range, unless there is very little development of facilities, access, and programming in the park and preserve.

The study finds that, by the tenth year of operation, the park unit could attract up to 780,000 annual visitors and support up to:

$81 million in local sales of goods and services
$27 million in personal income (payroll and proprietor income)
1,028 jobs (full-time and part-time)

This is more than a four-fold increase over the estimated economic impacts anticipated during park's first year of operation.

INTRODUCTION

The Mobile Tensaw Delta and Bluffs sit at a crossroads of North America's natural diversity and human history. The Delta drains the nation's richest aquatic system and is surrounded by some of the world's richest temperate forests, supporting species found nowhere else. It has global significance, comparable in some ways to the most biologically diverse places on the planet.

The Delta figures centrally in the region's heritage, and in its appeal to residents. It is also a potentially valuable asset in attracting more tourists, greater investment, and new residents and businesses.

This analysis explores the potential economic impact of including a portion of the Delta and its surrounding bluffs in the National Park system. Its focus is a seven-county region (Baldwin, Clarke, Escambia, Mobile, Monroe, Washington, and Wilcox) in southwestern Alabama.

The study finds that the ongoing economic impacts of a new National Park and Preserve or similar National Park Service (NPS) designation would be largely driven by increased tourism, although there would be some impacts from National Park Service operations. Construction or renovation of facilities such as visitor centers, campgrounds, trails, boardwalks, and launches would yield some additional—but temporary—impacts.

A range of economic benefits from a new NPS unit is likely. This study looks specifically at effects on local jobs, personal income (payroll and proprietor income), economic activity (sales of goods and services), and local and state sales and hotel tax revenues, that are likely to accompany the designation and operation of a National Park and Preserve.

TOURISM IN THE DELTA REGION

Between 2001 and 2010, tourism made a steady contribution to the region's economy. In each of the four counties for which figures were reported, two sectors closely related to tourism maintained a relatively consistent share of the overall economy during that time.[1] Baldwin County has the strongest concentration of tourism jobs, with a total of 14 percent of 2010 employment in accommodation and food services and arts, entertainment, and recreation.

[1] Data from County Socioeconomic Profiles generated using the Economic Profile System-Human Dimensions Toolkit (http://headwaterseconomics.org/tools/eps-hdt). August 2013. When employment in an industry is very small, or concentrated in one or two large companies, employment data can be unreported, as is the case in Monroe and Washington counties, as well as for 2001 accomodation and food services employment in Wilcox county.

Concentration of Jobs in Tourism-Related Industries

	Accommodation and food services		Arts, entertainment, and recreation		Total jobs in two industries	Share of regionale mploy-m ent
County	**2001**	**2010**	**2001**	**2010**	**2010**	**2010**
Baldwin	11.1%	11%	2%	2%	11,634	36%
Clarke	2.2%	2.4%	0.1%	0.1%	692	2%
Escambia	4.7%	4.8%	1.6%	0.7%	939	3%
Mobile	6.1%	6.6%	1.2%	1.2%	17,807	56%
Monroe	na	na	na	na	na	2% (est)
Washington	na	na	na	na	na	>1% (est)
Wilcox	na	2.8%	0.1%	0.1%	112	>1% (est)
Total reported jobs in two industries, 2010					**31,184**	

A 2012 study of wildlife tourism in coastal areas along the Gulf of Mexico found that Mobile and Baldwin Counties are home to nearly 1,400 tourism-related businesses, and 26,575 tourism jobs.[2] Among wildlife-related activities, wildlife watching draws the most visitors to Alabama (1.1 million each year). Recreational fishing attracts 683,000 visitors each year, and hunting draws 535,000 annual visitors.[3]

Depending upon the land and resources included, a National Park and Preserve in the Delta would likely protect and provide access to natural and culturally and historically significant resources. Across the seven-county region, nature and heritage tourism are being recognized among the top prospects for increasing visitation to the area. Some examples of efforts at planning, development, and promotion underway:

1) Nature-based tourism along with arts and culture are two of the three focal areas for the Mobile Bay Convention and Visitors Bureau's new strategic plan.
2) This strategic planning process spawned a Coastal Alabama Outdoor Tourism master planning process, which is well underway.
3) By the end of 2013, both Mobile and North Baldwin counties will be featuring nature and heritage tourism in marketing campaigns.
4) Monroe County is producing a new outdoor-recreation-focused visitor publication, which will likely be updated annually.

[2] Shawn Stokes and Marcy Lowe. Wildlife Tourism and the Gulf Coast Economy. Datu Research, July 2013.
[3] *Ibid.*

5) There are evolving plans for a river-based nature and cultural tour with stops in Delta communities.
6) A Gulf Coast States geotourism project is underway—in collaboration with National Geographic—to highlight natural, cultural, historical, and recreational sites, businesses, and events across Florida, Alabama, Mississippi, and Louisiana.
7) Some discussions are happening across community and county lines to build more regional nature and cultural tourism offerings and to attract more visitors to rural parts of the region.

Those interviewed for this study, by and large, see an NPS unit as a positive, providing a focal point for efforts at building nature, recreation, cultural, and heritage travel opportunities in the region, promoting them, and providing more public access and interpretation than is currently available for the Delta's rich resources.

