

The Space Coast birding & wildlife

Festival 2011
Economic Impact Report
& Demographic Profile



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Mike Legare, U.S. Fish & Wildlife Service

Prepared for **The Brevard Nature Alliance**
by **PRÆCIPIO EFS**

The Space Coast Birding & Wildlife Festival 2011

Economic Impact Report & Demographic Profile

Presented by The Brevard Nature Alliance

Hosted in Brevard County, Florida, January 26- 31, 2011

Report completed by



Michael H. Slotkin, Ph.D.
mslotkin@praecipio-efs.com

Alexander R. Vamosi, Ph.D.
avamosi@gmail.com

Karen Chambliss, Ph.D.
kchambliss1@cfl.rr.com



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EXECUTIVE SUMMARY

The 14th Annual Space Coast Birding & Wildlife Festival (hereafter SCBWF), presented by the Brevard Nature Alliance, was held January 26–31, 2011, in Brevard County, Florida. The SCBWF is based in Titusville, the heart of Florida’s Space Coast, whose wealth of environmental, historical, and cultural resources along with outstanding quality of life activities provides an ideal setting. “The Festival focuses on the abundance and diversity of the natural world around us – from the Atlantic Ocean west through the Indian River Lagoon estuary system to the St. Johns River and surrounding wetlands.” The 2011 Festival offered 367 activities, including but not limited to field trips, photo workshops, classroom and keynote presentations, and kayaking and airboat tours, with 1,182 persons registered for participation in one or more events. Overall, 4,578 individuals participated in some aspect of the Festival. Available exhibit space was rented to capacity, with 76 businesses, governmental and non-governmental organizations staffing booths. The array of activities and participation from attendees and exhibitors represented all time highs.

Participants hailed from 41 different states encompassing all regions of the United States; moreover, a few attendees traveled from international origins, including Argentina, Canada, Ecuador, Ireland, Jamaica, the Netherlands, Panama, South Africa, and the United Kingdom. In total, 71 percent of Festival registered attendees arrived from origins outside Brevard County, while 29 percent were locals. Concerning the non-locals, about 58 percent arrived from 37 other Florida counties comprising the Festival registrant base, while the other 42 percent came from other states or international origins.

In terms of gender composition, surveyed registrants were tilted toward females by a 69 – 31 split, and about 36 percent of surveyed registrants resided in households where annual income is equal to or greater than \$100,000. Just under 18 percent of surveyed registrants held a Ph.D. or a professional degree, and almost 82 percent held at least a baccalaureate degree. Of the 54 percent of 2011 registrants who attended the Festival in prior years, the average number of times previously attended equaled 2.55. In terms of lodging, of the 3,416 aggregate nights stayed by Festival visitors, about 75 percent were booked in hotel/motel rooms or rented condos, while another 14 percent were procured at campgrounds or RV Parks. The average length of stay comprised 2.9 nights.

Registrants traveled to the Festival by way of auto (86 percent) and airline (14 percent). The dominant mode of registration was via the internet (71 percent of registrations), highlighting the superlative work of the Festival’s professional staff maintaining an effective, user-friendly website, which was redesigned and augmented prior to the 2011 Festival. Gauging attendee interest and satisfaction, when presented with the statement, “I plan to attend the Space Coast Birding & Wildlife Festival next year,” about 45 percent of respondents “strongly agreed.” Moreover, when presented with the statement, “I would recommend the Space Coast Birding & Wildlife Festival to others,” about 71 percent of those surveyed “strongly agreed.”

Finally, in terms of the Festival’s economic impact, PRÆCIPPIO EFS estimates the effect of Festival activities on Brevard County’s economy amounted to \$945,239 in sales output. Due to the omission of spending impacts associated with non-registrant visitors falling outside the scope of surveying, the Festival’s “true” economic impact is undoubtedly higher. The estimated impact of \$945,239 is *equivalent* to the creation of about 10.8 new and/or part-time jobs, and generated almost \$360,000 in labor income. In addition, the government revenues produced by Festival economic activity, at the federal and state & local levels, were estimated to be about \$125,000 in tax receipts.

INTRODUCTION

The 2011 SCBWF, the 14th edition of what has now become the nation's signature celebration of birds and wildlife, was held January 26-31, 2011 in Brevard County, Florida. Headquartered at Brevard Community College's Titusville Campus, the SCBWF is an ecotourism event of international renown, and a testament to the burgeoning popularity of birding, both in the U.S. and internationally, and the dedicated efforts of partnering communities at preserving vital habitats. The 14th Annual SCBWF garnered a prestigious honor when it was recognized by the Southeast Tourism Society (STS) as one of the Top 20 Events for Winter 2011. The STS promotes economic development through travel and sustainable tourism in 12 states of the Southeastern U.S.

Through the extraordinary efforts of a visionary professional staff, the SCBWF has carved a special niche within the birding and ecotourism industries. The SCBWF “[offers] attendees an opportunity to explore the globally significant natural areas of the Space Coast, home of one of the largest collections of endangered wildlife and plants in the continental United States.” With a stated mission “to protect and promote the environment for ecotourism activities,” the SCBWF educates and enlightens visitors through classroom and keynote presentations, workshops, wildlife and habitat tours, and photography optics presentations. An “educational emphasis is placed on the preservation and management of species and their habitats, as well as the cultural heritage and historical venues to be found in East Central Florida.”

Entering 2011, the central question for SCBWF stakeholders, as it has been for the past few years, was whether the dramatic improvement in Festival strength experienced in 2007 and 2008, which held steady in the “Great Recession” years of 2009 and 2010, would maintain itself despite still persistent national economic headwinds. The U.S. economy entered a recession at about the time the 2008 SCBWF transpired; by the 2009 Festival, the current economic downturn had ended its first year, with national job losses amounting to 4 million. By the time of the 2010 SCBWF was held, another 4 million jobs were lost, boding ill for the travel and tourism industry. While national job recovery did begin in late 2009, the payroll employment base, at the time of the 2011 Festival, was still about 7 million jobs lower than its pre-recession peak. Against this backdrop, expectations concerning the 2011 Festival were once again hopeful but guarded: Could the SCBWF hold its own during a continuing economic malaise?

In short, the answer is “YES”! SCBWF registrations amounted to 1,182 persons; down about 4.5 percent from 2010 but almost identical to the 1,179 individuals registered for the 2009 event. During the 6-day run of the 2010 Festival, an estimated 4,538 persons attended; similarly, in 2011, an estimated 4,578 persons attended and participated in some aspect of the Festival. This continued show of strength is greatly attributable to the drawing power of the Festival Exhibit Center, with its Raptor Project presentations, premier exhibitors, and art show and competition and silent auction.

A continuing indicator of the Festival's public education mission is The Raptor Project, a traveling collection of owls, falcons, hawks and eagles coordinated by Jonathan Wood, a master falconer and wildlife rehabilitator. Jonathan's shows always delight and enlighten those in attendance, facilitating a lasting learning experience about the raptor species. Other indicators of the SCBWF's reputational capital are provided by the quality of its keynotes. Renowned for booking nationally recognized speakers, the 2011 SCBWF continued that tradition with several distinguished guests. Julie Zickefoose, a noted author and artist, presented “Letters from Eden,” a naturalist's journal of stories and watercolors. Educated at

Harvard as a biologist, Julie strikes an emotional connection with her readers with essays that reveal the natural beauty of southern Ohio, and her 80-acre Appalachian home.

Another well received keynote was presented by Chuck Hagner, author of “Wings of Spring” and the “Guide to Duck and Geese.” Chuck is a long-time birder as well as contributing writer for *Birder’s World* (now *BirdWatching*) magazine, where he serves as editor-in-chief. Originally from Wisconsin and a devoted Milwaukee Brewers fan, Chuck enlightened the SCBWF with his keynote, “What We Have Learned and What We still Don’t Know about Birds.” An interview with Chuck is highlighted a bit later in this report.

In essence, at the heart of the SCBWF’s success are the stories offered at each year’s event. This report illustrates the value-added brought to Festival attendees through the SCBWF’s continual efforts *to be not only entertaining, but current as well as relevant*. But it is also an economic impact and marketing analysis of SCBWF activities, and in that light, hopefully just as illuminating.

The pages that follow provide the methodology and outcome of a survey-based analysis of the economic impact of the SCBWF on Florida’s Space Coast. **PRÆCIPPIO EFS estimates the impact of SCBWF activities on Brevard County, during the 2011 event, to be \$945,239 in sales output, equivalent to the creation of 10.8 full and/or part-time jobs.** Additionally, almost \$360,000 in labor income was generated, and about \$125,000 in government tax revenues were accrued. Considering the context, a national unemployment rate of about 9 percent and a regional unemployment rate above 11 percent, the drawing power of the SCBWF remained strong, which testifies to the Festival’s reputation within the birding industry. The pages that follow provide background and context to the economic impact statement that closes this manuscript.



Lorne Malo Guides a Field Tour at Lake Monroe

photo credit: Ray Scory

BACKGROUND

Since the “Great Recession” gripped the national and global economy, expectations have been guarded concerning SCBWF registrations, particularly in light of the tremendous gains which had been made in 2007 with the move to the January date. On balance, Festival registrations held steady in 2009 and 2010, falling by a modest 6 percent in the former, but amazingly, increasing by 5 percent in 2010. In 2011, registrations dipped a bit, declining by about 4.5 percent. All told, however, this resilience in the face of continuing economic headwinds is indicative of the regard the SCBWF is held within the birding community.

The success of the 2011 SCBWF is in large part attributable to sound organizational planning and execution. Festival planning tasks are split between these three central players: Ms. Laurilee Thompson, a lifelong environmentalist and managing owner of the Dixie Crossroads Seafood Restaurant in Titusville, founder of the Festival in 1997, serves with overview responsibilities of the annual event. Ms. Neta Harris, who serves as the Executive Director of the Brevard Nature Alliance (BNA), “a 501(c)(3) non-profit that provides support services for the Festival including office functions, financial services, statistical collection, and logistical activities,” functions also as the Festival’s lead facilitator. She interacts with sponsors, attendees, and volunteers and manages the timeline and budget. Ms. Harris is also instrumental in incorporating significant data gathering as part of the registration process, providing rather impressive marketing and demographic detail about SCBWF attendees and exhibitors. Indeed, other festivals consult with Ms. Harris on a regular basis due to the scope of data she possesses about the event. Ms. Barbara Hoelscher, Festival Coordinator, is responsible for talent, field trips, classroom presentations and workshops, the Art Show & Competition presented by the Titusville Art League, and overview of the Silent Auction. Ms. Hoelscher also oversees the creative layout and publication of the Festival Program.

The SCBWF represents yearlong planning and task participation by dedicated members of the BNA Board of Directors, staff, and devoted volunteers. And in 2011, the fruits of this entrepreneurial and managerial endeavor were truly outstanding. Some 367 activities, including but not limited to field trips, photo workshops, seminars, keynote lectures, and kayaking tours, were offered to attendees; in addition, available exhibit space was rented to capacity, with over 76 booths staffed and on display. Overall, 4,578 individuals participated in some aspect of the Festival.

Successful facilitation of this project is testament to the dedication of the SCBWF organizers and volunteers. Some basic metrics help illuminate this point. Over 1,022 emails were received and answered between April 2010 and February 2011, and over 548 phone calls and voice messages were received and/or returned during the same time period. Between October 2010 and February 2011, about 16,500 visits were made to the newly redesigned Festival website (www.spacecoastbirdingandwildlifefestival.org), with an average number of page views of just under 3 and an average time on site of about 3.5 minutes.

The SCBWF has also been quite proactive in its use of social media, an absolute must in developing a younger demographic market. A social media report conducted for the SCBWF by David McRee detailed the Festival’s efforts and cultivated a Facebook following, which resulted in 561 “fans” – people who have elected to receive updates from the SCBWF Facebook page directly to their own Facebook profile. SCBWF Facebook fans are found in about 20 countries and speak 15 different languages. David also blogs about the Festival on a regular basis, generating page views in the thousands, as well as posting SCBWF video to a YouTube account. The SCBWF has plans to embed some of the YouTube videos on its own website which should serve to increase video views and further showcase the Festival.

Moreover, other national blogs were utilized via negotiated exchanges to spread the word of the 2011 Festival to a larger audience. Overall, this “sweat equity” ultimately yields the event’s true deliverable, the production, at reasonable cost, of a panoply of scheduled activities and an amassing of experienced birding and wildlife talent second to none.

An Interview with Festival Keynoter Chuck Hagner, Editor-in-chief, *Birder’s World* (now *BirdWatching*) Magazine



Chuck Hagner in Denali
photo credit: Chuck Hagner

Mike Slotkin (MS): I'm here with Chuck Hagner, editor-in-chief Of *Birder's World* magazine and SCBWF keynoter. Chuck, you had a successful career at Time Life Books before taking the editor's position at *Birder's World*. What was the motivation for that move?

Chuck Hagner (CH): Yes, I had a successful and fun career at Time-Life Books. The fact that we wrote about all sorts of different topics is what made it fun as well as very interesting. I was at Time-Life Books for about 15 years and wrote about the Civil War, World War II, ancient civilizations, mysteries of the unknown, gardening, home repairs and projects. Many, many times, I tried to get the people at Time-Life interested in creating a series of books about Birds and Bird watching. But for one reason or another, it just didn't work out. So, when the folks in Milwaukee, Wisconsin called me and asked if I would consider working for them on *Birder's World* magazine, I thought it was an answer to a prayer. I grew up in Milwaukee, so, not only was this an opportunity for me to get paid to work on my hobby, but it also was an opportunity to move near my parents and to live where I grew up, cheering for our sports teams. It's been a good deal all the way around.

