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Visitor Profiles, Economic Impacts and Recreational Aesthetic Values Associated with Eight Priority Florida Springs Located in the St. Johns River Water Management District

Submitted by:

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Finally, appreciation is extended to all of those county, state and federal government representatives providing invaluable information necessary for the completion of this study.

Mark A. Bonn, Ph.D. President Bonn Marketing Research Group, Inc.

EXECUTIVE SUMMARY

Purpose of the Study

The purpose of this research project was to establish a present baseline of knowledge pertaining to visitor characteristics including their economic impacts and associated recreational values for eight priority springs in the St. Johns River Water Management District (SJRWMD). Priority springs by definition are those springs prioritized by SJRWMD for the establishment of minimum flows and levels in accordance with Chapter 373, *Florida Statutes*. These springs by county include:

Marion County:

- 1. Silver Glen Springs
- 2. Silver Springs

Lake County:

- 3. Alexander Springs
- 4. Apopka Spring
- 5. Bugg Spring

Volusia County:

- 6. Ponce de Leon Springs
- 7. Gemini Springs
- 8. Green Springs

This research project included on-site data collection, editing, collation, entry, and various statistical and economic analyses over a twelve-month period of time for the eight selected priority springs. A total of 2,298 usable surveys were obtained to meet the objectives of this study. This allowed for overall statistical reporting at the 95% level of confidence with +/-5% error.

During the twelve months of on-site data collection, it became obvious that seasonality was a key issue related to springs usage patterns. Table ES-1 identifies the seasonality of attendance by quarter for the priority springs.

Table ES-1
A Summary of the Seasonality of Attendance by Quarter in Eight Priority Springs in Marion, Lake and Volusia Counties, Florida

	marron, Lar	to arra vora	ora ocarriros,	7 707744		
Springs	First (Jan-Mar)	Second (Apr-June)	Third (July-Sept)	Fourth (Oct-Dec)	Annual %	Source of Data
Marion County						
Silver Glen Springs	7%	44%	43%	6%	100%	USFS*
Silver Springs	25	28	27	20	100	Shifflet**
Lake County						
3. Alexander Springs						
Day Visitors	15	41	37	7	100	USFS*
Camper Visitors	31	31	17	21	100	USFS*
4. Apopka Spring	15	41	37	7	100	Alex****
5. Bugg Spring	15	41	37	7	100	Alex***
Volusia County						
6. Ponce de Leon Springs	21	33	34	12	100	Florida***
7. Gemini Springs	20	40	24	16	100	Volusia County*****
8. Green Springs	20	40	24	16	100	Volusia County*****
Average	19%	38%	31%	12%	100%	

^{*} U.S. Forest Service Data, 1998-2002;

FINDINGS

Silver Glen Springs

➤ Average party size: 3.5 (74% non-county residents)

Average nights spent: 1.6

➤ Daily expenditures per party: \$44.31

➤ Willingness to pay for access to private springs: \$4.17

> Percent using commercial lodging properties¹: 3%

First visit to springs? 21.5%

Annual economic impact: \$348,770.00

➤ Wages created: \$66,370.00

> Employment created: 5.63 full/part time jobs

¹ Commercial lodging properties include hotels/motels, campgrounds and RV parks.

^{**} Shifflet and Associates for Central Region of Florida (2002);

^{***} Florida Park Service, 1990-2002;

^{****} Alexander Springs Seasonality in Lake County is used for Apopka Spring and Bugg Spring in same county;

^{******} Gemini Springs Seasonality in Volusia County is used for Green Springs in same county.

Silver Springs

- Average party size: 3.0 (percent of non-county residents unavailable)
- > Average nights spent: 2.3
- ➤ Daily expenditures per party: \$248.60
- ➤ Willingness to pay for access to private springs: N/A
- ➤ Percent using commercial lodging properties: N/A
- First visit to springs? N/A
- Annual economic impact: \$61,450,000.00
- Wages created: \$12,610,000.00
- Employment created: 1,060.5 full/part time jobs

Alexander Springs

- Average party size: 3.7 (54% non-county residents)
- > Average nights spent: 1.2
- ➤ Daily expenditures per party: \$43.85
- ➤ Willingness to pay for access to private springs: \$4.57
- ➤ Percent using commercial lodging properties: 29.3%
- First visit to springs? 20.0%
- Annual economic impact: \$775,520.00
- ➤ Wages created: \$170,240.00
- Employment created: 13.6 full/part time jobs

Apopka Spring

- ➤ Average party size: 3.3 (67% non-county residents)
- > Average nights spent: 1.3
- ➤ Daily expenditures per party: \$22.21
- ➤ Willingness to pay for access to private springs: \$4.50
- ➤ Percent using commercial lodging properties: 23.4%
- First visit to springs? 34.3%
- Annual economic impact: \$28,520.00
- ➤ Wages created: \$5,940.00

> Employment created: 0.52 full/part time jobs

Bugg Spring

- ➤ Average party size: N/A
- > Average nights spent: N/A
- ➤ Daily expenditures per party: N/A
- ➤ Willingness to pay for access to private springs: N/A
- ➤ Percent using commercial lodging properties: N/A
- First visit to springs? N/A
- > Annual economic impact: \$11,660.00
- ➤ Wages created: \$2,420.00
- > Employment created: 0.21 full/part time jobs

Ponce de Leon Springs

- ➤ Average party size: 3.7 (62% non-county residents)
- Average nights spent: 1.1
- ➤ Daily expenditures per party: \$43.50
- ➤ Willingness to pay for access to private springs: \$4.95
- ➤ Percent using commercial lodging properties: 14.0%
- First visit to springs? 43.8%
- Annual economic impact: \$2,185,440.00
- Wages created: \$425,600.00
- Employment created: 36.11 full/part time jobs

Gemini Springs

- Average party size: 3.9 (51% non-county residents)
- > Average nights spent: 1.2
- ➤ Daily expenditures per party: \$34.10
- ➤ Willingness to pay for access to private springs: \$4.67
- ➤ Percent using commercial lodging properties: 5.8%
- First visit to springs? 17.8%
- Annual economic impact: \$322,870.00

➤ Wages created: \$68,910.00

➤ Employment created: 6.26 full/part time jobs

Green Springs

> Average party size: N/A

➤ Average nights spent: N/A

➤ Daily expenditures per party: N/A

➤ Willingness to pay for access to private springs: N/A

➤ Percent using commercial lodging properties: N/A

First visit to springs? N/A

Annual economic impact: \$81,550.00

➤ Wages created: \$16,870.00

➤ Employment created: 1.53 full/part time jobs

Overall findings for the eight priority springs indicated that total annual direct spending by visitors accounted for over \$65 million, generated over \$13 million in wages, and created over 1,100 jobs. Silver Springs, which has a large theme park associated with the natural springs environment, accounted for 94% of the total economic impact to the region, while the remainder of the springs contributed only 6% (Table ES-2).

	Table ES-2 Economic Impact Summary for Eight Springs								
Springs	Direct Spending	%	Wages	%	Employment	%			
Silver Glen	\$348,770.00	0.53%	\$66,370.00	0.50%	5.63	0.50%			
Silver	\$61,450,000.00	94.24%	\$12,610,000.00	94.34%	1,060.50	94.32%			
Alexander	\$775,520.00	1.19%	\$170,240.00	1.27%	13.60	1.21%			
Apopka	\$28,520.00	0.04%	\$5,940.00	0.04%	0.52	0.05%			
Bugg	\$11,660.00	0.02%	\$2,420.00	0.02%	0.21	0.02%			
Ponce de Leon	\$2,185,440.00	3.35%	\$425,600.00	3.18%	36.11	3.21%			
Gemini	\$322,870.00	0.50%	\$68,910.00	0.52%	6.26	0.56%			
Green	\$81,550.00	0.13%	\$16,870.00	0.13%	1.53	0.14%			
Total	\$65,204,330.00	100.00%	\$13,366,350.00	100.00%	1,124.36	100.00%			

CHAPTER 1

INTRODUCTION TO THE PRIORITY SPRINGS ECONOMIC ANALYSES FOR MINIMUM FLOWS AND LEVELS DEVELOPMENT

1.1. Purpose of the Study

The purpose of this Chapter is to introduce to the reader the economic impacts and recreational and aesthetic values associated with eight priority springs in the St. John River Water Management District (SJRWMD). By State of Florida law, SJRWMD must establish minimum flows and levels (MFLs) necessary to prevent significant ecological damage or harm to both permitted consumptive and non-consumptive uses such as navigation, recreation, fish and wildlife habitat and other natural resources. MFLs designate hydrological conditions that identify which water is available for reasonable beneficial use. If not set properly, these MFLs can also impair and harm economic activity connected with aquatic communities such as wetlands, streams and lakes, and springs for which Florida is famous with residents and visitors. An important objective of this research is to establish a data-base containing information, such as values, socioeconomic and associated market characteristics, etc., that surround the eight priority springs for which SJRWMD is developing MFLs.

The main objective of this research is to establish a present economic baseline including economic impacts and recreational values for eight priority springs in SJRWMD. These springs by county are:

Marion County:

Silver Glen Springs

Silver Springs

Lake County:

Alexander Springs

Apopka Spring

Bugg Spring

Volusia County:

Ponce de Leon Springs

Gemini Springs

Green Springs

The St. Johns River Water Management District selected the Bonn Marketing Research Group, Inc. (BMRG) to complete this study of eight priority springs because of BMRG's well established expertise in marketing research, economics and statistical applications applied to natural springs resources, tourism and recreation. Prior to the initiation of this project, BMRG recently completed several similar regional research projects for Florida water management districts that addressed many similar issues related to Florida springs visitors including their psychological characteristics and associated economic value attributed to their springs-related spending (Bonn & Bell, 2003). These eight priority springs addressed in this study range from highly developed, well attended springs to those in the development stage with little or presently no appreciable attendance.

The work designated by the contract included randomized day/site/time data collection, editing, collation, entry, and various statistical and economic analyses to present an assessment and summary of the economic impacts and recreational and aesthetic values for eight priority priority springs. Priority springs by definition are those springs prioritized by SJRWMD for the establishment of minimum flows and levels in accordance with Chapter 373, *Florida Statutes*.

1.2. An Overview of Priority Spring Attendance

Table 1.1 shows a summary of some fundamental economic variables that we have gathered in our research for each of the eight priority springs. We have included estimated annual attendance; days per attendee; percent of total visitors from outside the county; the number of annual visitors from outside the county; the source/managing the particular spring and last year for which attendance was available given the time constraints of this contract. The source of such data in Table 1.1 varies considerably as does the quality of such data. Total attendance at all eight counties is a little over 1.5 million persons ranging from 2,900 visitors to Bugg Spring in Lake County to over one million persons visiting Silver Springs in Marion County (Table 1.1). These springs are managed/controlled by various state, federal, and private entities. For example, Ponce de Leon in Volusia County is managed and owned by the State of Florida. Silver Glen and Alexander Springs in Marion and Lake Counties respectively are owned and managed by the U.S. Forest Service. Gemini Springs and Green Springs are managed and owned by Volusia County. Finally, Silver Springs and Bugg Spring are privately controlled. Some springs are fully developed, such as Ponce de Leon, while others, such as Green Springs in

Volusia County, are under development by the county. Bugg Spring in Lake County is still held by private owners and or government entities (e.g., Federal government) that place this spring in a category of "developing." Thus, there is great diversity in ownership and stage of development for the eight priority springs listed in Table 1.1.

Table 1.1
Estimated Total Annual Attendance and Visitors from Outside the County for Eight Priority Springs in Marion, Lake and Volusia Counties, Florida

		Annual Attendance (Person Days)	Days Per Attendee	Percent from Outside County*	Estimated Number of Visitor to County	Springs Managed by	Year for Data
Mario	n County						
1.	Silver Glen Springs	39,235	One	70%	27,471	USFS**	2002
2.	Silver Springs	1,096,000	One	70%	767,200	Private	2003
Lake	County						
3.	Alexander Springs						
	Day	55,819	One	68%	37,957	USFS**	2002
	Camping	21,414	Two	68%	14,562	USFS**	2002
4.	Apopka Spring	5,776***	One	70%	4,064	Florida****	2003
5.	Bugg Spring	2,888***	One	61%	1,756	Private	2002
Volus	sia County						
6.	Ponce de Leon	259,000	One	72%	186,480	Florida****	2002
7.	Gemini	57,755	One	64%	36,964	Volusia County	2002
8.	Green	14,439***	One	64%	9,241	Volusia County	2002
Total		1,529,223			1,085,695		

^{*} Percentage of Total Attendance Living Outside the County from On-Site Survey

^{**} Data Obtained from the United States Forest Service on Attendance.

^{***} Official attendance figures are not available for Apopka, Bugg and Green springs. However, the potential attendance figures could be estimated by using Gemini attendance figures by Volusia County. The following conversion factors were applied:

⁻⁻ Green Springs: 25% of Gemini

⁻⁻ Apopka Spring: 10% of Gemini

⁻⁻ Bugg Spring: 5% of Gemini

^{****} The State of Florida owns Apopka Spring, but does not collect attendance data since it is not well developed. Of the 8 springs, the State of Florida runs only Ponce de Leon as an operating springs park.

Attendance at the priority springs is, in most cases, measured on a daily basis since the springs are closed for the night. Thus, the annual attendance shown in Table 1.1 is also the number of person days for the entire year with one exception, attendees who camp overnight at Alexander Springs, Lake County. Forest Service personnel indicate that campers usually stay in the campgrounds for at least 2 days. Person days are estimated by multiplying by 2. This will become important later in the economic analysis because spending is estimated through surveys on a per party day basis. More will be said about the economics procedure used to calculate the impact of spending by those attending the priority springs.

As indicated in Table 1.1, approximately two-thirds of those attending the priority springs come from outside the county in which the spring is located. This percentage is generally the same from spring to spring. Therefore, we see that of the over 1.5 million spring attendees, over 1 million are not residents of the county in which the spring is located. From an economic impact point of view, visitors from outside a region or county infuse money spent during their visit into the local economy that reverberates through that county in a multiplier fashion. A dollar spent by visitors equates to a \$1.30 - \$1.80 impact upon the local economy and is, therefore, an important contribution to the economic base of each county. The economic base of each county is rooted in those industries and visitor facilities that draw money into the local economy. In addition, resident spending is stimulated by the availability of the spring(s) in their county. This is addressed in the following chapters where the economic impact for all springs specific to this study are addressed

The reader should be aware that this project stretched from 2003 to 2004. We were able to get some data earlier than other data on attendance. At the point of contact (i.e., researcher to the U.S. Forest Service), the most recent annual data were either 2002 or 2003. It will make little difference which of the most recent years is used because of the fluctuation in attendance from year to year.

1.3. An Overview of the Seasonality of Spring Attendance

In developing MFLs for springs, it is important to recognize that hydrological events vary greatly within the year. Rainfall in Florida varies considerably depending on the region of the state. For example, precipitation in Jacksonville in 2001 was 0.6 inches in April and 16 inches in September (Florida Statistical Abstract). Such rainfall variation is not always the same from

year to year, but there is a noticeable seasonality in environmental variables. In many cases, variations in environmental variables, such as temperature and rainfall, are the causal factors behind variations in economic measures. Because of the interaction between environmental variables and economic behavior during the year, we developed seasonal indices of economic behavior.

Table 1.2 shows the estimated percent of annual attendance by quarter to provide the economic seasonality of attendance at springs. In most cases, the source of the data is from the same source that we used to obtain annual data (Table 1.1). We requested data from these sources on a monthly basis for several years, when possible, in order to establish the seasonality of priority springs attendance. Data records varied from source to source. For example, monthly attendance data for Ponce de Leon Spring were obtained from 1990-2002. The U.S. Forest Service only had attendance data going back to 1998. Gemini Springs in Volusia County has had only a few years to establish seasonal patterns. For some springs we used nearby springs as proxies for the springs in question because of lack of data. For example, the seasonality of Apopka and Bugg Spring was approximated by data obtained for Alexander Springs run by the U.S. Park Service and the seasonality of Green Springs was establish by using the data set we generated for Gemini Springs in Volusia County. Finally, the privately owned Silver Springs in Ocala did not provide any attendance data, but our analysis indicates that it is a theme park facility (e.g., Disney) that would exemplify the seasonality in tourism to Central Florida formulated by Shifflet (2002). In all cases, we contacted the officials involved with running or developing the springs to confirm that they were in agreement with our attendance projections.

The data show that strong attendance seasonality exists at the priority springs (Table 1.2). The non-weighted average of attendance at the priority springs indicates that 60 – 70% of the annual attendance occurs during the spring and summer (second and third quarters, Table 1.2). Weather probably plays a role in this distribution. Interesting attendance patterns are displayed by Alexander Springs in Lake County, the only spring analyzed that has camping facilities, and Silver Springs in Marion County, the only theme park facility. Day visitors to Alexander Springs show a seasonal pattern similar to the other priority springs. However, campers show a concentration in the winter and spring quarters presumably because in-state campers are avoiding the periods of extreme summer heat in Florida and out-of-state visitors are coming south during the winter months to enjoy the less extreme winter conditions experienced in Florida. Silver

Springs is estimated to have a more even attendance pattern because it is a theme park facility and should follow typical Florida attractions visitation patterns.

Table 1.2
A Summary of the Seasonality of Attendance by Quarter in Eight Priority Springs in Marion, Lake and Volusia Counties, Florida

	,					
Springs	First (Jan-Mar)	Second (Apr-June)	Third (July-Sept)	Fourth (Oct-Dec)	Annual %	Source of Data
Marion County						
1. Silver Glen Springs	7%	44%	43%	6%	100%	USFS*
2. Silver Springs	25	28	27	20	100	Shifflet**
Lake County						
3. Alexander Springs						
Day Visitors	15	41	37	7	100	USFS*
Camper Visitors	31	31	17	21	100	USFS*
4. Apopka Spring	15	41	37	7	100	Alex****
5. Bugg Spring	15	41	37	7	100	Alex***
Volusia County						
6. Ponce de Leon Springs	21	33	34	12	100	Florida***
7. Gemini Springs	20	40	24	16	100	Volusia County*****
8. Green Springs	20	40	24	16	100	Volusia County*****
Average	19%	38%	31%	12%	100%	

^{*} U.S. Forest Service Data, 1998-2002;

The priority springs were sampled on a quarterly basis in order to better understand seasonality of attendance and issues related to seasonal patterns of spending, wages, and employment associated with the priority springs. In our analysis, we address economic impacts associated with priority springs in three counties: Lake, Marion, and Volusia. The following report chapters (2-4) provide a brief description of each spring and summarize:

^{**} Shifflet and Associates for Central Region of Florida (2002);

^{***} Florida Park Service, 1990-2002;

^{****} Alexander Springs Seasonality in Lake County is used for Apopka Spring and Bugg Spring in same county;

^{*****} Gemini Springs Seasonality in Volusia County is used for Green Springs in same county.

- Economic trends and the level of economic activity in that county;
- Annual and seasonal attendance;
- The economic impact of the springs upon the county measured in spending;
- Wages and employment both seasonally and annually; and
- The economic value of recreational and aesthetic uses of the spring resources.

This general outline will be used throughout our economic analysis or baseline economic data for all eight priority springs. Chapter 5 will summarize the recreational value of the springs along with the springs' visitor profiles.

CHAPTER 2

MARION COUNTY, FLORIDA: AN ECONOMIC ANALYSIS OF SILVER GLEN SPRINGS AND SILVER SPRINGS

2.1. An Economic Profile of Marion County, Florida

Marion County is located in north central Florida. This county contains two priority springs; Silver Glen Springs, located in the Ocala National Forest in the southern part of the county, and Silver Springs, located in and around the city of Ocala. These two priority springs draw approximately three-quarters of a million visitors from outside the county annually (Table 1.1). Residents of Marion County comprise an estimated 30% of attendance or demand. Thus, the county economics is important in determining part of the demand for both priority springs. Since estimating the demand for these springs is part of the scope for this study, an economic profile for Marion County can be developed that may have a bearing on spring attendance.

Table 2.1 shows growth trends according to major economic indicators for Marion County during the period 1990-2001 (U.S. Bureau of Economic Analysis, 2003). In terms of the population growth rate, Marion County has increased by nearly 36% during this period, compared to a 26% increase for the State of Florida. In 2001, 0.26 million people resided in Marion County. Of significance, aggregate personal income grew at a faster rate than that of the State. The growth in personal income greatly exceeded that of population growth leading to a rise in per capita income of 44.1% for the period 1990-2001. Even though population and income growth rates exceeded that of the state, Marion County's per capita income growth of 44.1 % was below the State of Florida rise of nearly 47%. This indicates that Marion County is adding industries to its economic base that rival those added by the State. The 34.4% increase in employment in Marion County indicates that the county is adding slightly more labor-intensive jobs than the State of Florida, where wage and salary job growth increased by 31.9% over the period 1990-2001. In most cases, labor-intensive jobs (e.g., restaurants; amusements; health care) do not increase earnings as fast as capital-intensive jobs. Marion County has a greater concentration of employees in agriculture, healthcare, social assistance, and low skilled manufacturing than the State of Florida. Its three major employers are Emergency One, Inc., Closet Maid, and Singular Wireless who employ nearly 3,300 persons. Thus, earnings per job in Marion County tend to be below the state average and are just keeping up with the state in terms of growth (Table 2.1).

Table 2.1 Growth of Selected Economic Indicators for Marion County, Florida Containing Two Priority Springs, 1990-2001

Francis Indicators		2004	0/ Ohanan	Rank of Marion County among 67 Counties in
Economic Indicators	1990	2001	% Change	Florida (2001)
Population Growth				
Marion County	194,833	264,277	35.6	18
Florida	12,938,071	16,331,739	26.2	N/A
Aggregate Personal Income				
Marion City (Thous \$)	\$ 3,071,486	\$ 6,003,254	95.5	19
Florida (Thous \$)	\$ 258,479,049	\$ 467,188,758	80.7	N/A
Per Capita Income Growth				
Marion County (\$)	\$ 15,765	\$ 22,716	44.1	34
Florida (\$)	\$ 19,832	\$ 29,048	46.5	N/A
Wage & Salary Job Growth				
Marion County	66,519	89,410	34.4	20
Florida	5,802,287	7,655,940	31.9	N/A
Average Earnings per Job				
Marion County (\$)	\$ 18,571	26,261	41.4	40
Florida (\$)	\$ 22,879	32,643	42.7	N/A

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

Marion County has been able to attract visitors from out of state despite not having any accommodations tax as a potential tourism revenue source. This is due largely to the fact that Interstate 75 provides for easy ingress and egress for visitors passing through the area on their way to popular Florida destinations. In 2002, out of state domestic visitors (U.S.) to Marion County were 1.1% of all the visitors to the State of Florida that was slightly under 70 million (Visit Florida, 2004, personal correspondence). Thus, three-quarters of a million domestic persons visited Marion County, with some stopping at the priority springs. Neither Canadians

nor overseas visitors are included in these numbers. Jobs in the visitor industry tend to represent low paying hourly positions. The skill demands are not great and there is a great deal of seasonal, of part-time work that generates relatively less earning per year. It would appear from Table 2.1 that Marion County is exceeding or paralleling the growth rate for many economic indicators when compared to the State of Florida. However, the county has failed to achieve parity for both personal per capita income and earnings per job. More will be said on this below.

