



A Preliminary Evaluation of

Opportunities for Economic Benefit

associated with a new National Park Service unit in the Mobile-Tensaw Delta

About This Report

In 2013, the Harbinger Consulting Group conducted a study to evaluate the potential economic impacts of designating a new National Park and Preserve in the Mobile Tensaw Delta. The study focused on a seven-county region in southwestern Alabama. The study was commissioned by the Friends of the Delta. This report summarizes the study's findings.

Understanding the Economic Impact Study

In its analysis, the Harbinger Consulting Group estimated economic impacts using an “input-output” model. This type of 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 as 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. Their expenditures are clearly “new” dollars 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 effect, 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 local visitor spending would make to the impacts examined in this study, this analysis takes a conservative approach, calculating the economic impact of visitor spending based solely at the expenditures of visitors from outside the seven-county study area.

Download the study, *Potential Economic Impact of a National Park and Preserve in the Mobile-Tensaw Delta* (The Harbinger Consulting Group, September 2013), at www.harbingerconsult.com/delta.





Cypress tree at sunset.
Courtesy Dennis Holt (dennisholt.com)

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Carol Hunter

Director of Communications,
Downtown Mobile Alliance

“Nature and culture tourism are two of the fastest-growing kinds of tourism, and these visitors spend more per visit and are more highly educated than the average traveler. Mobile doesn’t have a single dominant tourism attraction like Disney World or the Statue of Liberty. Our strength is our wealth of cultural heritage and natural tourism assets. I think this is our future.

“There needs to be better overall coordination of all the tremendous assets in and along the Delta. There are incredible natural places and amazing historical and archeological sites throughout the area. Right now, though, you have to be a pretty dedicated traveler to get there.”

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, is surrounded by some of the world’s most diverse temperate forests, and supports species found nowhere else. It is among the most biologically diverse places on the planet.

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

Promoting Nature and Heritage Tourism

Communities across the Delta region are turning attention to promoting nature and cultural tourism. For many, that means leveraging recreation and travel opportunities in and near the Delta. Efforts include a new annual outdoor recreation publication in Monroe County, and evolving plans for a river-based nature and culture tour with stops in Delta communities.

The Mobile Convention and Visitors Bureau’s recent strategic plan features nature tourism as a primary focus. By the end of 2013, both Mobile and North Baldwin counties will be featuring nature and heritage tourism in marketing campaigns.

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 Origin of this Economic Study

The river bottom lands in the Delta have been recognized as a national natural landmark for nearly 40 years. At the request of a local Congressional representative, the National Park Service is

Key Findings

Projected benefits for Baldwin, Clarke, Escambia, Mobile, Monroe, Washington, and Wilcox counties.

By its 10th year, a National Park and Preserve in the Mobile-Tensaw Delta could:

Attract up to
780,000 annual visitors

Support up to
\$81 million local sales

1,074 local jobs

Sustain up to
3% more jobs in the tourism industry, mostly in areas away from the beaches, where most tourism activity is currently concentrated

updating a 1979 study that evaluated the resources in the Delta. Like the original study, the update is expected to offer alternative management scenarios that could help meet local conservation, public access, and visitation goals.

While the NPS update is underway, Friends of the Delta is developing additional sources of information to help local communities consider potential benefits and drawbacks of a National Park Service presence—and ultimately other management alternatives.

Study Findings

This report is part of that effort, based on an examination of potential economic impacts of a new NPS unit in the Delta.[†] The study focused on a seven-county region in southwestern Alabama surrounding the Delta.

The study found that a new National Park and Preserve or similar designation could offer the region’s communities significant economic advantages. At the same time, it could enhance hunting, fishing, and other traditional forms of recreation; foster coordinated development and promotion of nature and cultural tourism opportunities and businesses; and help conserve southwestern Alabama’s priceless natural heritage.

[†] An NPS 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);
- a significant area (tens of thousands of acres);
- 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.

Seven-County Economic Impact Study Area



The impact study focused on how the designation of a new National Park Service unit in and around the Delta might affect economic activity in a seven-county area. The included counties are Baldwin, Clarke, Escambia, Mobile, Monroe, Washington, and Wilcox.



Sunset over the Delta.
Courtesy Five Rivers Delta Safaris

How a National Park Service unit could

Boost Economic Activity

Similar to most National Park Service sites, visitor spending would support the largest share of the economic impact of a Delta National Park and Preserve or other NPS designation.

To identify likely trends in visitation, this study evaluated trends at nine other NPS areas similar to the proposed Delta park.^{††} Among these comparable park areas, average visitation in the first year of operation was 237,000. Over the first ten years, on average, visitation nearly quadrupled.

Based on local visitation data and more than two dozen interviews with local experts, business owners, and tourism promoters, the study estimates that, in its first year, a Delta park and preserve

would attract between 125,000 and 200,000 visitors. Over the first ten years, as the park matures, visitation is projected to grow by nearly 300 percent, as it did in the comparable sites.