MS: Were you a birder early in life? Did someone introduce you to birding?

CH: I think I've been fascinated with things that fly my entire life. My early memories are of airplanes. I loved fast airplanes and things that fly very high. But there was a time when I was maybe 9 or 10 years old, when my father and I had a project. We took an old bleach jug, cleaned it out and let it dry. Then we cut some ports in the sides, filled it with birdseed and hung it up on the swing set in our backyard. I'll never forget that I could just look out the back window of my house and see all these birds ... so many different birds in my backyard! There would be such a tremendous array of colors and the fact that it could happen right in my backyard was amazing! It just didn't seem possible until that moment. So I'm very grateful to my Dad and that old bleach jug birdfeeder. I think that's what really turned me into a birdwatcher.

MS: With respect to “Guide to Ducks and Geese,” what was the inspiration for that project?

CH: Actually, that book grew out of a request from the publisher, Stackpole Books. I had just worked on a magnificent, coffee-table book that was filled with the photos of the great photographer, Tom Vezo, called *Wings of Spring*, and when that book went to press, the editor there said, “I've always wanted to create a guide for ducks and geese.” So the inspiration for that project actually came from a publisher, not me; although I was happy to do it.

MS: What are the two most significant things we've learned about birds in the past decade?

CH: We've learned that the numbers of birds are declining. There are fewer birds today than there were 10, 20, or 30 years ago and, in many cases, we don't know the reasons why. So, that means in many respects we are powerless to halt the decline or to restore the populations to what they used to be. However, we do know that in order to save and protect birds, we need to understand and preserve the lands the birds live and breed in, as well as the lands the

(continued on next page)

birds migrate through. The second thing I do know is that every birdwatcher's observations of birds can play a vital role in helping conserve and to understand birds that are around us. So if you see a bird and you enter it into E-Bird, or you participate in the Christmas Bird Count, you are helping us understand and put together the puzzle pieces that could ultimately help preserve a species well into the future.

MS: In your opinion, what's the most important "unknown" that still exists?

CH: There are so many unknowns. It's interesting to think that a species like the Cave Swallow; in 1980 we knew of it, but we didn't know where it spent the winter. Now we know that the majority of the birds fly down and winter in Mexico, but we didn't know that until 1994. Kirtland's Warbler is another species that we've known about since the late 1700's. We knew it wintered in the Bahamas, but we didn't know where it congregated until March/April of 2002. There's a large number of birds out there we're still learning about. There are too many unknowns for me to just pick one.

MS: Chuck, if you were given the choice of spending a day birding with either former Milwaukee Brewers Robin Yount or Paul Molitor, who would it be?

CH: Well, that's an easy one – it would have to be "the Kid," Hall of Famer #19, and all I would want to do is talk with him about his 3,000 hit. Every Milwaukee Brewer's fan would want to spend a day with #19, and that's no offense to Paul Molitor. ♦

Note: *Birder's World* has been renamed *BirdWatching* magazine – more information about Chuck Hagner and *BirdWatching* magazine can be found at the website: www.birdwatchingdaily.com.



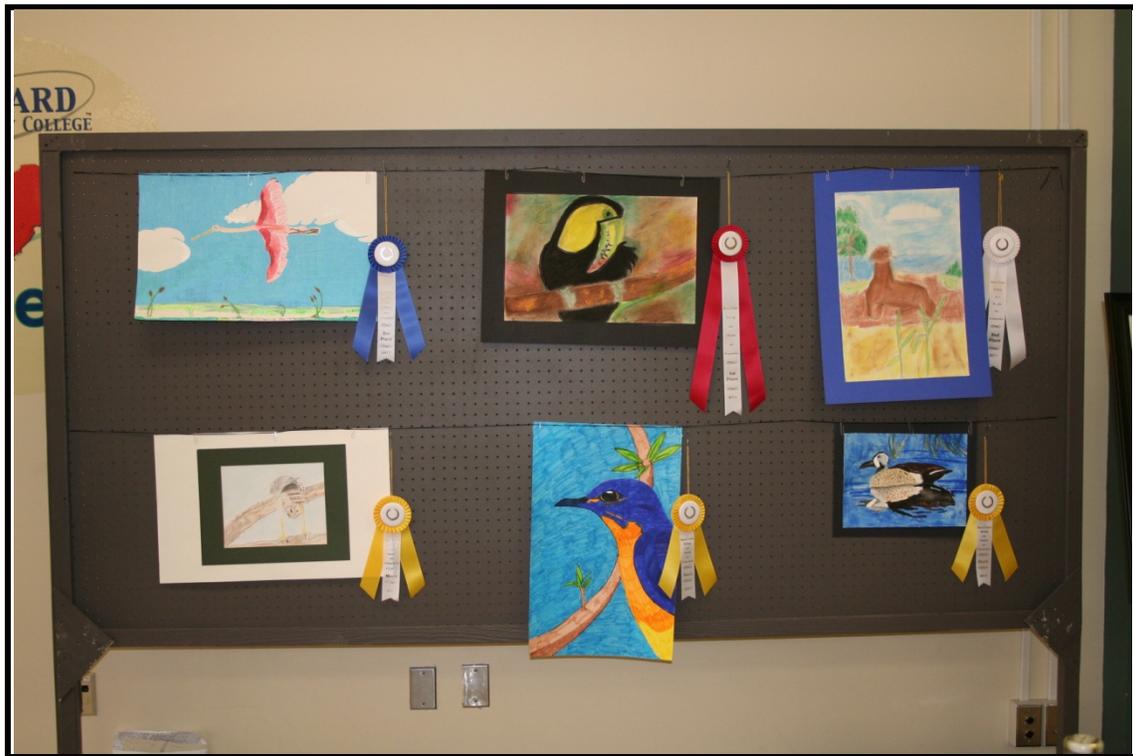
Double-Crested Cormorant

photo credit: DeeAnn Jennings Kiesel

ECOTOURISM & THE 2011 SCBWF

In order to provide context for the 2011 SCBWF, an understanding of ecotourism and developments in the ecotourism market must first be explored. The International Ecotourism Society currently defines ecotourism as “responsible travel that conserves natural environments and sustains the well-being of local people” [www.ecotourism.org]. The ubiquitous reference to “green travel” in mainstream periodicals supports the generally held notion that ecotourism is one of the fastest growing segments of world tourism.

Economic and demographic trends associated with bird and wildlife viewing, a crucial subset of ecotourism, are consistent with the overall growth in world nature travel. According to preliminary results from the 2006 U.S. National Survey of Fishing, Hunting, and Wildlife-Association Recreation, 71.1 million people aged 16 years and older engaged in wildlife observation, spending about \$45.7 billion per year. Wildlife watchers who embarked on trips away from home for the purposes of observing or photographing wildlife numbered 23 million, and trip-related expenditures amounted to almost \$13 billion. Bird observation comprises the largest component of trip-related wildlife viewing, with away-from-home participants numbering about 20 million. This constitutes over 85 percent of the trips taken away from home for the purposes of observing or photographing wildlife.



Children's Art Competition Winners

photo credit: DeeAnn Jennings Kiesel

The state of Florida offers a unique and fertile location for ecotourists who actively engage in bird and wildlife viewing. A recent report prepared for the Florida Fish & Wildlife Conservation Commission estimated that in 2006 about 4.2 million people participated in some form of bird and wildlife viewing. The net effect was the creation of 51,367 full and part-time jobs, the generation of almost \$700 million in state sales and federal income taxes, and a total economic effect of \$5.2486 billion for Florida's economy [Southwick Associates (2008)].

Florida's Space Coast is ideally positioned to appropriate a sizable share of the bird & wildlife ecotourism market in the Sunshine State. The ecological landscapes of Brevard County and its border areas provide a wondrous bounty of natural capital, offering sustenance for an unparalleled collection of endangered plants and wildlife. These environmental assets include but are not limited to the following: Merritt Island National Wildlife Refuge and Canaveral National Seashore; Pelican Island National Wildlife Refuge, the nation's first wildlife refuge; Archie Carr National Wildlife Refuge, renowned for its importance in protecting endangered sea turtles; various state parks and conservation areas; local land acquisition projects such as the Enchanted Forest Sanctuary; and, the St. Johns River, Florida's longest freshwater river. In addition to Brevard's 72 miles of Atlantic Ocean coastline, the Indian River Lagoon, one of the most diverse estuaries in North America, spans the entire western side of the barrier island ecosystem. The BNA is in the process of inaugurating a long-range plan for ecotourism activities in Brevard County with the objective of becoming the single-point of contact and clearinghouse for ecotourism on the Space Coast.



Canaveral Marshes - Blue Heron Water Reclamation Area

photo credit: DeeAnn Jennings Kiesel

The relationship between ecotourism and land and biodiversity conservation is reinforcing. Land and biodiversity protection lays the groundwork for successful ecotourism ventures whose revenue streams can be used to inspire even further land set-asides. Thus, events like the SCBWF, which galvanize public and private support for ecotourism, provide needed emphasis for conservation efforts.

In the balance of this report, we explore both demographic and attitudinal characteristics of the SCBWF registrant population. This analysis leads into a survey-based examination of the economic impact of the SCBWF on Brevard County, Florida. Economic impact studies are driven by the assumptions and methodologies employed by researchers; accordingly, results are proffered only after a concise but thorough discussion of this study's research method. Some final comments close the report.



Historic Cape Canaveral Lighthouse

photo credit: Joel Reynolds

FESTIVAL PEOPLE

By examining SCBWF registration documents as well as attendance sign-in sheets, the BNA Board of Directors is able to report some general demographic information on SCBWF attendees. For the 2011 SCBWF, participants hailed from 41 different states encompassing all regions of the United States, signifying a diffusion of the SCBWF brand-name. Moreover, a few attendees traveled from international origins, including Argentina, Canada, Ecuador, Ireland, Jamaica, the Netherlands, Panama, South Africa, and the United Kingdom..

As would be expected, many of the SCBWF visitors were local, and in fact, some 29 percent of attendees hailed from Brevard County. Another 41 percent of attendees arrived from 37 other counties in Florida, including as far west as Leon County in the Panhandle and as far south as the Florida Keys (Monroe County). Overall, 71 percent of attendees visited from outside of Brevard County; of these non-locals, 42 percent originated from outside the state of Florida (or 30 percent of the total registrant pool).

More detailed information about SCBWF attendees can be gleaned from surveys administered by consultants from PRÆCIPPIO EFS. In particular, this demographic analysis concentrates on one specific and vital segment of the attendee population: SCBWF registrants who paid an initial \$10 registration fee. This is done for two primary reasons. First, while many visitors freely traveled through the exhibit area, and others attended a select few seminars on a pay as you go basis, only SCBWF registrants were able to participate in field trips and other special events, which constituted the largest segment of SCBWF attendee revenue streams. And because of their greater intensity of interest, as reflected by the registration fee, SCBWF registrants comprise the bulk of out-of-town guests attending the SCBWF. This point is crucial in that lodging, dining and other expenditures by non-locals are a significant factor in the SCBWF's economic impact. Second, SCBWF registrants constituted the largest cohort of the surveyed population. Accordingly, generalizations based upon this surveyed group are the most reliable.

Are there any benchmarks with which to compare SCBWF registrants? Wight (1996a, 1996b), Meric and Hunt (1998), and Diamantis (1999) provide general profiles of the ecotourist market, and their findings show that experienced ecotourists tend to be older, better educated, and willing to spend more than the greater tourist population. In terms of their preferences and motivations, ecotourists are interested in a variety of activities that run the gamut from passive to active. Hiking, wildlife viewing, and casual walks are preferred by ecotourists, with the motivations of seeing new places or experiencing new sights and sounds, enjoying nature, finding undisturbed locales, and most importantly, learning from their discoveries. Facilitating wildlife observation is a central tenet of the ecotourist experience, and PRAECIPPIO's Mike Slotkin sat down for a Q&A with Field Guides – Birding Tours Worldwide's Jan Pierson, one of the company founders and a n international birding veteran of more than three decades (see next page).

With these cohorts in mind, an analysis of SCBWF registrant survey results provides some interesting demographic detail. Figures 1-4 examine the *surveyed* registrant population by gender, age, household income, and educational attainment. In terms of gender composition, registrants were weighted towards females, 69 vs. 31 percent (see Figure 1), which is consistent with splits observed at previous SCBWFs where female super-majorities have occurred. In 2008, for example, the Festival exhibited a 64-36 female-male split.

Jan Pierson, Co-Founder and Guide for Field Guides – Birding Tours Worldwide

Mike Slotkin (MS): Jan, can you tell us a little about Field Guides? What do you focus on and where do you visit?

Jan Pierson (JP): Field Guides was started in 1985 and has grown to where we offer about 130-140 trips each year to about 50+ countries on about 110 to 115 different itineraries.

MS: What is the range of time frames of the various itineraries?

JP: Our shortest trips are in the 6 – 7 day range and our longest ones are about a month long, depending on the destination. We don't do weekend trips any more.

MS: Who's your usual client? Is there a specific demographic or folks that utilize your tours?

JP: Generally, it's folks whose kids have moved out of the house and who now have the time and resources to put toward their birding interests. So, the average age is probably in the late 50's to early the 60's, but we've have teens as well octogenarians on tours ... the full range!