In Table 2.2, we see a socioeconomic profile of Marion County. Such a profile may be useful in judging spring attendance figures in terms of those local residence using priority springs. In 2001, Marion County had a somewhat comparable unemployment rate to the state of less than 5%. Marion County had a lower participation rate or percent of the population that were gainfully employed (Marion at 64.3% compared to 73.9 % for the State). This condition appears where the population is of advanced age and/or there is a lot of disguised unemployment (i.e., people that wish to work, but because jobs are so scarce, they leave the labor force). The poverty rate was slightly higher than that for the state reflected in part by the relatively lower paying jobs in the county. Table 2.2 shows that the median age in Marion County is about 5 years above the state, which is consistent with lower labor force participation and relatively low per capita income. Attendance at priority springs may be higher or lower depending on the kinds of recreation offered. Silver Glen Springs probably has more of an appeal to younger people with its raw terrain. Silver Springs, which is more of a theme park, might appeal to an older consumer. This county has a higher percentage of white population than exists statewide. Marion County has nearly 25% of its population over 65 years of age compared to the state average of nearly 18%. This reinforces our observations that Marion County is, in part, a retirement community. This county is ranked 14th in the state in terms of median age.

Additionally, we prepared a detailed comparison of the components of per capita income comparing Marion County to the State of Florida (Table 2.3). Because of the relatively low paying industrial base, dependence on tourism, and age structure of the population, Marion County has a per capita income over \$6,000 below that of the State of Florida. Nearly 88% of this difference is due to low earnings per person in the county (Table 2.3).

Table 2.2 Socioeconomic Profile of Marion County, Florida Containing Two Priority Springs, 2001

County Profile	Marion	Florida	Rank of Marion County Among 67 Florida Counties
Recorded Unemployment Rate (%)			
	4.9	4.8	29
Labor Force Participation Rate (%)			
	64.3	73.9	38
Poverty Rate (% of Population)	40.0	10.4	
	13.8	12.4	35
Median Age (Years)			
Median Age (Tears)	43.8	38.7	14
	40.0	30.7	17
Ethnicity (%)			
White	84.2	77.8	29
Other	15.5	22.2	39
65 year or Over (%)	24.6	17.5	14

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

Table 2.3
Economic Characteristics of Marion County, Florida
Containing Two Priority Springs, 2001

Economic Characteristics	Marion	Florida	Difference Marion Vs Florida
Per Capita Income	\$22,910	\$29,048	(\$6,138)
Per Capita Earning	11,612	17,037	(5,425)
Per Capita Transfers	5,392	4,483	909
Income Maintenance	340	316	24
Unemployed Insurance	46	64	(18)
Retirement	5,005	4,103	902
Per Capita Dividends, Interest &			
Rents	5,907	7,526	(1,619)

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

These low earnings stem from a labor-intensive base coupled with a lower participation rate (i.e., less people are gainfully employed from the population). Transfer payments to individuals such as retirement (e.g., social security) are positive, reflecting the age structure of Marion County's population. We examined this retiree population in terms of its economic characteristics (Table 2.3). In some Florida counties, people have migrated to the state with considerable assets in stocks, bonds, property, and cash. This is true of Lee and Collier Counties (i.e., cities of Naples and Ft. Myers). In the case of Marion County, the average individual receives about \$1,600 below the state average in dividends, interest, and rent meaning that the retirement community is relatively non-affluent. Depending on the nature of the springs, they may appeal to individuals that are less affluent because admission costs are relatively low and the springs are located within close proximity to their homes.

Tables 2.1, 2.2 and 2.3 show a growing community measured by population and income that has an industrial base with a per capita income 22% below the state average. Part of this is due to the relatively low-income retirement community in the county. The tables provide an economic profile of the community in which the two priority springs are located. Little or nothing is really known about the demand structure for recreational activity at the springs and how altering the springs (i.e., lowering discharges) may influence the economics of the area. These are matters of immense importance, but are well beyond the scope of this report.

2.2. Silver Glen Springs

2.2.1. Description of Silver Glen Springs

Silver Glen Springs is located near Astor in Marion County, in the Ocala National Forest, and flows into Lake George. Although owned by the U.S. National Park Service, private concessionaires operate Silver Glen Springs. The annual revenue collected by concessionaires in 2002 was approximately \$155,000 as reported by the Park Service to Bonn Marketing, Inc. Recreational activities include swimming, hiking, and boating. The latter is not permitted in the springs' pool, but it is acceptable in the springs run. There are many large fresh and saltwater fishes in both vents of the pool. This spring has a maximum depth of around 25 feet. Facilities include parking, bathrooms, picnic tables, and concessions. Only day visitors come to Silver Glen to avail themselves of its beauty and opportunity for outdoor recreation.

2.2.2. Annual and Seasonal Attendance

The researchers obtained annual and monthly attendance figures for Silver Glen Springs from the National Park Service for the period 1998-2002. In 2002, there were over 39,000 visitors to this priority spring. Over this five-year period, there did not appear to be any trend in annual attendance with highest attendance in 1999 (i.e., over 40,000) and the lowest being in 1998 (i.e., slightly less than 36,000). The U.S. Forest Service pointed out that these figures only count those attendees coming to the area by land and, "... not the thousands and thousands on an annual basis that are in the run itself on boats" (Tooley, 2003). Thus, our use of attendance figures counted by the U.S. Forest Service is very conservative and is probably an understatement of actual usage of this spring.

Using the five years of monthly data supplied by the U.S. Forest Service, we were able to establish a fairly stable seasonal pattern of attendance from year to year. This was discussed in Chapter 1. Seasonality was measured by looking at the quarterly attendance pattern over the 1998-2002 period. Quarterly seasonality was selected since the economic survey data discussed later in this report was collect every 3 months running from the 3rd quarter of 2003 to the 2nd quarter of 2004 as stipulated in the contract with SJRWMD. This was to enable SJRWMD to get the most recently available economic data on those using Silver Glen Springs for recreation. If no seasonal pattern existed, we would expect 25% of the annual attendance during each quarter of the year. With the aid of spreadsheet analyses, the researchers were able to compute the average quarterly attendance expressed as percent of annual attendance (see Table 2.4 for details).

Table 2.4 Annual Attendance Estimation for Silver Glen Springs						
Quarter	Months	Percent of Annual Attendance				
1 st	Jan-Mar	6.7%				
2 nd	Apr-June	44.3%				
3^{rd}	July-Sept	43.4%				
4 th	Oct-Dec	<u>5.6%</u>				
Total		100.0%				

Attendance peaks from the early spring to the early fall of each year with 85.7% of annual attendance occurring between April and September. Located in North Central Florida where the weather can be quite chilly during this period, it is clear that Silver Glen patrons may be impacted by the weather. As indicated in Chapter 1, most attendees to Silver Glen are not local residents of Marion County, but come from surrounding counties and from non-Florida domestic regions. MFLs must take into account the seasonality of springs public use when coming to any policy decision. For example, reductions in water levels and flows of springs may only impact ~12% of the attendees at Silver Glen Springs if the major impacts occur between October and March (Table 2.4). A refinement of seasonality may be calculated at the monthly level if needed using the data gathered by this research project.

Silver Glen Springs has the greatest economic impact to Marion County from April through September of each year. This extreme seasonality gives rise to highly used resources during part of the year and idle resources during the balance of each year. Such extreme seasonality usually creates only part time jobs since employers can only use employees for part of the year (i.e., April through September). Public infrastructure is also strained during only part of the year so there is reluctance by much of the local population to heavily invest in infrastructure (i.e., roads, bridges, sidewalks, etc.).

2.2.3. <u>Economic Impact of Visitors from Outside Marion County - Spending, Wages and Employment Generated Quarterly and Annually</u>

As we have indicated in our discussion of the Marion County economy in the first part of this chapter, the economic growth of this region is largely determined by the growth in what are called "base" or export industries in the county. That is, dollars must be brought into the local economy in order for economic growth to occur. Silver Glen Springs is part of the economic base of Marion County since it draws visitors into the area who spend money locally. The initial round of spending is called the "direct economic impact" of such dollars on the local economy, which generates "direct" sales, wages, and employment. This is a typical "tourist effect" which is understood throughout Florida since the state itself as a region depends on export industries such as tourism. To

be an export industry, it is only necessary that dollars be brought into the local economy. Thus, priority springs are largely export industries since they bring non-county visitors to the area. Please note that the term "visitor" refers only to the attendance that comes from outside the county of interest.

Because eight priority springs are being evaluated for four quarters with an annual summary, a large number of tables were prepared to illustrate the economic impact for all the springs. For each quarter, all parameters (e.g., expenditure per person, etc) necessary to calculate "direct spending" by visitors and the direct employment and wages generated by this spending were considered. The tables summarize exactly how the economic impacts were derived and identify which local industries benefit from this spending. For example, visitors may use local hotels and restaurants, as well as purchases from concessionaires at Silver Glen Springs. Because of this, it is important to provide a breakdown of total direct expenditures by spring visitors for industries in the area. To assist the reader's understanding, we will review in detail the first quarter of economic analyses for Silver Glen Springs. For the remaining quarters and the annual summary for Silver Glen Springs, as well as for each additional spring analysis, a narrative of the economic impact will be provided and the supporting documentation (i.e., spreadsheets) placed in the appendices of the report for reference.

An estimate of the direct economic impact of visitor attendance to Silver Glen Springs is summarized in Table 2.5. This table was constructed from data collected from detailed on-site surveys of visitors. The economic impact tables are located in Appendix A while the survey instrument is located in Appendix C. The purpose of this random sample of visitors was to obtain quarterly data on direct spending by visitors to the springs, to derive annual economic data. 200 interviews were made during the 3rd quarter of 2003 (the first quarter of the study, Table 2.5).

Table 2.5
Estimation of the Direct Economic Impact of Visitors Associated with Silver Glen Springs, Marion County, Florida 3rd Quarter (July-Sept), 2003

Economic Impact	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Marion	39,235	0.43	0.71		11,809.7
Visitors from Outside Marion County by Accommodation	Sample Size	Accommodation %	Visitors by Accommodation	Party Size	Length of Stay (LS)
Hotels and Motels	5	3%	295	3.8	3.8
Friends and Family	17	9%	1,004	3.4	4.2
Camping	0	0%	0	0.0	0.0
Condominiums & Others	47	24%	2,775	3.4	2.4
Day Visitors Total	131 200	66% 100%	7,735 11,810	3.4	1.0

Estimated Spending Per Party and	\$EPF	PD	\$EPPED	
Person by Accommodation	(Daily Spendin	g per Party)	(Daily Spending per Person)	
Hotel and Motels	\$85.80		\$22.58	
Friends and Family	\$41.18		\$12.11	
Camping	\$0.00		\$0.00	
Condominiums & Others	\$54.06		\$15.90	
Day Visitors	\$37.13		\$10.92	
Estimated Spending, Wages and Employment	Spending	Wages	Employment	
Hotel and Motels	\$6,666.28	\$1,596.79	0.56	
Friends and Family	\$12,158.12	\$2,291.15	0.74	
Camping	\$0.00	\$0	0	
Condominiums & Others	\$44,127.07	\$6,841.29	2.19	
Day Visitors	\$84,474.86	\$17,073.89	5.75	
Total	\$147,426.34	\$27,803.12	9.24	

Source: U.S. Forest Service; Bonn Marketing Survey.

As reported by the U.S. Forest Service, there were 39,235 total annual attendees at Silver Glen Springs of which approximately 43% of the annual attendance took place during the 3rd quarter of 2003 (Table 2.3). Based upon our survey of all attendees (i.e., visitors from outside and local residents), we estimated that about 71% of seasonal attendees came from outside Marion County. Combining these figures gives an estimate of ~12,000 visitors to Marion County during the 3rd quarter of 2003 (i.e., July – September). All such estimates are what statisticians call point estimates, and their precision (i.e., variance about the mean) depends on sample size. A sample of 200 produces a +/- 10% error of estimate.

In Table 2.5, the sample of 200 visitors is broken down by accommodation mode such as hotels or camping sites. This identifies the facilities or infrastructure needed to handle the seasonal influx of visitors to Marion County produced by Silver Glen Springs. Over two-thirds of the visitors to the spring are day visitors. Because Silver Glen only permits day access, some of these visitors may stay over-night in a hotel or motel on their travels. The data indicated that ~3% of visitors actually stayed in paid lodgings (Table 2.5).

The economic model used to make the calculations in Table 2.5 is quite simple. During the survey, visitors were asked their party size (SP) and how much money their party spent per day (\$EPPD) while visiting Silver Glen. Day visitors had a Length of Stay (LS) of 1, while those staying in hotels and motels had a LS of 3.8 days. Earlier in this chapter, we discussed the economic structure of Marion County. Nearly 1.1% of the some 70 million visitors to Florida visited Marion County in 2002. Silver Glen Springs is undoubtedly part of the reason why these visitors came to Marion County, but there is a strong case for not attributing other days stayed in this county to the priority springs under study.

Thus, our economic model for obtaining total expenditures by accommodation mode is expressed as follows:

$$S(i) = (EPPDi / SPi) V(i)$$
 Equation (1)

where, \$S (i) = Total Dollar Spending by ith mode;

\$EPPDi = Expenditures per Party Day for ith mode;

SPi = Size of Party for ith mode;

Vi = Visitor Day for ith mode.

The implementation of Equation (1) is shown in Table 2.5. For example, \$EPPD for those using paid lodging was \$85.80 per party day. The size of the party (SP) was 3.8 with the corresponding \$EPPED or expenditure per person day of \$22.58 as shown at the bottom of Table 2.5. The number of visitor days (Vi) for those using paid lodging was 295 (Table 2.5). When multiplied by \$22.58, this yields a total spending for those using paid lodging (\$Si) of \$6,666.

Finally, we obtained data from the interviewees on their detailed expenditures leading to their total expenditures per party day of \$85.80. This ranged from expenditures on lodging to local shopping are shown in detail by the survey instrument in Appendix B. We obtained data for Marion County on sales, wages, and employment from the U.S. Census (2000). For an industry like lodging in Marion County, we obtained the percent of sales going to wages plus the amount of sales that were generated per employee. Our estimate of spending for lodging, for example, was multiplied by the percent going to wages to obtain "wages generated." Finally, the estimate of employment generated by Silver Glen Springs was obtained by dividing expenditure in the case of hotel and motels by the ratio of sales to employment in this industry for Marion County. All figures were adjusted by an inflation factor to 2003 dollars. This procedure was used for all eight priority springs.

Among all five accommodation modes (Table 2.5), we estimated that for the 3rd quarter (July-Sept) of 2003, direct spending by Marion County visitors was ~\$150,000, generating about \$28,000 in wages and nearly 10 jobs. As we shall see later, sales and wages must be summed among quarters to obtain annual figures while employment is a stock variable and could be the same for each quarter depending on seasonality. The

annual rate of pay per employee is \$12,000. The tourist sector is notorious for being low skilled, low waged and highly part-time, so this low annual pay per employee is not totally unexpected.

During the interview process, the daily 3rd Quarter 2003 spending per party connected with Silver Glen Springs was broken down into eight separate "spending sectors" (Table 2.6). The spending by sector, ranged from just under \$50,000 on food and beverages (groceries) to a low of just under \$1,000 on ground transportation. The light spending for ground transportation (i.e., gas stations) may be because day visitors from neighboring counties drive but a few miles to Silver Glen Springs in Marion County.

The previous analysis for Silver Glen Springs, is an estimate of direct spending and wages and employment created by visitors to the area for the 3rd quarter where the seasonality for Silver Glen Springs is at it peak (Tables 2.4 and 2.5). As stated, half of the quarters show relatively few visitors due primarily to the weather. The reader is referred to Appendix A to view data and summary tables for the remaining three quarters for Silver Glen Springs. This procedure will be followed for all other springs. The report shall concentrate only on the annual impact of each spring to from here on.

In terms of the economic impact, direct spending by springs visitors from outside the county plus the direct employment and wages created by this spending is presented. Money injected into a local economy will have a multiplier effect. For local economies such as Marion County, such multipliers are usually between 1.2 and 1.8.

Quarterly and annual total spending, wages, and employment for Silver Glen Springs are summarized in Table 2.7. The detailed spreadsheets for deriving these data are in Table A.2.1 through Tables A.2.8 (Appendix A). Table 2.7 shows that visitors from outside Marion County spend approximately \$350 thousand dollars annually as a result of Silver Glen Springs. This direct spending created approximately six jobs in the community and annual wages of nearly \$67 thousand. Note that the quarter-to-quarter spending mirrors the seasonality for Silver Glen Springs (Tables 2.4 and 2.7). The 2nd and 3rd quarters account for about 92% of all spending during the year (Table 2.7).

Table 2.6
Estimation of Quarterly Spending, Created Employment and Wages
at Glen Springs, Marion County, Florida
3rd Quarter (July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$5,372	0.48	\$1,332
Food & Beverages(Restaurants)	\$28,401	3.34	\$7,725
Food & Beverages(Groceries)	\$49,887	1.57	\$4,988
Admission Fees	\$32,839	2.66	\$9,260
Evening Entertainment	\$9,004	0.74	\$2,539
Ground Transportation	\$989	0.01	\$52.00
Shopping	\$9,994	0.21	\$910
All Other	\$10,951	0.23	\$997
All	\$147,437	9.24	\$27,803

Sources: U.S. Forest Service; Bonn Marketing Research Group, Inc. On-Site Survey Data.

Table 2.7 Quarterly and Annual Economic Impact of Out of County Visitors to Silver Glen Springs on Marion County, Florida, 2003-2004

	2003	2003	2004	2004	Annual
	3rd	4th	1st	2nd	(03-04)
	July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quarters
Economic Indicators	(Thous \$)				
Direct Spending	\$147.43	\$10.69	\$17.59	\$173.06	\$348.77
Wages Created	\$27.80	\$2.11	\$3.31	\$33.15	\$66.37
Employment Created*	9.24	0.70	1.12	11.47	5.63
Components of Spending**					
Lodging	\$5.37	\$0.29	\$0.74	\$10.32	\$16.72
Food & Beverages (Restaurant)	\$28.40	\$1.95	\$3.49	\$41.79	\$75.63
Food & Beverages (Groceries)	\$49.89	\$3.38	\$6.28	\$64.85	\$124.40
Admission Fees	\$32.84	\$2.82	\$3.71	\$32.07	\$71.44
Evening Entertainment	\$9.00	\$0.90	\$1.04	\$7.91	\$18.85
Ground Transportation	\$0.99	\$0.00	\$0.00	\$0.00	\$0.99
Shopping	\$10.00	\$0.86	\$1.02	\$10.43	\$22.31
Other	\$10.95	\$0.48	\$1.30	\$5.69	\$18.42

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Survey by Bonn Marketing, Inc.

^{**} Rounding errors may occur.

2.2.4. Recreational and Aesthetic Use Value

Silver Glen Springs charges attendees \$3 per person day to visit the springs. The U.S. Forest Service does not manage the springs as a commercial enterprise, but regards the springs as "public goods" that are largely common property. A nominal fee to visit a spring is not used to measure the recreational value of such springs. Rather, the "use value" of such resources is measured by what the user would be willing to pay to access the spring above all cost incurred. "Use value" is usually measured by the "contingent value method." Contingent valuation is a direct-questioning approach by which individuals are asked the value they place on an item or activity. To measure "use value," we asked the following question: "If privately owned springs in this area were opened to the public on a limited access basis, how much would you be willing to spend on the entrance fee for each visit if you knew the money would go to the protection of those natural springs?" "Use value" applies to all users of the springs and not to just those coming from outside the county. Over the four quarters, 400 individual were asked this question that visited Silver Glen Springs. There was little variation from quarter to quarter with the arithmetic mean of the response ranging from \$3.7 to \$4.7 per person day (Appendix B). There was little statistical difference between these estimates and the average for the year was calculated to be \$4.17 per person day. This figure represents the use value per day of seeing the springs and participating in all or one of the recreational opportunities available to attendees. Johns et al (2001) found that the "use value" for natural reef systems was \$8.49 per person day in Southeast Florida. Another study documented the use value for artificial reefs in North Florida were \$9.65 per day (Bell, Bonn and Leeworthy, 1998).

"Use value" is used to identify the value lost due to environmental calamities such as oils spills, beach erosion, overfishing, reef destruction by boats, etc. It is not only used by the Federal government (e.g, USACE) to identify dollar value of damages, but would be used to measure any damages to springs resulting from the adoption of measures altering the levels and flows of water. The economic impact identifies who makes a living as a result of having the natural asset of springs in any areas. If springs did not exist, this money might be spent elsewhere. However, loss of springs due to a natural or man-made disaster would only be measured in terms of "use value."

At Silver Glen Springs, there are 39,235 person days per year (Table 1.1). If the "use value" was \$4.17 per day, then the absence of the springs would produce an annual loss of approximately \$163, 610. Carried into perpetuity, this dollar loss would occur every year into infinity. Such future losses would be small when discounted back to the present. The final simple equation to estimate the "Asset Use Value" of the spring resource is:

$$AUV = UV(t)/r$$
 Equation (2)

where: AUV =the asset use value;

UV(t) = total "use value" lost in the first year; and

r = real discount rate.

Most economists use a discount rate of 3% (Johns et al, 2001). Thus, dividing our annual use value of \$163,610 by 0.03 yields an AUV of \$5.45 million for Silver Glen Springs.

2.2.5. Visitor Profile

Visitor profile for Silver Glen Springs can be found in Appendices B and C.

2.3. Silver Springs

2.3.1. Description of Silver Springs

The Silver Springs group flows from several vents and forms the headwaters of the Silver River, a major tributary of the Ocklawaha River. It is located near the city of Ocala in Marion County, Florida. The eastern portion of the main spring pool is deepest, being between 25 and 30 feet. Silver Springs as a group has the largest long term, measured average flow of any freshwater spring group in Florida and possibly in the United States. For many years, Silver Springs has been operated as a major tourist attraction. It is famous for its rides in glass bottom boats from which the several spring outlets and the associated aquatic life may be viewed through the remarkably clear water. In addition, visitors may take a ride in a jungle-cruise boat several miles down the Silver River and enjoy many other interesting attractions along the shores of the spring pool, including zoos, museums, gift shops, and various food service facilities.

Today, visitors of all ages enjoy the 350-acre nature theme park at Silver Springs and the adjacent Wild Waters water park. During the yearly Concert Series, nationally known performers entertain visitors. Silver Springs is privately owned by Palace Entertainment which is the largest family amusement and water park operator in the U.S. with 37 parks and over 15 million attendees annually. Attendance figures for individual springs are regarded as proprietary information. However, BMRG learned from a very reliable source who was previously associated with this company (personal conversation with Dr. Bonn, anonymous source, 2003) that there are approximately 1,095,000 annual visitors to Silver Springs with about 70 percent (766,500) being from outside Marion County.