STUDY ASSUMPTIONS

A National Park Service presence could take many forms, and involve collaboration with existing land managers (e.g. Alabama Forever Wild and state parks) and potential partners such as the U.S. Fish and Wildlife Service. This study of potential economic impacts does not assume a specific configuration. It does assume that NPS involvement would include:

- a high-profile designation (e.g., a National Park and Preserve as opposed to a National Monument);[4]

- a significant area (tens of thousands of acres);

[4] National Park Service units carry over twenty different designations including National Park, National Historical Park, National Battlefield, National Preserve, National Monument, and a slate of lesser-known titles. There is a common belief that the designation itself makes a difference in visitor perception and interest, and that a "National Park" designation carries more prestige than another of the many options.

A 2005 study examined visitation at eight National Monuments that were redesignated as National Parks between 1979 and 2000. It found that the change to a National Park conferred an increase of nearly 13,000 additional visitors per year, even after controlling for acreage expansion that accompanied the redesignations and visitation trends at comparable sites. Further, the study found that the National Park designation was a more important signal to potential visitors from outside the state or metropolitan area in which the park was located than it was to area residents who have better information about the nearby site. (Stephan Weiler. A Park by Any Other Name: National Park Designation as a Natural Experiment in Signaling. Economic Research Department, Federal Reserve Bank of Kansas City, 2005.)

- new visitor facilities and access (likely funded through a mix of federal, private, and other sources, and including some co-location with existing facilities); and

- a moderate level of funding for staffing and operations.

TECHNICAL BACKGROUND

ECONOMIC IMPACT ANALYSIS METHODS

Overview

This economic impact analysis uses an "input-output" model. This model is based on the premise that money spent locally—for example, by visitors paying for meals, lodging, fuel, and gifts—supports further economic activity. Businesses spend these dollars to pay employees, purchase goods, and pay for rent, fuel, taxes, and other expenses. Some of these expenditures are made locally, where the money can then be spent "again" by the businesses and persons who receive it, and so on.

"Direct impacts" are calculated as the amount of spending for an activity or by an organization or group—such a nonprofit preserve manager or non-local visitors—and the jobs this spending immediately supports. "Total impacts" reflect the "multiplier effect" of portions of those direct expenditures being circulated through the local economy, as described above.

Impacts of visitor spending are estimated based on non-local visitor spending only. These expenditures represent "new" funds that originated outside the study area and can be clearly linked to the presence of the National Park and Preserve. Spending by local visitors does have an economic impact, but it is difficult to determine how much of that money would *not* have been spent locally if the park and preserve did not exist. Given these difficulties, and the relatively small contribution of local visitor spending would make to the economic impacts examined in this study, this analysis takes a conservative approach, calculating the economic impact of visitor spending based solely at the expenditures of out-of-area visitors (those from outside the five-county study area).

Impact Model Used

This study uses the established National Park Service economic analytical model, the Money Generation Model (MGM2), to estimate the potential economic impacts of the proposed National Recreation Area.

MGM2 is a system of calculations for estimating the economic impacts of NPS visitor spending on a local region. MGM2 is an update of the NPS Money Generation Model as originally developed by Ken Hornback. Daniel Stynes and Dennis Propst at Michigan State University developed the new version, called MGM2, in 2001.

MGM2 estimates the impacts that park visitors and operations have on the local economy in terms of their contribution to sales, income, and jobs in the area. MGM2 produces quantifiable measures of park economic benefits that can be used for planning, concessions management, budget justifications, policy analysis and

marketing. MGM2 economic impact information has been used to foster partnerships between parks and gateway communities. The economic analysis can help to illuminate the roles the park, local community and tourism businesses play in attracting and serving visitors.

The MGM2 model was customized for the five-county region using area-specific RIMS II multipliers from the U.S. Bureau of Economic Analysis. Visitor expenditure profiles were adjusted using data from the Mobile Bay Convention and Visitors Bureau.

COMPONENTS USED IN ESTIMATING ECONOMIC IMPACTS

Overview

To arrive at projections of future economic impacts, the analysis begins by estimating visitation during the first year of full operation of the new National Park and Preserve. That estimate is used as a foundation upon which to project future visitation levels after ten years of operating the park and preserve, and developing new facilities, programs, and marketing efforts associated with it.

Estimating First-Year Visitation

If created, the National Park and Preserve would create new opportunities for outdoor recreation and interpretation, as well as provide access to naturally diverse and historically significant areas. It would be a companion to—not a replacement for—the substantial acreage already conserved by the state, and would create a larger area for recreation and conservation, and greater public access.

First-year visitation estimates were also informed by an analysis of visitation at nine National Park Service units that are in various ways comparable to the potential Delta park and preserve. Among the nine comparable park units, average first-year visitation was 237,000. (The list of NPS comparable sites is included in the next section.)

Although first year visitation at a Delta NPS unit would be influenced by a wide range of factors—notably, the size and location of the park and preserve, and the visitor activities, infrastructure, and services available—it seems reasonable to project a first-year visitation figure in the same range of the average first-year of the nine comparable NPS units. Notably:

1) Year One visitation at Little River Canyon National Preserve in northern Alabama about an hour drive from Chattanooga, Tennessee, and Montgomery, Alabama—was just short of 184,000.