MS: Are the folks who go on your tours more educated or more adventure-seekers?

JP: It's definitely a well-educated audience, in general. We have people with all levels of bird-watching experience as well as people with quite a lot of travel experience, too.

MS: As President of the company, are you behind a desk most of the time or do you still get out and guide tours?

JP: Well, I am behind a desk most of the time right now. Our primary office is in Austin, Texas and I live in Maine, so I telecommute right now. I have traveled a lot and guided numerous trips over the years. I was a full time Guide before starting the company in 1985 and was guiding for another 10 years before I started doing more of the Administrative work. I was still guiding about 3 – 4 tours a year up to about 1.5 years ago.

MS: About what age did you start Birding?

JP: Actually, compared to my colleagues, I started late in life. I started when I was in college at about age 19. A lot of my colleagues started when they were age 7 or 8 or 12 or something like that.

MS: Have you been to the Space Coast Birding & Wildlife Festival before?

JP: I have. This is my second time and I was here a couple of years ago.

MS: What are your impressions of this event?

JP: It's great! There are a lot of activities and some really good speakers, as well as a lot of vendors. Saturday seems to be the busy day with a lot of people going through. ♦

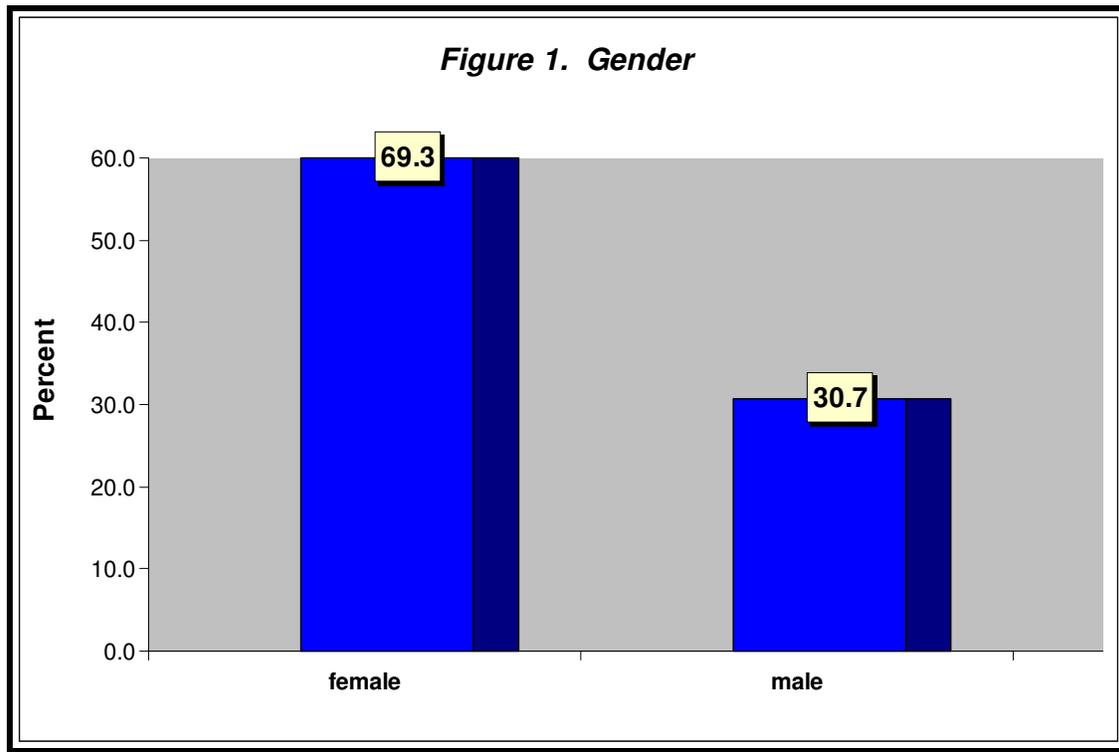
For more information on Jan Pierson and Field Guides – Birding Tours, please visit the website: www.fieldguides.com.



Jan Pierson, Field Guides – Birding Tours Worldwide
photo credit: Jan Pierson



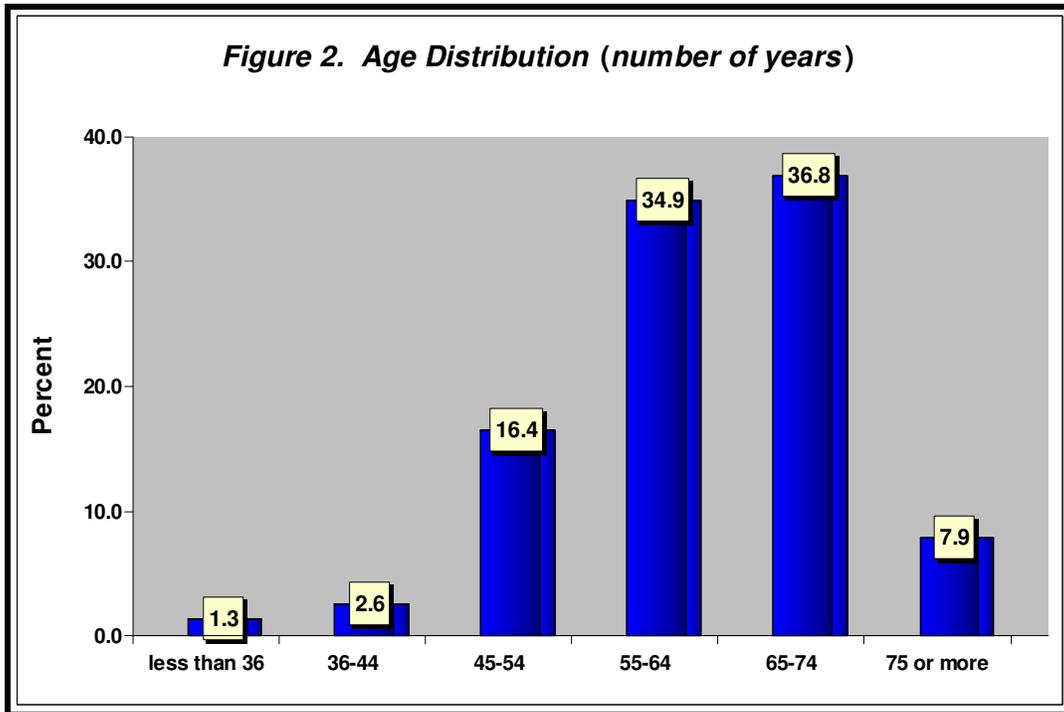
Field Guides – Birding Tours Worldwide Booth
photo credit: Jan Pierson



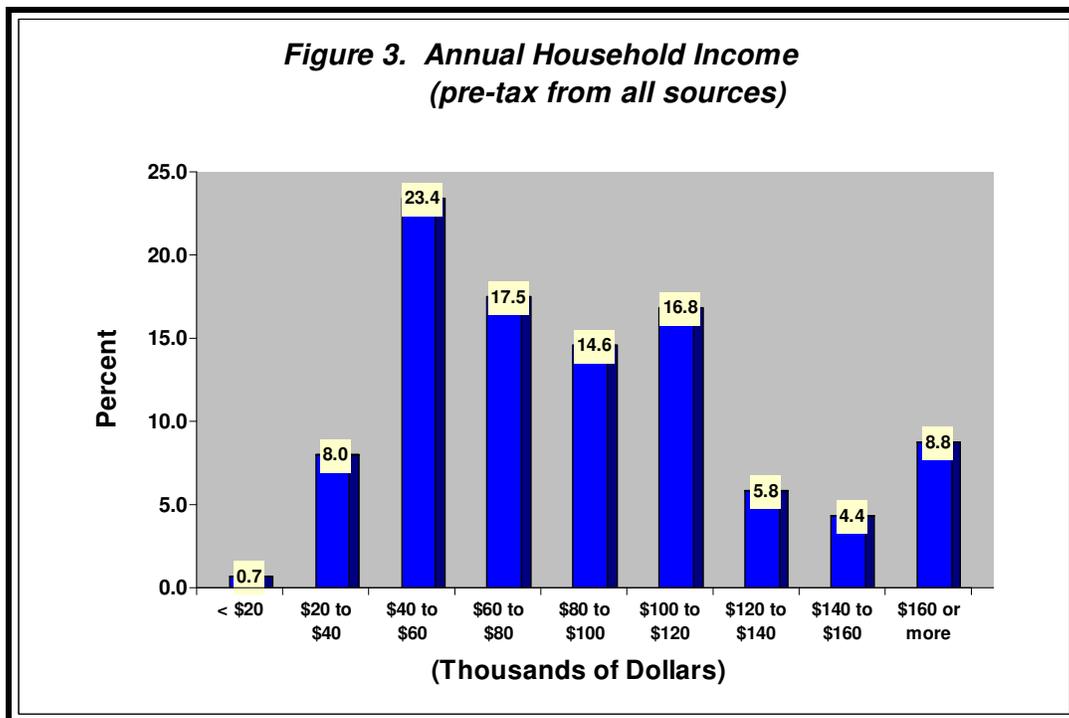
Source: PRÆCIPPIO EFS & Brevard Nature Alliance

Consistent with ecotourism trends, SCBWF registrants are indeed older, more affluent, and better educated than the population as a whole. Approximately 79.6 percent of surveyed registrants were aged 55 or greater, with about 45 percent aged 65 or greater (see Figure 2). Although young adult birders were participants at the SCBWF, the surveyed population revealed only 4 percent of attendees aged less than 44 years, and this demographic may represent a target market to develop in future years. Overall, the age mix attending the 2011 SCBWF closely resembled the age make-up of previous Festivals, and the core 45-64 year old bi-segment is indicative of this fact. Representing about 54 percent of surveyed registrations in 2009, and 51 percent in 2010, about 51 percent of surveyed registrants at the 2011 Festival resided in the 45-64 year old age bracket.

As for affluence, SCBWF surveyed registrants tend to be wealthier than the population as a whole, again consistent with established cohorts. About 36 percent of registrants live in a household where yearly income exceeded \$100k, and about 13 percent of all registrants denoted annual household income equal to or greater than \$140k (see Figure 3). However, birding is not solely the domain of the wealthy; all in all, the SCBWF revealed a rather healthy distribution of income. In fact, the number of surveyed individuals marking a yearly household income less than \$60k comprised about 32 percent of the 2011 registrant population.

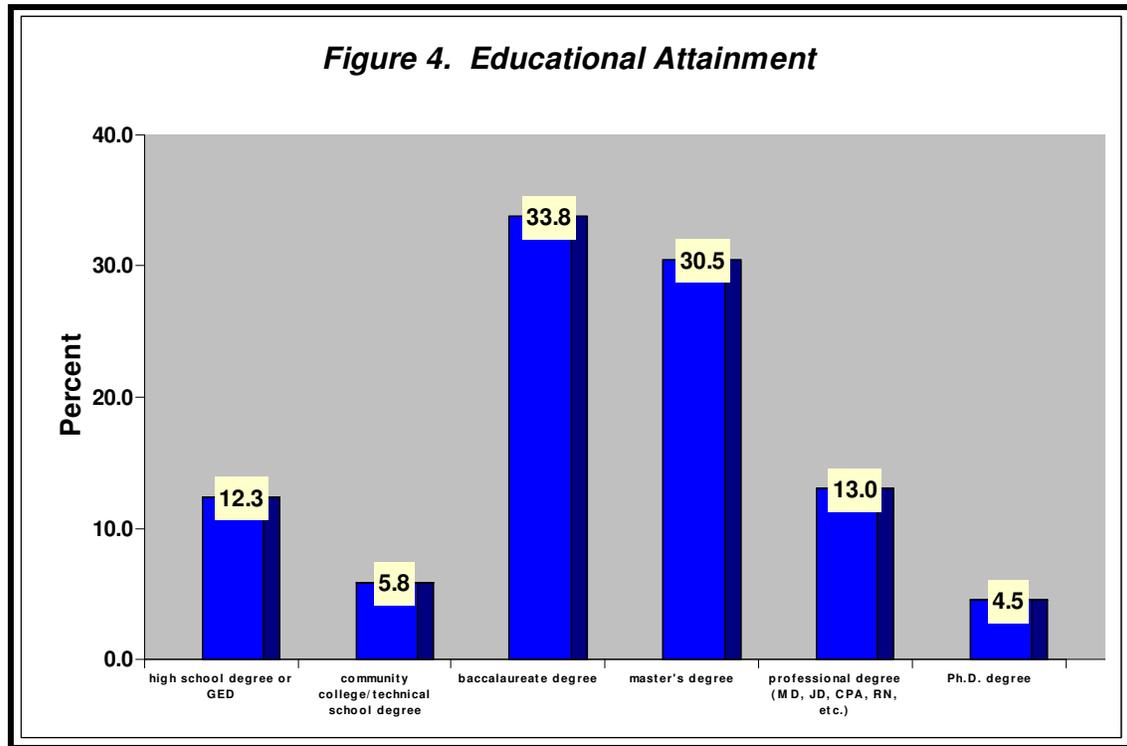


Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Source: PRÆCIPPIO EFS & Brevard Nature Alliance