2.3.2. Annual and Seasonal Attendance

As discussed above, we estimated that over one million persons visit Silver Springs annually of which about 70% are from outside Marion County. This is a substantial operation in a county of only 250,000 residents. No observed monthly or quarterly data is available from the Silver Springs operation. However, since the Silver Springs operation is one of the largest visitor attractions in Central Florida, we used the seasonality factor for that region published by Shifflet (2003) (Table 2.8).

Table 2.8								
Annual Attendance Estimation for Silver Springs Quarter Months Percent of Annual Attendance								
1 st	Jan-Mar	25%						
2 nd	Apr-June	28%						
3 rd	July-Sept	27%						
4 th	Oct-Dec	<u>20%</u>						
<u>Total</u>		100.0%						

The seasonal tourist peak for the Central Florida region is during the period April through September, which coincides roughly with children being out of school. The average age of adult travelers is 42 with 35% of all yearly travelers being families. The authors feel that these global figures on attendance and seasonality are reasonable estimates for Silver

Springs and will come very close to actual data that could be collected, if possible, from corporate authorities.

2.3.3. <u>Economic Impact of Visitors from Outside the County – Spending, Wages and Employment Generated by Quarter and Annually</u>

On-site visitor surveying at Silver Springs was not permitted by Palace Entertainment because of the company's proprietary stance on data collected on its operations. Therefore, the research team obtained limited information on Silver Springs visitors using a database from a study of visitors to Tampa, Florida conducted by Bonn Marketing Research Group, Inc. (2003) whom indicated they had visited Silver Springs as a part of their overall travel experience to Tampa. This database provided initial information pertaining to visitor spending in the Marion County area but should be considered conservative in its use until on-site data collection at Silver Springs becomes possible.

The quarterly economic analyses for Silver Springs (3rd quarter of 2003 to the 2nd quarter of 2004) are summarized in Tables A.2.1 to A.2.8 (Appendix A). Table A.2.1 summarizes estimated direct spending by visitors to Silver Springs during the 3rd quarter 2003. A total of 181 individuals visited Marion County during their visit to Tampa in the 3rd quarter of 2003 (Table A.2.1). About 30% of these visitors stayed in hotels and motels while in the county and spent over \$320 per party day. According to Equation (1)(Section 2.2.3), only the spending per person day was included, which in the case of the hotel/motel room group was a little over \$90. We only counted the average spending on the day the visitor toured Silver Springs, while the individual/party may have spent 5-9 days in Florida. In 2002, the general admission for a party to Silver Springs was about \$32 per day that included many discounts, such as for senior citizens (55+) and small children. Party size was about 3.5 persons, so average entrance fee per person may approach \$9. For hotel/motel users, spring entrance fees may be as little as 10% of total spending per person day. However, a careful breakdown of admission fees from other expenses in Table A.2.2 (Appendix A) indicated that they may run up to 24% of total spending. Admission fees to the Silver Springs concert series held at the facility may run considerably higher since major national singing artist are featured.

During the 3rd quarter of 2003, it was estimated that visitors to Silver Springs from outside the county spent \$17.4 million which generated nearly 1,200 jobs and \$3.5 million dollars in wages paid. Measured by spending, Silver Springs was the largest visitor attraction among the eight priority springs studied. The highest spending quarter was the 1st quarter of 2004 at \$18.7 million dollars, which tends to seasonally attract out-of-state domestic and international visitors. For the four quarters under study, visitors from outside Marion County spent over \$61.4 million connected with Silver Springs which generated over 1,060 jobs and \$12.6 million in wages (Table 2.9).

	Table	2.9						
Quarterly and Annual Economic	c Impact of C	Out of Coun	ty Visitors t	o Silver Sprir	ngs on			
Marior	County, Flo	rida, 2003-	2004					
2003 2003 2004 2004 Annual								
	3rd	4th	1st	2nd	(03-04)			
	July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quart			
Economic Indicators	(Mil \$)	(Mil \$)	(Mil \$)	(Mil \$)	(Mil \$)			
Direct Spending	\$17.39	\$14.86	\$18.71	\$10.49	\$61.45			
Wages Created	\$3.50	\$3.08	\$3.79	\$2.24	\$12.61			
Employment Created*	1,177	1,027	1,293	745	1,060.5			
Components of Spending**								
Lodging	\$2.05	\$1.54	\$4.07	\$1.01	\$8.67			
Food & Beverages (Restaurant)	\$3.93	\$3.30	\$3.73	\$2.36	\$13.32			
Food & Beverages (Groceries)	\$0.74	\$0.63	\$0.89	\$0.68	\$2.94			
Admission Fees	\$4.24	\$4.15	\$3.79	\$3.58	\$15.76			
Evening Entertainment	\$0.61	\$0.65	\$0.54	\$0.12	\$1.92			
Ground Transportation	\$1.33	\$1.01	\$1.58	\$0.41	\$4.33			
Shopping	\$3.51	\$2.91	\$3.10	\$1.88	\$11.40			
Other	\$0.98	\$0.67	\$1.01	\$0.46	\$3.12			

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Tampa Bay Visitor Study, 2003

2.3.4. Recreational and Aesthetic Use Value

The natural value of the springs and the recreation associated with the use of the springs has consumer use value. However, for Silver Springs, which is privately operated, no use value exists, as it does for springs that are administered by a Federal or state agency as a common property or public good for all citizens to use.

^{**} Rounding errors may occur.

2.3.5. <u>Visitor Profile</u>

Visitor profiles for Silver Springs can be found in Appendix B and Appendix D. Please note that much of the visitor information was not accessible, since on-site surveying at Silver Springs was not permitted.

CHAPTER 3

LAKE COUNTY, FLORIDA: AN ECONOMIC ANALYSIS OF ALEXANDER SPRINGS, APOPKA SPRING AND BUGG SPRING

3.1. An Economic Profile of Lake County, Florida

Lake County is located in the northern part of Central Florida and contains three priority springs: Alexander, Apopka, and Bugg Spring. Alexander Springs is located in the Ocala National Forest and is owned and operated by the U.S. Federal Government. Apopka Spring is part of Lake Apopka and is owned by the State of Florida. Bugg Spring is owned by the Federal government and private individuals participate in its ownership. Further details will be discussed below.

Table 3.1 shows the growth in major economic indicators for Lake County over the period 1990-2001 for which the latest data are available from the U.S. Department of Commerce (2003). In terms of population growth, Lake County has increased 45 percent from 1990 to – 2001, which was about double that for the State of Florida. This rapid growth in this county is exerting pressure on the springs and other natural resources. In 2001, somewhat less than onequarter of a million people lived in Lake County ranking it 21st out of 67 in the State of Florida in population growth. Because of the rapid growth in population, Lake County's personal income grew much faster than that of the State (Table 3.1). However, Lake County's per capita income of \$24,418 lagged behind the State of Florida average of \$29,048 in 2001 (84% of the State's average). Per capita income is widely used by economists to measure the level of affluence in an area. Job growth in Lake County, although substantial, has not kept up with the State of Florida average (Table 3.1). This growth is largely a function of the economic base of the county (i.e., the kind of industries in the county). However, the growth of earnings per job in Lake County has slightly exceeded that of the State. This implies a subtle shift in the economic base toward industries with higher earning potential. In 2001, Lake County's industrial base was concentrated in agriculture, construction, healthcare, and social assistance. Agriculture was prominent in the early development of the county while construction reflects the tremendous population growth experienced during the last decade. Florida Trend (April, 2004) indicated that Lake County is experiencing an explosion in healthcare businesses, including hospital campuses, physician's offices, medical equipment distributions, and other related services.

Healthcare institutions such as Leesburg Regional Medical Center and Florida Hospital-Waterman employ nearly 3,000 people of the over 80,000 individual employed in Lake County (Table 3.1). The large number of retirees in Lake County dictates an ever-increasing demand for medical services.

Table 3.1:
Growth of Selected Economic Indicators for Lake County, Florida
Containing Three Priority Springs, 1990-2001

	4000	2004	0/ Changa	Rank of Lake County Among 67 Counties
Economic Indicators	1990	2001	% Change	in Florida (2001)
Population Growth				
Lake County	153,468	223,610	45.7	21
Florida	12,938,071	16,331,739	26.2	N/A
Aggregate Personal Income				
Lake City (Thous \$)	2,662,110	5,460,200	105.1	21
Florida (Thous \$)	258,479,049	467,188,758	80.7	N/A
Per Capita Income Growth				
Lake County (\$)	17,346	24,418	40.8	26
Florida (\$)	19,832	29,048	46.5	N/A
Wage & Salary Job Growth				
Lake County	50,468	81,675	61.8	23
Florida	5,802,287	7,655,940	31.9	N/A
Average Earnings per Job				
Lake County (\$)	17,490	25,616	46.5	42
Florida (\$)	22,879	32,643	42.7	N/A

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

Tables 3.2 and 3.3 show a socioeconomic profile of Lake County that may help us further understand the economic role of the priority springs. In 2001, Lake County's unemployment rate was more than one percentage point below that of Florida as a whole. This was one of the lowest in the state ranking 48th out of 67 counties in terms of low unemployment. This tight labor market was induced by the rapid migration of people into the county. Despite the large number

of retirees, the participation rate is exceedingly high (Table 3.2). This implies that "retirees" are re-entering the labor force for additional income. The fact that the per capita income is lower than the state average supports this thesis. Yet, the poverty rate is below the State average indicating that per capita income is not too low. The median age for Lake County is well above the state average (45.1 vs. 37.3 years) reflecting the fact that many older individuals that are a part of the labor force. Note that the percent of the labor force 65 years and older is nearly twice that of the State of Florida, which is known for its elderly population as a whole.

The reason for Lake County having a lower per capita income is explained in Table 3.3. In 2001, there was a \$4,628 difference in the per capita income between the State of Florida and Lake County mostly caused by low per capita "earnings." "Income" to individuals is composed of earnings, transfer payments (e.g., social security) and income from investments (e.g., stocks and bonds). Because of the higher percentage of the population 65 and older, transfer payments such as private and public retirement helped offset the low per capita earnings to the tune of \$1,151 (Table 3.3). Investment income brought into Lake County, although lower than the state average, provided additional offset to the lower per capita income. The Lake County economy has a higher percent of the population working in relatively lower skilled jobs just to keep their per capita income within 80-90% of that received in Florida. Usually, such counties have a lower participation rate since retirees bring more money in from capital investments. A good illustration is Lee (Ft. Myers) and Collier (Naples) counties in Southwest Florida.

Finally, little is known about the demand structure for outdoor recreational activity. However, it would appear that in Lake County, many in the population choose work over leisure recreation activities, in order to raise per capita income levels.

Table 3.2 Socioeconomic Profile of Lake County, Florida Containing Three Priority Springs, 2001

County Profile	Laka Caumtu	Elevido	Rank of Lake County Among 67
County Profile	Lake County	Florida	Florida Counties
Recorded Unemployment Rate (%)			
	3.7	4.8	48
Labor Force Participation Rate (%)			
	75.8	73.9	12
5 5 (2/ . / 5)			
Poverty Rate (% of Population)			
	10.8	12.4	48
Median Age (Years)			
Median rige (Tears)	45.1	38.7	11
	43.1	30.7	11
Ethnicity (%)			
White	87.5	77.8	16
Other	12.5	22.2	N/A
65 year or Over (%)	29.0	17.5	10

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

Table 3.3
Economic Characteristics of Lake County, Florida
Containing Three Priority Springs, 2001

Economic Characteristics	Lake	Florida	Difference Lake Vs Florida
Per Capita Income	\$24,418	\$29,048	(\$4,628)
Per Capita Earning	11,424	17,037	(5,613)
Per Capita Transfers	5,634	4,483	1,151
Income Maintenance	253	316	(63)
Unemployed Insurance	42	64	(22)
Retirement	5,337	4,103	1,234
Per Capita Dividends, Interest &			
Rents	7,360	7,526	(166)

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

3.2. Alexander Springs

3.2.1. <u>Description of Springs</u>

Alexander Springs is located in the Ocala National Forest near Astor Park. The springs issue vertically from a conical depression with a large spring pool with a depth of about 25 feet. The water is clear and sky-blue with a large boil on the pool surface over the vent. The pool discharges directly to a run about 150 ft wide that flows northwest a short distance, then curves north and eastward to the St. Johns River. Recreational activities at Alexander Springs include camping, swimming, scuba diving, hiking, fishing, bicycling, and canoeing. The U.S. National Park Service owns these springs. Private concessionaires are employed to provide for the springs users and their associated recreation. In 2002, the fee to enter these springs was \$3 per person with an additional camping fee. Alexander Springs is unique in having two primary users: "day visitors" who leave when the springs close at 8p.m. and campers who average 2-day visits.

3.2.2. Annual and Seasonal Attendance:

We obtained monthly attendance data from the U.S. Forest Service for the period 1998-2002 for day users and campers. For day users, annual attendance increased from 50, 416 in 1998 to 55,819 in 2002. However, the number of campers declined over he same period from 27,074 in 1998 to 21,414 in 2002. The U.S. Forest Service was unable to provide a reason for these trends.

As in the case of Silver Glen Springs, the seasonality was quite pronounced. The quarterly attendance data provided by the U.S. Forest Service for the period 1998-2002 was analyzed to show seasonal trends (Table 3.4).

Day visitors to Alexander Springs exhibited about the same seasonal pattern as that for Silver Glen. Attendance is greatest between April and September of each year. For day visitors, 77% of the demand is concentrated in the 2nd and 3rd quarters of the year. It is quite obvious that the factors governing seasonal demand for day visitors at Silver Glen and Alexander Springs are the same since they are only miles apart and provide generally the same services. We hypothesized that such seasonality was prompted by warm weather, children being out of school and normal vacations taken during the summer months.

Table 3.4
Annual Attendance Estimation for Silver Glen Springs

Quarter	Months	Percent of Annual Attendance			
1 st	Jan-Mar	Day Visitors 15%	Campers 31%		
2 nd	Apr-June	41%	31%		
3 rd	July-Sept	37%	17%		
4 th	Oct-Dec	<u>7%</u>	<u>21%</u>		
<u>Total</u>		100.0%	<u>100.0%</u>		

In the case of campers, the seasonality is quite different (Table 3.4). The first two quarters of the year are identical in terms of seasonal demand running from January through June as shown above. About 83% of the annual camper demand at Alexander Springs takes place during the cooler months of the year when maximum daily temperatures are more favorable to outdoor living. In addition, camping attendance may be influenced by general tourism to the State of Florida where the first quarter is the peak as people travel to Florida seeking a break from winter conditions in more northern states.

3.2.3. <u>Economic Impact of Visitors from Outside the County – Spending, Wages and</u> Employment Generated by Quarter and Annually

As with the other priority springs, information from surveyed springs visitors was combined with attendance data to derive estimates of spending, wages, and employment generated by them. Tables A.3.1 to A.3.8 (Appendix A) contain the worksheets for the four quarters of the year beginning in the 3rd quarter of 2003 and ending with the 2nd quarter of 2004. Day attendance at Alexander Spring is about 40-50% greater than at Silver Glen Spring, also owned by the U.S. Forest Service. The economic analysis for the 3rd quarter of 2003 is summarized in Table A.3.1 (Appendix A). Table A.3.1 shows that for our sample of 55 campers that the average stay was 2.47 days. The number of camping days per party averaged about 2.5 days for all four quarters. Based upon the

U.S. Forest Service advice, and our desire to be conservative whenever dealing with dollar estimates, we elected to use 2 days per camper. This doubles the economic impact of camper attendance estimates since the U.S. Park Service reports only the number of campers and not camper days.

Table 3.5 shows a summary of the economic impact for all four quarters and annual totals for Alexander Springs. These figures show the combined spending of both day visitors and campers. Spending averaged about \$194,000 per quarter, more than double that estimated for Silver Glen Springs just to the north. Annually, visitors from outside Lake County spent approximately \$775,000 that supported about \$170,000 in wages and created approximately 15 jobs. This spending would include items and services in Lake County, as well as goods and services bought through concessionaires at the springs.

Tables A.3.2 - A.3.8 (Appendix A) show the spending by quarters broken down by kinds of goods and services purchased. Admission fees represented one of the largest expenditures made by visitors from outside Lake County. In 2002, admission to Alexander Springs was \$3 per day per person with camping being extra. Camping is the main form of "recreation." Extra charges for camping may have elevated "admission fees" to one of the largest expenditure item shown in Table 3.5.

Table 3.5
Quarterly and Annual Economic Impact of Out of County Visitors
to Alexander Springs, Lake County, Florida, 2003-2004

to Alexander C	2003	2003	2004	2004	Annual
	3rd	4th	1st	2 nd	(03-04)
	July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quarters
Economic Indicators	(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)
Direct Spending	\$211.55	\$115.81	\$192.47	\$255.69	\$775.52
Wages Created	\$45.14	\$26.21	\$43.14	\$55.75	\$170.24
Employment Created*	14.47	8.19	13.58	18.16	13.60
Components of Spending**					
Lodging	\$21.99	\$24.04	\$36.39	\$39.26	\$121.68
Food & Beverages (Restaurant)	\$30.67	\$15.55	\$26.89	\$42.43	\$115.54
Food & Beverages (Groceries)	\$52.86	\$28.01	\$47.17	\$78.63	\$206.67
Admission Fees	\$56.43	\$26.31	\$44.24	\$64.33	\$191.31
Evening Entertainment	\$19.28	\$10.13	\$17.34	\$13.53	\$60.28
Ground Transportation	\$5.53	\$2.46	\$3.85	\$2.23	\$14.07
Shopping	\$21.53	\$7.04	\$12.77	\$11.39	\$52.73
Other	\$3.27	\$2.26	\$3.82	\$3.89	\$13.24

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Survey by Bonn Marketing, Inc.

3.2.4. Recreational and Aesthetic Use Value

For Alexander Springs, the respondents' willingness to pay for the use of the resource which reflects the value of recreation. In contrast to Silver Springs, Alexander Springs is really a common property resource administered for the public use by the Federal Government. A minimum charge of only \$3 per day for admission to Alexander Springs reflects this. By quarter, people attending this priority springs were willing to pay the following for use of the resource as determined by our contingent valuation survey (Table 3.6).

Use value per day does not vary much among quarters and, with a sample of 400 observations, was not statistically different. Using \$4.58 per day for use value, the annual average for Alexander Springs, the asset value of the resource can be estimated. Total user days for 2002 were 55,819 for day visitors plus two times the number of

^{**} Rounding errors may occur.

Table 3.6 Use Value for Alexander Springs						
Ose value for Alexander Ophings						
Quarter	Months	Willingness to Pay				
1 st	Jan-Mar	\$4.67				
2 nd	Apr-June	\$4.54				
3 rd	July-Sept	\$4.31				
4 th	Oct-Dec	<u>\$4.80</u>				
Annual Average \$4.58						

campers (21,414) for a total of 98,646 days. This figure represents residents and visitors from outside Lake County, since use value is created for all visitors. The annual average (\$4.58) multiplied by total use days (98,646) give an annual use value of \$4.5 million. Without any change in future annual flow, we need only divide by the real discount rate of 3%, which yields a spring resource worth of approximately \$150 million. If use value fell by 10%, for example, due to pollution or a reduction in flow, then the resource value would be reduced by \$15 million. This is how the use value of Alexander Springs can be used in assessing environmental damages. This is an illustration of how the Federal Government and the court system are estimating environmental damages. Thus, such use value numbers are useful for policy decisions made by the Florida Water Management Districts.

3.2.5. Visitor Profile

The visitor profile for Alexander Springs can be found in Appendices B and E.

3.3. Apopka Spring

3.3.1. <u>Description of the Spring</u>

Apopka Spring, also known a Gourd Neck Spring, is located near Clermont in Lake County. This spring flows eastward down a run about 200 feet to the "gourd neck," a narrow arm of Lake Apopka. The spring pool is roughly circular, between 100 and 200 feet in diameter. Spring discharge is from a single submerged oval-shaped opening in the bottom of the central part of the pool. The pool has a depth of about 35-40 feet. Title to

Apopka Spring is held by the State of Florida as part of its Land Trust Fund. There are no official estimates of how many people use Apopka Spring for recreation.

3.3.2. Annual and Seasonal Attendance

Observers at various springs place attendance very low relative to other more majestic springs in Central Florida. Apopka Spring is very near Alexander Springs and is considered by some as a small Alexander Spring without the upkeep furnished by the U.S. Forest Service. The Lake County Water Authority compares Apopka Spring to Gemini Springs in neighboring Volusia County, and estimates that annual attendance at Apopka Spring is not more than 10% of annual attendance at Gemini Springs (Roff, 2004). In 2002, Gemini Springs reported an attendance of 57,755 according to the officials in Volusia County officials. Therefore, the estimate of annual attendance for Apopka Spring is 5,767 or 10% of Gemini attendance. If further evidence indicates that actual attendance is higher or lower, the economic model has been constructed so that the economic impact estimates from this report for Apopka Spring can be determined by increasing or decreasing the spending, wages, or employment by this percentage.

Tourism research experts feel that Apopka Spring would appeal to day visitors using Alexander Springs due to their close proximity (BMRG, 2004). The seasonality figures from Alexander Springs (Table 1.2) were used to make estimates of seasonal spending for Apopka Spring.

3.3.3. <u>Economic Impact of Visitors from Outside Lake County - Spending, Wages and Employment Generated by Quarter and Annually</u>

Appendix A (Tables A.4.1-A.4.8) contains the analyses concerning the economic impact of Apopka Spring for the 3rd quarter 2003 to 2nd quarter 2004. Estimates indicate that spending per quarter connected with Apopka Spring range from \$4-\$10 thousand dollars and generate little wages and employment. Data on spending were collected directly from those using Apopka Spring.

Table 3.7

Quarterly and Annual Economic Impact of Out of County Visitors to Apopka Spring, Lake County, Florida, 2003-2004

, 0,				
2003	2003	2004	2004	Annual
1	4th	1st		(03-04)
July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quarters
(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)
\$8.87	\$1.93	\$5.04	\$4.49	\$28.52
\$1.87	\$0.39	\$1.07	\$0.90	\$5.94
0.65	0.15	0.35	0.31	0.52
\$1.93	\$0.32	\$1.48	\$1.02	\$6.10
\$2.29	\$0.56	\$0.85	\$0.90	\$7.03
\$2.99	\$0.69	\$1.79	\$1.63	\$10.08
\$0.29	\$0.12	\$0.11	\$0.11	\$1.14
\$0.77	\$0.10	\$0.49	\$0.36	\$2.17
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$0.59	\$0.13	\$0.25	\$0.33	\$1.85
\$0.00	\$0.00	\$0.09	\$0.15	\$0.24
	3rd July-Sept (Thous \$) \$8.87 \$1.87 0.65 \$1.93 \$2.29 \$2.99 \$0.29 \$0.77 \$0.00 \$0.59	3rd 4th July-Sept Oct-Dec (Thous \$) (Thous \$) \$8.87 \$1.93 \$1.87 \$0.39 0.65 0.15 \$1.93 \$0.32 \$2.29 \$0.56 \$2.99 \$0.69 \$0.29 \$0.12 \$0.77 \$0.10 \$0.00 \$0.00 \$0.59 \$0.13 \$0.00 \$0.00	3rd 4th 1st July-Sept Oct-Dec Jan-Mar (Thous \$) (Thous \$) \$8.87 \$1.93 \$5.04 \$1.87 \$0.39 \$1.07 0.65 0.15 0.35 \$1.93 \$0.32 \$1.48 \$2.29 \$0.56 \$0.85 \$2.99 \$0.69 \$1.79 \$0.29 \$0.12 \$0.11 \$0.77 \$0.10 \$0.49 \$0.00 \$0.00 \$0.25 \$0.00 \$0.00 \$0.09	3rd 4th 1st 2nd July-Sept Oct-Dec Jan-Mar Apr-June (Thous \$) (Thous \$) (Thous \$) \$8.87 \$1.93 \$5.04 \$4.49 \$1.87 \$0.39 \$1.07 \$0.90 0.65 0.15 0.35 0.31 \$1.93 \$0.32 \$1.48 \$1.02 \$2.29 \$0.56 \$0.85 \$0.90 \$2.99 \$0.69 \$1.79 \$1.63 \$0.29 \$0.12 \$0.11 \$0.11 \$0.77 \$0.10 \$0.49 \$0.36 \$0.00 \$0.00 \$0.00 \$0.33 \$0.00 \$0.00 \$0.00 \$0.33 \$0.00 \$0.00 \$0.09 \$0.15

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Survey by Bonn Marketing, Inc.