2) Mobile and Baldwin counties alone host some 7.2 million visitors each year.[5] A first-year visitation figure of 200,000 is likely less than 2.5 percent of the region's current annual out-of-town visitor count, and would also include about 30 to 40 percent local visitors.

3) Mobile's major natural and cultural attractions—Bellingrath Gardens, the Exploreum and IMAX, and USS Alabama—typically host more than 100,000 annual visitors each, with the latter two attractions reaching over 200,000.[6]

4) Five Rivers Delta Resource Center hosted an estimated 55,581 visitors in 2012, including 9,756 educational program participants, 26,292 meeting or event attendees, and 13,000 walk-ins.[7] This at a single, small site that benefits very little from promotion.

Estimating Tenth-Year Visitation

The year-one visitation estimate serves as the foundation for projecting visitation in the tenth year of National Park and Preserve operation. This analysis projects visitation growth across the entire gateway region for the park and preserve, rather than pegging it to specific sites or gateway communities.

The development of new facilities, services, and programs, along with a regional "brand" or identity connected with the National Park and Preserve and broader exposure because of affiliation with the National Park Service are likely to result in increased visitor traffic. This increased activity can be viewed as an opportunity for communities across the region to both help create and use to their economic benefit.

There are several reasons to project that visitation at an NPS unit in the Delta would grow significantly during the first ten years. These include the following.

1) At nine National Park Service units that are, in various ways, peers to the proposed Delta park and preserve, visitation grew an average of 290% during the first ten years of operation. The NPS units used for comparison and the visitation growth rate in the first ten years of operation at each follow.
    a) Big Cypress National Preserve (294%);
    b) Buffalo National River (218%)
    c) Congaree National Park (449%)

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[5] Mobile Chamber of Commerce. Mobile Bay; On the Water, On the Move: An Economic Profile. 2010.

[6] Mobile Attractions Attendance Database. Accessed at www.semoonchang.com, August 2013.

[7] Data provided by Hank Burch, Five Rivers Delta Resource Center.

d) Chattahoochee River National Recreation Area (382%)
e) Cuyahoga Valley National Park (124%);
f) Everglades National Park (367%);
g) New River Gorge National River (335%);
h) Padre Island National Seashore (465%); and
i) Santa Monica Mountains National Recreation Area (-29%).[8]

2) Interviews with local community and business leaders, tourism marketers and business operators, and managers of natural and cultural sites suggest that nature tourism (and associated cultural tourism) is not well promoted in the Delta, and that there is little infrastructure to support it. However, there is also great interest in developing this type of tourism, and some efforts at planning, development, and promotion underway.

3) Interviews suggest that, while most efforts to promote nature and cultural tourism have been focused within communities or counties in the Delta region, there have also been some attempts at creating efforts that cross boundaries. A National Park Service presence could help catalyze and organize these efforts to develop nature and heritage tourism regionwide.

   Regional identities or attractions for tourism can spark collaboration and coordination among local participants, and in turn attract more visitors than the typical competition for visitors' attention.

   Two examples: Along the Crooked Road, a music heritage trail spanning ten counties in southern Virginia, collaborative marketing efforts led to measurable benefits. Accommodations sales in one county increased 90% in the first four years, and more than tripled in one town on the route. Attendance at existing music events grew five percent annually. The region experienced two percent higher growth in tourism share over other parts of the state.[9]

[8] In all large natural area parks, including coastal parks, weather conditions and events such as hurricanes, flooding, and large fires can dramatically affect visitation from year to year. In coastal areas, periodic hurricanes often depress visitation in recovery years following the storm, and sometimes take out infrastructure that can take a long time to replace. Other factors can affect visitation figures, such as malfunctioning counting equipment and unusually large events. We lessen the significance of these fluctuations by considering averages at across several parks.

[9] Robert R Jones. Economic Impact Assessment of the Crooked Road; Virginia's Heritage Music Trail. Lebanon, VA: Sustainable Development Consulting International. 2008.

And in Montana, at 14 rural museums along the "Dinosaur Trail," visitation grew more than 14 percent during the first two years of coordinated promotion.[10]

Finally, there are already regional "trails" and byways either completed or underway (e.g., Civil War Trail, War of 1812 Trail, Coastal and Piney Woods birding trails) that could link to and be reinforced by the presence of a National Park and Preserve.

The study's preliminary analysis developed three scenarios for visitation growth at a National Park and Preserve in the Delta. These differ from each other primarily in their assumptions about first-year visitation.

— The first scenario (the "low visitation" scenario) projects a first-year visitation figure of 50,000. This figure in keeping with early visitation at smaller, less-developed park or preserve areas, but adjusted upward to reflect the influence of the nearby concentration of population and tourism.

  This figure probably dramatically underestimates Year One visitation at a potential National Park and Preserve in the Delta. Several smaller area attractions host more visitors than this, e.g., Five Rivers, and the Dauphin Island Sea Lab and and Estuarium. Although it is possible, this scenario is most likely if there is very little development of facilities, access, and programming in the park and preserve.

— The second scenario, (the "medium visitation" scenario) projects a first-year visitation figure of 125,000, which lies between the low and high figures.