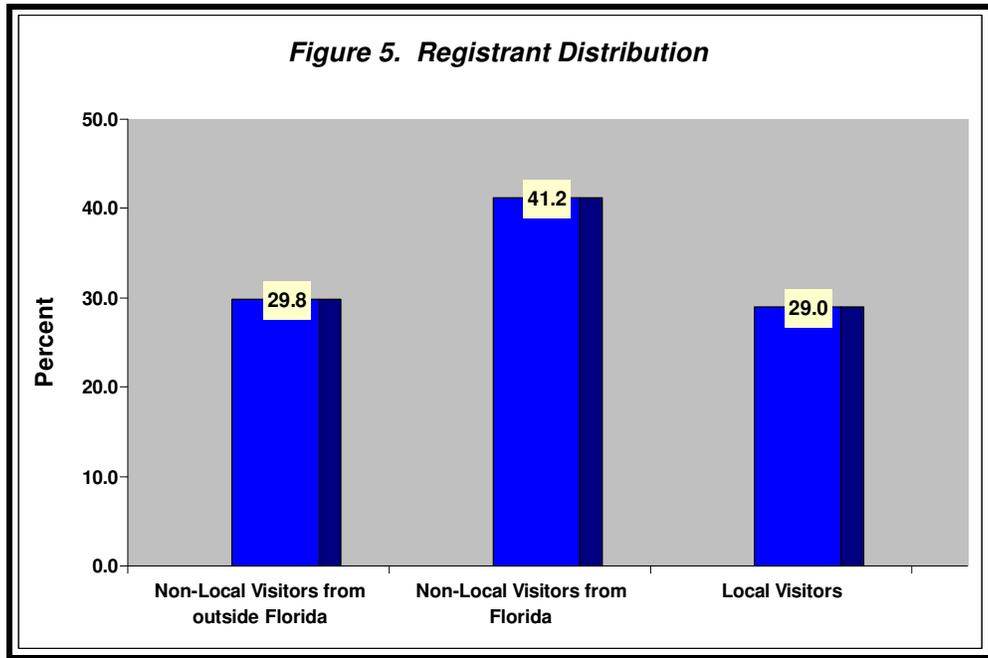
Higher levels of educational attainment tend to accompany higher levels of wealth. This is indeed the case with respect to surveyed SCBWF registrants. Just under 18 percent of registrants held a Ph.D. or professional degree, and almost 82 percent held at least a baccalaureate degree (see Figure 4). Given the fact that “learning” is an important criterion of ecotourism, the level of education attainment associated with SCBWF registrants is consistent with this tourism market segment.



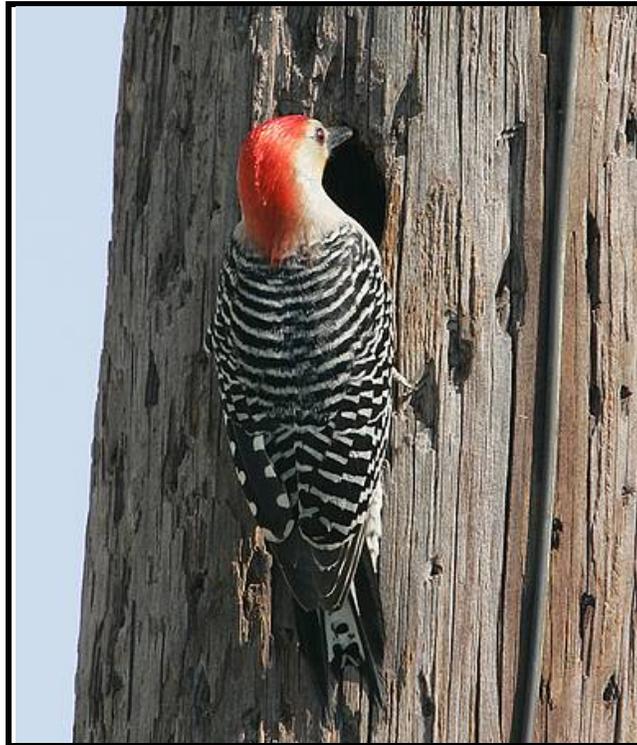
Source: PRÆCIPPIO EFS & Brevard Nature Alliance

This report will showcase the SCBWF’s economic impact on Brevard County. It is therefore appropriate to delve into particular demographics that ultimately drive economic activity. About 71 percent of Festival registrants classified themselves as non-local (see Figure 5), while the remainder identified themselves as permanent residents of Brevard County (29 percent). Non-locals were segmented into those originating from other areas of Florida or outside the State of Florida. Since about 58 percent of non-locals hailed from other parts of Florida, this segment constitutes about 41 percent (i.e., 58% of 71%) of the registrant population while the cohort arriving from outside Florida also comprises about 30 percent (i.e., 42% of 71%) of the registrant pool.

This is an extraordinarily significant result, for while community interest and support are vital components of SCBWF success, non-local visitors residing in hotel/motels, renting condos, or parking at campgrounds and RV parks, who additionally purchase restaurant meals, groceries, and souvenirs, impart the largest boost on local economies. Thus, the magnitude of the stimulus depends crucially on attracting non-local birding enthusiasts.



Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Red-Bellied Woodpecker Entering the Nest

photo credit: Joel Reynolds

The geographic distribution of the 2011 SCBWF registrant origination (see Figure 6a) highlights the regional and national drawing power of this premier birding event (non-U.S. zip codes are omitted). Tight clustering occurs all along the Atlantic Coast as well as the large metro areas of the southeast, northeast and midwest regions of the U.S. Rural settings are also represented (e.g., western North Carolina), and as stated earlier, attendees originated from 41 of the 50 states. It is interesting to note the smaller but still significant draws occurring from west of the Mississippi River. On the Pacific coast, both the Los Angeles and San Francisco Bay Area showcase registrant potential, as do other major markets in Texas, Oregon, Washington State, Arizona, Nevada, and Colorado.

Figure 6a. Geographic Distribution of Registrant Origination, National Focus, 2011



Source: PRÆCIPIO EFS, Brevard Nature Alliance, © Microsoft MapPoint 2011

Figure 6b highlights the geographic distribution of the 2011 SCBWF registrant origination from the perspective of the southeastern United States. Within the State of Florida, tight clustering occurs along transportation corridors in neighboring counties, but representation is strong throughout the peninsula, even up to the midpoint of the Panhandle. Another interesting feature is the fact that every state in the heart of the Old South is represented save Louisiana, with particularly broad depth offered from the mid-Atlantic regions (i.e., the Carolinas and Virginia).

Figure 6b. Geographic Distribution of Registrant Origination, Southeast Focus, 2011



Source: PRÆCIPPIO EFS, Brevard Nature Alliance, © Microsoft MapPoint 2011

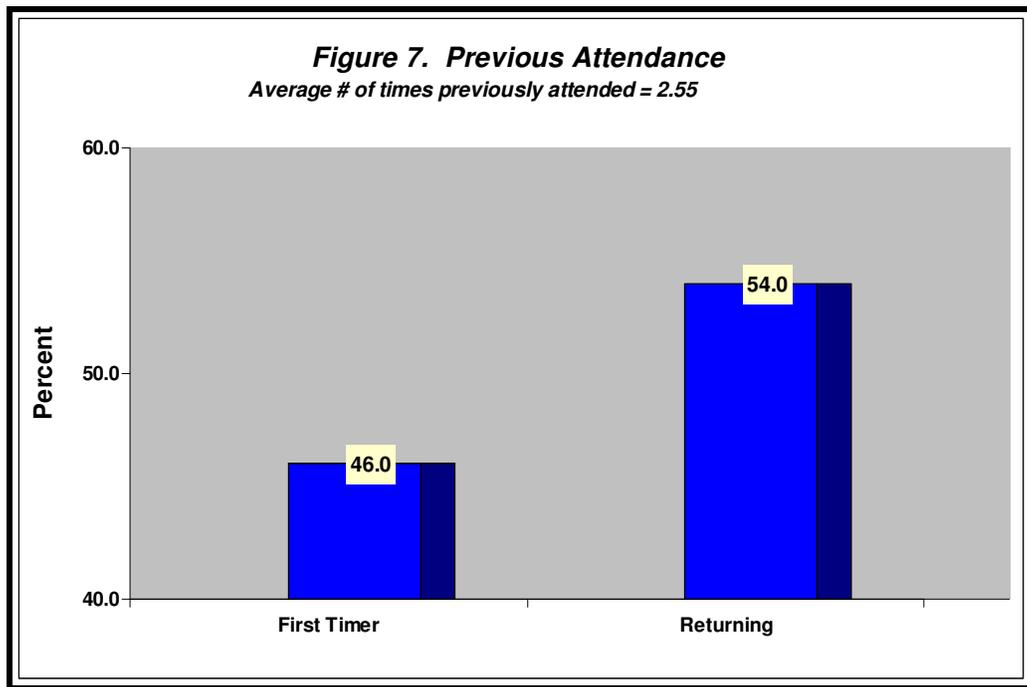


Marlene Smith, Festival PR Representative at the I-95 Welcome Center

photo credit: Marlene Smith

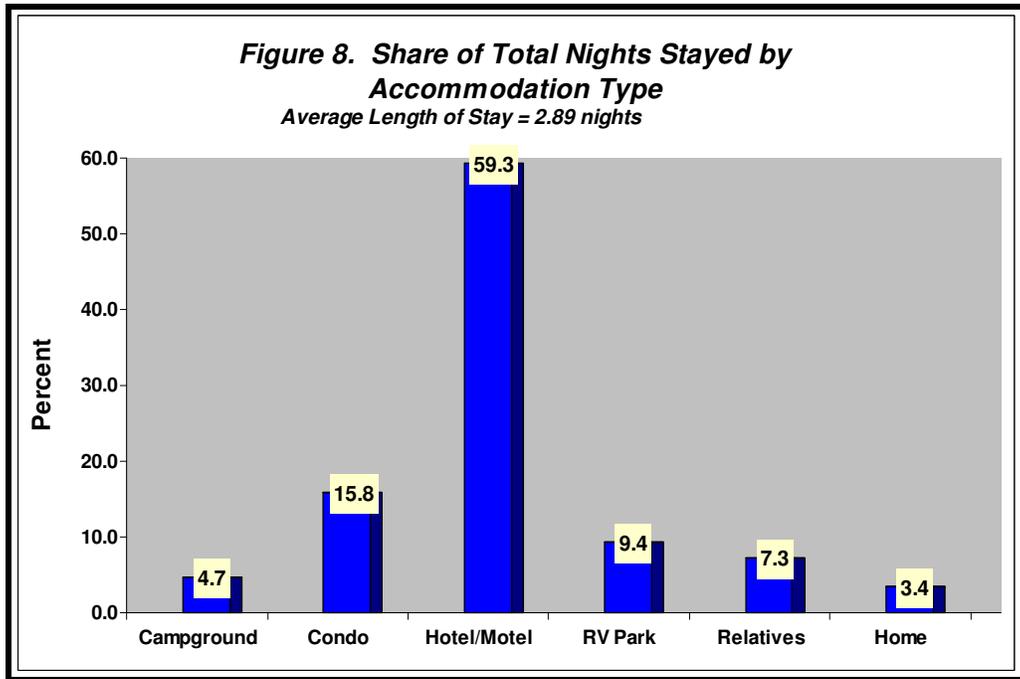
One hallmark of successful, recurring events is the ability to draw a healthy mix of new and return attendees. Returnees provide an “anchor” market and generate considerable advertising by word-of-mouth contact with friends, family, and co-workers. At the same time, the ability to draw in “new blood” is indicative of the Festival’s expansive reach, particularly in light of enhanced national advertising. About 46.6 percent of 2009 registrants attended the SCBWF in prior years, similar to the returning visitation rates exhibited in 2007 & 2008. In 2010, 50.5 percent of Festival registrants were returning visitors, while 49.5 percent were first timers. Continuing that slight upward trend, in 2011, 54 percent of Festival registrants were returning visitors, while 46 percent were first timers (see Figure 7).

For returnees, the average number of times previously attended was about 2.55, indicative of a solid core constituency. This nucleus is composed of former registrants, now numbering in the thousands, who on average return to the Festival every 3-4 years. This blend of new registrants and veteran SCBWF visitors provides uniqueness to each Festival, while still maintaining needed institutional memory and foundation. Indeed, at this juncture the SCBWF is a recognized brand; preserving that brand is the central mission of Festival stakeholders.



Source: PRÆCIPIO EFS & Brevard Nature Alliance

Examining the accommodations utilized by SCBWF registrants (see Figure 8), about 75 percent of non-local visitation nights were booked at hotel/motels or rented condos, the type of lodging amenity typically entailing higher expenditure. Another 14 percent or so of room nights were reserved at campgrounds or RV parks, with the balance staying with friends and families. In aggregate, the average length of stay was about 2.9 nights, which bodes well for local economies since lodging oftentimes constitutes the largest component of tourist spending.