Over the year, Apopka Spring generated nearly \$29 thousand in spending, \$6 thousand dollars in wages, and about 4 jobs (Table 3.7). These estimates could change greatly with a better estimate of total attendance. All these estimates are adjusted to account for just visitors from outside Lake County and assume that 72% of total users were from outside Lake County.

3.3.4. Recreational and Aesthetic Use of Value

As with other priority springs, respondents were asked to answer a contingency valuation question to estimate use value. For Apopka Spring, use values by quarter were estimated (Table 3.8).

^{**} Rounding errors may occur.

Table 3.8 Use Value for Apopka Spring						
Quarter						
1 st	Jan-Mar	\$4.27				
2 nd	Apr-June	\$4.32				
3 rd	July-Sept	\$4.13				
4 th	Oct-Dec	<u>\$5.30</u>				
Annual Averag	е	\$4.51				

As with the other priority springs, there was little variation in the estimate of use value per day from quarter to quarter with the average being \$4.51 per day. Including residents, Apopka Spring has only 5,776 per days per year. When multiplied by the use value per day the annual flow is \$26,050 per year. Dividing this rate by the real discount rate of 3%, the asset value for Apopka Spring was derived as \$868,000. Since Gourd Neck is part of the State of Florida land preservation fund, it could be listed as this figure in present use. Conversion of this land to other uses could increase or decrease the asset value of this spring's resource.

3.3.5. Visitor Profile

Visitor profiles for Apopka Spring can be found in Appendix B and F.

3.4. Bugg Spring²

3.4.1. Description of Spring

Bugg Spring is located near Okahumpka in Lake County, Florida. This spring is in the Ocklawaha River Basin. According to the Lake County Water Authority, Bugg Spring has always been a highly desired acquisition. However, the property surrounding the springs is privately owned and under a long-term lease to the U.S. Navy. Bugg Spring is classified as a potentially developable area for recreation. Little is known about how many people presently use these springs. If sold to Lake County, authorities estimate that attendance might be about 5% of Gemini Springs (Roff, 2004).

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² Bugg Spring is currently under a lease agreement with the U. S. Navy. There is no official data available on recreational use of the springs.

3.4.2. Annual and Seasonal Attendance

If developed by Lake County, it is estimated that Bugg Spring might have an annual attendance of about 2,900 individuals or 5% of Gemini Springs nearly 58,000 attendance. Because no data exists on seasonality of spring use for Bugg Spring, the seasonality pattern for day visitors in Alexander Springs was applied to Bugg Spring.

3.4.3. The Economic Impact of Visitors from Outside the County- Spending; Wages and Employment Generated by Quarter and Annually

Presently, there is no economic activity associated with Bugg Spring. There is only economic potential associated with the development of this area. Accordingly, the spending by party day, by mode, and by kinds of goods and services estimated for Apopka Spring were applied to Bugg Spring to provide spending estimates. The results are presented by quarter in Tables A.5.1 through A.5.8 (Appendix A). A summary of these calculations is given in Table 3.9. As Table 3.5 shows spending by a rather small attendance will generate from \$1.00 to \$5.38 thousand per quarter. Annual spending will be about \$12 thousand with \$2.42 thousand in wages and 0.21 jobs created.

Table 3.9
Quarterly and Annual Economic Impact of Out of County Visitors to Bugg Spring on Lake County, Florida, 2003-2004

	2003 3rd	2003 4th	2004 1st	2004 2nd	Annual (03-04)
	July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quarters
Economic Indicators				•	
Economic indicators	(Thous \$)				
Direct Spending	\$3.69	\$1.00	\$2.08	\$5.38	\$11.66
Wages Created	\$0.78	\$0.21	\$0.45	\$1.08	\$2.42
wages Created	φυ.76	φυ.Ζ1	φυ.45	φ1.00	ΨΖ.42
Employment Created*	0.27	0.07	0.14	0.36	0.21
Components of Spending**					
Lodging	\$0.81	\$0.21	\$0.59	\$1.15	\$2.65
5 5					
Food & Beverages (Restaurant)	\$0.95	\$0.28	\$0.35	\$1.12	\$2.56
Food & Beverages (Groceries)	\$1.25	\$0.34	\$0.74	\$1.94	\$4.11
Admission Fees	\$0.12	\$0.06	\$0.04	\$0.13	\$0.32
Evening Entertainment	\$0.32	\$0.05	\$0.21	\$0.46	\$1.01
Ground Transportation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Shopping .	\$0.24	\$0.06	\$0.11	\$0.38	\$0.76
Other	\$0.00	\$0.00	\$0.03	\$0.18	\$0.21

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Survey by Bonn Marketing, Inc.

3.4.4. Recreational and Aesthetic Use Value of Springs

At present, Bugg Spring is not owned by a public entity. We have no knowledge of individuals using the spring for recreational purposes. As with Silver Springs, we regard Bugg Spring as privately owned, therefore, use value does not exist.

3.4.5. <u>Visitor Profile</u>

Visitor profiles for Bugg Spring are not available due to its private ownership, and on-site survey was not allowed in the Bugg Spring.

^{**} Rounding errors may occur.

CHAPTER 4

VOLUSIA COUNTY, FLORIDA: AN ECONOMIC ANALYSIS OF PONCE DE LEON SPRINGS, GEMINI SPRINGS, AND GREEN SPRINGS

4.1. Economic Profile of Volusia County, Florida

Volusia County is located in Northeast Florida along the Atlantic Ocean. This county contains three priority springs: Ponce de Leon, Gemini and Green. Ponce de Leon Springs is located at or near DeLand, Florida. This priority spring is owned and operated by the State of Florida and is called "De Leon Springs" by those in the state park system. Gemini Springs, near Enterprise, Florida, is owned and operated by Volusia County. Green Springs, near DeBary, Florida, is owned by Volusia County and has only passive recreation such as picnicking, hiking, and bird watching.

Table 4.1 shows the growth in major economic indicators for Volusia County over the period 1990-2001 (U.S. Bureau of Economic Analysis, 2003). In terms of population growth, Volusia County has increased by about 21 percent from 1990 to 2001, which is about 80% of the population growth rate for the State of Florida. This relatively slow growing county is probably reaching the limit of some of its resources. The county is ranked 14th in the State of Florida in population density with 416 persons per square mile (University of Florida, 2003). In 2001, somewhat more than 450 million people lived in Volusia County (University of Florida, 2003). Out of the 67 counties in Florida, Volusia County ranked 10th in the State of Florida in terms of population size. Because of the relatively slow growth in population, Volusia County's aggregate personal income grew much slower than that of the State (Table 2.1). Volusia County's per capita income of \$23,832 still lagged behind the State of Florida average of \$29,048 in 2001 (82% of the State average). This percentage has not changed appreciably since 1990. Per capita income is widely used by economists to measure the level of affluence in an area. Volusia County has not been gaining in terms of its relative per capita income when compared to the State of Florida average. This is generally indicative of a low paying industrial base.

Although significant, job growth in Volusia County has not kept up with the State of Florida average (Table 4.1). Such growth is largely a function of the economic base of the

county (i.e., the kind of industries in the county). An important component of per capita income, the growth of earnings per job in Volusia County, has been about the same as that of the State. This implies there has been no appreciable shift in the economic base toward industries with higher earning potential. In 2001, Volusia County's industrial base was concentrated in health care and social assistance, tourism and other services. Halifax Fish Community Health System, for example, employs nearly 4,500 persons (Enterprise Florida, 2003). Daytona Beach and other beaches in Volusia County attract tourist such as "spring breakers" and "sports racing enthusiasts." Florida Trend (April, 2004) indicates that Volusia County is engaged in a five-year plan to bring health care and medical products companies to the area. The large number of retirees in Volusia County dictates an ever-increasing demand for medical services.

Table 4.1
Growth of Selected Economic Indicators for Volusia County, Florida
Containing Three Priority Springs, 1990-2001

	COIII	airiirig Trifee i	Tionly	Springs, 18	990-2001	
		1990		2001	% Change	Rank of Marion County among 67 Counties in Florida (2001)
Population Growth						
Volusia County		374,200		451,641	20.7	10
Florida	1:	2,938,071	16	5,331,739	26.2	N/A
Aggregate Personal Income						
Volusia City (Thous \$)	\$ 6	5,219,227	\$ 1	0,763,331	73.1	14
Florida (Thous \$) Per Capita Income Growth	\$ 258	3,479,049	\$ 467	,188,758	80.7	N/A
Volusia County (\$)	\$	16,620	\$	23,832	43.1	31
Florida (\$) Wage & Salary Job Growth	\$	19,832	\$	29,048	46.5	N/A
Volusia County		129,660		155,505	19.9	12
Florida Average Earnings per Job		5,802,287	7	7,655,940	31.9	N/A
Volusia County (\$)	\$	19,583		27,796	41.9	34
Florida (\$)	\$	22,879		32,643	42.7	N/A

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

Table 4.2 shows the socioeconomic profile of Volusia County which may help us further understand the economic role of the priority springs. In 2001, Volusia County's unemployment

rate was somewhat below that of Florida as a whole. This relatively tight labor market was induced by the rapid migration of people into the county from out-of-state but also from other congested counties in the State of Florida. As a result of having a high percentage of retirees, the participation rate is exceedingly low (Table 4.2). This implies that many "retirees" are not reentering the labor force. The median age for Volusia County (42.4 years) is well above the state average (37.3 years) reflecting the fact that Volusia County has a lot of older individuals. The prominence of the retirement community is shown in the percent of the population 65 years and older (Table 4.2). Volusia County has nearly 22% of their population in this category compared to only 17.5% for the State of Florida.

The reason Volusia County has a lower per capita income than the State of Florida is explained in the bottom of Table 4.3. In 2001, there was a \$5,215 difference in the per capita income between the State of Florida and Volusia County mostly caused by low per capita "earnings." "Income" to individuals is composed of earnings transfer payments (e.g. social security) and income from investments (e.g. stocks and bonds). Because of the higher percentage of the population 65 and older, transfer payments such as private and public retirement helped offset the low per capita earnings by \$651 (Table 4.3). Investment income, although lower than the state average brought into Volusia County, provided additional offset to the lower per capita income. The Volusia County economy has a higher percent of the population working in relatively lower skilled jobs keeping the per capita income within 80-90% of that received in Florida. Usually, such counties have a lower participation rate since retirees bring more money in from capital investments. Volusia County depends on a low paying economic base for income and relatively less on income from capital assets such as stocks and bonds which is balanced out by transfer payments (e.g., retirement income).

Finally, little is known about the demand structure for outdoor recreational activity. However, it appears that in Volusia County, many of the population choose leisure over work. The high dependence of the County's economic base on tourism would emphasize the use of springs as a form of outdoor recreation.

Table 4.2 Socioeconomic Profile of Volusia County, Florida Containing Three Priority Springs, 2001

County Profile	Volusia	Florida	Rank of Volusia County Among 67 Florida Counties
-	Volusia	1 IOIIua	i iorida codrities
Recorded Unemployment Rate (%)			
	4.3	4.8	37
Labor Force Participation Rate (%)			
	63.6	73.9	40
Poverty Rate (% of Population)			
, , ,	11.5	12.4	44
Median Age (Years)			
Modian rigo (Todio)	42.4	38.7	18
	72.7	30.7	10
Ethnicity (%)	00.0	77.0	05
White	86.0	77.8	25
Other	14.0	22.2	N/A
65 year or Over (%)	21.9	17.5	19

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

Table 4.3 Economic Characteristics of Volusia County, Florida Containing Three Priority Springs, 2001

Economic Characteristics	Volusia	Florida	Difference Volusia Vs Florida
Per Capita Income	\$23,832	\$29,048	(\$5,215)
Per Capita Earning	11,841	17,037	(5,196)
Per Capita Transfers	5,134	4,483	651
Income Maintenance	279	316	(37)
Unemployed Insurance	52	64	(12)
Retirement	4,803	4,103	700
Per Capita Dividends, Interest &			
Rents	6,856	7,526	(670)

Source: Regional Economic Information System, U.S. Bureau of Economic Analysis, CD Rom-2003.

4.2. Ponce de Leon Springs

4.2.1. <u>Description of the Springs</u>

Ponce de Leon Springs is about 7 miles north of DeLand, Florida. The springs area is semicircular in shape and is about 170 feet in diameter. The depth of the pool ranges from about 29 feet to approximately 41 feet. These springs are a State of Florida park that is operated by an independent contractor. Activities at Ponce de Leon Springs include swimming, boating, fishing, hiking, canoeing, paddleboat rentals and scuba diving (with special permission). As in contrast with Alexander Springs discussed in Chapter 3, no camping is allowed in or near Ponce de Leon Springs. The listed acreage for Ponce de Leon Springs State Park is 592 acres.

4.2.2. Annual and Seasonal Attendance

We obtained annual and seasonal attendance data from the Office of Park Planning, State of Florida for the period 1990-2002. This was the longest time series we were able to get among the eight priority springs under study. Annual attendance at Ponce de Leon Springs for selected intervals showed in Table 4.4.

	Table 4.4
	ance Trend 1990-2002,
Ponce	de Leon Springs
<u>Year</u>	Annual Attendance
1990	193,858
1992	213,482
1994	209,714
1996	209, 563
1998	221,085
2000	255,154
2002	258,474

Over the 1990-2002 period, attendance increased by 64,616 individuals, reflecting an increase of 33%. With rather finite resources at the springs, the attendance growth rate may not be sustained. Using spreadsheet analyses, we analyzed the seasonal pattern of

individuals attending the park for 13 years of data and found the following seasonal pattern in Table 4.5.

Annua		ble 4.5 tion for Ponce de Leon Springs
Quarter	Months	Percent of Annual Attendance
1 st	Jan-Mar	21%
2 nd	Apr-June	33%
3 rd	July-Sept	34%
4 th	Oct-Dec	<u>12%</u>
<u>Total</u>		100.0%

These seasonality factors were highly consistent throughout the 1990-2002 period (i.e., year to year variations in percentages were nominal and any outliers were eliminated from the statistical analyses). The pattern is familiar in that the peak of spring attendance is from April through September. That is, 67% of annual attendance is accounted for by these six months of the year. In contrast, the seasonal peak for South and part of Central Florida (e.g., Tampa) is in the first quarter of the year. It appears that seasonal peaks in the case of springs may be based upon children being out of school with families visiting on normally planned vacations during summer periods. Also, visitors to Ponce de Leon Springs come not only from out of state, but also from surrounding Florida counties, which further influences the seasonal analyses. Note that Volusia County is one of the first counties encountered when entering Florida via I-95 on the east coast, and consequently it is also one of the last counties encountered as visitors leave Florida via this venue. Therefore, we would expect visitors from outside Florida to be well represented among the users of Ponce de Leon Springs.

4.2.3. Economic Impact of Visitors from Outside the County – Spending, Wages, and Employment Generated by Quarter and Annually

The individual quarters along with associated economic indicators are included in Appendix A, Tables A.6.1 through Tables A.6.8. The economic impact of direct spending by visitors from outside Volusia County varies from a high of approximately

\$795 thousand in the 3rd period of 2003 to a low of \$263 thousand in the 4th quarter of the same year (Table 4.6). This spending follows the seasonal pattern discussed above, where the 3rd quarter has the highest attendance while the 4th quarter has the lowest attendance. For the entire year, spending reached \$2.18 million generating \$425 thousand in wages and salaries and approximately 36 full and part time jobs. Of the eight priority springs, Ponce de Leon Springs was found to have received the second most spending from visitors from outside the county.

	T. 1	1. 10			
0 - 4-4 - 44		ole 4.6	0 () (0)		
Quarterly and Ann					
to Ponce de Leon					l .
	2003	2003	2004	2004	Annual
	3rd	4th	1st	2nd	(03-04)
	July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quarters
Economic Indicators	(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)
			.		
Direct Spending	\$794.89	\$263.05	\$494.47	\$633.03	\$2,185.44
Wages Created	\$155.94	\$51.55	\$97.06	\$121.05	\$425.60
vvages created	ψ100.04	ψ51.55	ψ57.00	Ψ121.00	ψ-20.00
Employment Created*	52.41	18.16	33.18	40.70	36.11
Components of Spending**					
Lodging	\$103.53	\$25.56	\$71.68	\$62.70	\$263.47
Food & Beverages (Restaurant)	\$222.02	\$91.77	\$144.08	\$142.49	\$600.36
Food & Beverages (Groceries)	\$137.06	\$45.85	\$94.75	\$116.98	\$394.64
Admission Fees	\$67.95	\$23.41	\$40.25	\$51.08	\$182.69
Evening Entertainment	\$137.39	\$27.29	\$70.17	\$76.18	\$311.03
Ground Transportation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Shopping .	\$106.62	\$41.36	\$59.23	\$58.70	\$265.91
Other	\$20.32	\$7.81	\$14.31	\$19.38	\$61.82

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Survey by Bonn Marketing, Inc.

4.2.4. Recreational and Aesthetic Use Value

Entrance fees to de Leon Springs are only \$4 per car having up to eight people. The resource is really owned by the State of Florida and can be regarded as a common property resource similar to bass in a lake or beaches on the Atlantic Ocean. Therefore, both residents of Volusia County and those coming to Ponce de Leon Springs from

^{**} Rounding errors may occur.

outside the county derive use value from the resource. With our contingent value question, for the 400 people sampled over the four quarters, the average use value was \$4.37 per day with a high of \$4.74 in the 3rd quarter of 2003 and a low of \$3.60 in the 4th quarter of the same year. Multiplying the annual attendance of 259,000 by the average use value of \$4.37, we obtain an annual aggregate flow of recreational value at \$1.13 million. If this flow continued into the future, we would be able to derive that asset value of the natural resources at the springs by dividing by an interest rate of 3%. This would amount to \$37.7 million. The reader should note that the \$37.7 million is the asset value of the land, water and general springs when used for recreational purposes. This analysis does not address the issue of alternative uses such as residential development, etc.

4.2.5. <u>Visitor Profile</u>

The Visitor profile for Ponce de Leon Springs can be found in Appendices B and G.

4.3. Gemini Springs:

4.3.1. Description of Springs

The 210 acres Gemini Springs was purchased in 1994 through the combined effort of Volusia County, the Trust for Public Lands and the St. Johns River Water Management District. Approximately 6.5 million gallons of water bubble up from Gemini's two springs each day. Gemini Springs is located between the town of Enterprise and the city of DeBary. Many types of wildlife and vegetation can be observed at Gemini Springs. Biking, canoeing and picnicking are the recreational activities of choice since swimming is presently not permitted (i.e., see below for a further discussion of swimming) and fishing is allowed only from the docks.

4.3.2. Annual and Seasonal Attendance

Gemini Springs has only been a recreationally active spring for a few years. Data on attendance were obtained from Leisure Services, Volusia County from 1998-2002. In 1998, over 100,000 persons visited Gemini Springs, but since then there was a decided decline in estimated attendance to only 57,755 individuals. Officials at Leisure Services

indicated that the reason for the declining attendance is because the swimming area was closed since June 8, 2001 due to high bacteria levels. Numerous actions have been taken to improve the water quality, but no long term solution has been achieved. Officials from Volusia County provided their estimate of seasonal attendance at Gemini Springs with the following seasonal pattern observed in Table 4.7.

	Tal	ble 4.7
	Annual Attendance Est	imation for Gemini Springs
Quarter	Months	Percent of Annual Attendance
1 st	Jan-Mar	19.7%
2 nd	Apr-June	39.7%
3 rd	July-Sept	23.9%
4 th	Oct-Dec	<u>16.7%</u>
Total		100.0%

This seasonal attendance follows the familiar pattern of the other springs in that nearly 64% of annual demand takes place during the second two quarters of the year. It is consistent with our hypotheses that spring's seasonality is governed by traditional vacations in the summer with children being out of school.

4.3.3. <u>Economic Impact of Visitors from Outside the County – Spending; Wages and Employment Generated by Quarter and Annually:</u>

Gemini Springs exhibited a peak in spending in 2nd quarter of 2004 by out of county visitors of over \$156 thousand which coincides with peak seasonal attendance (Table 4.8). The lowest spending during the last 12 months was in the 4th quarter of 2003 with reported spending at just a little under \$50 thousand. This also coincides with the pattern of annual attendance. Direct spending by people connected with Gemini springs from outside Volusia County on an annual basis was estimated at about \$333 thousand dollars. This generated wages and salaries of about \$69 thousand and approximately 7 full and part time jobs in Volusia County. When swimming recreation returns to Gemini Springs, it is expected that attendance will return to the level of annual visitation as reported for 1998.

Table 4.8

Quarterly and Annual Economic Impact of Out of County Visitors to Gemini Springs on Volusia County, Florida, 2003-2004

,	2003 3rd	2003 4th	2004 1st	2004 2nd	Annual (03-04)
	July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quarters
Economic Indicators	(Thous \$)				
Direct Spending	\$70.44	\$47.36	\$58.33	\$156.74	\$332.87
Wages Created	\$13.50	\$9.54	\$12.25	\$33.62	\$68.91
Employment Created*	4.63	3.39	4.37	12.65	6.26
Components of Spending**					
Lodging	\$8.89	\$2.86	\$5.61	\$14.93	\$32.29
Food & Beverages (Restaurant)	\$21.15	\$18.39	\$23.54	\$76.00	\$139.08
Food & Beverages (Groceries)	\$10.26	\$6.38	\$5.12	\$18.30	\$40.06
Admission Fees	\$7.89	\$5.65	\$6.65	\$12.38	\$32.57
Evening Entertainment	\$6.12	\$5.00	\$6.95	\$11.07	\$29.14
Ground Transportation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Shopping	\$12.95	\$7.02	\$6.79	\$15.50	\$42.26
Other	\$3.17	\$2.06	\$3.67	\$8.56	\$17.46

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Survey by Bonn Marketing, Inc.