— The third scenario (the "high visitation" scenario) projects a first-year visitation figure of 200,000. To maintain a conservative approach to estimating economic impacts, this figure is close to, but lower than, the average first-year visitation of 237,000 at the nine NPS comparable units listed above.

For all scenarios, a growth rate of 290 percent is used to estimate Year Ten visitation. This is the average for the nine comparable NPS units.

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[10] National Trust for Historic Preservation. Dinosaur Trail Links Sites in Eastern and Central Montana (http://www.preservationnation.org/issues/heritage-tourism/survival-toolkit/dinosaur-trail-links-sites-in-montana.html). Accessed December 10, 2011.

Visitor Spending Model

Visitor spending, which drives most of the economic impact of National Park Service units, was estimated for non-local day-use and non-local overnight visitors, using a variety of sources.[11] These averages reflect the spending of day-trip visitors traveling more than 50 miles from their homes, as well as overnight visitors.

Non-local day visitors

Average total expenditure (per visitor party per day) $107.03

Transportation	$31.11
Food	$32.11
Shopping	$13.91
Entertainment	$13.91
Miscellaneous	$14.99

Non-local overnight visitors

Average total expenditure (per visitor party per day) $310.27

Transportation	$49.64
Food	$62.05
Room	$111.70
Shopping	$31.03
Entertainment	$31.03
Miscellaneous	$24.82

Attributing Visitor Spending to the National Park and Preserve

The information outlined above was used to estimate the total economic impacts of National Park and Preserve visitor spending in the first and tenth years of operation. These total impacts were then adjusted to reflect the role that the park and preserve would likely play in attracting those visitors and their dollars to the region. Many visitors are likely to come to the area primarily for reasons other than the park and preserve (e.g., visiting other attractions, going to the beach, visiting friends or family,

[11] Local per-visitor or per-party expenditure data were not available. Estimates were developed using several sources including:

Evans-Klage, Inc. 2011 - 2012 Visitor ProfileAlabama Gulf Coast Convention & Visitors Bureau. Alabama Gulf Coast Convention and Visitors Bureau, December 2012.

Alabama Tourism Department. Economic Impact Alabama Travel Industry, 2010.

Spending and party-size averages from other similar National Park Service units.

D.K. Shifflet & Associates, Ltd., Texas Destinations 2008-2009 (for comparison).

attending an event). For these visitors, only the part of their spending that is directly related to their park visit is credited to the economic impact of the NPS unit.

Conversely, many visitors will travel primarily to visit the National Park and Preserve, and participate in other activities, use other local services, and visit other local attractions while in the area. Beyond the spending directly related to their park visit, a part of their additional spending in the area is also included in the park's economic impact.

In the first year of operation, an estimated 30 percent of visitors would travel to the region primarily to visit National Park and Preserve, while the remaining 70 percent would come primarily for other reasons, and visit the park while in the area. By the tenth year of operation, the National Park and Preserve would be a stronger destination in its own right, because of park facilities and services development, more widespread public awareness, and the effect of promotional campaigns, special events, and development of visitor attractions, services, and events in the region. In the tenth year, an estimated 50 percent of its visitors would travel to the region primarily because of the National Park and Preserve.[12]

The impact figures represent only the economic activity resulting from visitor spending that is directly associated with park visits, with a small adjustment to reflect the growing influence over time that the park and preserve is likely to have as a primary attraction for visitors.[13] The economic impact projections do not account

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[12] Visitor surveys indicate that NPS units vary widely in the role they play in travelers' decisions to visit an area. Visitor surveys at four of the comparable NPS units suggest that a park and preserve in the Delta might be the primary attraction for between a quarter and three quarters of its visitors. At Congaree National Park, 71 percent of visitors travel to the area primarily to go to the park. At New River Gorge National River, 23 percent of visitors travel to the area primarily to go to the park, and another 25 percent go primarily for recreation. At Big Cypress National Preserve and Everglades National Park, located in an area with a large variety of visitor attractions, the NPS units were the primary draw for about a quarter of their visitors.

[13] To factor in the influence of the park and preserve as a primary attraction for visitors who spend time and money in the area beyond their park visits, the following formula was used:

Day visitors (not staying overnight in the seven-county Delta region):

If the park and preserve is the primary reason for visiting the area, a full day's spending is included in the impact calculation;

If the park and preserve is *not* the primary reason for visiting the area, 0.75 of a day's spending is included in the impact calculation.

Overnight visitors (staying at least one night in the seven-county Delta region):

If the park and preserve is the primary reason for visiting the area, a 1.75 of an overnight visitor's daily spending is included in the impact calculation;

for the likely influence the park and preserve would have on the development of a more vital nature and cultural tourism industry in the region.

National Park and Preserve Operations

If designated, a National Park and Preserve in the Delta could involve a collaborative management arrangement with partners that might include other federal, state, and local government agencies and private landowners. It is difficult to anticipate what the operating budget of the NPS unit would be because details of that governing partnership could be worked out in many ways.

Nonetheless, it is likely that the National Park Service would maintain a small to moderate staff and operating budget. A review of annual operating budgets of other NPS units informed this study's estimates for the Delta park and preserve.