Four main factors account for this projected increase in visitor numbers and expenditures in the area:

- 1) The drawing power associated with National Park Service affiliation, which would put the Delta on par with the nation's finest public lands, and offer exposure to national and international markets.
- 2) Development of new or expanded recreational sites and access, visitor facilities, services, and programs.
- 3) Opportunities for businesses to develop or expand visitor services and operate as park concessionaires.
- 4) Regional coordination to connect discreet sites and events into more cohesive offerings for visitors, and develop an identity and marketing for nature and cultural travel.

By its tenth year, a fully developed National Park and Preserve that is complemented by additional natural and cultural tourism development in the Delta region could support up to 1,074 new jobs in the seven-county region. These jobs would be concentrated in areas away from the beaches, where most tourism activity is currently focused.

^{††} The nine comparable NPS units evaluated in this study are: Big Cypress National Preserve, Buffalo National River, Congaree National Park, Chattahoochee River National Recreation Area, Cuyahoga Valley National Park, Everglades National Park, New River Gorge National River, Padre Island National Seashore, and Santa Monica Mountains National Recreation Area.



Looking for birds.
Courtesy Beth Hamric

Other Potential Sources of Economic Impact

Another source of economic impact is park operations. For this analysis, the annual NPS operating budget is estimated at \$3.5 million—a figure arrived at by analyzing budgets for comparable NPS sites. This spending would support 46 jobs in the local region.

Construction is another source of likely economic impact from a new NPS unit in the Mobile-Tensaw Delta. The size and diversity of the landscape and its spatial orientation around a broad floodplain suggest that this unit would need multiple entry points and contact stations for visitor access, interpretation, information, services, and recreational facilities such as boardwalks, trails, and boat launches. Campgrounds, signage, offices, and scenic driving route improvements are other possible construction projects.

Other Potential Benefits

A Delta park and preserve could also provide financial leverage and access to funding sources. Collaboration and the high profile of NPS designation

could help attract nonprofit, corporate, federal, and other funds. Some funds, such as NPS project funding and Land and Water Conservation Funds, are available only to NPS units. Strong friends groups often help raise funds, recruit volunteers, and conduct special programs. Because of its tremendous diversity, a Delta park could be a focal point for research, which could drive more economic activity.

An NPS unit could also help provide a shared identity for tourism development and marketing. Experience in heritage areas and tourism trails across the country suggests this regional focus can expand the size of the “tourist pie.”

Finally, a park could enhance quality of life for area residents. Lack of easy public access to the Delta was a consistent theme in local interviews. One interviewee noted, “Every young person should have the opportunity to travel in a vast wilderness. Our young people won’t all be able to go to Yellowstone. The ease and access that a well-funded park offers can give them that ability.”



Stacy Hamilton

Vice President, Marketing and Communications, Mobile Convention & Visitors Bureau

“So much of our heritage and culture is based on water being part of our lives. People who travel to and through Mobile know we are on the water, but many don’t realize the access that is available. From our historical downtown, it’s just minutes to the nearest kayak launch.

“National Park Service recognition could help make nature and heritage tourism a primary draw for this region. This would allow us to reach outside our traditional, regional markets and tap national and international audiences who are looking for this kind of destination.

“That third-party validation would mean more than any marketing or advertising we could do. Not only would it bring international attention, it would also give us a new focal point for our marketing efforts.”

Economic Impact Could Quadruple in Ten Years

Growing visitation and a higher profile are expected to quadruple the economic impact of the proposed NPS unit in its first ten years.

YEAR ONE of Operation

Attract

200,000 visitors

Support

\$19 million local sales

239 local jobs

\$9 million personal income

\$0.7 million state & local sales and hotel taxes

YEAR TEN of Operation

Attract

780,000 visitors

Support

\$81 million local sales

1,074 local jobs

\$27 million personal income

\$3 million state & local sales and hotel taxes



Larry Scott
Owner,
Scott's Landing

“The Mobile-Tensaw Delta is not as big as the Louisiana wetlands, but nothing really equals our ecosystem here.

“It’s tough to access the Delta now if you don’t have your own boat. There is so much to see 30, 40, or 50 miles up, it’s incredible. And there are all kinds of historic stops along the way.

“I think a national park could really bring a lot to our area. They could work side-by-side with our state and local agencies that concentrate more on enforcement, and provide more access and park rangers engaging with visitors so more people can see the Delta and really enjoy it and come to know it.

“A lot of folks come through hopping from state park to state park. Imagine what a national park designation could do.”

Building a Park to Maximize Economic Benefits

The Mobile-Tensaw Delta harbors a patchwork of natural, cultural, and historical sites with largely untapped economic value. An NPS unit such as a National Park and Preserve could help develop this potential more fully.