4.3.4. Recreational and Aesthetic Use Value

Over the four quarters under study, 400 individuals were surveyed about their willingness to pay for recreation at Gemini Springs. The admission fee to Gemini Springs is \$3.50 per vehicle carrying up to 8 people or about \$.45 per person day.

Willingness to pay for recreation at Gemini Springs varied from \$5.58 per person day in the 3rd quarter of 2003 to as little as \$4.20 in the 4th quarter of 2004. The average use value for the 400 Gemini Springs users surveyed was \$4.68. When multiplied by the 2002 annual attendance of 57,755, we obtained an annual aggregate use value of a little over \$270,000 per year. If this flow of use value was uninterrupted over time, then the asset value of Gemini Springs would be about \$9 million.

4.3.5. Visitor Profile

A visitor profile for Gemini Springs can be found in Appendices B and H.

^{**} Rounding errors may occur.

4.4. Green Springs

4.4.1. <u>Description of the Spring</u>

Green Springs is near Osteen. Volusia County owns the property and is now in the design stage of this project. Construction started this year to improve the site which will be geared to such passive recreational activities as walking/hiking trails and picnicking areas. It will also serve as a trailhead for an upcoming rail to trails project adjacent to the site. Swimming will not be allowed. The site is much smaller than Gemini Springs and, according to Volusia County Leisure Services, Green Springs will never lend itself to a large number of visitors. Currently, it is not very accessible to the public according to the Director of Leisure Services for Volusia County (Apgar, 2003). Green Springs has no recreational value at this time although people are free to use the springs providing they can get there.

4.4.2. Annual and Seasonal Attendance

Green Springs will be treated the same way as Apopka Spring and Buggs Spring. In these cases, they were posed as developing springs with minimum attendance today. Our discussion above on Green Springs indicated it will only attract a fraction of the attendance of Gemini Springs when fully developed. To estimate future economic development at Green Springs attendance was assumed to be 25% of that now existing at Gemini Springs. We also assume that this attendance will occur sometime after the renovation. Using our 25% rule, estimated annual attendance would be 14,439 (i.e., 25% of 57,755 for Gemini) in 2005 or sometime later.

With respect to seasonality, Green Springs is expected to be similar to Gemini Springs catering to more visitors during the middle six months of the year, which has been a recurring theme for springs.

4.4.3. <u>Economic Impact of Visitors from Outside the County – Spending, Wages, and</u> Employment Generated by Quarter and Annually

Based on an attendance of a little under 15,000 per year and the same seasonality and economic parameters from Gemini Springs (e.g., spending per person per day),

spending by people from outside Volusia County is estimated at nearly \$38 thousand in the 2nd quarter of 2005 or 2006 when Green Springs is properly improved and advertised as available to the public. As expected, this high in spending among quarters of the year is dictated by the seasonality factor where nearly 40% of annual demand takes place in the 2nd quarter shown in Table 4.9. Almost \$12 thousand is expected to be spent in the depressed seasonality of the 4th quarter by the out of county visitors. Annual spending at Green Springs is projected at a little over \$81 thousand. On an annual basis, the spending generates a little under \$17 thousand in wages and salaries supporting 2 full and part time jobs. The nature and size of Green Springs makes Leisure Services officials doubtful that this area will ever reach the attendance now present at nearby Gemini Springs.

	Tol	-la 10			
Quarterly and Ann		ole 4.9	Out of Count	v Vicitore	
	en Spring, V	•		y visitors	
10 0700	2003	2003	2004	2004	Annual
	2003 3rd	2003 4th	2004 1st	2004 2nd	
					(03-04)
	July-Sept	Oct-Dec	Jan-Mar	Apr-June	4 Quarters
Economic Indicators	(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)	(Thous \$)
Direct Spending	\$17.60	\$11.83	\$14.58	\$37.54	\$81.55
Wages Created	\$3.37	\$2.38	\$3.06	\$8.06	\$16.87
Employment Created*	1.16	0.85	1.09	3.03	1.53
Components of Spending**					
Lodging	\$2.22	\$0.71	\$1.40	\$3.61	\$7.94
Food & Beverages (Restaurant)	\$5.29	\$4.60	\$5.88	\$18.16	\$33.93
Food & Beverages (Groceries)	\$2.57	\$1.60	\$1.28	\$4.20	\$9.65
Admission Fees	\$1.97	\$1.41	\$1.66	\$3.01	\$8.05
Evening Entertainment	\$1.53	\$1.25	\$1.74	\$2.69	\$7.21
Ground Transportation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Shopping	\$3.24	\$1.75	\$1.70	\$3.78	\$10.47
Other	\$0.78	\$0.51	\$0.92	\$2.09	\$4.30

^{*} Full and Part time Jobs, in units, not in thousands.

Source: Quarterly detail shown in Appendix A; Survey by Bonn Marketing, Inc.

4.4.4. Recreational and Aesthetic Use Value

Based upon the correspondence with Leisure Services in Volusia County, few if any people presently use Green Springs for recreation. There are no barriers to enter

^{**} Rounding errors may occur.

Green Springs so some individuals probably go there and derive some recreational use value from this area. Because of the sparse attendance and the early stage of development, it is not worth the effort to get data on willingness to pay or use value of Green Springs. Since the present use value per person day of Green Springs is not known and attendance is but conjecture, we were unable to measure the aggregate recreational flow and/or the asset value of this area.

4.4.5. <u>Visitor Profile</u>

A visitor profile for Green Springs cannot be obtained due to its early development stage, and no recreational activities in the springs are available yet.

CHAPTER 5 SUMMARY

During 2003-2004, nearly 2,300 visitors to selected priority springs were interviewed in order to better understand the economic value natural springs have to local economies and the importance these natural resources have to the quality of life of Florida residents and nonresidents. Study results indicated that the eight priority springs generated an economic impact of over \$65 million. Silver Springs, which has a large theme park in conjunction with the natural springs environment, accounted for 94% of this total economic impact. Non-county visitation to these eight springs was estimated at 1.85 million and attendance varied considerably due to ownership (private vs. public) and level of on-site development (i.e., infrastructure). The most heavily visited spring studied in this project was Silver Springs, which had an estimated 767,200 non-county visitors annually, representing 71% of the total. Bugg Spring, a privately owned spring, was estimated to attract 1,756 non-county visitors annually. This represented the lowest number of non-county springs visitors among the study sample. The study documented that over \$13 million in wages and 1,123 jobs were generated by visitor spending. Visitor spending by category indicated "Admissions" (\$16.24 million), "Restaurants" (\$14.29 million), "Shopping" (\$11.80 million) and "Lodging" (\$9.12 million) accounted for approximately 85% of all visitor spending (Tables 5.1 and 5.2).

Study results of 2,298 interviewed visitors to selected priority springs suggested the following representative market profile (Table 5.3). The most prevalent springs visitor was a married (76.6%), Caucasian (80.9%) female (57.5%), having some college education or a college degree (43.6%), living in a household earning between \$50,000 - \$79,999 annually (39.5%).

The most prevalent springs visitor spent an average of \$64.96 per party per day, spent 1.4 days visiting the springs with 3.5 persons per party. An interesting finding was that 63% of each party was represented by non-county residents, suggesting that locals often have a very high level of influence upon visitors and their decision to visit springs. This was further substantiated by documenting that 18.8% of springs visitors heard about those springs from friends and family. Also, 45.8% of all respondents indicated they would likely return to the springs within the next six months. Over 72% of all respondents were identified as repeat springs visitors.

Overall, respondents indicated their main purposes for visiting the springs were to "enjoy the outdoors" (60.7%) and to "spend time with family" (23.2%). "Picnicking" (62.2%),

"swimming" (38.2%), "viewing wildlife" (20.9%), "fishing" (18.2%) and "boating" (17.4%) represented the top five visitor activities associated with spring visits.

By far, the typical springs visitor was a Florida resident (66.8%) living in those counties where the springs were located. Non-Florida residents represented 38 different states with New York (3.8%), Pennsylvania (2.6%), Michigan (2.0%), Massachusetts (1.9%), and Ohio (1.6%) accounting for the greatest numbers of non-Florida U.S. residents (Table 5.3). International visitors accounted for 5.1% of all total visitors (Table 5.3).

In order to evaluate overall visitor satisfaction with the springs experience, respondents were asked to indicate on a scale of 1-5, with 1 being poor and 5 being excellent, how satisfied they were with their visit. Overall, springs visitors rated their experience as a 4.22 indicating a high level of satisfaction.

An important part of this study was to obtain information about willingness to pay for an opportunity to access privately owned natural springs. Individuals were asked how much they were willing to spend on the entrance fee for each visit to privately owned natural springs if they knew the money would be used to protect those natural springs. Results indicated that on average, individuals would be willing to pay \$4.50 to enter privately owned springs currently with no public access. This has far reaching implications for potential public-private management scenarios in Florida.

Total Economic Impac	t for Fight Priority	Springs
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	O	

	Total Visitor	Spending (in thousands)	Wages (in thousands)	Employment
Marion County				
Silver Glen Springs	27,471	348.76	66.37	5.63
Silver Springs Lake County	767,200	61,460.00	12,610.00	1,060.50
Alexander Springs	52,519	775.52	170.24	13.60
Apopka Spring	4,064	28.62	5.94	0.52
Bugg Spring Volusia County	1,756	11.68	2.42	0.21
Ponce de Leon Springs	186,480	2,079.92	100.88	35.00
Gemini Springs	36,964	332.87	68.91	6.26
Green Springs	9,241	81.55	16.87	1.53
Total	1,085,695	\$65,118.92	\$13,041.63	1,123.25

		Table 5.2 Vi	sitor Spendi	ing Categories (in thousands)	5.2 Visitor Spending Categories for Eight Priority Springs (in thousands)	rity Springs			
	Lodging	Restaurant	Groceries	Admission	Evening Ground Entertainment Transportation	Ground Transportation	Shopping	Other	Total
Marion County Silver Glen Springs	\$16.72	\$75.63	\$124.40	\$71.44	\$18.85	\$0.99	\$22.31	\$18.42	\$348.76
Silver Springs	8,670.00	13,320.00	2,940.00	15,760.00	1,920.00	4,330.00	11,400.00	3,120.00	61,460.00
Lane County Alexander Springs	121.68	115.54	206.67	191.31	60.28	14.07	52.73	13.24	775.52
Apopka Spring	6.10	7.03	10.08	1.14	2.17	0.00	1.85	0.24	28.61
Bugg Spring	2.65	2.56	4.11	0.32	1.01	0.00	92.0	0.21	11.62
Volusia Courity Ponce de Leon Springs	263.47	98.009	394.64	182.69	311.03	0.00	265.91	61.82	2,079.92
Gemini Springs	32.29	139.08	40.06	32.57	29.14	0.00	42.26	17.46	332.86
Green Springs	7.94	33.93	9.65	8.05	7.32	0.00	10.47	4.30	81.66
Total	\$9,120.85 \$14,	\$14,294.13	\$3,729.61	\$16,247.52	\$2,349.80	\$4,345.06	\$11,796.29	\$3,235.69	\$65,118.95

Overall Visitor Profile for Eight Priority Springs

Table 5.3

Date	Expenditures	Avg. Nights	Avg.	# In Party	Lik	ikely To Return	To Return:	Will Not	ls This
	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos. Do	Mos. Don't Know	Return	Your First Visit?
2003-2004	\$64.96	4.	3.5	2.2	33.1%	45.8%	13.7%	7.5%	Yes 27.5% No 72.5%

Top Visitor County Origin		
Florida Resident	%8.99	¥
Volusia	17.7	
Lake	15.8	Re
Marion	14.4	Ad
Seminole	3.5	ອັ
Polk	3.1	ည
		Š
Non Florida Resident – U.S.	28.1%	Ш
New York	3.8	ອັ
Pennsylvania	2.6	ō
Michigan	2.0	
Massachusetts	1.9	Ď
Ohio	1.6	
Non Florida Resident – International	5.1%	

Average Daily Expenditures	
Restaurants Admission Fees Groceries Shopping Lodging Evening Entertainment Ground Transportation	\$12.89 12.92 9.64 8.99 8.79 14.14
Other Items Total Avg. Daily Expenditure	2.78 \$64.96

lop Visitor Activities	
Picnickina	62.2%
Onimaina	200
Swilling	20.7
View Wildlife	20.9
Fishing	18.2
Boating	17.4
Photography	12.8
Water Sports	0.6
Snorkeling	8.5
Scuba Diving	0.9
Archeology	3.1

	Where Stayed Overnight	
	No Overnight Stay 70.85 Locally 23.6 Another County 5.6	70.8% 23.6 5.6

60.7% 23.2 8.8 7.3

Enjoy the outdoors Spending time with family Enjoy the wildlife Entertaining guests

Main Purpose for Visit

Rate your Visit to the Springs Rate Importance of Springs to Your Quality of Life (On a 1-5 Scale, with 5 being the highest)	4.22	3.52	
	Rate your Visit to the Springs	Rate Importance of Springs to Your Quality of Life	(On a 1-5 Scale, with 5 being the highest)

	Accommodation Used	
	No Overnight Stay	68.1
	Hotel/Motel	4.9
	Private Home	9.9
	Other	6.8
	Campground	10.3

68.9% 18.8 6.7 5.8

Repeat Visitor Family/Friends Internet Brochure

How Heard About the Springs

\$4.50	
Willingness to Pay for Access to Private Springs	
Willingness to Private Sp	

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad	43.6%	Male	42.5%	Married	%9.9/	Caucasian	80.9%	Under \$20,000	4.4%
Post Graduate Degree	14.3	Female	57.5	Single	18.4	Hispanic	5.6	\$20,000-\$49,999	26.2
High School Graduate	11.5			Divorced/Widowed	3.7	African-American	12.0	\$50,000-\$79,999	39.5
Technical School	26.2			No Answer	1.3	Other	1.5	\$80,000 or More	14.8

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APPENDICES

APPENDIX A: QUARTERLY VISITOR ECONOMIC IMPACT FOR EIGHT PRIORITY SPRINGS

APPENDIX B: QUARTERLY VISITOR PROFILE

APPENDIX C: SILVER GLEN SPRINGS VISITOR PROFILE

APPENDIX D: SILVER SPRINGS VISITOR PROFILE

APPENDIX E: ALEXANDER SPRINGS VISITOR PROFILE

APPENDIX F: APOPKA SPRING VISITOR PROFILE

APPENDIX G: PONCE DE LEON SPRINGS VISITOR PROFILE

APPENDIX H: GEMINI SPRINGS VISITOR PROFILE

APPENDIX I: FLORIDA SPRINGS SURVEY INSTRUMENT

Appendix A: Quarterly Visitor Economic Impact for Eight Priority Springs

Table A.1.1
Estimation of the Direct Economic Impact of Visitors Associated with Silver Glen Springs, Marion County, Florida
3rd Quarter (July-Sept), 2003

	Siu	Quarter (July-Se	<i>ιρι),</i> 2003		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to		(2222222)			,
Marion	39,235	0.43	0.7		11,809.7
Visitors from Outside Marion County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	5	3%	295	3.8	3.8
Friends and Family	17	9%	1,004	3.4	4.2
Camping	0	0%	0	0.0	0.0
Condominiums & Others	47	24%	2,775	3.4	2.4
Day Visitors Total	131 200	<u>66%</u> 100%	<u>7,735</u> 11,810	3.4	1.0
Estimated Spending Per Party Person by Accommodation	and	\$EP (Daily Spendir		\$EPPED	nding per Person)
Hotel and Motels		\$85		\$22.58	namy per r ereem,
Friends and Family		\$41	.18	\$12.11	
Camping		\$0	.00	\$0.00	
Condominiums & Others		\$54	.06	\$15.90	
Day Visitors		\$37	.13	\$10.92	
Estimated Spending, Wages a Employment	nd	Spending	Wages	Employme	nt
Hotel and Motels		\$6,666.28	\$1,596.79	0.56	
Friends and Family		\$12,158.12	\$2,291.15	0.74	
Camping		\$0.00	\$0	0	
Condominiums & Others		\$44,127.07	\$6,841.29	2.19	
Day Visitors Total		\$84,474.86 \$147,426.34	\$17,073.89 \$27,803.12	5.75 9.24	

Table A.1.2
Estimation of Quarterly Spending, Created Employment and Wages at Silver Glen Springs, Marion County, Florida
3rd Quarter(July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$5,372	0.48	\$1,332
Food & Beverages(Restaurants)	\$28,401	3.34	\$7,725
Food & Beverages(Groceries)	\$49,887	1.57	\$4,988
Admission Fees	\$32,839	2.66	\$9,260
Evening Entertainment	\$9,004	0.74	\$2,539
Ground Transportation	\$989	0.01	\$52.00
Shopping	\$9,994	0.21	\$910
All Other	\$10,951	0.23	\$997
All	\$147,437	9.24	\$27,803

Table A.1.3 Estimation of the Direct Economic Impact of Visitors Associated with Silver Glen Springs, Marion County, Florida
4th Quarter (Oct.-Dec.), 2003

		-,			
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Marion	39,235	0.06	0.4		641.6
Visitors from Outside Marion County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	2	2%	19	4.0	3.0
Friends and Family	5	5%	47	4.0	3.8
Camping	0	0%	0	0.0	0.0
Condominiums & Others	18	18%	169	3.5	2.7
Day Visitors Total	<u>75</u> 100	<u>75%</u> 100%	<u>706</u> 942	3.5	1.0
Estimated Spending Per Party Person by Accommodation	and	\$EP (Daily Spendir		\$EPPED (Daily Spe	nding per Person)
Hotel and Motels		\$89.		\$22.38	,
Friends and Family		\$30	.40	\$7.60	
Camping		\$0	.00	\$0.00	
Condominiums & Others		\$35	.50	\$10.14	
Day Visitors		\$40	.25	\$11.60	
Estimated Spending, Wages a Employment	nd	Spending	Wages	Employme	nt
Hotel and Motels		\$421.88	\$95.07	0.03	
Friends and Family		\$357.82	\$79.43	0.03	
Camping		\$0.00	\$0.00	0.00	
Condominiums & Others		\$1,719.17	\$336.45	0.11	
Day Visitors Total		\$8,191.86 \$10,690.23	\$1,599.44 \$2,110.39	0.53 0.70	

Table A.1.4
Estimation of Quarterly Spending, Created Employment and Wages at Silver Glen Springs, Marion County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$285	0.03	\$71
Food & Beverages(Restaurants)	\$1,948	0.23	\$530
Food & Beverages(Groceries)	\$3,383	0.11	\$338
Admission Fees	\$2,821	0.23	\$796
Evening Entertainment	\$898	0.07	\$253
Ground Transportation	\$0	0.00	\$0
Shopping	\$865	0.02	\$79
All Other	\$486	0.01	\$44
All	\$10,686	0.70	\$2,111

Table A.1.5
Estimation of the Direct Economic Impact of Visitors Associated with Silver Glen Springs, Marion County, Florida
1st Quarter (Jan.-Mar.), 2004

Percent of Quarterly

Estimated

Annual

Attend. in

	Annual	Quarter (Seasonal)	Attendees Visitors	_	Quarterly Visitors to Springs
Non-Resident Visitors to Marion	39,235	0.07	0.5		1,373.2
Visitors from Outside Marion County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	3	3%	41	4.0	2.0
Friends and Family	7	7%	96	4.0	3.3
Camping	0	0%	0	0.0	0.0
Condominiums & Others	15	15%	206	3.1	2.5
Day Visitors Total	<u>75</u> 100	<u>75%</u> 100%	<u>1,030</u> 1,373	3.4	1.0
Estimated Spending Per Party Person by Accommodation	imated Spending Per Party and		\$EPPD (Daily Spending per Party)		nding per Person)
Hotel and Motels		\$118		\$29.67	inding por 1 didding
Friends and Family		\$23	.86	\$5.97	
Camping		\$0	.00	\$0.00	
Condominiums & Others		\$53	.07	\$17.29	
Day Visitors		\$40	.50	\$11.88	
Estimated Spending, Wages a Employment	nd	Spending	Wages	Employme	nt
Hotel and Motels		\$1,222.10	\$276.14	0.10	
Friends and Family		\$573.39	\$118.58	0.04	
Camping		\$0.00	\$0.00	0.00	
Condominiums & Others		\$3,560.77	\$590.98	0.19	
Day Visitors Total		\$12,232.17 \$17,588.43	\$2,326.42 \$3,312.12	0.79 1.12	

Table A.1.6
Estimation of Quarterly Spending, Created Employment and Wages at Silver Glen Springs, Marion County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$743	0.07	\$184
Food & Beverages(Restaurants)	\$3,491	0.41	\$949
Food & Beverages(Groceries)	\$6,276	0.20	\$628
Admission Fees	\$3,709	0.30	\$1,046
Evening Entertainment	\$1,043	0.09	\$294
Ground Transportation	\$0	0.00	\$0
Shopping	\$1,022	0.02	\$93
All Other	\$1,304	0.03	\$118
All	\$17,588	1.12	\$3,312

Table A.1.7 Estimation of the Direct Economic Impact of Visitors Associated with Silver Glen Springs, Marion County, Florida 2nd Quarter (Apr.-June), 2004

		-, -, -, -, -, -, -, -, -, -, -, -, -, -	,,		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Marion	39,235	0.44	0.7		12,084.4
Visitors from Outside Marion County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	4	4%	483	4.0	2.5
Friends and Family	10	10%	1,208	4.3	3.0
Camping	0	0%	0	0.0	0.0
Condominiums & Others	22	22%	2,659	3.1	2.6
Day Visitors Total	<u>64</u> 100	<u>64%</u> 100%	<u>7,734</u> 12,084	3.4	1.0
Estimated Spending Per Party Person by Accommodation	and	\$EP (Daily Spendir		\$EPPED (Daily Spe	nding per Person)
Hotel and Motels		\$120.5		\$30.13	<u> </u>
Friends and Family		\$37.7	0	\$8.77	
Camping		\$0.0	0	\$0.00	
Condominiums & Others		\$68.3	6	\$22.41	
Day Visitors		\$37.1	3	\$10.79	
Estimated Spending, Wages a Employment	nd	Spending	Wages	Employme	nt
Hotel and Motels		\$16,041.50	\$4,005.39	1.47	
Friends and Family		\$10,591.07	\$2,408.36	0.83	
Camping		\$0.00	\$0.00	0.00	
Condominiums & Others		\$59,596.47	\$10,741.63	3.81	
Day Visitors		\$86,827.64	\$15,997.37	5.36	

Source: U.S. Forest Service; Bonn Marketing Survey.