Source: PRÆCIPPIO EFS & Brevard Nature Alliance

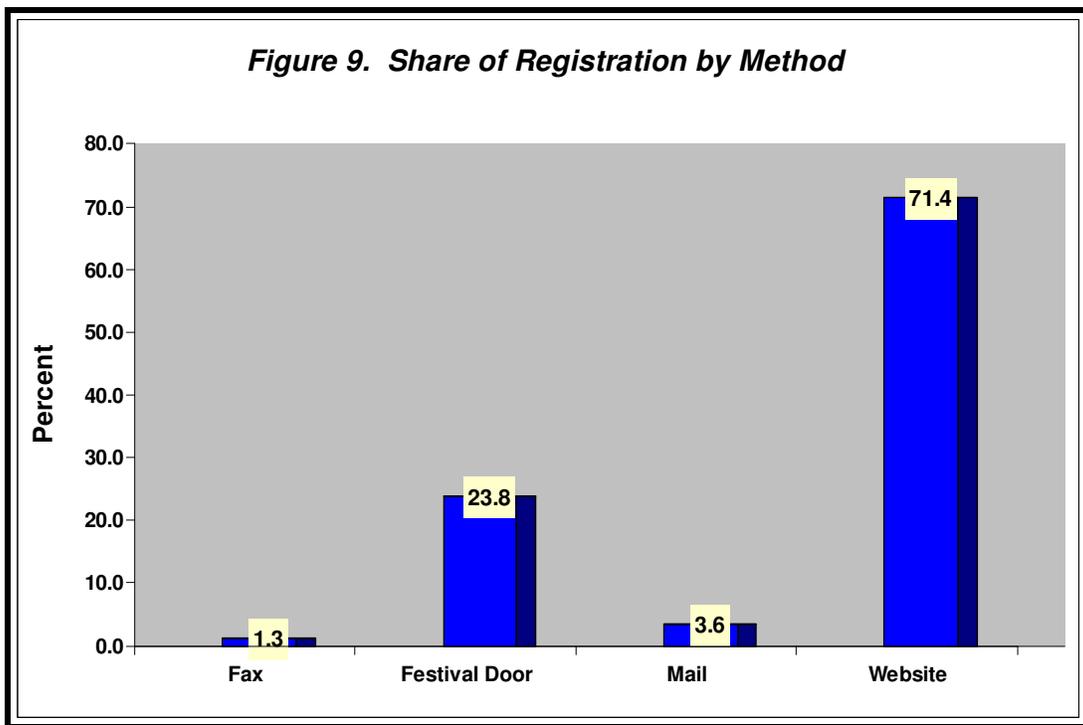


Having Fun on the Florida Bird Detective Field Trip

photo credit: Ray Scory

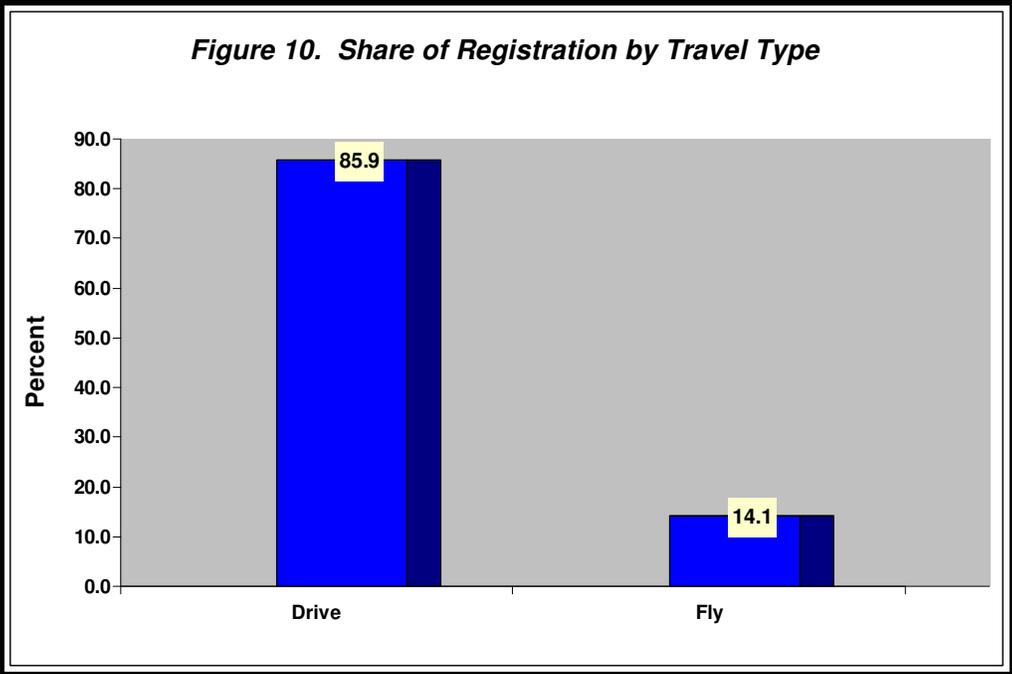
The next two graphics signify the depth of visitor detail the SCBWF has at its disposal due to the superior efforts at data collection by the Festival’s professional staff, and in particular, Ms. Harris. Recognizing that data collection would be most thorough at the point of registration, Ms. Harris incorporated many of the questions, tendered in previous years during the survey process, as part of the registration questionnaire. The earlier visitor zip code analysis is also representative of this effort. Results are more conclusive in that rather being estimates based on a random sample of registrants they are formed from data captured from all registrants. In addition, the survey data is likely better since with fewer questions to answer respondents are more likely to entertain the queries in a deliberative manner.

Figure 9 showcases the importance of having an efficient, user-friendly website by highlighting the fact that more than 71 percent of the SCBWF attendees use the internet for registration purposes. About 24 percent, most likely locals, register in person at the Festival door, while a meager 4.9 percent rely on snail-mail or fax. Given the profound importance of the internet, the SCBWF unveiled a newly designed website prior to the 2011, providing a more user friendly interface to prospective Festival attendees, sponsors, talent and exhibitors.

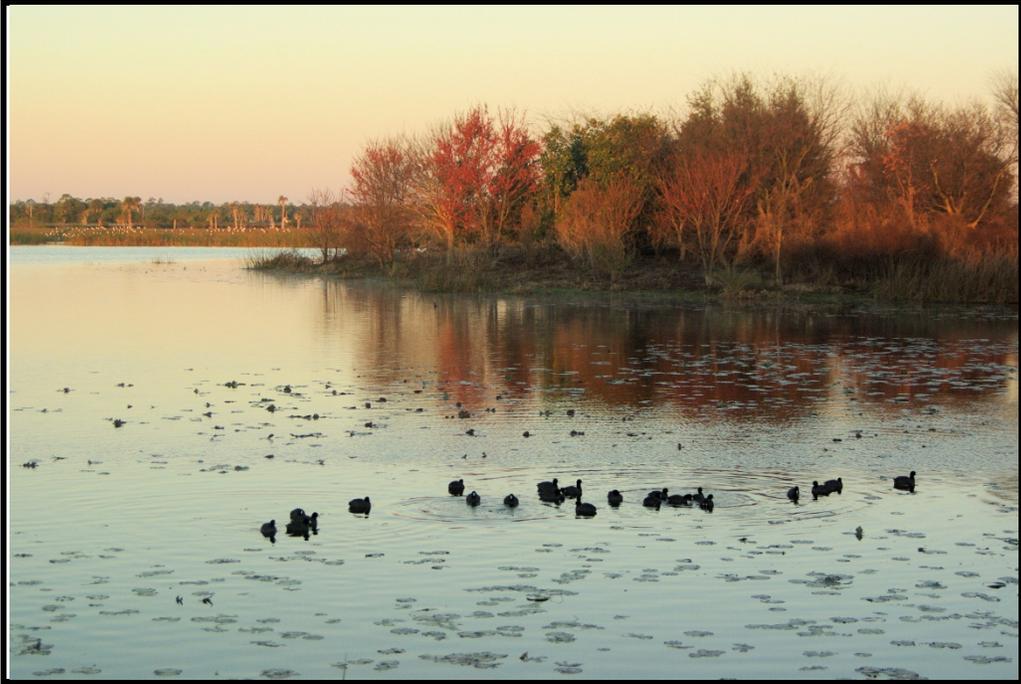


Source: PRÆCIPIO EFS & Brevard Nature Alliance

Figure 10 details the method of transportation by which SCBWF registrants arrive at the Festival. About 86 percent rely on the use of a personal or rental car, while about 14 percent fly into the area. This is similar to the percentages observed in 2010, where about 92 percent drove to the Festival and another 8 percent took a flight.



Source: PRÆCIPPIO EFS & Brevard Nature Alliance

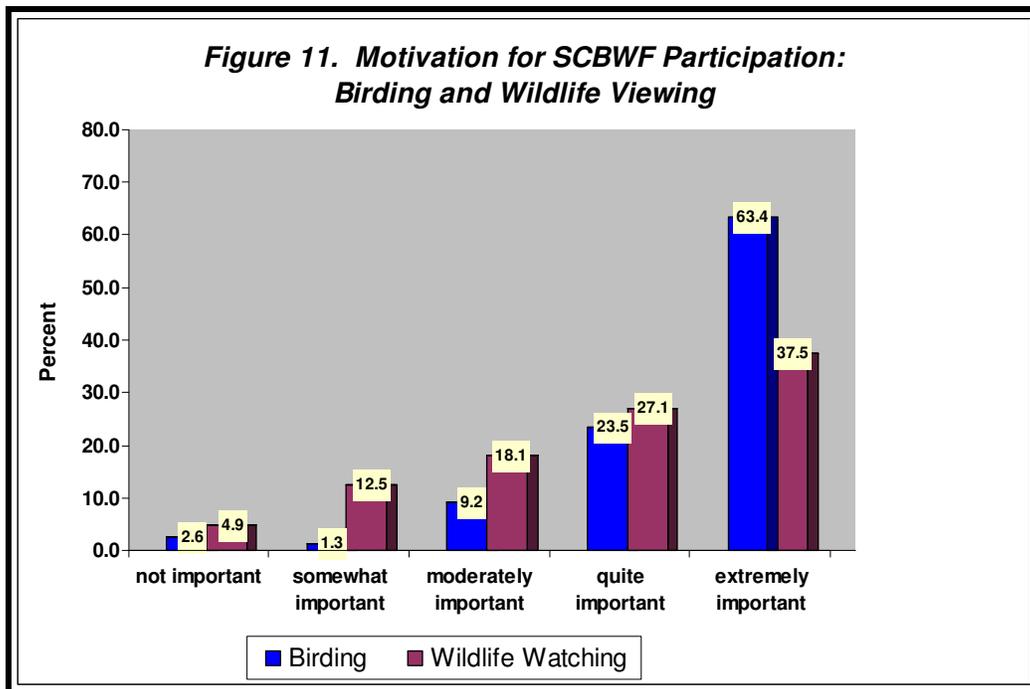


Morning Outing

photo credit: Ray Scory

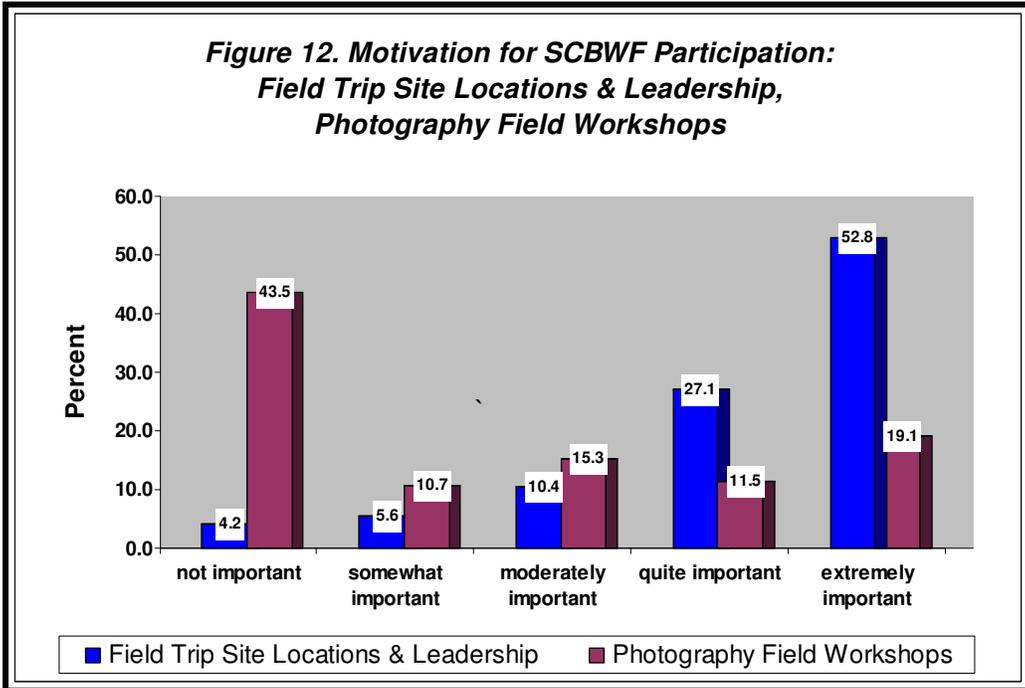
Finally, three sets of Likert scale questions (5-point) were presented to registrants, the first set requiring the respondent to mark down an answer ranging from not important to extremely important. These initial questions dealt with the motivations of Festival registrants, essentially seeking to ascertain the primary rationale(s) for why attendees chose to participate in the SCBWF. Potential *motivators* included “birding,” “wildlife viewing,” “field trip site locations and leadership,” “photography field workshops,” “keynotes & classroom presentations,” “water adventures,” and “social interaction.” Results are displayed in Figures 11-13.

In particular, and as expected, “birding” and “wildlife viewing” drew strongly affirming responses, where “extremely important” was the modal answer at 63.4 percent and 37.5 percent, respectively (see Figure 11). “Field trip site locations and leadership” was also a significant drawing card (see Figure 12), where about 53 percent of respondents tabbed “extremely important,” again the modal answer. Interestingly, “photography field workshops” exhibited a degree of bi-modalism, either “quite important” or “extremely important” to about 31 percent in aggregate, but another 44 percent viewed “photography field workshops” as “not important.”