Factors that Influence Visitation

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

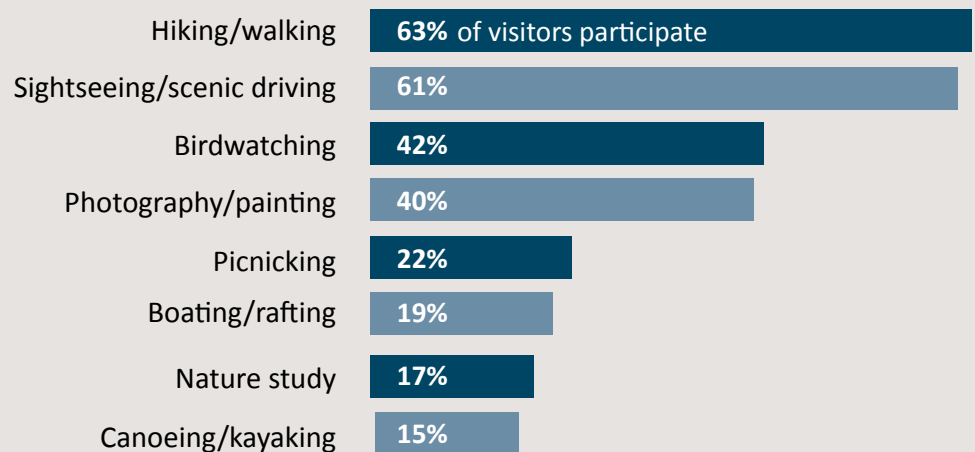
- 1) The nature of the protected landscape. Including an array of landscapes and cultural features in the park could broaden its appeal, and encourage longer stays.
- 2) Access and facilities—the kinds, capacity, location, and appeal of in-

terpretive and recreational facilities, scenic drives, and visitor services such as watercraft rentals, guides. The majority of park visitors will seek an easily accessible experience to engage them, especially on their first visit.

Even if the Delta park and preserve is largely water-oriented, including upland areas where there can be walking trails and boardwalks, as well as scenic drives, would expand its appeal for visitors. (See chart below.) Visitor centers and interpretive facilities are critical because visitors expect them and use them heavily.

Especially in a water-oriented park, guide and rental services are key. In Everglades National Park, the ma-

Most Popular Activities at Water-Focused National Parks



At four NPS units primarily focused on water (e.g., rivers and swamps), the most popular visitor activities are land-based. At New River Gorge National River, for example, only about a quarter of visitors participate in river recreation.

majority of visitors who see the park by water do so on a guided tour.

- 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.

- 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.

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 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 histor-



Linda Vice

Director, Rural Southwest Alabama Office of Tourism and Film

“Our connection to the Delta will be a big draw for the whole region. With so many natural attractions, Alabama is the ‘Colorado of the East.’ And there is a deep cultural history with five major Indian tribes and so many undiscovered artifacts, the Mauvilia heritage, and all kinds of cultural attractions.

“This is a region of stories. I know of 25 storytelling clubs that connect to the rich history and lore of this area. When people hear stories, they get enthralled and want to learn more and do more here.

“We really need more marketing exposure, which means cooperation. A national park would give us more of a focus, and absolutely be a positive development. Park visitors would want to branch out and visit other nearby attractions.”



Mounds, canals, and artifacts from Mississippian sites such as Bottle Creek point to the region’s deep cultural roots. Courtesy University of South Alabama Archaeology Museum



Kristian Aboud

Owner,
Five Rivers Delta Safaris

“In the Delta, we have a clean slate, so we have an opportunity to implement a national park effectively and ensure a high level of quality in the process.

“An NPS designation could increase the income potential for the area. NPS holds concessionaires to a high standard, and that helps raise the quality of vendor offerings and the visitor experience. Their presence could improve wages and salaries.

“Within an hour of Mobile, I can take visitors fishing, hunting, kayaking, canoing, and hiking—everywhere from pine forests to salt marshes. On our tours, we hear: ‘Wow! I didn’t know this existed. I wish I’d planned more time here.’

“Global societies travel specifically to national parks. We could be on that map, and have the added appeal of being one of the newest national parks.”

ical 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.

Cultivating the Local Context for a National Park Service Presence

The array of efforts underway around the Delta region to develop and promote cultural and nature tourism could help create a context in which an NPS designation such as a National Park and Preserve could provide maximum economic benefits.

Efforts to improve promotion, transportation links, and packaging of visitor experiences will help lay that groundwork. In this context, an NPS unit could significantly improve public access in the Delta and expand the market for lodging and other services for nature and heritage travelers.

This preliminary study found that economic impacts could vary dramatically depending in large measure upon how the park and preserve is configured, the types of visitor facilities and services developed, and the extent to which surrounding communities support, promote, and enhance visitors’ park experience.

An Idea Worth Exploring

This study found that a new National Park and Preserve or similar NPS designation is an idea worth exploring, if economic gain is one of the goals for expanding conservation lands, public access, and recreational opportunities in the Delta. Such a designation would go hand-in-hand with regionwide efforts to expand the area’s appeal to cultural and nature travelers, and offer the region’s communities the opportunity to realize significant economic advantages.



White-topped pitcher plant in bloom.
Courtesy Dennis Holt (dennisholt.com)

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Back cover: Low light across the Delta.
Courtesy Beth Hamric.

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analysis.



Friends of the Delta