Total

\$173,056.68

11.47

\$33,152.75

Table A.1.8
Estimation of Quarterly Spending, Created Employment and Wages at Silver Glen Springs, Marion County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages	
Lodging	\$10,320	0.92	\$2,559	
Food & Beverages(Restaurants)	41,793	4.91	\$11,368	
Food & Beverages(Groceries)	\$64,852	2.00	\$6,485	
Admission Fees	\$32,072	2.62	\$9,044	
Evening Entertainment	\$7,908	0.65	\$2,230	
Ground Transportation	\$0	0.00	\$0	
Shopping	\$10,425	0.21	\$949	
All Other	\$5,687	0.12	\$518	
All	\$173,057	11.43	\$33,153	

Table A.2.1
Estimation of the Direct Economic Impact of Visitors Associated with Silver Springs, Marion County, Florida
3rd Quarter (July-Sept), 2003

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Marion	1,096,000	0.27	0.7		207,144.0
Visitors from Outside Marion County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	54	30%	61,800	3.56	4.81
Friends and Family	52	29%	59,511	2.38	9.00
Camping	2	1%	2,289	3.50	5.50
Condominiums & Others	10	6%	11,444	3.70	6.78
Day Visitors Total	<u>63</u> 181	<u>35%</u> 100%	<u>72,100</u> 207,144	3.40	1.00

Estimated Spending Per Party and Person by Accommodation	\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)
Hotel and Motels	\$320.7		\$90.10
Friends and Family	\$259.8	31	\$109.16
Camping	\$236.	50	\$67.57
Condominiums & Others	\$212.30		\$57.38
Day Visitors	\$212.79		\$62.59
Estimated Spending, Wages and Employment	Spending (Mil)	Wages (Mil)	Employment
Hotel and Motels	\$5.57	\$1.22	416
Friends and Family	\$6.49	\$1.14	390
Camping	\$0.16	\$0.04	12
Condominiums & Others	\$0.67	\$0.15	49
Day Visitors	\$4.51	\$0.96	310
Total	\$17.40	\$3.51	<u>1,177</u>

Source: D.K. Shifflet and Associates; Bonn Marketing Survey.

Table A.2.2
Estimation of Quarterly Spending, Created Employment and Wages at Silver Springs, Marion County, Florida
3rd Quarter (July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$2,054,959	184	\$509,629
Food & Beverages(Restaurants)	\$3,929,551	462	\$1,068,838
Food & Beverages(Groceries)	\$740,297	24	\$74,029
Admission Fees	\$4,235,826	346	\$1,194,503
Evening Entertainment	\$610,688	49	\$172,214
Ground Transportation	\$1,329,062	20	\$69,111
Shopping	\$3,509,718	72	\$319,384
All Other	\$977,711	20	\$88,972
All	\$17,387,812	1,177	\$3,496,680

Source: Bonn Marketing Survey.

Table A.2.3
Estimation of the Direct Economic Impact of Visitors Associated with Silver Springs, Marion County, Florida
4th Quarter (Oct.-Dec.), 2003

	~.		0.7, = 0 0 0		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Marion	1,096,000	0.2	0.7		153,440.0
Visitors from Outside Marion County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	20	23%	34,873	3.2	5.1
Friends and Family	13	15%	22,667	2.2	5.7
Camping	2	2%	3,487	3.5	5.5
Condominiums & Others	8	9%	13,949	3.6	3.9
Day Visitors Total	<u>45</u> 88	<u>51%</u> 100%	<u>78,464</u> 153,440	2.8	1.0

Estimated Spending Per Party and Person	\$EP	PD	\$EPPED
by Accommodation	·		(Daily Spending per Person)
Hotel and Motels	\$319.2	25	\$99.77
Friends and Family	\$395.	54	\$183.97
Camping	\$236.	50	\$67.57
Condominiums & Others	\$172.63		\$47.56
Day Visitors	\$224.74		\$80.26
Estimated Spending, Wages and Employment	Spending (Mil)	Wages (Mil)	Employment
Hotel and Motels	\$3.48	\$0.76	259
Friends and Family	\$4.17	\$0.68	233
Camping	\$0.24	\$0.06	19
Condominiums & Others	\$0.67	\$0.16	53
Day Visitors	\$6.30	\$1.42	463
Total	\$14.86	\$3.08	<u>1,027</u>

Source: D.K. Shifflet and Associates; Bonn Marketing Survey.

Table A.2.4
Estimation of Quarterly Spending, Created Employment and Wages at Silver Springs, Marion County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$1,536,972	138	\$381,169
Food & Beverages(Restaurants)	\$3,302,731	388	\$898,343
Food & Beverages(Groceries)	\$625,316	20	\$62,532
Admission Fees	\$4,152,264	339	\$1,170,938
Evening Entertainment	\$646,674	53	\$182,362
Ground Transportation	\$1,006,428	15	\$52,334
Shopping	\$2,905,081	60	\$264,362
All Other	\$670,599	14	\$61,025
All	\$14,846,065	1,027	\$3,073,065

Source: Bonn Marketing Survey.

Table A.2.5
Estimation of the Direct Economic Impact of Visitors Associated with Silver Springs, Marion County, Florida
1st Quarter (Jan.-Mar.), 2004

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Marion	1,096,000	0.25	0.7		191,800.0
Visitors from Outside Marion County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	12	17%	32,417	2.8	2.0
Friends and Family	7	10%	18,910	4.4	5.0
Camping	0	0%	0	N/A	N/A
Condominiums & Others	29	41%	78,341	2.7	6.9
Day Visitors Total	<u>23</u> 71	<u>32%</u> 100%	62,132 191,800	3.5	1.0

Ф ГО	חח	¢ EDDED
· ·		\$EPPED
· · · · ·		(Daily Spending per Person)
\$392.6	66	\$138.75
0011	. –	DEF 4.4
\$244.7	15	\$55.11
CO (20	\$0.00
\$0.0	00	\$0.00
\$286.3	24	\$107.61
Ψ200.2		Ψ107.01
\$265.2	29	\$76.23
Spending	Wages	
(Mil)	(Mil)	Employment
\$4.50	\$0.82	271
\$1.04	\$0.15	49
\$0.00	\$0.00	0.00
CO. 40	# 4.00	057
\$8.43	\$1.90	657
\$4.74	\$0.92	316
•		1,293
	\$392.6 \$392.6 \$244.7 \$0.0 \$286.2 \$265.2 Spending (Mil) \$4.50	(Daily Spending per Party) \$392.66 \$244.15 \$0.00 \$286.24 \$265.29 Spending Wages (Mil) \$4.50 \$0.82 \$1.04 \$0.15 \$0.00 \$0.00 \$8.43 \$1.90 \$4.74 \$0.92

Source: D.K. Shifflet and Associates; Bonn Marketing Survey.

Table A.2.6
Estimation of Quarterly Spending, Created Employment and Wages at Silver Springs, Marion County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$4,067,718	365	\$1,008,794
Food & Beverages(Restaurants)	\$3,733,354	439	\$1,015,472
Food & Beverages(Groceries)	\$889,107	28	\$88,910
Admission Fees	\$3,786,706	309	\$1,067,851
Evening Entertainment	\$535,470	44	\$151,003
Ground Transportation	\$1,582,331	24	\$82,281
Shopping	\$3,100,238	64	\$282,122
All Other	\$1,011,782	21	\$92,072
All	\$18,706,706	1,294	\$3,788,505

Source: Bonn Marketing Survey.

Table A.2.7
Estimation of the Direct Economic Impact of Visitors Associated with Silver Springs, Marion County, Florida
2nd Quarter (Apr.-June), 2004

			.0,, = 0 0 .		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Marion	1,096,000	0.27	0.7		207,144.0
Visitors from Outside Marion County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	7	15%	31,522	3.05	2
Friends and Family	0	0%	0	N/A	N/A
Camping	0	0%	0	N/A	N/A
Condominiums & Others	27	59%	121,585	3	4
Day Visitors Total	<u>12</u> 46	<u>26%</u> 100%	<u>54,038</u> 207,144	3.17	1

Estimated Spending Per Party and Person	\$EPPD		\$EPPED
by Accommodation	(Daily Spending per Party)		(Daily Spending per Person)
Hotel and Motels	\$173.7	72	\$56.96
Friends and Family	\$0.0	00	\$0.00
Camping	\$0.0	00	\$0.00
Condominiums & Others	\$135.66		\$45.22
Day Visitors	\$136.42		\$43.03
Estimated Spending, Wages and Employment	Spending Wages (Mil) (Mil)		Employment
Hotel and Motels	\$2.67	\$0.47	154
Friends and Family	\$0.00	\$0.00	0
Camping	\$0.00 \$0.00		0
Condominiums & Others	\$5.50 \$1.23		413
Day Visitors	\$2.32	\$0.54	178
Total	<u>\$10.49</u>	<u>\$2.24</u>	<u>745</u>

Source: D.K. Shifflet and Associates; Bonn Marketing Survey.

Table A.2.8
Estimation of Quarterly Spending, Created Employment and Wages at Silver Springs, Marion County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$1,009,105	90	\$250,258
Food & Beverages(Restaurants)	\$2,360,234	277	\$641,984
Food & Beverages(Groceries)	\$677,935	22	\$67,793
Admission Fees	\$3,579,262	292	\$1,009,352
Evening Entertainment	\$116,747	10	\$32,923
Ground Transportation	\$408,750	6	\$21,255
Shopping	\$1,877,911	38	\$170,890
All Other	\$464,902	10	\$42,306
AII	<u>\$10,494,846</u>	<u>745</u>	<u>\$2,236,761</u>

Source: Bonn Marketing Survey.

Table A.3.1
Estimation of the Direct Economic Impact of Visitors Associated with Alexander Springs, Lake County, Florida 3rd Quarter (July-Sept), 2003

Annual

Percent of

	Annual	Annual Attend. in Quarter (Seasonal)	Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs	
Non-Resident – Day Visitors	55,819	0.37	0.68		14,044.1	
Non-Resident – Camping	21,414	0.17	0.68		2,475.5	
Visitors from Outside Lake County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)	
Hotels and Motels	4	3%	387	3.0	2.0	
Friends and Family	20	14%	1,937	3.9	2.5	
Condominiums & Others	1	1%	97	3.0	1.0	
Day Visitors Subtotal	<u>120</u> 145	<u>83%</u> 100%	11,623 14,044	3.7	1.0	
Camping	55	100%	4,951	3.9	2.5	
Estimated Spending per Party a Person by Accommodation	Estimated Spending per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$47.75		\$15.92		
Friends and Family	Friends and Family		\$29.65		\$7.70	
Condominiums & Others		\$9.0	00	\$3.00		
Day Visitors		\$37.0	03	\$10.12		
Camping		\$56.74		\$14.66		
Estimated Spending, Wages ar	nd					
Employment		Spending	Wages	Employme	ent	
Hotel and Motels		\$6,160	\$1,556	0.49		
Friends and Family	nds and Family		\$2,986	0.95		
Condominiums & Others		\$291	\$86	0.02		
Day Visitors		\$117,596	\$23,747	7.93		
Subtotal		\$138,964	\$28,375	9.39		
Camping		\$72,589	\$16,762	5.08		
Total		<u>\$211,553</u>	<u>\$45,137</u>	14.47		

Table A.3.2
Estimation of Quarterly Spending, Created Employment and Wages at Alexander Springs, Lake County, Florida
3rd Quarter (July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$21,990	1.80	\$7,015
Food & Beverages(Restaurants)	\$30,668	4.00	\$7,943
Food & Beverages(Groceries)	\$52,855	1.67	\$5,127
Admission Fees	\$56,432	4.74	\$16,647
Evening Entertainment	\$19,276	1.62	\$5,686
Ground Transportation	\$5,530	0.08	\$288
Shopping	\$21,532	0.48	\$2,110
All Other	\$3,272	0.08	\$321
All	\$211,555	14.47	\$45,137

Table A.3.3
Estimation of the Direct Economic Impact of Visitors Associated with Alexander Springs, Lake County, Florida
4th Quarter (Oct.-Dec.), 2003

Annual

Attend. in

Quarter

Percent of

Quarterly

Attendees

Estimated Quarterly Visitors

	Annual	(Seasonal)	Visitors		to Springs
Non-Resident – Day Visitors	55,819	0.07	0.68		2,657.0
Non-Resident – Camping	21,414	0.21	0.68		3,058.0
Visitors from Outside Lake County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	0	0%	0	N/A	N/A
Friends and Family	10	14%	380	4.2	3.1
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Subtotal	<u>60</u> 70	<u>86%</u> 100%	<u>2,277</u> 2,657	3.6	1.0
Camping	30	100%	6,116	4.1	2.9
Estimated Spending per Party a	and	\$EP	PD	\$EPPED	
Person by Accommodation		(Daily Spending per Party)		(Daily Spending per Person)	
Hotel and Motels		\$0.00		\$0.00	
Friends and Family		\$30.90		\$7.36	
Condominiums & Others		\$0.0	00	\$0.00	
Day Visitors		\$41.4	6	\$11.42	
Camping		\$57.9	00	\$14.23	
Estimated Spending, Wages ar Employment	nd	Spending	Wages	Employme	ant
Hotel and Motels		\$0	\$0	0.00	,,,,,
		**	4.5		
Friends and Family		\$2,796	\$554	0.17	
Condominiums & Others	ndominiums & Others		\$0	0.00	
Day Visitors		\$26,007	\$5,155	1.77	
Subtotal		\$28,803	\$5,709	1.94	
Camping		\$87,006	\$20,495	6.25	
Total		<u>\$115,809</u>	<u>\$26,204</u>	<u>8.19</u>	

Table A.3.4
Estimation of Quarterly Spending, Created Employment and Wages at Alexander Springs, Lake County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$24,043	1.97	\$7,670
Food & Beverages(Restaurants)	\$15,551	2.03	\$4,028
Food & Beverages(Groceries)	\$28,010	0.89	\$2,717
Admission Fees	\$26,310	2.21	\$7,762
Evening Entertainment	\$10,132	0.85	\$2,989
Ground Transportation	\$2,458	0.03	\$128
Shopping	\$7,043	0.16	\$690
All Other	\$2,263	0.05	\$222
All	\$115,810	8.19	\$26,206

Table A.3.5
Estimation of the Direct Economic Impact of Visitors Associated with
Alexander Springs, Lake County, Florida
1st Quarter (Jan.-Mar.), 2004

Annual

Attend. in

Percent of

Quarterly

Estimated

	Annual	Quarter (Seasonal)	Attendees Visitors	=	Quarterly Visitors to Springs
Non-Resident – Day Visitors	55,819	0.15	0.68		5,693.5
Non-Resident – Camping	21,414	0.31	0.68		4,514.0
Visitors from Outside Lake County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	1	1%	80	3.0	2.0
Friends and Family	7	10%	561	3.1	2.0
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Subtotal	<u>63</u> 71	<u>89%</u> 100%	<u>5,052</u> 5,694	3.6	1.0
Camping	29	100%	9,028	4.0	2.4
Estimated Spending per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$24.0	00	\$8.00	
Friends and Family		\$21.4	13	\$6.82	
Condominiums & Others		\$0.00		\$0.00	
Day Visitors		\$41.4	16	\$11.42	
Camping		\$57.9	90	\$14.58	
Estimated Spending, Wages ar Employment	nd	Spending	Wages	Employme	ent
Hotel and Motels		\$640	\$189	0.05	
Friends and Family		\$2,464	\$499	0.14	
Condominiums & Others		\$0	\$0	0.00	
Day Visitors Subtotal		\$57,702 \$60,806	\$11,439 \$12,127	3.93 4.12	
Camping		\$131,668	\$31,015	9.46	
Total		<u>\$192,474</u>	<u>\$43,142</u>	<u>13.58</u>	

Table A.3.6
Estimation of Quarterly Spending, Created Employment and Wages at Alexander Springs, Lake County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$36,385	2.98	\$11,607
Food & Beverages(Restaurants)	\$26,899	3.51	\$6,967
Food & Beverages(Groceries)	\$47,168	1.49	\$4,575
Admission Fees	\$44,238	3.71	\$13,050
Evening Entertainment	\$17,343	1.47	\$5,116
Ground Transportation	\$3,847	0.06	\$200
Shopping	\$12,771	0.28	\$1,252
All Other	\$3,822	0.08	\$375
All	\$192,473	13.58	\$43,142

Table A.3.7 Estimation of the Direct Economic Impact of Visitors Associated with Alexander Springs, Lake County, Florida 2nd Quarter (Apr.-June), 2004

Annual

Attend. in

Percent of

Quarterly

Estimated

		Attend. in Quarter	Attendees	=	Quarterly Visitors	
Non Regident - Day Visitors	Annual	(Seasonal) 0.41	Visitors 0.6		to Springs	
Non-Resident – Day Visitors Non-Resident – Camping	55,819 21,414	0.41	0.6		13,731.5 3,983.0	
Visitors from Outside Lake County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)	
Hotels and Motels	2	3%	371	3.0	1.3	
Friends and Family	5	7%	928	4.0	2.2	
Condominiums & Others	0	0%	0	N/A	N/A	
Day Visitors Subtotal	<u>67</u> 74	<u>91%</u> 100%	<u>12,433</u> 13,731	3.7	1.0	
Camping	26	100%	7,966	4.1	2.5	
Estimated Spending per Party a Person by Accommodation	Estimated Spending per Party and		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$92.5		\$30.83	· · · · · · · · · · · · · · · · · · ·	
Friends and Family	Friends and Family		\$35.80 \$8.95			
Condominiums & Others		\$0.0	0	\$0.00		
Day Visitors		\$36.0	7	\$9.83		
Camping		\$58.2	6	\$14.28		
Estimated Spending, Wages ar Employment	nd	Spending	Wages	Employme	nt	
Hotel and Motels		\$11,439	\$3,578	0.94		
Friends and Family		\$8,303	\$1,748	0.59		
Condominiums & Others		\$0	\$0	0.00		
Day Visitors		\$122,196	\$25,278	9.03		
Subtotal		\$141,938	\$30,604	10.56		
Camping		\$113,750	\$25,145	7.6		
Total		<u>\$255,688</u>	<u>\$55,749</u>	<u>18.16</u>		

Table A.3.8
Estimation of Quarterly Spending, Created Employment and Wages at Alexander Springs, Lake County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$39,261	3.21	\$12,524
Food & Beverages(Restaurants)	\$42,437	5.54	\$10,991
Food & Beverages(Groceries)	\$78,625	2.49	\$7,627
Admission Fees	\$64,329	5.40	\$18,977
Evening Entertainment	\$13,633	1.15	\$4,022
Ground Transportation	\$2,127	0.03	\$110
Shopping	\$11,391	0.25	\$1,116
All Other	\$3,885	0.09	\$382
All	\$255,688	18.16	\$55,749

Table A.4.1
Estimation of the Direct Economic Impact of Visitors Associated with Apopka Spring, Lake County, Florida
3rd Quarter (July-Sept), 2003

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	5,776	0.37	0.72		1,538.7
Visitors from Outside Lake County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	5	3%	38	3.8	1.2
Friends and Family	20	10%	154	3.7	2.7
Camping	41	21%	315	3.5	2.6
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>134</u> 200	<u>67%</u> 100%	<u>1,031</u> 1,539	3.2	1.0

Estimated Spending Per Party and Person by Accommodation	\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)
Hotel and Motels	\$77.		\$20.26
Friends and Family	\$13.	55	\$3.66
Camping	\$32.28		\$9.12
Condominiums & Others	\$0.00		\$0.00
Day Visitors	\$14.55		\$4.52
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$770.00	\$234.00	0.06
Friends and Family	\$564.00	\$120.00	0.05
Camping	\$2,873.00	\$673.00	0.22
Condominiums & Others	\$0.00	\$0.00	0.00
Day Visitors	\$4,659.00	\$844.00	0.32
Total	\$8,866.00	\$1,871.00	0.65

Table A.4.2
Estimation of Quarterly Spending, Created Employment and Wages at Apopka Spring, Lake County, Florida
3rd Quarter (July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$1,932	0.16	\$616
Food & Beverages(Restaurants)	\$2,287	0.30	\$593
Food & Beverages(Groceries)	\$2,994	0.09	\$291
Admission Fees	\$285	0.02	\$84
Evening Entertainment	\$775	0.07	\$229
Ground Transportation	\$0	0.00	\$0
Shopping	\$594	0.01	\$59
All Other	\$0	0.00	\$0
All	\$8,867	0.65	\$1,872

Table A.4.3
Estimation of the Direct Economic Impact of Visitors Associated with Apopka Spring, Lake County, Florida
4th Quarter (Oct.-Dec.), 2003

			0./, = 0 0 0		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	5,776	0.07	0.72		291.1
Visitors from Outside Lake County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	1	1%	3	3.0	1.6
Friends and Family	11	11%	32	3.4	2.8
Camping	22	22%	64	3.4	2.9
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>66</u> 100	<u>66%</u> 100%	<u>192</u> 291	2.9	1.0

Estimated Spending Per Party and Person by Accommodation	\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)
Hotel and Motels	\$67.0	00	\$22.04
Friends and Family	\$14.9	90	\$4.43
Camping	\$28.09		\$8.36
Condominiums & Others	\$0.00		\$0.00
Day Visitors	\$17.76		\$6.17
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$66.12	\$21.04	0.01
Friends and Family	\$141.91	\$31.02	0.01
Camping	\$535.05	\$126.02	0.04
Condominiums & Others	\$0.00	\$0.00	0.00
Day Visitors	\$1,184.00	\$215.38	0.09
Total	\$1,927.08	\$393.46	<u>0.15</u>

Table A.4.4
Estimation of Quarterly Spending, Created Employment and Wages at Apopka Spring, Lake County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$320	0.03	\$102
Food & Beverages(Restaurants)	\$564	0.07	\$146
Food & Beverages(Groceries)	\$694	0.02	\$67
Admission Fees	\$119	0.01	\$35
Evening Entertainment	\$104	0.01	\$31
Ground Transportation	\$0	0.00	\$0
Shopping	\$127	0.01	\$13
All Other	\$0	0.00	\$0
All	<u>\$1,928</u>	<u>0.15</u>	<u>\$394</u>

Table A.4.5 Estimation of the Direct Economic Impact of Visitors Associated with Apopka Spring, Lake County, Florida
1st Quarter (Jan.-Mar.), 2004

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	5,776	0.15	0.72		623.81
Visitors from Outside Lake County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	4	4%	25	3.5	3.0
Friends and Family	11	11%	69	3.8	2.3
Camping	20	20%	125	3.4	2.6
Condominiums & Others	4	4%	25	3.5	3.0
Day Visitors Total	<u>61</u> 100	<u>61%</u> 100%	<u>381</u> 624	3.2	1.0

Estimated Spending Per Party and Person	\$EPPD \$EPPED			
by Accommodation		ng per Party)	(Daily Spending per Person)	
	· · · · · ·		· · · · · · · · · · · · · · · · · · ·	
Hotel and Motels	\$80.	/5	\$23.07	
	400		A- 00	
Friends and Family	\$20.	12	\$5.29	
•				
Camping	\$35.	15	\$10.34	
	400		***	
Condominiums & Others	\$80.	75	\$23.07	
- NO. 11			A- 00	
Day Visitors	\$18.	81	\$5.86	
Estimated Spending, Wages and				
Employment	Spending	Wages	Employment	
Hotel and Motels	\$576.79	\$169.18	0.04	
Friends and Family	\$365.33	\$60.14	0.02	
Camping	\$1,292.28	\$271.85	0.09	
Condominiums & Others	\$576.79	\$169.18	0.04	
Day Visitors	\$2,232.59	\$403.21	0.16	
Total	\$5,043.78	\$1,073.56	<u>0.35</u>	