For the nine comparable NPS units listed above, the average fiscal year 2012 operating budget was $7.5 million, which supported an average of 77 full-time-equivalent (FTE) employees. The average 2012 operating budget for the newer of those NPS units—the five established since 1980[14]—was $5.6 million.

To develop an average for parks with smaller operating budgets and staffs, two NPS units in our comparables list with budgets below $5 million per year—Congaree National Park and Chattahoochee River National Recreation Area—were considered along with two units not included among the nine units on the comparable parks list: Big Thicket National Preserve in Texas, and Little River Canyon National Preserve in northern Alabama. The average 2012 operating budget of those four units was $2.3 million, which supported an average of 22 FTE employees.

For purposes of this analysis, the annual NPS operating budget in both year one and year ten is estimated at $3.5 million—higher than the average for the smaller parks, and much lower than for the group of nine NPS peers identified above.[15]

If the park and preserve is *not* the primary reason for visiting the area, one full day's spending for an overnight visitor is included in the impact calculation (one day and one night).

[14] Of the nine comparable NPS units, five were established since 1980. These are: Big Cypress National Preserve, Congaree National Park, Chattahoochee River National Recreation Area, New River Gorge National River, and Santa Monica Mountains National Recreation Area.

[15] In any year of operation, an NPS unit will also rely on other sources of funding beyond its base budget, such as grants and special programmatic funds. These have not been estimated as part of this impact analysis.

National Park and Preserve Construction
Construction of facilities is another likely source of economic impact from the designation of a new NPS unit in the Mobile Tensaw Delta.

While it is early to project construction needs for a Mobile-Tensaw Delta NPS unit, the size and diversity of the landscape and its spatial orientation around a broad floodplain suggest that this unit will require multiple visitor access points and contact stations for park access, interpretation, visitor information and services, and easily accessible recreational facilities such as boardwalks, family-friendly trails, and boat launches.

Some of these visitor centers or visitor contact stations could be at existing facilities or sites such as Five Rivers Delta Resource Center or Historic Blakeley State Park. This approach could reduce initial construction costs. Existing historical or natural sites such as Fort Mims and Splinter Hill could benefit from the location of NPS visitor facilities there. A visitor contact station in Mobile, downtown and/or near other tourist attractions, could provide an introduction to the park and preserve and focus on cultural connections.

Other construction needs might include additional campgrounds and trails; signage; and a park administrative headquarters. Creating one or more scenic drives along existing routes such as Highway 59—with improvements such as interpretive pullouts and bicycle lanes or paths—is another potential construction project, which would likely be carried out with funds from a variety of sources.

Because the park and preserve—and the partnerships the will underpin it—could be configured in so many different ways, construction costs are not included in the impact analysis.

A few points about construction costs and impacts may provide a sense of potential magnitude:

- A General Accounting Office study of NPS visitor center construction projects underway or planned between 1995 and 2005 found that the average visitor center project costs $6.8 million. However, this average is distorted by several unusually large projects such as a new $39 million visitor center at Gettysburg National Military Park, a privately funded facility serving a park with 1.1 million annual visiors and a need for intensive interpretation and artifact storage and display.

Looking at less-ambitious, but full-service visitor centers, a $2-$3 million construction figure for a new center seems reasonable. For renovation projects, the cost may be as low as $500,000.[16]

- A report by the Scientific Reasoning Research Institute found that different types of economic stimulus projects have a range of average statewide economic impacts during the life of the construction project. For example:

  — For new commercial structures including educational facilites, each $1 million dollars supports 11.7 total jobs, and an additional $770,301 in economic activity.
  — $1 million in spending on infrastructure and public works projects—including roads, recrational facilities, and parking facilities—supports 12.4 jobs and an additional $825,858 in economic activity.
  — For maintenance, repair, and renovation of commercial strutures, each $1 million in spending supports 14.2 jobs and an additional $837,223 in economic activity.[17]

Visitor facilities are the lifeblood of an NPS unit, providing important information, education, programming space, access to recreational facilities, and facilities for basic services such as restrooms. Funds for facilities may not come from the federal government exclusively. For example, at Little River Canyon National Preserve, the Jacksonville State University constructed the Little River Canyon Center, and leases part of it to the park service.

Impact of Changes in Area Residents' Travel Decisions

A new National Park and Preserve—and associated development of nature and cultural tourism opportunities, lodging, and visitor services in the region—could encourage more locals to vacation close to home rather than traveling out of the area. It could also promote new weekend and recreational travel within the region by residents.

The impact of having "their own Everglades" nearby on area residents' travel decisions is not possible to estimate without survey data. This spending, like the

[16] General Accounting Office. Park Service: Visitor Center Costs, Size and Functions Vary Widely. GAO, 2001.

[17] Scientific Reasoning Research Institute. Stimulus Calculation Tool—Statewide Economic Impacts of Construction Spending in California. "Economic activity" includes sales and value added.

spending of all park visitors who live in the seven-county region, is not included in the impact analysis.

However, it is informative to roughly estimate the magnitude of impact that changing local travel decisions could have on the region's economy. In Year Ten, in the high visitation scenario, an estimated 234,000 area residents would visit the National Park and Preserve. If five percent of those were groups choosing to vacation in the area rather than outside of it because of the park, that would create an additional $2.7 million in spending that would have otherwise gone outside the Delta region.