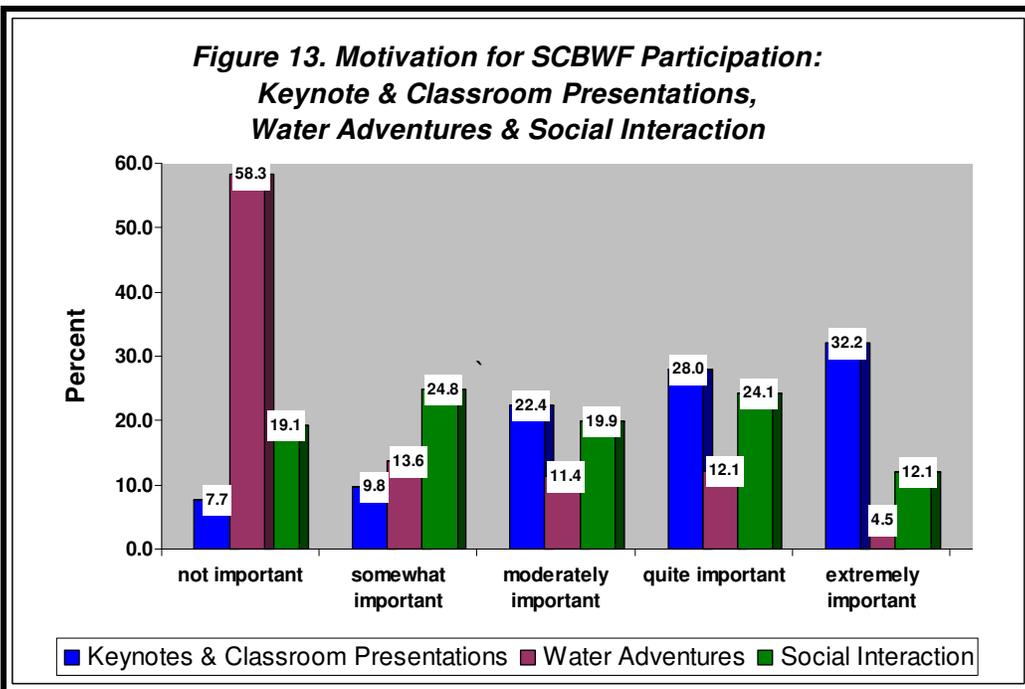


Source: PRÆCIPPIO EFS & Brevard Nature Alliance

“Keynotes & classroom presentations” drew “quite important” or “extremely important” responses from about 60 percent of respondents (see Figure 13), signifying the professional regard held for Festival speakers and their value-added in complementing field excursions. Motivators that appear to drive a smaller niche of the Festival population include “social interaction,” where the modal response was “somewhat important” (see Figure 13), and “water adventures,” which was deemed “extremely important” by a modest 4.5 percent (see Figure 13) of Festival participants.



Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Indispensable Volunteers Filling Festival Welcome Bags

photo credit: DeeAnn Jennings Kiesel



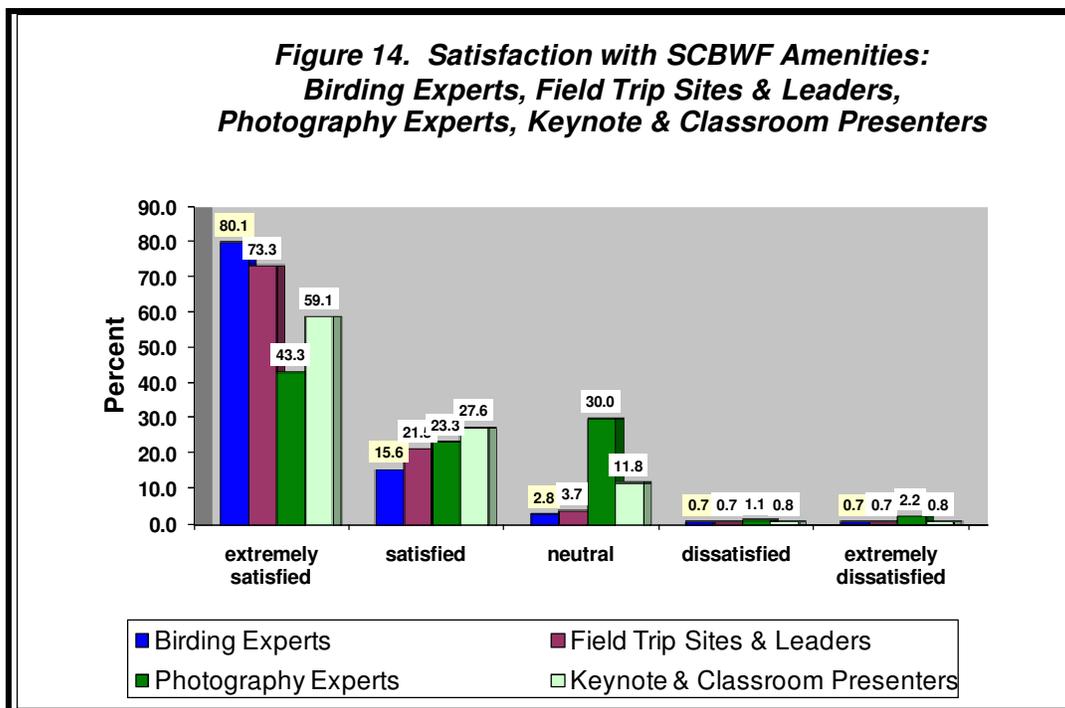
Birding Experiences at the Enchanted Forest

photo credit: DeeAnn Jennings Kiesel

PRÆCIPPIO EFS believes that these results reaffirm our assessment that as a nature-based festival, the SCBWF differentiates itself by the combination of a concentrated wealth of expert talent amassed and the amazing variety of opportunities to observe birds and wildlife. In short, the diversity of birds found on the Space Coast (over 300 species on record – 205 species observed at the 2011 Festival) are a necessary predicate for success, but people who love birds and love talking about them are equally important.

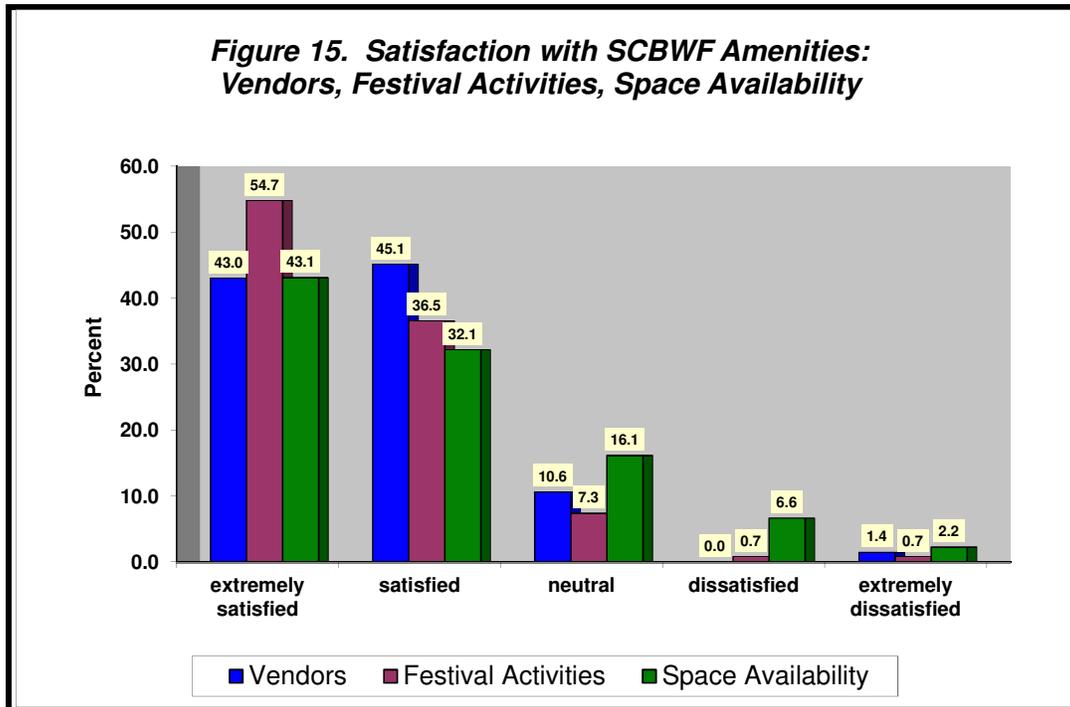
For the second set of Likert scale questions, registrants were presented statements designed to measure their satisfaction with the quality of SCBWF “birding experts,” “field trip sites & leaders,” “photography experts,” “keynote & classroom presenters,” “exhibitors,” “festival activities,” and “space availability.” Possible answers ranged from “extremely satisfied” to “extremely dissatisfied,” and respondents clearly indicated their immense satisfaction with the range of SCBWF amenities.

Attendees registered “extreme satisfaction” with “birding experts” (80.1 percent), “field trip sites & leaders” (73.3 percent), “keynote & classroom presenters” (59.1 percent), and “photography experts” (43.3 percent), in overview significantly favorable results (see Figure 14). Affirming responses were also recorded for “festival activities,” “exhibitors,” and “space availability,” (see Figure 15), where at minimum about 75 percent of registrants registered either “extreme satisfaction” or “satisfaction” to each of the items. Despite these favorable reviews, the SCBWF continuously strives to enhance satisfaction with all aspects of the Festival, with yearly action items targeting areas deemed to be improvable.



Source: PRÆCIPPIO EFS & Brevard Nature Alliance

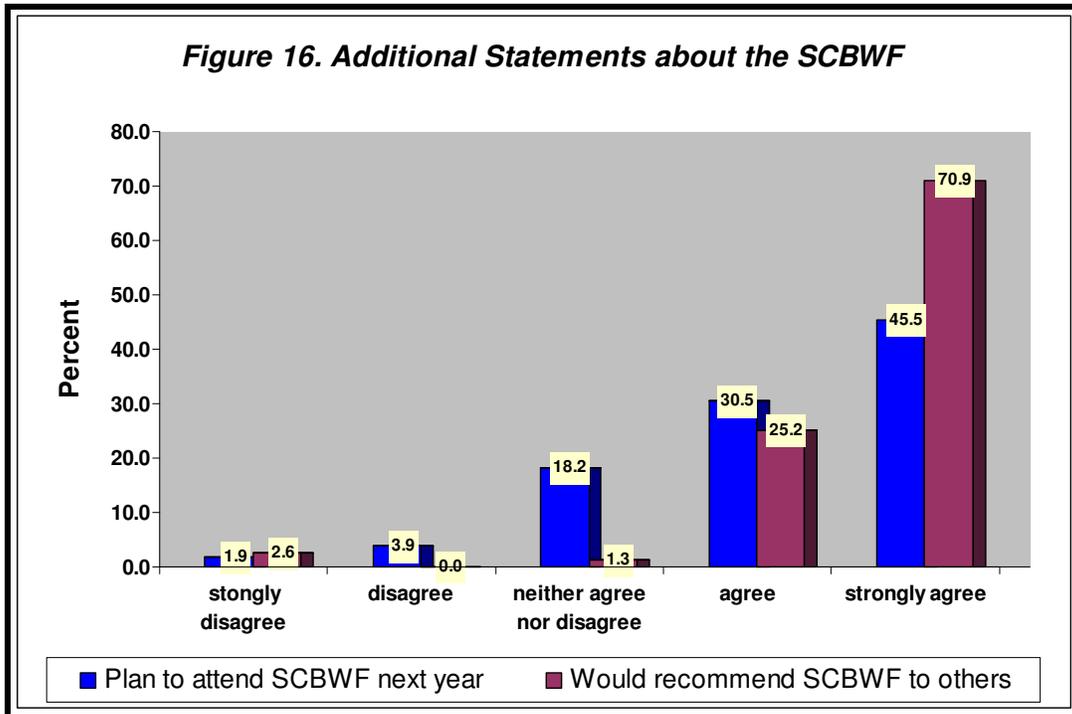
**Figure 15. Satisfaction with SCBWF Amenities:
Vendors, Festival Activities, Space Availability**



Source: PRÆCIPPIO EFS & Brevard Nature Alliance

For the last set of Likert scale questions, registrants were presented statements designed to measure their interest in future SCBWFs as well as their willingness to endorse the SCBWF. Responses were gauged on a 5-point Likert scale ranging from “strongly disagree” to “strongly agree,” and survey results continue to point towards a bright future both for the SCBWF and ecotourism in Brevard County. When presented with the statement, “I plan to attend the SCBWF next year,” about 46 percent of respondents “strongly agreed” and another 31 percent “agreed” (see Figure 16).

Not to be overlooked, non-returnees may still inspire others to attend through word-of-mouth effects. When presented with the statement, “I would recommend the SCBWF to others,” about 71 percent “strongly agreed” and another 25 percent “agreed” (see Figure 16). This is a convincing vote of confidence, and signifies that almost all Festival registrants are willing to refer other birding enthusiasts to future SCBWFs.