Table A.4.6
Estimation of Quarterly Spending, Created Employment and Wages at Apopka Spring, Lake County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$1,476	0.12	\$471
Food & Beverages(Restaurants)	\$847	0.11	\$220
Food & Beverages(Groceries)	\$1,788	0.06	\$174
Admission Fees	\$106	0.01	\$32
Evening Entertainment	\$496	0.03	\$146
Ground Transportation	\$0	0.00	\$0
Shopping	\$249	0.01	\$25
All Other	\$83	0.01	\$8
All	\$5,045	0.35	\$1,076

Table A.4.7
Estimation of the Direct Economic Impact of Visitors Associated with Apopka Spring, Lake County, Florida 2nd Quarter (Apr.-June), 2004

		0.0	,,		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	5,776	0.41	0.68		1,610.4
Visitors from Outside Lake County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	4	4%	64	3.3	2.8
Friends and Family	6	6%	97	4.0	2.5
Camping	20	20%	322	3.2	2.7
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>70</u> 100	<u>70%</u> 100%	<u>1,127</u> 1,610	3.2	1.0

Estimated Spending Per Party and Person	\$EP	PD	\$EPPED
by Accommodation	(Daily Spendi		(Daily Spending per Person)
Hotel and Motels	\$66.0	00	\$20.31
Friends and Family	\$10.3	33	\$2.58
Camping	\$38.4	40	\$12.19
Condominiums & Others	\$0.00		\$0.00
Day Visitors	\$18.90		\$5.89
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$507.69	\$157.92	0.05
Friends and Family	\$178.19	\$18.45	0.01
Camping	\$1,523.81	\$325.31	0.10
Condominiums & Others	\$0.00	\$0.00	0.00
Day Visitors	\$2,278.77	\$399.44	0.15
Total	\$4,488.46	\$901.12	<u>0.31</u>

Table A.4.8
Estimation of Quarterly Spending, Created Employment and Wages at Apopka Spring, Lake County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages	
Lodging	\$1,018	0.08	\$325	
Food & Beverages(Restaurants)	\$900	0.12	\$233	
Food & Beverages(Groceries)	\$1,622	0.05	\$157	
Admission Fees	\$111	0.01	\$33	
Evening Entertainment	\$362	0.03	\$107	
Ground Transportation	\$0	0.00	\$0	
Shopping	\$331	0.01	\$33	
All Other	\$146	0.01	\$15	
All	\$4,490	0.31	\$903	

Table A.5.1
Estimation of the Direct Economic Impact of Visitors Associated with
Bugg Spring, Lake County, Florida
3rd Quarter (July-Sept), 2003

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	2,886	0.37	0.6		640.7
Visitors from Outside Lake County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	5	3%	16	3.8	1.2
Friends and Family	20	10%	64	3.7	2.7
Camping	41	21%	131	3.5	2.6
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>134</u> 200	<u>67%</u> 100%	<u>492</u> 641	3.2	1.0

Estimated Spending Per Party and Person	\$EPPD		\$EPPED
by Accommodation	(Daily Spending per Party)		(Daily Spending per Person)
Hotel and Motels	\$77.00		\$20.26
Friends and Family	\$13.55		\$3.66
Camping	\$32.28		\$9.12
Condominiums & Others	\$0.00		\$0.00
Day Visitors	\$14.55		\$4.52
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$324.00	\$98.26	0.03
Friends and Family	\$234.38	\$49.72	0.02
Camping	\$1,194.54	\$279.72	0.09
Condominiums & Others	\$0.00	\$0.00	0.00
Day Visitors	\$1,938.49	\$351.16	0.13
Total	\$3,691.41	\$778.86	0.27

Source: Data Based on Economic Parameters for Apopka Spring

Table A.5.2
Estimation of Quarterly Spending, Created Employment and Wages at Bugg Spring, Lake County, Florida
3rd Quarter(July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$807	0.07	\$257
Food & Beverages(Restaurants)	\$952	0.12	\$246
Food & Beverages(Groceries)	\$1,245	0.04	\$121
Admission Fees	\$119	0.01	\$35
Evening Entertainment	\$322	0.02	\$95
Ground Transportation	\$0	0.00	\$0
Shopping	\$247	0.01	\$24
All Other	\$0	0.00	\$0
All	\$3,692	0.27	\$778

Table A.5.3
Estimation of the Direct Economic Impact of Visitors Associated with
Bugg Spring, Lake County, Florida
4th Quarter (Oct.-Dec.), 2003

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	2,886	0.07	0.72		145.45
Visitors from Outside Lake County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	5	3%	4	3.0	1.6
Friends and Family	20	10%	15	3.4	2.8
Camping	41	21%	30	3.4	2.9
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>134</u> 200	<u>67%</u> 100%	<u>97</u> 145	2.9	1.0

Estimated Spending Per Party and Person	\$EF	PD	\$EPPED
by Accommodation	(Daily Spending per Party)		(Daily Spending per Person)
Hotel and Motels	\$67.0		\$22.04
Friends and Family	\$14.90		\$4.43
Camping	\$28.0	09	\$8.36
Condominiums & Others	\$0.00		\$0.00
Day Visitors	\$17.76		\$6.17
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$88.16	\$28.06	0.01
Friends and Family	\$66.52	\$14.54	0.01
Camping	\$250.80	\$59.07	0.02
Condominiums & Others	\$0.00	\$0.00	0.00
Day Visitors Total	\$598.17 \$1003.65	\$108.81 \$210.48	0.04 0.07

Source: Data Based on Economic Parameters for Apopka Spring

Table A.5.4
Estimation of Quarterly Spending, Created Employment and Wages at Bugg Spring, Lake County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$206	0.02	\$66
Food & Beverages(Restaurants)	\$279	0.04	\$72
Food & Beverages(Groceries)	\$343	0.01	\$33
Admission Fees	\$61	0.01	\$18
Evening Entertainment	\$52	0.00	\$15
Ground Transportation	\$0	0.00	\$0
Shopping	\$63	0.00	\$6
All Other	\$0	0.00	\$0
All	\$1,004	0.07	\$210

Table A.5.5 Estimation of the Direct Economic Impact of Visitors Associated with Bugg Spring, Lake County, Florida 1st Quarter (Jan -Mar.) 2004

	1st Q	uarter (JanMa	r.), 2004		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	2,886	0.15	0.6		259.7
Visitors from Outside Lake County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	4	4%	10	3.5	3.0
Friends and Family	11	11%	29	3.8	2.3
Camping	20	20%	52	3.4	2.6
Condominiums & Others	4	4%	10	3.5	3.0
Day Visitors Total	<u>61</u> 100	<u>61%</u> 100%	<u>158</u> 260	3.2	1.0
Estimated Spending Per Party and Person by Accommodation		\$EF (Daily Spendi	PPD ng per Party)	\$EPPED (Daily Spe	ending per Person)
Hotel and Motels		\$80.		\$23.07	· · · · ·

Estimated Spanding Per Party and Person	¢EE	PDD	\$EPPED
Estimated Spending Per Party and Person by Accommodation	\$EPPD (Daily Spending per Party)		(Daily Spending per Person)
•	· · · · ·		· · · · · · · · · · · · · · · · · · ·
Hotel and Motels	\$80.	75	\$23.07
			A- 00
Friends and Family	\$20.	12	\$5.29
Camping	\$35.	15	\$10.34

Condominiums & Others	\$80.	/5	\$23.07
5 10 %			A- 00
Day Visitors	\$18.	81	\$5.86
Estimated Spending, Wages and			
Employment	Spending	Wages	Employment
Hotel and Motels	\$230.71	\$67.67	0.02
Friends and Family	\$153.55	\$25.28	0.01
Camping	\$537.59	\$113.09	0.03
Condominiums & Others	\$230.71	\$67.67	0.02
Day Visitors	\$925.85	\$167.21	0.06
Total	\$2,078.41	\$440.92	<u>0.14</u>

Source: Data Based on Economic Parameters for Apopka Spring

Table A.5.6
Estimation of Quarterly Spending, Created Employment and Wages at Bugg Spring, Lake County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$599	0.05	\$191
Food & Beverages(Restaurants)	\$352	0.05	\$91
Food & Beverages(Groceries)	\$741	0.02	\$72
Admission Fees	\$44	0.01	\$13
Evening Entertainment	\$206	0.02	\$60
Ground Transportation	\$0	0.00	\$0
Shopping	\$103	0.01	\$10
All Other	\$34	0.01	\$3
All	\$2,079	0.17	\$440

Table A.5.7
Estimation of the Direct Economic Impact of Visitors Associated with Bugg Spring, Lake County, Florida
2nd Quarter (Apr.-June), 2004

			,,		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Lake County	2,886	0.41	0.6		710.0
Visitors from Outside Lake County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	4	4%	28	3.2	1.1
Friends and Family	6	6%	43	4.0	2.5
Camping	20	20%	142	3.2	2.7
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>70</u> 100	<u>70%</u> 100%	<u>497</u> 710	3.2	1.0
Estimated Spending Per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$66.		\$20.56	<u> </u>
Friends and Family		\$10.5	33	\$2.58	
Camping		\$38.4	40	\$12.19	
Condominiums & Others		\$0.0	00	\$0.00	
Day Visitors		\$18.9	90	\$5.89	
Estimated Spending, Wages a Employment	ınd	Spending	Wages	Employme	ent
Hotel and Motels		\$568.61	\$176.86	0.05	
Friends and Family		\$111.05	\$12.00	0.01	
Camping		\$1,731.05	\$369.55	0.11	
Condominiums & Others		\$0.00	\$0.00	0.00	
Day Visitors		\$2,972.56	\$521.06	0.19	

Source: Data Based on Economic Parameters for Apopka Spring

Total

\$5,383.27

\$1,079.47

0.36

Table A.5.8
Estimation of Quarterly Spending, Created Employment and Wages at Bugg Spring, Lake County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$1,149	0.09	\$366
Food & Beverages(Restaurants)	\$1,125	0.14	\$291
Food & Beverages(Groceries)	\$1,941	0.06	\$188
Admission Fees	\$136	0.01	\$40
Evening Entertainment	\$465	0.03	\$137
Ground Transportation	\$0	0.01	\$0
Shopping	\$386	0.01	\$38
All Other	\$182	0.01	\$18
All	\$5,384	0.36	\$1,078

Table A.6.1
Estimation of the Direct Economic Impact of Visitors Associated with Ponce de Leon Springs, Volusia County, Florida 3rd Quarter (July-Sept), 2003

			_ / ·		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	259,000	0.34	0.72		63,403.2
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	16	8%	5,072	3.8	2.3
Friends and Family	22	11%	6,974	3.7	2.6
Camping	12	6%	3,804	3.9	2.3
Condominiums & Others	2	1%	634	3.5	3.0
Day Visitors Total	<u>148</u> 200	<u>74%</u> 100%	46,918 63,403	3.7	1.0

Estimated Spending Per Party and Person	\$EP	PD	\$EPPED
by Accommodation	(Daily Spending per Party)		(Daily Spending per Person)
Hotel and Motels	\$116.0		\$30.46
Friends and Family	\$52.4	16	\$14.06
Camping	\$47.17		\$12.03
Condominiums & Others	\$39.00		\$11.14
Day Visitors	\$35.62		\$9.68
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$154,503	\$32,565	11
Friends and Family	\$98,085	\$20,042	8
Camping	\$45,774	\$10,109	4
Condominiums & Others	\$42,388	\$9,232	2
Day Visitors Total	\$454,136 \$794,886	\$83,987 \$155,935	29 54

Table A.6.2
Estimation of Quarterly Spending, Created Employment and Wages at Ponce de Leon Springs, Volusia County, Florida 3rd Quarter (July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$103,523	8	\$24,328
Food & Beverages(Restaurants)	222,019	27	\$61,005
Food & Beverages(Groceries)	\$137,063	4	\$14,118
Admission Fees	\$67,951	4	\$14,677
Evening Entertainment	\$137,391	7	\$29,951
Ground Transportation	\$0	0	\$0.00
Shopping	\$106,618	2	\$9,915
All Other	\$20,321	1	\$1,890
All	\$794,886	53	\$155,884

Table A.6.3

Estimation of the Direct Economic Impact of Visitors Associated with Ponce de Leon Springs, Volusia County, Florida 4th Quarter (Oct.-Dec.), 2003

Annual

Percent of

	Annual	Attend. in Quarter (Seasonal)	Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	259,000	0.12	0.72		22,377.6
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	4	4%	895	3.5	2.5
Friends and Family	9	9%	2,014	3.8	2.6
Camping	12	12%	2,685	3.9	2.3
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>75</u> 100	<u>75%</u> 100%	<u>16,783</u> 22,378	3.7	1.0
Estimated Spending Per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$92.75		\$26.50	
Friends and Family		\$40.	78	\$10.79	
Camping		\$47.	17	\$12.03	
Condominiums & Others		\$0.0	00	\$0.00	
Day Visitors		\$40.0	63	\$11.04	
Estimated Spending, Wages as Employment	nd	Spending	Wages	Employme	ent
Hotel and Motels		\$23,718	\$5,063	2	
Friends and Family		\$21,728	\$4,520	2	
Camping		\$32,309	\$7,136	3	
Condominiums & Others		\$0	\$0	0	
Day Visitors Total		\$185,297 \$263,052	\$34,828 \$51,547	12 19	

Table A.6.4
Estimation of Quarterly Spending, Created Employment and Wages at Ponce de Leon Springs, Volusia County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$25,560	2	\$6,006
Food & Beverages(Restaurants)	91,780	11	\$25,240
Food & Beverages(Groceries)	\$45,852	2	\$4,723
Admission Fees	\$23,407	1	\$5,056
Evening Entertainment	\$27,289	2	\$5,949
Ground Transportation	\$0	0	\$0
Shopping	\$41,355	1	\$3,846
All Other	\$7,809	1	\$726
AII	\$263,052	20	\$51,546

Table A.6.5

Estimation of the Direct Economic Impact of Visitors Associated with Ponce de Leon Springs, Volusia County, Florida 1st Quarter (Jan.-Mar.), 2004

Annual

Attend. in

Percent of

Quarterly

Estimated

	Annual	Quarter (Seasonal)	Attendees Visitors	=	Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	259,000	0.21	0.72		39,160.8
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	10	10%	3,916	4.1	2.2
Friends and Family	10	10%	3,916	3.4	2.6
Camping	4	4%	1,566	4.0	2.8
Condominiums & Others	1	1%	392	4.0	3.0
Day Visitors Total	<u>75</u> 100	<u>75%</u> 100%	<u>29,371</u> 39,161	3.6	1.0
Estimated Spending Per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$132.40		\$32.29	<u> </u>
Friends and Family		\$46.6	60	\$13.71	
Camping		\$42.7	75	\$10.69	
Condominiums & Others		\$49.0	00	\$12.25	
Day Visitors		\$35.	59	\$9.97	
Estimated Spending, Wages as Employment	nd	Spending	Wages	Employme	ent
Hotel and Motels		\$126,458	\$26,402	8	
Friends and Family		\$53,672	\$11,359	5	
Camping		\$16,737	\$3,939	2	
Condominiums & Others		\$4,802	\$1,046	1	

Source: Florida Department of Environment Protection; Bonn Marketing Survey.

Day Visitors

Total

\$292,805

\$494,474

\$54,311

\$97,057

19

<u>35</u>

Table A.6.6
Estimation of Quarterly Spending, Created Employment and Wages at Ponce de Leon Springs, Volusia County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$71,680	6	\$16,845
Food & Beverages(Restaurants)	144,081	17	\$39,622
Food & Beverages(Groceries)	\$94,756	3	\$9,760
Admission Fees	\$40,250	2	\$8,695
Evening Entertainment	\$70,166	3	\$15,296
Ground Transportation	\$0	0	\$0
Shopping	\$59,225	1	\$5,508
All Other	\$14,315	1	\$1,331
All	\$494,473	33	\$97,057

Table A.6.7

Estimation of the Direct Economic Impact of Visitors Associated with Ponce de Leon Springs, Volusia County, Florida 2nd Quarter (Apr.-June), 2004

Annual

Percent of

	Annual	Attend. in Quarter (Seasonal)	Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	259,000	0.33	0.72		61,538.4
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	4	4%	2,462	3.8	2.3
Friends and Family	5	5%	3,077	4.0	2.6
Camping	10	10%	6,154	3.6	2.9
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>81</u> 100	<u>81%</u> 100%	<u>49,846</u> 61,538	3.7	1.0
Estimated Spending Per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$109.00		\$29.07	
Friends and Family		\$43.0	60	\$10.90	
Camping		\$60.5	50	\$16.81	
Condominiums & Others		\$0.0	00	\$0.00	
Day Visitors		\$31.3	34	\$8.52	
Estimated Spending, Wages as Employment	nd	Spending	Wages	Employme	ent
Hotel and Motels		\$71,562	\$16,152	5.6	
Friends and Family		\$33,539	\$8,446	3.4	
Camping		\$103,421	\$21,293	6.9	
Condominiums & Others		\$0	\$0	0	
Day Visitors Total		\$424,504 \$633,026	\$75,157 \$121,048	24.8 40.7	

Table A.6.8
Estimation of Quarterly Spending, Created Employment and Wages at Ponce de Leon Springs, Volusia County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$75,258	5.9	\$17,686
Food & Beverages(Restaurants)	\$170,993	20.8	\$47,023
Food & Beverages(Groceries)	\$140,383	4.3	\$14,460
Admission Fees	\$61,297	3.1	\$13,240
Evening Entertainment	\$91,414	4.7	\$19,928
Ground Transportation	\$0	0.0	\$0.00
Shopping	\$70,437	1.5	\$5,550
All Other	\$23,244	0.5	\$2,162
All	\$633,026	40.7	\$120,049

Table A.7.1
Estimation of the Direct Economic Impact of Visitors Associated with Gemini Springs, Volusia County, Florida
3rd Quarter (July-Sept), 2003

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	57,755	0.24	0.64		8,871.2
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom. %	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	12	6%	532	4.2	3.4
Friends and Family	28	14%	1,242	3.8	3.3
Camping	0	0%	0	N/A	N/A
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>160</u> 200	<u>80%</u> 100%	<u>7,097</u> 8,871	4.0	1.0

Estimated Spending Per Party and Person	\$EP	PD	\$EPPED
by Accommodation	(Daily Spendi		(Daily Spending per Person)
Hotel and Motels	\$96.67		\$23.18
Tioter and Moters	ψ50.0	<i>,</i> ,	Ψ23.10
Friends and Family	\$24.8	30	\$6.64
Theres and Farmy	Ψ Σ-τ. (,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	ψ0.04
Camping	\$0.0	00	\$0.00
Camping	Ψ0.0		ψ0.00
Condominiums & Others	\$0.0	00	\$0.00
	45.0		40.00
Day Visitors	\$27.7	75	\$7.03
Estimated Spending, Wages and			
Employment	Spending	Wages	Employment
Hotel and Motels	\$12,333	\$2,649	0.87
Tieter and Metele	ψ.2,000	Ψ2,0.0	o.o.
Friends and Family	\$8,244	\$1,584	0.57
r nonde and r animy	Ψ0,2	ψ1,001	o.o.
Camping	\$0	\$0	0.00
- Camping	40	40	0.00
Condominiums & Others	\$0	\$0	0.00
2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3		Ţ,	
Day Visitors	\$49,859	\$9,268	3.19
Total	\$70,436	\$13,501	<u>4.63</u>

Table A.7.2
Estimation of Quarterly Spending, Created Employment and Wages at Gemini Springs, Volusia County, Florida 3rd Quarter (July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$8,888	0.70	\$2,089
Food & Beverages(Restaurants)	\$21,150	2.57	\$5,816
Food & Beverages(Groceries)	\$10,263	0.31	\$1,057
Admission Fees	\$7,894	0.40	\$1,705
Evening Entertainment	\$6,124	0.31	\$1,335
Ground Transportation	\$0	0.00	\$0
Shopping	\$12,947	0.27	\$1,204
All Other	\$3,168	0.07	\$295
All	\$70,434	4.63	\$13,501

Table A.7.3

Estimation of the Direct Economic Impact of Visitors Associated with Gemini Springs, Volusia County, Florida 4th Quarter (Oct.-Dec.), 2003

			- /,		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	57,755	0.16	0.64		5,914.1
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	3	3%	177	4.3	2.3
Friends and Family	13	13%	769	3.8	2.6
Camping	0	0%	0	N/A	N/A
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>84</u> 100	<u>84%</u> 100%	<u>4,968</u> 5,914	3.6	1.0

Estimated Spending Per Party and Person	¢ED.	DD	\$EPPED
by Accommodation	i i		(Daily Spending per Person)
Hotel and Motels	\$101.1		
Hotel and Motels	\$101.1	17	\$23.36
Friends and Family	\$22.8	00	\$5.99
Friends and Family	φ22.0	00	φ3.99
Camping	\$0.0	00	\$0.00
Camping	ψο.ο	,,,	ψο.σσ
Condominiums & Others	\$0.0	00	\$0.00
Day Visitors	\$28.1	14	\$7.77
Estimated Spending, Wages and			
Employment	Spending	Wages	Employment
Hotel and Motels	\$4,136	\$924	0.30
Friends and Family	\$4,606	\$1,002	0.38
Camping	\$0	\$0	0.00
		•	
Condominiums & Others	\$0	\$0	0.00
Day Visitors	\$38,619	\$7,614	2.70
-			
Total	<u>\$47,361</u>	<u>\$9,540</u>	<u>3.38</u>

Table A.7.4
Estimation of Quarterly Spending, Created Employment and Wages at Gemini Springs, Volusia County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$2,862	0.22	\$673
Food & Beverages(Restaurants)	\$18,389	2.23	\$5,057
Food & Beverages(Groceries)	\$6,388	0.19	\$658
Admission Fees	\$5,651	0.29	\$1,221
Evening Entertainment	\$4,997	0.26	\$1,089
Ground Transportation	\$0	0.00	\$0
Shopping	\$7,018	0.15	\$653
All Other	\$2,056	0.04	\$191
All	\$47,361	3.38	\$9,542

Table A.7.5

Estimation of the Direct Economic Impact of Visitors Associated with Gemini Springs, Volusia County, Florida 1st Quarter (Jan.-Mar.), 2004

		(,,		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	57,755	0.2	0.64		7,392.6
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	5	5%	370	3.9	1.0
Friends and Family	15	15%	1,109	3.6	3.0
Camping	0	0%	0	N/A	N/A
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>80</u> 100	<u>80%</u> 100%	<u>5,914</u> 7,393	4.0	1.0
Estimated Spending Per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$78.	50	\$20.18	
Friends and Family		\$22.5	56	\$6.27	
Camping		\$0.0	00	\$0.00	
Condominiums & Others		\$0.0	00	\$0.00	
Day Visitors		\$29.33		\$7.43	
Estimated Spending, Wages ar Employment	nd	Spending	Wages	Employme	ent
Hotel and Motels		\$7,467	\$1,750	0.57	
Friends and Family		\$6,950	\$1,405	0.53	
Camping		\$0	\$0	0.00	
Condominiums & Others		\$0	\$0	0.00	

Source: Florida Department of Environment Protection; Bonn Marketing Survey.