The impacts of that spending would be approximately 44 local jobs, $1.5 million in income, and $4 million local sales.[18]

[18] Estimates assume a party size of 2.5, an average visit length of 2.5 nights, and an average spending per party per day of $232.70 (75 percent of the daily per-party spending of out-of-area visitors).

ECONOMIC IMPACT PROJECTIONS

Economic impacts are estimated for the seven-county region in the first year of operation of a Delta National Park and Preserve, and in the tenth year.

	Low Visitation Scenario	Medium Visitation Scenario	High Visitation Scenario
VISITATION Year 1 **Year 10**	50,000 **195,000**	125,000 **487,500**	200,000 **780,000**
OUT OF AREA VISITATION Year 1 (60%) **Year 10 (70%)**	30,000 **102,500**	75,000 **253,750**	120,000 **406,000**
Economic Impacts from Out-of-Area Visitation			
LOCAL SALES Year 1 **Year 10**	$3.7 million **$19.2 million**	$9.0 million **$48.0 million**	$14.4 million **$76.9 million**
PERSONAL INCOME (payroll & proprietor) Year 1 **Year 10**	$1.1 million **$5.7 million**	$2.7 million **$14.3 million**	$4.3 million **$22.9 million**
JOBS (full & part-time) Year 1 **Year 10**	50 **256**	121 **641**	193 **1,028**
Economic Impacts from NPS Operations			
LOCAL SALES	$4.6 million		
PERSONAL INCOME (payroll & proprietor)	$4.4 million		
JOBS (full & part-time)	46		
State and Local (City/County) Sales and Lodging Tax Revenues			
STATE Year 1 **Year 10**	$69,000 **$0.4 million**	$0.2 million **$0.9 million**	$0.3 million **$1.4 million**
CITY/COUNTY Year 1 **Year 10**	$91,000 **$0.6 million**	$0.2 million **$1.2 million**	$0.4 million **$1.9 million**

DISTRIBUTION OF IMPACTS ACROSS THE SEVEN-COUNTY REGION

How the anticipated economic benefits would be distributed among the seven-county Delta region and its communities will be influenced by where the park and preserve is located, where visitor facilities are located, and how nearby communities and businesses position themselves to take advantage of the flow of park visitors.

Distribution of economic benefits is likely to follow, generally, the current distribution of tourism-related business activity within the region (see table on page 4). However, because the bulk of tourism businesses and services are currently concentrated in coastal and urban areas of Baldwin and Mobile Counties, inland areas are likely to benefit disproportionately as the park and preserve and related NPS and private business services would be focused inland and in rural parts of the region. In these less-populated areas, even small gains in sales, jobs, and income will have an important impact as a share of the total community or county economy.

FACTORS LIKELY TO INFLUENCE VISITATION AND ECONOMIC IMPACT OF THE PROPOSED NATIONAL PARK AND PRESERVE

Overview

Research conducted for this and other similar studies suggest that five major factors are likely to affect visitation at a national park and preserve, or any complex of conservation and recreation lands in the Delta.

1) The nature of the protected landscape — especially what there is to do and see, and how appealing that is (or can be made to be) to visitors. Including an array of landscapes and cultural features in the park could broaden its appeal, and encourage longer stays.

   One potential advantage of a National Park and Preserve over some other possible NPS designations is that a National Preserve allows a wider range of activities that could appeal to a broader range of potential visitors. Traditional recreational uses such as hunting, fishing, and trapping may be allowed in National Preserves, while they are significantly limited or prohibited in other areas such as National Parks.

2) Access and facilities — the kinds, capacity, location, and appeal of interpretive and recreational facilities, scenic drives, and visitor services.

   Even for a water- and wetlands-oriented park like a Delta NPS unit would be, including upland areas that can provide diversity of habitat and scenery—and

the kinds of recreation that park visitors tend to participate in most—would be a significant benefit for attracting visitors.

Survey data from four of the comparable parks that are water- and wetlands-focused suggest that visitors tend to use the terrestrial recreation opportunities in parks more than the water-based opportunities. The most popular visitor activity in New River Gorge National River, Congaree National Park, Everglades National Park, and Big Cypress National Preserve is walking/hiking.

At New River Gorge National River, NPS staff estimate that only about a quarter of park visitors participate in water recreation.[19]

By percent of visitor groups participating, the most popular activities in these four comparable NPS areas are shown in the table below.

Most Popular Activities in Four Water- and Wetlands-Focused NPS Areas[20]

Activity	Average percentage of visitor groups participating
Walking/hiking	63%
Scenic driving/sightseeing	61%
Birdwatching	42%
Photography/painting/drawing	40%
Picnicking	22%
Boating	19%
Nature study	17%
Canoeing/kayaking	15%
Camping	14%
Fishing	10%
Bicycling	9 %
Backcountry camping/backpacking	3%

(Note: Some activities are not available or reported in all of the four NPS sites. The averages noted above are for activities available and reported in two or more

[19] Personal communication, Deborah Darden, assistant superintendent, New River Gorge National River. September 2013.

[20] University of Idaho Park Studies Unit. Visitor Studies for Big Cypress National Preserve (2007), Congaree National Park (2005), Everglades National Park (2008), and New River Gorge National River (2004). National Park Service Visitor Services Project.

of the sites, and reflect only the parks for which participation is reported. Participation rates for Everglades National Park reflect self-guided activities only. Participation in guided activities is reported separately, and noted below.)