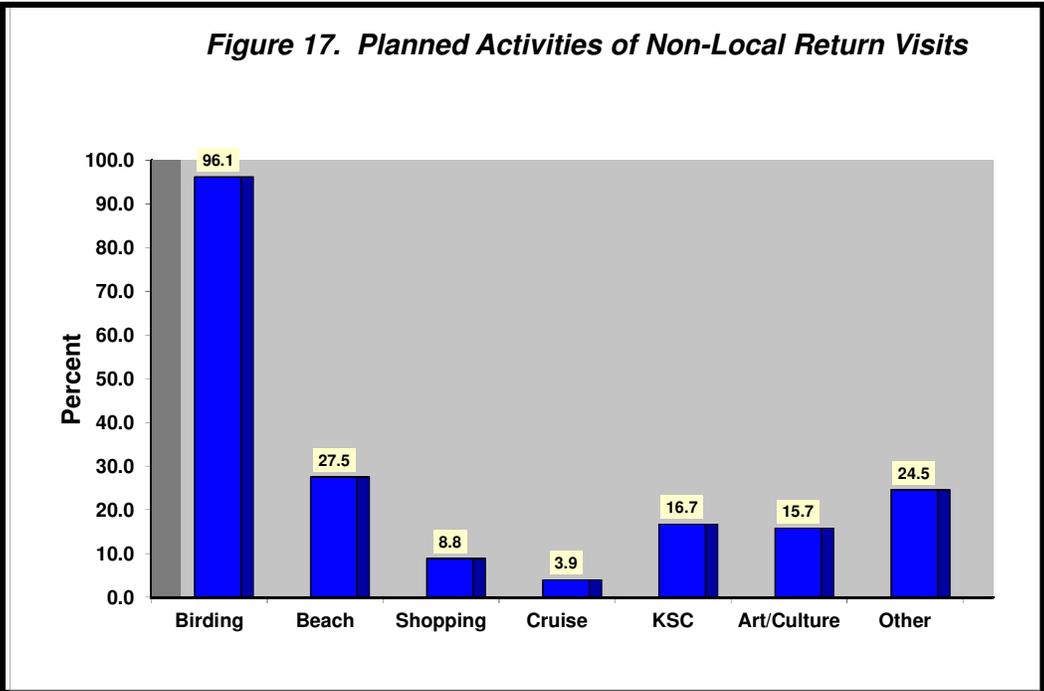


Source: PRÆCIPPIO EFS & Brevard Nature Alliance

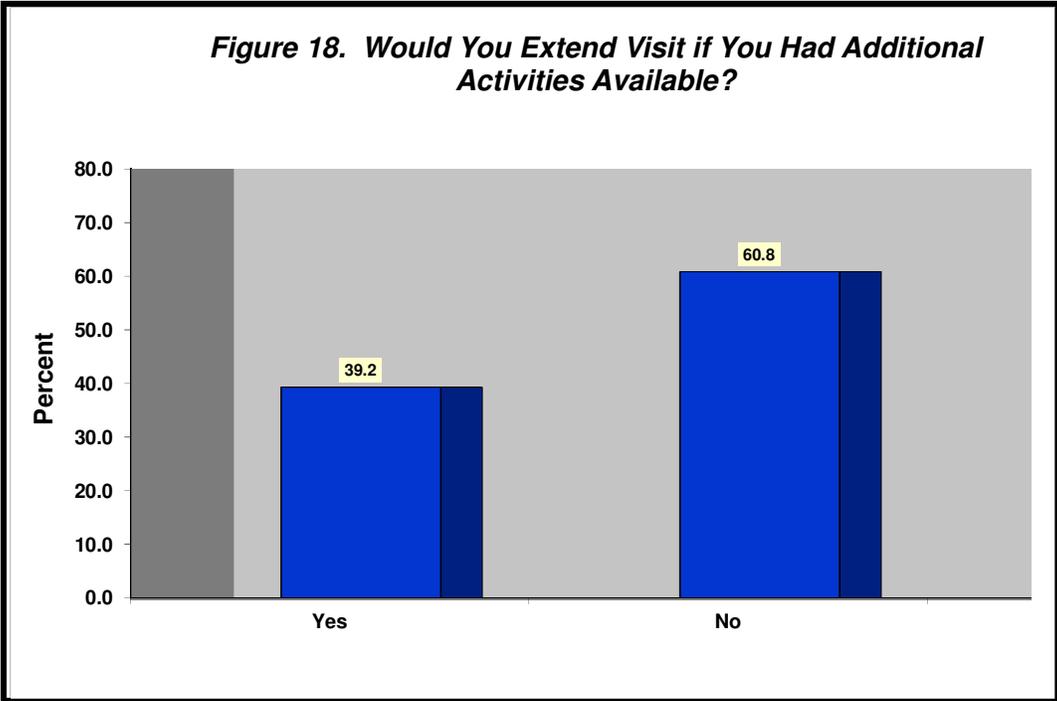
Figures 17 & 18, two new graphics introduced in this year’s report, provide tourism feedback for County officials by asking non-locals what activities they would plan to do if they returned to the Space Coast (see Figure 17). Not surprisingly, the top answer was birding (96 percent), followed much farther behind by the beach (28 percent). Figure 18 shows results from a question asking non-locals if they would extend their stay in the area if they had additional activities available. Highlighting potential opportunities for the Space Coast, about 40 percent of non-locals surveyed stated they would extend their visits.

It is seemingly transparent that the demographic trends associated with the SCBWF of older, better educated, and more affluent registrants create the foundation for sizable economic impacts. This point is reinforced by the final graphic dealing with yearly watchable-wildlife recreation spending. Registrants were asked about their annual spending on bird and/or wildlife viewing, and the results are reported in Figure 19. Overall, about 22 percent of SCBWF registrants spend in excess of \$3,000 per year, and almost 15 percent spend in excess of \$5,000 per year. Interestingly, about 48 percent of registrants spend \$1,000 or more per year on watchable wildlife recreation. These spending fundamentals lead to the promise of even more successful future SCBWFs. One way to catalogue this growth pathway is to track economic impacts through time.

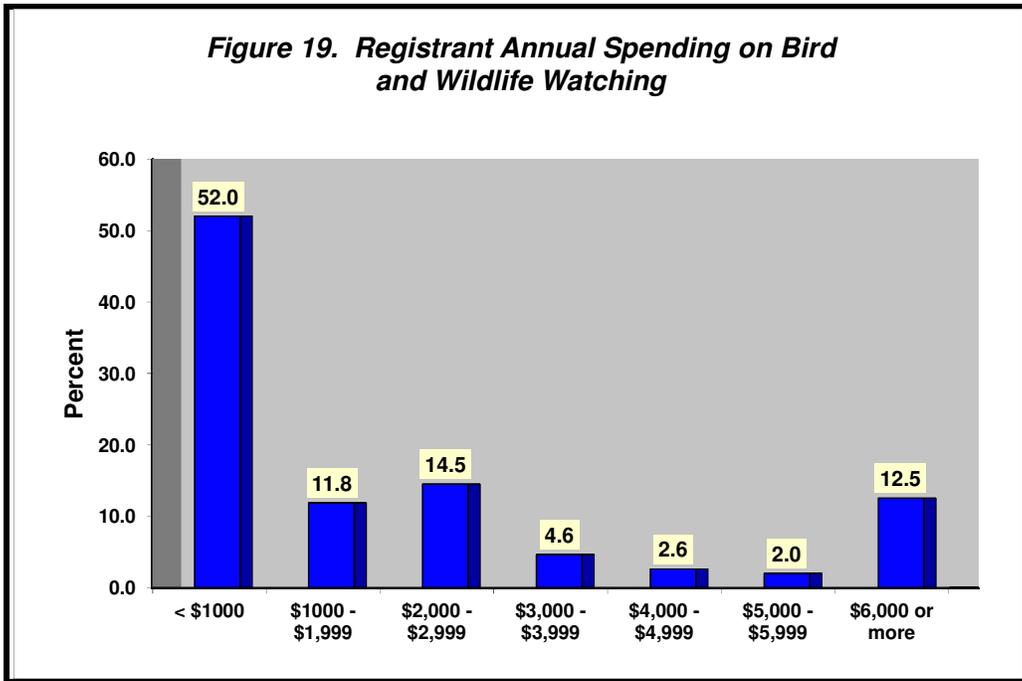
In 2010, SCBWF generated an economic impact of about \$954,000. Despite persistent economic headwinds, and at the regional level, continuing job losses, in 2010 the SCBWF’s economic impact decreased by less than 1 percent. As stated earlier, when considered in context, the drawing power of the SCBWF remains strong, which testifies to the Festival’s reputation within the birding industry. This report now details the determination of the 2011 SCBWF’s economic impact.



Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Tour of Inland Waterway Led by Captain Ben Evans

photo credit: Wildside Tours



SCBWF Exhibit Area

photo credit: Ray Scory



Judging the Art Competition – Walt Johnson & Louise Zemaitis

photo credit: DeeAnn Jennings Kiesel

Economic Impacts

Survey Description and Methodology

Data were obtained through survey instruments created by economics and finance consultants from PRÆCIPPIO EFS, Inc. Two of the consultants attended the SCBWF and were stationed at a conveniently located booth in the exhibit area. Every individual who *registered* for the Festival was asked to participate in the survey, which was included with their registration material. Registrants had the opportunity to complete the survey at their leisure. Surveys were returned during the Festival weekend (the last two days), and in many cases, mailed back after the Festival's end. A total of 157 usable registrant surveys were collected.

An important element in developing the economic assessment is to suitably segment the Festival population into groups with similar average spending behavior. Accordingly, a separate survey instrument was created for Festival exhibitors, volunteers, trip leaders, and presenters. In an important sense, exhibitors who attend the Festival for commercial purposes, reveal spending propensities which typically differ from the registrant population. A total of 52 exhibitor/presenter/volunteer surveys were collected.

Economic impact studies often delineate between local and non-local visitors. Because the proximity to their homes is close, locals rarely incur expenses for lodging, and compared to non-locals, they are less likely to frequent a food or drinking establishment. In this study, local visitors include people who identify themselves as permanent or seasonal residents of Brevard County.¹

The reported motivation of non-local SCBWF visitors is also germane. If an attendee is visiting Brevard County to participate in a family reunion, wedding, or some other occasion, and decided that the Festival might be a pleasant diversion for an afternoon, the travel, lodging, and food and drink costs reported by that individual would in no way be derived from the SCBWF. In short, that spending would have occurred anyway, and should not be considered an outgrowth of the Festival. A survey item, targeted at non-locals, asked the visitor to report whether the SCBWF was the primary purpose for their visit to Brevard County.

In summary, the three population groups analyzed for economic impact purposes at the 2011 Festival are the following: non-local registrants (sample size 102), local registrants (sample size = 55), and exhibitors, trip leaders, volunteers (sample size = 52).

It should be noted that spending by local registrants is debited for opportunity cost. To explain further, if a local Festival attendee spent \$50 at the SCBWF, but would have spent \$40 on some other leisure activity had they not attended the Festival, the SCBWF's true economic value-added for Brevard County is \$10. In this study we report net spending figures for the local visitors listed above. While this approach yields a conservative spending estimate, the estimate is entirely attributable to the SCBWF.

¹ In the State of Florida, seasonal residents constitute a sizable portion of the population. Most still identify themselves as native to their states of origin, thus biasing aggregate spending results. In this analysis, seasonal residents are considered "locals" and thus the seasonal bias is vitiated.

This report also excludes an impact estimate of walk-through traffic, a population numbering about 2,300. Undoubtedly a small economic boost is generated by this cohort. Unfortunately, without an adequate means for sampling this population segment, any estimate would be unreliable. We think it likely that walk-throughs generated an economic impact of between \$25,000 and \$30,000, a figure that would represent about 2.5 to 3.0 percent of the SCBWF's total economic effect.

Festival related spending forms the basis of the economic impact estimates reported in this paper. Respondents were asked to categorize their spending within the Brevard County area over the course of the six-day event (Jan 26-31). Each new dollar of spending generates indirect and induced impacts that must be factored into the analysis. Indirect impacts are additional purchases for goods and services made by retailers, wholesalers and manufacturers in industries affected by the new direct spending. Induced impacts reflect the additional spending by employees of these industries who are paid wages and salaries for their services. Together, the indirect and induced impacts generate a multiplier effect on the original final-demand spending. The IMPLAN² economic modeling system was used to derive total, indirect and induced impacts of direct festival spending on the Brevard County economy. IMPLAN affords ease of use, flexibility, modeling options, and ability to seamlessly track induced and indirect impacts on over 500 economic sectors. This powerful regional input-output model is used by over 1,000 public and private institutions for impact analysis and planning.

One major innovation introduced in 2008 and retained since then involved the omitting of spending related questions concerning the SCBWF registration, field trips, and vendor purchases. To explain further, in previous years, participants were asked to total their expenditures on direct Festival activities, including the Sunday Social, as well as any items purchased from exhibitors manning booths in the gymnasium. With enhanced and timely direct reports from Ms. Harris, the expenditure flow from SCBWF registrants can be ascertained, in entirety, from SCBWF software, and thus, more accurate aggregate total figures supplant previous years' estimates of registrant Festival spending.

Additionally, PRÆCIPPIO EFS has endeavored to eliminate bias in the registrant spending on exhibitor purchases. A souvenir or merchandise purchased from a non-local commercial exhibitor has no output impact on the Brevard community as production occurred elsewhere (although there are sales taxes generated). In previous years, deconstructing what might have been purchased from non-local exhibitors was accomplished by the assumption that high-cost items (e.g., optics) were purchased from non-local exhibitors while lower-cost items were purchased from locals. Starting in 2008, PRÆCIPPIO EFS established a sales tax instrument for exhibitors which afforded the ability to: 1) estimate an aggregate exhibitor purchase number and 2) formulate a more plausible distribution of those purchases between local and non-local exhibitors. Moreover, it also allows for the inclusion of exhibitor sales tax generation in the assessment of federal, state & local tax receipts produced by SCBWF activities.