Other popular visitor activities available (or reported) in only one of the four comparable NPS sites are visiting historical sites, enjoying solitude, and wildlife viewing other than birds (which may be incorporated into the "nature study" category).

A 2008 survey of winter and spring visitors to Everglades National Park provides a glimpse into the types of activities offered as guided services there.

Everglades National Park, Visitor Group Participation in Selected Guided and Self-Guided Activities[21]

Activity	Guided # of visitor groups participating on day of survey	Self-guided # of visitor groups participating on day of survey
Boat tour	428	47
Tram tour	256	
Walking/hiking	65	683
Photography/painting	30	531
Boating	30	57
Canoeing/kayaking	30	85
Birdwatching	12	114
Bicycling	12	114
Camping	6	85

Interviews with park staff suggest that the majority of visitors to many national parks look for similar experiences — visitor centers, interpretive exhibits and videos, short walking paths or boardwalks, and scenic drives. These are the "hooks" that appeal to the largest number of visitors, and may encourage them to come back for a more in-depth experience.

In NPS visitor surveys, respondents are typically asked to rate the importance of various facilities and services to their park visits. While these ratings vary from site to site, there are some commonalities. Typically highly ranked are campgrounds, trails, wildlife viewing areas, and scenic drives and overlooks. Restrooms, parking areas, and scenic overlooks tend to rank highly as well, as do canoe and boat launches.

In surveys where services are included in these rankings, park rangers, tour guides, ranger-led walks and talks, and park brochures, and interpretive exhibits and programming typically receive high marks for importance.

At New River Gorge National River, staff attribute the steady growth of visitation to three factors: the growing popularity of adventure travel and recreation; promotion and an expanding awareness of the park and area recreational

[21] Park Studies Unit, University of Idaho. Everglades National Park Visitor Study, Winter and Spring 2008. National Park Service Visitor Services Project, November 2008.

opportunities; and the development of park facilities (especially visitor centers, trails, and river access) and programs.[22]

3) The nature and extent of marketing and promotion of the park and other nature and heritage travel opportunities in the region. Here, the "national park" brand can be helpful, even if the park is one player among many in a larger protected landscape.

   The Convention and Visitors Bureau in Oak Hill, West Virginia, has adopted the New River Gorge identity, and promotes the area as an adventure travel and family vacation destination. Staff at New River Gorge National River have worked closely with local businesses and the bureau to create a larger regional identity around the national park, adjacent state parks, the river, and outdoor recreation.

   A collaboration involving the CVB, NPS, and other local groups successfully competed to be the site of the Boy Scouts of America's new $400 million Jamboree facility and adventure camp. The new facility will be located adjacent to the park, and the selection committee noted the presence of the national park and its recreational facilities and opportunities as a key factor in choosing the West Virginia site.

4) How the region develops its tourism opportunities, businesses, and infrastructure. Every national park exists in a larger context, which can offer park travelers additional activities and services. A focus on creating and promoting facilities and services that appeal to nature, adventure, and cultural travelers would help the region attract more visitors and keep them in the area longer.

   Partnerships can also develop facilities that benefit parks, communities, and other organizations. At Little River Canyon National Preserve, a partnership among Jacksonville State University, NPS, and NASA created a $7 million visitor and education center. A new public-private partnership to build a park lodge is now being explored.[23]

   Many NPS units promote research, and there are 21 park-based research and learning centers. A public-private partnership runs the largest of these, the Schoodic Research and Learning Center at Acadia National Park. The park service and private donations funded renovations to the former Navy base that is

[22] Personal communication, Deborah Darden.

[23] Personal communication, Pete Conroy, director, Jacksonville State University Environmental Policy and Information Center, September 2013.

the Center's campus, and a nonprofit institute raises funds to support educational programming.

5) Development and promotion of events that attract local and out-of-area visitors.

   Santa Monica Mountains National Recreation Area provides the historical setting for the annual Topanga Banjo Fiddle Contest and Folk Festival. The park's friends group is a partner in the event, which attracts some 6,000 visitors.

APPENDIX A

An analysis of visitation and operations at comparable or "peer" NPS units was central to the development of the visitation and operations models for this economic impact analysis. Several characteristics were considered in selecting peer NPS units for this study, including:

- Large, natural areas
- Historical features
- Multiple entry points
- Multiple visitor contact facilities/visitor centers
- Wilderness character (whether designated or not)
- Rural character
- Proximity to urban centers
- Major access highways
- Adventure/recreation focus, including water and land-based recreation
- Accessibility to scenic driving routes
- Collaborative park or area management

Selection of comparable NPS units was solely for purposes of understanding visitation trends and operations at other parks that are similar in certain ways to the type of NPS unit that could be created in the Delta. Selection of these units as "peers" for purposes of this study is not intended to make any recommendation about the nature and management of a National Park Service unit in the Delta.

The comparable sites include:

1. Big Cypress National Preserve (Florida)
This large area protects the watershed for the threatened ecosystem of South Florida, including Everglades National Park. Subtropical plant and animal life abounds. The park is home to endangered species including the Florida panther and the red-cockaded woodpecker.

Authorized 1974
First year of visitation data: 1989
2012 visitation: 882,570

Total acreage: 720,567 (federal: 648,191, nonfederal: 72,376)

2. Buffalo National River (Arkansas)
Running 136 miles, this park offers both swift-running and placid stretches of river, coursing through multicolored bluffs and past numerous springs. The Buffalo is one of the few remaining unpolluted, free-flowing rivers in the lower 48 states.

Authorized 1972
First year of visitation data: 1973
2012 visitation: 1,093,083

Total acreage: 94,293 (federal: 91,813, nonfederal: 2,480)
Wilderness area: 36,000 acres

3. Chattahoochee River National Recreation Area (Georgia)
A series of sites along a 48-mile stretch of the Chattahoochee River, north of Atlanta, offers public access to recreation and historic spots.

Established 1978
First year of visitation data: 1980
2012 visitation: 3,168,137

Total acreage—9,271 (federal: 4,817, nonfederal: 4,454)

4. Congaree National Park (South Carolina)
This park, near Columbia, South Carolina, protects the last significant tract of southern bottomland hardwood forest in the United States. It is home to a rich diversity of plant and animal species associated with an alluvial floodplain. Several national and state record trees are in the park.

Authorized 1976 as national monument, designated national park 2003
First year of visitation data: 1989
2012 visitation: 882,570

Total acreage: 26,546 (federal: 21,769, nonfederal: 4,777)
Wilderness area: 15,000 acres

5. Cuyahoga Valley National Park (Ohio)

The park preserves rural landscapes along the Cuyahoga River between Cleveland and Akron, Ohio. The 20-mile Ohio & Erie Canal Towpath Trail follows the historic route of the canal. Historic structures and natural features can be seen as the trail continues along the Ohio & Erie National Heritage Canalway.

Established as a national recreation area 1975
Redesignated a national park 2000
First year of visitation data: 1978
2012 visitation: 2,299,722

Total acreage: 32,855 (federal: 19,761, nonfederal: 13,094)

6. Everglades National Park (Florida)

Largest remaining subtropical wilderness in the contiguous United States, with extensive fresh-water and salt-water areas, open sawgrass prairies, and mangrove forests. Abundant wildlife includes rare and colorful birds.

Established 1947
Designated a Biosphere Reserve 1976, World Heritage Site 1979
First year of visitation data: 1948
2012 visitation: 1,141,906

Total acreage: 1,508,538 (federal: 1,505,976, nonfederal: 2,562)
Wilderness area: 1,296,500
Water area: 625,000

7. New River Gorge National River (West Virginia)

A rugged, whitewater river flowing northward through deep canyons, the New is among the oldest rivers on the continent. The free-flowing, 53-mile section from Hinton to Hawks Nest State Park is abundant in natural, scenic, historic, and recreational features.

Authorized 1978
First year of visitation data: 1984
2012 visitation: 1,128,195

Total acreage: 72,189 (federal: 52,197, nonfederal: 19,992)

8. Padre Island National Seashore (Texas)

Noted for its wide sand beaches, excellent fishing, and abundant bird and marine life, the park stretches along the Gulf Coast for 70 miles.

Authorized 1962, established 1968
First year of visitation data: 1966
2012 visitation: 573,855

Total acreage—130,434 (federal: 130,355, nonfederal: 79)

9. Santa Monica Mountains National Recreation Area (California)

This recreation area near Los Angeles offers rugged mountains, a coastline with sandy beaches and rocky shores, canyons covered with chaparral, and abundant wildlife. The area preserves a Mediterranean ecosystem, shelters wildlife habitat, and includes historical areas like Paramount Ranch and Satwiwa American Indian cultural centers.

Established 1978
First year of visitation data: 1982
2012 visitation: 649,471

Total acreage—154,095 (federal: 22,892, nonfederal: 131,203)

APPENDIX B

The following individuals from the Delta region were interviewed as part of the research for this study:

Kristian Aboud, Five Rivers Delta Safaris
Bill Barrick, Bellingrath Gardens
Wiley Blankenship, Coastal Alabama Partnership
Colette Boehm, Gulf Shores Orange Beach Tourism
Hank Burch, Five Rivers Delta Resource Center
Claudia Slaughter Campbell, Organizer, Fort Mim's 150th anniversary celebration
Rebecca Cheshire, North Baldwin Chamber of Commerce
Steve Cox, International Expeditions
Jason Dawsey, Bates Lake Landing
Mike Dow, Chair of Mobile's World Leisure Congress Committee
Stacy Hamilton, Mobile Bay Convention and Visitors Bureau
Lynn Hastie-Bozone, Stockton Heritage Association
Carol Hunter, Downtown Mobile Alliance
Richard Long, Mayor of Jackson
Austin Monk, Washington County Economic Development Initiative
Larry Scott, Scott's Landing
Joe Skipper, Skipper Insurance
Sandy Smith, Monroeville Chamber of Commerce
Sheryl Threadgill-Matthews, Wilcox County Chamber of Commerce
Michon Trent, Contessa Group
Patsy Waters, Upper Bryant Landing
Linda Vice, Director of Rural Southwest Alabama Office of Tourism and Film