² *Data and software:* Minnesota IMPLAN Group, Inc., IMPLAN System (data and software), 1725 Tower Drive West, Suite 140, Stillwater, MN, 55082: www.implan.com.

Spending and Economic Impact Estimates

Table 1 summarizes the economic impact of the 2011 SCBWF. The six-day celebration imparted a healthy \$945,239 economic stimulus to Brevard County; given the exclusions discussed on the previous page, this, in effect, implies that the SCBWF's economic impact is just under a million dollars. When compared to the 2010 economic impact of \$954,244, the slight decline in economic activity in 2011 amounts to less than 1 percent, an insignificant fall and, in fact, tremendous showing in the midst of a persistent economic headwinds. About \$700,000 of the impact is attributed to personal spending by Festival visitors, with the remainder resulting from spending by Festival organizers in marketing and staging the SCBWF. The magnitude of spending by Festival visitors warrants further analysis, to which this report now turns.

Table 1. Economic Impact of the Space Coast Birding & Wildlife Festival

	DIRECT SPENDING ¹	INDIRECT & INDUCED SPENDING ²	TOTAL ECONOMIC IMPACT ³
NON-LOCAL REGISTRANTS	\$292,348	\$133,767	\$426,115
LOCAL REGISTRANTS	\$35,156	\$15,157	\$50,313
EXHIBITORS, PRESENTERS, VOLUNTEERS, ETC.	\$147,667	\$69,362	\$217,029
FESTIVAL VISITORS	\$475,171	\$218,286	\$693,457
FESTIVAL ORGANIZERS	\$152,055	\$99,727	\$251,782
TOTAL	\$627,226	\$318,013	\$945,239

¹ Participant expenditures on commodity purchases have been margined.

² Indirect and induced effects are estimated via the IMPLAN regional input-output model.

³ Aggregate SAM Output Multiplier is 1.5070.

Source: *PRÆCIPPIO EFS & Brevard Nature Alliance*

Table 2 lists the direct personal spending of SCBWF participants by population group. Attendees spent in excess of \$475,000, with the bulk (62 percent) originating from the non-local visitors who registered for the Festival. *These individuals spent an average of about \$348 per person during their visit to the Festival*, a figure that is about 3.4 times larger than the amount spent by local registrants. The second largest aggregate spending unit includes exhibitors, trip leaders and presenters at the Festival. This group spent about \$415 per person, and in total, this cohort was responsible for around 31 percent of the direct personal spending associated with the SCBWF. In aggregate, the average spending figure for all SCBWF participants amounted to just under \$309 per person.

Table 2. Direct Personal Spending by Festival Participants

	SAMPLE SIZE	AVERAGE SPENDING ¹	POPULATION ESTIMATES ²	TOTAL DIRECT SPENDING
NON-LOCAL REGISTRANTS	102	\$348.45	839	\$292,348
LOCAL REGISTRANTS EXHIBITORS, PRESENTERS, VOLUNTEERS, ETC.	55	\$102.50	343	\$35,156
	52	\$414.79	356	\$147,667
TOTAL	209	\$308.95	1,538	\$475,171

¹ Total direct spending (after margining of commodity purchases) divided by total estimated population.

² Provided by Neta Harris.

Source: PRÆCIPPIO EFS & Brevard Nature Alliance



Bonaparte's Gull, Great Egret, White Ibis

photo credit: Ray Scory

Table 3 provides a summary breakdown of the economic impact by output (sales), employment, and value-added measures. Value-added refers to the income payments made by industry in wages, interest, profits, and indirect payments, and is a regional corollary to the gross domestic product figure reported in business and economic reports. A subset of value-added typically of great interest to local communities is labor income, which is comprised of employee compensation and proprietors' income. In aggregate, SCBWF economic activity generates about to \$522,400 in factor income payments of which almost \$359,000 represents labor income flows. The overall impact is equivalent to the creation of 10.8 new jobs (full and/or part-time), and in total, generated a little over \$125,000 in Federal and State/Local tourism-related tax receipts.

Table 3. Economic Impact Summary – Output, Value-Added, Employment, Taxes

	DIRECT EFFECTS	INDIRECT & INDUCED EFFECTS ¹	TOTAL ECONOMIC IMPACT ²
TOTAL VALUE ADDED	\$339,591	\$182,804	\$522,395
LABOR INCOME	\$252,122	\$106,711	\$358,833
EMPLOYMENT	8.0 jobs	2.8 jobs	10.8 jobs ³
OUTPUT (SALES)	\$627,226	\$318,013	\$945,239

¹ Indirect and induced effects are estimated via the IMPLAN regional input-output model.

² Estimated tax receipts generated from Festival economic activity include the following: 1) Federal governmental revenues = \$72,214; and, 2) State/Local governmental tourism-related revenues = \$53,123 – in aggregate, \$125,337.

³ Full and part-time employment.

Source: *PRÆCIPPIO EFS & Brevard Nature Alliance*

The methodology employed in this analysis serves to provide a *conservative estimate* of the true economic impact. Careful screening has placed the general population into groups that exhibit similar levels of average spending. Those expenses that are reported as monies that would have been spent had the Festival NOT been held *have been excluded*. Even with this conservative strategy, the stimulus imparted by the widely respected and highly successful SCBWF was substantial.

This study documents an economic impact of about \$945,000 for Brevard County. With the inclusion of likely economic activity associated with walk-through traffic, a population estimated at about 2,300, it is likely that SCBWF yielded an economic impact some \$25-30k greater, yielding a range more inclusive of all expenditures of \$970,000 to \$975,000. This report now closes with some final comments.

FINAL COMMENTS

The SCBWF is assuredly an economic success, but even more important, the Festival's success sustains rather than exploits the surrounding environment. Educating participants about the natural world, a continuing Festival theme, nurtures a conservation mindset and creates an expanding supply of environmental stakeholders. And county officials, confronted with the fact that protected lands and species can generate "green" incomes, are more inclined to support projects that preserve natural capital rather than allow those pristine landscapes to be developed.

This report closes with an interview of an individual who embodies why the SCBWF is the success story that it has been: GenOn's Bill Baker. Formerly Reliant Energy, GenOn has provided needed financial support to the SCBWF for several years, and Bill has displayed his commitment to the Festival by serving as the liaison between GenOn and the SCBWF during that entire period. Like the keynoters, trip leaders, and registrants who return year after year to the SCBWF, Bill offers a personal commitment to the Festival that makes it such a special event. Most importantly, he is not unique; core SCBWF stakeholders are too numerous to list, but return every January to showcase their support.

PRÆCIPRO EFS wishes to thank Neta Harris, Laurilee Thompson, Barbara Hoelscher and the many Festival volunteers, participants, sponsors, and partners who made this study possible. Local talents DeeAnn Jennings Kiesel, Ray Scory, Joel Reynolds, Kathie England, Marlene Smith and Wildside Tours provided incredible photos which detail the beauty of Brevard County's natural habitats. Mike Legare of the U.S. Fish & Wildlife Service at MINWR was a blessing in providing us the sensational photo of the Elusive Black Rail, which graces the cover of this report. Chuck Hagner, Jan Pierson, and Bill Baker were gracious in submitting to interview (and photo) requests in order to reveal a more personal perspective on the sponsors, exhibitors, presenters and participants who represent the life blood of this event. Finally, while we can't acknowledge every Festival volunteer, two were especially helpful in facilitating the delivery and return of the surveys used to compile this study: Cary and Betty Salter. To all involved, WE THANK YOU! KC, MHS, and ARV



Whistling Ducks (and Friends) in Sherwood Pond

photo credit: Kathie England

William B. “Bill” Baker, Jr. Manager, Environmental Outreach GenOn Energy

Mike Slotkin (MS): Bill, you have a Panther-level sponsorship position in the SCBWF - can you tell us your background? Who are you and what do you do?

Bill Baker (BB): I'm a wildlife and fisheries biologist. I have worked for a power company for 29 years and my focus within the company is habitat restoration projects, habitat preservation and environmental education in and around the areas where we own power production assets.

MS: Is this locally? Where do you actually live and work?

BB: My office is in Houston, Texas and I live nearby, but most of my work is scattered outside of Texas. In the Northeast, I work in New Jersey, Pennsylvania, Ohio, Maryland, Virginia, and Illinois. Out West, I do work in California and Nevada; and in the Southeast I do work in Florida and Mississippi.

MS: Are you a birder or nature-enthusiast yourself?

BB: I am both a birder and nature-enthusiast! I have been since I was a young boy and it's the reason I do what I do.

MS: What are some of the places or refuges you've traveled to that have left a strong impression on you?

BB: In Florida ... everywhere I go leaves an impression on me! Merritt Island is a wonderful place with multiple habitats, which are very diverse and have a lot of species within them. Florida is well blessed in birding opportunities and I like to take advantage of them when I'm here.

MS: How did GenOn become a sponsor of the SCBWF?

BB: Our company has always been interested in environmental education and community opportunities in the environmental realm. We have done quite a bit of focus on the Birding Community across the country. About 9 years ago I met Neta and Laurilee and talked about this event which seemed to fit with our business model. Since there were some birding competitions at that time, I brought in some folks from Pennsylvania & Texas to participate in the birding competitions. It's a great event with a tremendous amount of diversity of people from around the country, which makes it easy for me to come to this one place and meet people from all over.

MS: As a sponsor, do you feel you are contributing to a worthwhile cause?

BB: Without doubt! And that's why we've been a continuing sponsor for all these years. The money is well spent and it is needed. The organization here is wonderful and these people do a very good job. They take good care of their sponsors. Every year we're proud and just pleased to be a part of it.

MS: As part of your company's Mission Statement, do you have an environmental mandate?

BB: Not a mandate, but we do have a focus on communities and the environment, and that's where my position comes in. For the last 25 years I have worked with an environmental outreach group and have managed a program called Environment Partners, which allows us to come into communities and be a part of restoration, preservation, or environmental education programs. So we bring in some funding, some in-kind support, and a little expertise where needed, which is all a part of our business ... and it's good business. ♦

For more information on GenOn, please visit the website: www.genon.com.



Bill Baker, GenOn Energy
photo credit: Bill Baker

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This study was conducted by

Karen Chambliss, Principal (PhD Finance); Michael H. Slotkin, Principal (PhD Economics); Alexander R. Vamosi, Principal (PhD Economics)

PRÆCIPPIO EFS, Inc. ♦ www.praecipio-efs.com ♦ (321) 574-0908

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APPENDIX

2011 SCBWF SPONSORS

Eagle

Swarovski Optik ♦ Dixie Crossroads Seafood Restaurant

Panther

Cornell Lab of Ornithology ♦ Space Coast Office of Tourism ♦ GenOn Energy ♦ Florida Power & Light

Scrub Jay

Bird Watcher's Digest ♦ Leica Sports Optics ♦ FLORIDA TODAY ♦ Waste Management ♦ *Birder's World* ♦ Canaveral Port Authority ♦ Victor Emanuel Nature Tours ♦ 10,000 Birds

Pelican

Coastal Angler Magazine ♦ City of Titusville ♦ Geomar Environmental Consultants, Inc. ♦ Eagle Optics ♦ Merritt Island Wildlife Association ♦ Airboat Rides at Midway ♦ Nikon ♦ Kowa ♦ Kennedy Space Center Visitor Complex ♦ Ron Jon Surf Shop ♦ Carl Zeiss Sports Optics ♦ Princeton University Press ♦ Friends of the Enchanted Forest

Gopher Tortoise

Canopy Tower Ecolodge & Nature Observatory ♦ WFIT (NPR Radio)

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Waste Management	www.WM.com
Canopy Tower EcoLodge & Nature Observatory	www.canopytower.com
WFIT (NPR Radio)	www.wfit.org

About the Authors

Michael H. Slotkin, PhD (Principal). Dr. Slotkin is a co-founder and President of PRÆCIPPIO EFS, an economic, financial, and statistical consulting firm based in Brevard County, Florida. He also holds an appointment as Associate Professor of Economics in the College of Business at the Florida Institute of Technology in Melbourne, Florida. Dr. Slotkin earned his doctoral degree in economics from the University of North Carolina at Chapel Hill, where he specialized in international trade theory.

Karen Chambliss, PhD (Principal). Dr. Chambliss is a co-founder and Treasurer of PRÆCIPPIO EFS, an economic, financial, and statistical consulting firm based in Brevard County, Florida. Dr. Chambliss earned her doctoral degree in business administration with a concentration in finance from Florida Atlantic University, where she specialized in corporate governance, multinational corporations, and financial institutions. She held an appointment at the Florida Institute of Technology's College of Business for 12 years (1995-2007), the last four years as associate professor of finance, as well as an appointment (2007-08) as Visiting Lecturer of Finance in the College of Business Administration at UCF.

Alexander R. Vamosi, PhD (Principal). Dr. Vamosi is a co-founder and Vice-President of PRÆCIPPIO EFS, an economic, financial, and statistical consulting firm based in Brevard County, Florida. He also holds an appointment as Associate Professor of Economics and Associate Dean in the College of Business at the Florida Institute of Technology in Melbourne, Florida. Dr. Vamosi earned his doctoral degree in economics from the University of North Carolina at Chapel Hill, where he specialized in econometrics, international economics and monetary theory. He held a previous appointment at The College of Wooster in Wooster, Ohio.