Day Visitors

Total

\$43,913

\$58,330

\$9,090

\$12,245

3.27

4.37

Table A.7.6
Estimation of Quarterly Spending, Created Employment and Wages at Gemini Springs, Volusia County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$5,612	0.44	\$1,319
Food & Beverages(Restaurants)	\$23,538	2.86	\$6,473
Food & Beverages(Groceries)	\$5,121	0.16	\$528
Admission Fees	\$6,651	0.34	\$1,437
Evening Entertainment	\$6,945	0.35	\$1,514
Ground Transportation	\$0	0.00	\$0
Shopping	\$6,792	0.14	\$632
All Other	\$3,670	0.08	\$341
All	\$58,329	4.37	\$12,244

Table A.7.7
Estimation of the Direct Economic Impact of Visitors Associated with Gemini Springs, Volusia County, Florida
2nd Quarter (Apr.-June), 2004

	2na Q	uarter (AprJul	ne), 2004		
	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	57,755	0.4	0.64		14,785.3
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	5	5%	739	3.8	1.3
Friends and Family	16	16%	2,366	3.6	3.4
Camping	1	1%	148	6.0	4.0
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>78</u> 100	<u>78%</u> 100%	<u>11,533</u> 14,785	3.8	1.0
Estimated Spending Per Party	and Person	\$EF	PPD	\$EPPED	anding per Person)

Estimated Spending Per Party and Person	\$EP	PD	\$EPPED
by Accommodation	·		(Daily Spending per Person)
Hotel and Motels	\$138.		\$36.26
Friends and Family	\$45.8	33	\$12.63
Camping	\$178.50		\$29.75
Condominiums & Others	\$0.00		\$0.00
Day Visitors	\$31.77		\$8.30
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$26,794	\$6,634	2.49
Friends and Family	\$29,872	\$6,786	2.73
Camping	\$4,403	\$969	0.39
Condominiums & Others	\$0	\$0	0.00
Day Visitors	\$95,667	\$19,229	7.04
Total	\$156,736	\$33,618	<u>12.65</u>

Table A.7.8
Estimation of Quarterly Spending, Created Employment and Wages at Gemini Springs, Volusia County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$14,932	1.17	\$3,509
Food & Beverages(Restaurants)	\$75,998	9.22	\$20,900
Food & Beverages(Groceries)	\$18,300	0.56	\$1,885
Admission Fees	\$12,380	0.63	\$2,674
Evening Entertainment	\$11,065	0.57	\$2,412
Ground Transportation	\$0	0.00	\$0
Shopping	\$15,497	0.32	\$1,441
All Other	\$8,562	0.18	\$796
All	\$156,734	12.65	\$33,617

Table A.8.1
Estimation of the Direct Economic Impact of Visitors Associated with Green Springs, Volusia County, Florida
3rd Quarter (July-Sept), 2003

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	14,439	0.24	64%		2,217.8
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	12	6%	133	4.2	3.4
Friends and Family	28	14%	310	3.8	3.3
Camping	0	0%	0	N/A	N/A
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>160</u> 200	<u>80%</u> 100%	<u>1,774</u> 2,218	4.0	1.0

Estimated Spending Per Party and Person by Accommodation	\$EP (Daily Spendi		\$EPPED (Daily Spending per Person)
Hotel and Motels	\$96.6		\$23.18
Friends and Family	\$24.8	39	\$6.64
Camping	\$0.0	00	\$0.00
Condominiums & Others	\$0.00		\$0.00
Day Visitors	\$27.75		\$7.03
Estimated Spending, Wages and Employment	Spending	Wages	Employment
Hotel and Motels	\$3,083	\$662	0.22
Friends and Family	\$2,058	\$395	0.14
Camping	\$0	\$0	0.00
Condominiums & Others	\$0	\$0	0.00
Day Visitors	\$12,463	\$2,317	0.80
Total	<u>\$17,604</u>	<u>\$3,374</u>	<u>1.16</u>

Source: Data Based on Economic Parameters for Gemini Springs

Table A.8.2
Estimation of Quarterly Spending, Created Employment and Wages at Green Springs, Volusia County, Florida
3rd Quarter (July-Sept), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$2,222	0.17	\$522
Food & Beverages(Restaurants)	\$5,286	0.64	\$1,453
Food & Beverages(Groceries)	\$2,565	0.08	\$264
Admission Fees	\$1,973	0.10	\$426
Evening Entertainment	\$1,531	0.08	\$334
Ground Transportation	\$0	0.00	\$0.00
Shopping	\$3,236	0.07	\$301
All Other	\$792	0.02	\$74
All	\$17,605	1.16	\$3,374

Table A.8.3

Estimation of the Direct Economic Impact of Visitors Associated with Green Springs, Volusia County, Florida 4th Quarter (Oct.-Dec.), 2003

Annual

Percent of

	Annual	Attend. in Quarter (Seasonal)	Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs	
Non-Resident Visitors to Volusia County	14,439	0.16	0.64		1,478.6	
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)	
Hotels and Motels	3	3%	44	4.3	2.3	
Friends and Family	13	13%	192	3.8	2.6	
Camping	0	0%	0	N/A	N/A	
Condominiums & Others	0	0%	0	N/A	N/A	
Day Visitors Total	<u>84</u> 100	<u>84%</u> 100%	<u>1,242</u> 1,479	3.6	1.0	
Estimated Spending Per Party a by Accommodation	Estimated Spending Per Party and Person by Accommodation		\$EPPD (Daily Spending per Party)		\$EPPED (Daily Spending per Person)	
Hotel and Motels		\$101.	17	\$23.36		
Friends and Family		\$22.8	88	\$5.99		
Camping		\$0.0	00	\$0.00		
Condominiums & Others		\$0.0	00	\$0.00		
Day Visitors		\$28.	14	\$7.77		
Estimated Spending, Wages ar Employment	nd	Spending	Wages	Employme	ent	
Hotel and Motels		\$1,028	\$230	0.08		
Friends and Family		\$1,150	\$250	0.09		
Camping		\$0	\$0	0.00		
Condominiums & Others		\$0	\$0	0.00		
Day Visitors Total		\$9,655 \$11,833	\$1,904 \$2,384	0.68 0.85		

Source: Data Based on Economic Parameters for Gemini Springs

Table A.8.4
Estimation of Quarterly Spending, Created Employment and Wages at Green Springs, Volusia County, Florida
4th Quarter (Oct.-Dec.), 2003

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$711	0.06	\$168
Food & Beverages(Restaurants)	\$4,596	0.57	\$1,264
Food & Beverages(Groceries)	\$1,597	0.05	\$165
Admission Fees	\$1,412	0.07	\$305
Evening Entertainment	\$1,249	0.06	\$272
Ground Transportation	\$0	0.00	\$0
Shopping	\$1,754	0.03	\$163
All Other	\$514	0.01	\$48
AII	\$11,833	0.85	\$2,385

Table A.8.5

Estimation of the Direct Economic Impact of Visitors Associated with Green Springs, Volusia County, Florida 1st Quarter (Jan.-Mar.), 2004

	Annual	Annual Attend. in Quarter (Seasonal)	Percent of Quarterly Attendees Visitors	=	Estimated Quarterly Visitors to Springs
Non-Resident Visitors to Volusia County	14,439	0.2	64%		1,848.2
Visitors from Outside Volusia County by Accommodation	Sample Size	Accom.	Visitors by Accom	Party Size	Length of Stay (LS)
Hotels and Motels	5	5%	92	3.9	1.0
Friends and Family	15	15%	277	3.6	3.0
Camping	0	0%	0	N/A	N/A
Condominiums & Others	0	0%	0	N/A	N/A
Day Visitors Total	<u>80</u> 100	<u>80%</u> 100%	<u>1,479</u> 1,848	4.0	1.0

\$EP (Daily Spendin \$78.5	ng per Party)	\$EPPED (Daily Spending per Person)
· · · ·		(Daily Spending per Person)
\$78.5	-0	
	00	\$20.18
\$22.5	56	\$6.27
\$0.0	00	\$0.00
Φο. σ	20	#0.00
\$0.00		\$0.00
\$20.23		\$7.43
Ψ29.	,,,	Ψ1.43
Spending	Wages	Employment
\$1,857	\$435	0.14
\$1,736	\$351	0.13
•	•	
\$0	\$0	0.00
C O	ው የ	0.00
\$0	\$0	0.00
\$10 982	\$2 273	0.82
		1.09
	\$22.5 \$0.0 \$0.0 \$29.3 Spending \$1,857 \$1,736 \$0 \$0 \$10,982	\$1,857 \$435 \$1,736 \$351 \$0 \$0 \$0 \$0

Source: Data Based on Economic Parameters for Gemini Springs

Table A.8.6
Estimation of Quarterly Spending, Created Employment and Wages at Green Springs, Volusia County, Florida
1st Quarter (Jan.-Mar.), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$1,395	0.11	\$328
Food & Beverages(Restaurants)	\$5,885	0.71	\$1,618
Food & Beverages(Groceries)	\$1,281	0.04	\$132
Admission Fees	\$1,663	0.09	\$359
Evening Entertainment	\$1,736	0.09	\$378
Ground Transportation	\$0	0.00	\$0
Shopping	\$1,698	0.03	\$158
All Other	\$918	0.02	\$85
All	\$14,576	1.09	\$3,058

Table A.8.7

Estimation of the Direct Economic Impact of Visitors Associated with Green Springs, Volusia County, Florida 2nd Quarter (Apr.-June), 2004

Annual

Percent of

		Annuai	Percent of		
		Attend. in	Quarterly	=	Estimated
		Quarter	Attendees	_	Quarterly Visitors
	Annual	(Seasonal)	Visitors		to Springs
Non-Resident Visitors to		,			
Volusia County	14,439	0.4	0.64		3,696.4
·				_	Length
Visitors from Outside Volusia	Sample	Accom.	Visitors	Party	of Stay
County by Accommodation	Size	%	by Accom	Size	(LS)
Hotels and Motels	5	5%	105	2.0	1.3
Hotels and Motels	5	5%	185	3.8	1.3
Friends and Family	16	16%	591	3.6	3.4
Camping	1	1%	37	6.0	4.0
1 0					
Condominiums & Others	0	0%	0	N/A	N/A
Condominatins & Others	U	0 76	0	IN/A	IN/A
D 10.0					
Day Visitors	<u>78</u>	<u>78%</u>	<u>2,883</u>	3.8	1.0
Total	100	100%	3,696		
Estimated Spending Per Party	and Person	\$EF	PD	\$EPPED	
by Accommodation		(Daily Spendi	ng per Party)	(Daily Spe	nding per Person)
Hotel and Motels		\$138.	50	\$36.26	<u> </u>
		,		, , , , ,	
Friends and Family		\$45.	83	\$12.63	
Therias and Fairing		ψ+0.	00	Ψ12.03	
0		6470	50	#00.75	
Camping		\$178.	50	\$29.75	
Condominiums & Others		\$0.	00	\$0.00	
Day Visitors		\$31.	77	\$8.30	
_ •		40.11		4 0.00	
Estimated Spending, Wages ar	nd				
Employment		Spending	Wages	Employme	ent
Hotel and Motels		\$6,708	\$1,661	0.62	
Friends and Family		\$7,462	\$1,695	0.68	
,		, , -	, , , , , , , , ,		
Camping		\$179	\$40	0.02	
Camping		ψιισ	ψ40	0.02	
One deministra & Other			•	0.00	
Condominiums & Others		\$0	\$0	0.00	
Day Visitors		\$23,188	\$4,661	1.71	
Tatal		***	A0 057	0.00	

Source: Data Based on Economic Parameters for Gemini Springs

Total

\$37,537

3.03

\$8,057

Table A.8.8
Estimation of Quarterly Spending, Created Employment and Wages at Green Springs, Volusia County, Florida
2nd Quarter (Apr.-June), 2004

Spending Category	Spending	Related Employment	Related Wages
Lodging	\$3,609	0.28	\$848
Food & Beverages(Restaurants)	\$18,154	2.20	\$4,992
Food & Beverages(Groceries)	\$4,203	0.13	\$433
Admission Fees	\$3,005	0.15	\$649
Evening Entertainment	\$2,694	0.15	\$588
Ground Transportation	\$0	0.00	\$0
Shopping	\$3,780	0.07	\$352
All Other	\$2,091	0.05	\$195
All	\$37,536	3.03	\$8,057

Table B.1: Eight Priority Springs Visitor Profile: Q3 2003

Sample Size = 593

Date	Expenditures	Avg. Nights	Avg.	# In Party	Lik	Likely To Return:	ikely To Return:	Will Not	Is This
	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos. Do	6 Mos. Don't Know	Return	Your First Visit?
Q3 2003	\$71.19	1.3	3.6	2.6	31.4%	49.0%	10.4%	9.2%	Yes 29.4% No 70.6%

Date	Expenditures Per Party	Avg. Nights Spent	Avg. Partv Size	# In Party Not Resident	Lik Next Year	Likely To Return: 6 Mos. Don't P	urn: Don't P
Q3 2003	\$71.19	1.3	3.6	2.6	31.4%	49.0%	10.4
T Stirily Rot	cicia Cutano Castion Con			A Silved Control of the Control of t	, i		
IOD VISITOR	County Origin		ĺ	Average Dally Expenditures	cheriques		Ī
Volusia		15.7%		Restaurants		\$14.65	
Lake		14.8		Admission Fees		12.96	
Alachua		11.5		Lodging		11.57	
Seminole		3.5		Shopping		10.86	
Polk		3.4		Groceries		9.28	
Citrus		1.9		Evening Entertainment	ment	4.34	
Polk		1.7		Ground Transportation	ation	3.91	
Orange		1.7		Other Items		3.62	
Non Florida Residents	Residents	34.7		Total Avg. Daily Expenditure	:xpenditure	\$71.19	

ı	Top Visitor Activities	
	Picnicking	54.4%
	Swimming	38.6
	View Wildlife	18.2
	Fishing	17.6
	Boating	15.4
	Photography	13.2
	Water Sports	10.4
	Snorkeling	8.4
	Archeology	9.9
	Scuba Diving	6.4

Where Stayed Overnight	
No Overnight Stay Locally Another County	66.6% 27.8 5.6

55.0% 26.0 9.6 9.4

Enjoy the outdoors Spending time with family Entertaining guests Enjoy the wildlife

Main Purpose for Visit

4.13

Rate your Visit to the Springs

3.43

Rate Importance of Springs to Your Quality of Life

(On a 1-5 Scale, with 5 being the highest)

	\$4.74
Willingness to Pay for Access	to Private Springs

66.6% 11.8 8.8 6.4 6.4

Accommodation Used
No Overnight Stay
Private Home
Campground
Hotel/Motel
Other

How Heard About the Springs	
Repeat Visitor	67.2%
Family/Friends	21.4
Brochure	5.8
Internet	5.6

Total	4.8% 30.4 38.6 12.6
Income	Under \$20,000 \$20,000-\$49,999 \$50,000-\$79,999 \$80,000 or More
Total	79.0% 6.6 12.8 1.6
Ethnicity	Caucasian Hispanic African-American Other
Total	77.0% 20.2 2.4 0.4
Marital Status	Married Single Divorced/Widowed No Answer
Total	43.6% 56.4
Sex	Male Female
Total	42.4% 11.6 14.8 28.2
Education	Some College/College Grad Post Graduate Degree High School Graduate Technical School

Table B.2: Springs Visitor Profile for Q4, 2003

Sample Size = 588

Date	Expenditures	Avg. Nights	Avg.	# In Party	Lik	ikely To Retur	ikely To Return:	Will Not	Is This
	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos. E	6 Mos. Don't Know	Return	Your First Visit?
2003-2004	\$70.33	1.5	3.4	2.2	33.8%	42.4%	17.2%	%9.9	Yes 27.8% No 72.2%

	Expenditures	Avg. Nights	Avg.	# In Party	Ě	Likely To Ret
Date	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos.
2003-2004	\$70.33	7:	3.4	2.2	33.8%	42.4%
Top Visitor (Top Visitor County Origin			Average Daily Expenditures	xpenditures	
Volusia		16.3%		Groceries		\$9.01
Lake		15.5		Restaurants		16.49
Marion		15.3		Admission Fees		16.79
Polk		3.7		Shopping		10.52
Citrus		3.2		Evening Entertair	ıment	4.46
Seminole		2.9		Lodging		7.70
Alachua		1.7		Ground Transportation	tation	3.05
Sumter		1.5		Other Items		2.32
Non-Florida Residents	Residents	34.8		Total Avg. Daily Expenditure	Expenditure	\$70.33

Average Daily Expenditures		Top Visitor Act
Groceries	\$9.01	Picnicking
Restaurants	16.49	Swimming
Admission Fees	16.79	View Wildlife
Shopping	10.52	Boating
Evening Entertainment	4.49	Photography
Lodging	7.70	Snorkeling
Ground Transportation	3.02	Fishing
Other Items	2.32	Water Sports
		Scuba Diving
Total Avg. Daily Expenditure	\$70.33	Archeology

61.6% 36.6 36.6 27.2 17.0 11.8 8.2 7.2 7.0 7.0 7.0

Top Visitor Activities

Rate your Visit to the Springs	Rate Importance of Springs to Your Quality of Life
	71.6% 22.4 5.8

Where Stayed Overnight

No Overnight Stay Locally Another County

Rate your Visit to the Springs Rate Importance of Springs to Your Quality of Life (On a 1-5 Scale, with 5 being the highest)	4.35	3.60	
	Rate your Visit to the Springs	Rate Importance of Springs to Your Quality of Life	(On a 1-5 Scale, with 5 being the highest)

Main Purpose for Visit	
Enjoy the outdoors Spending time with family Entertaining guests Enjoy the wildlife	70.0% 16.6 7.8 5.6

	72.0%	9.6	12.8	2.0	3.6	
Accommodation Used	No Overnight Stay	Private Home	Campground	Hotel/Motel	Other	

70.0% 16.6 7.8 5.6

Repeat Visitor Family/Friends Internet Brochure

\$4.40	
Willingness to Pay for Access to Private Springs	

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad	46.4%	Male	39.4%	Married	%9'52	Caucasian	80.08	Under \$20,000	3.8%
Post Graduate Degree	15.4	Female	9.09	Single	17.0	Hispanic	7.0	\$20,000-\$49,999	23.6
High School Graduate	9.4			Divorced/Widowed	5.2	African-American	12.2	\$50,000-\$79,999	43.4
Technical School	26.2			No Answer	2.2	Other	0.8	\$80,000 or More	17.2

Table B.3: Springs Visitor Profile for Q1, 2004

Sample Size = 571

Date	Expenditures Per Party	Avg. Nights Spent	Avg. Party Size	# In Party Not Resident	Lii Next Year	Likely To Return: 6 Mos. Do	Likely To Return: r 6 Mos. Don't Know	Will Not Return	ls This Your First Visit?	
2003-2004	\$67.86	7:	3.5	2.3	33.6%	45.2%	14.0%	7.2%	Yes 26.8% No 73.2%	

Top Visitor County Origin		Average Daily Expenditures	
Volusia Marion	18.8%	Restaurants Admission Fees	\$15.40
Lake	16.0	Groceries	9.87
Seminole	4.0	Lodging	9.61
Orange	3.2	Shopping	9.21
Polk	3.0	Evening Entertainment	4.76
Sumter	2.4	Ground Transportation	3.58
Alachua	2.0	Other Items	3.31
Non Florida Residents	29.0	Total Avg. Daily Expenditure	\$67.86

Average Daily Expenditures		
Restaurants Admission Fees Groceries Lodging Shopping Evening Entertainment Ground Transportation Other Items	\$15.40 12.12 9.87 9.61 9.21 4.76 3.58	ши>шшк>ис
Total Avg. Daily Expenditure	\$67.86	0 4

	72.8% 21.8 5.4
Where Stayed Overnight	No Overnight Stay Locally Another County

60.6% 23.2 9.0 7.2

Enjoy the outdoors Spending time with family Enjoy the wildlife Entertaining guests

Main Purpose for Visit

3.48

Rate Importance of Springs to Your Quality of Life

(On a 1-5 Scale, with 5 being the highest)

4.21

Rate your Visit to the Springs

No Overnight Stay Locally Another County	72.8% 21.8 5.4	
		· I
Accommodation Used		
No Overnight Stay	%0.99	
Private Home	10.7	
Campground	9.3	
Hotel/Motel	6.1	
Other	7.9	

70.0% 17.6 6.2 6.2

Repeat Visitor Family/Friends Internet Brochure

Top Visitor Activities	
Picnicking	63.2%
Swimming	37.8
View Wildlife	21.2
Fishing	20.2
Boating	16.8
Photography	13.2
Water Sports	8.6
Snorkeling	8.6
Scuba Diving	8.9
Archeology	4.4
·	

\$4.36	
Willingness to Pay for Access to Private Springs	

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad Post Graduate Degree High School Graduate Technical School	39.6% 15.8 10.3 25.6	Male Female	43.2% 56.8	Married Single Divorced/Widowed No Answer	76.9% 17.3 3.9 2.0	Caucasian Hispanic African-American Other	80.9% 5.6 11.9 1.6	Under \$20,000 \$20,000-\$49,999 \$50,000-\$79,999 \$80,000 or More	4.4% 25.7 36.4 13.7
					ì				

Table B.4: Springs Visitor Profile for Q2, 2004

Sample Size = 546

xpen	Expenditures Per Party	Avg. Nights Spent	Avg. Party Size	# In Party Not Resident	Lil Next Year	Likely To Return: 6 Mos. Do	ikely To Return: 6 Mos. Don't Know	Will Not Return	ls This Your First Visit?	
\$49.37		4.1	3.5	1.8	33.6%	46.4%	13.2%	%8.9	Yes 25.8% No 74.2%	

Top Visitor County Origin	۷.	٩
Volusia 20.5%		ñ
		Ū
Marion 14.4	_	¥
	_	٩
Seminole 3.6	0)	$\overline{\alpha}$
		ıίι
Flagler 1.8	_	Ó
Orange 1.6	_	(1)
	_	\vdash
Non Florida Residents 27.6		

Average Daily Expenditures	
Restaurants	\$12.91
Groceries	10.48
Admission Fees	9.54
Lodging	6.07
Shopping	5.10
Evening Entertainment	2.92
Other Items	1.78
Ground Transportation	0.58
Total Avg. Daily Expenditure	\$49.37

69.4% 39.6 22.8 20.4 17.8 13.0 10.0 8.8 3.8

> Boating Fishing Photography Water Sports Snorkeling Scuba Diving Archeology

Top Visitor Activities

Picnicking Swimming View Wildlife

_	

(On a 1-5 Scale, with 5 being the highest)

3.54

Rate Importance of Springs to Your Quality of Life

72.1% 22.4 5.6

No Overnight Stay Locally Another County

Where Stayed Overnight

4.21

Rate your Visit to the Springs

isit	62.6% amily 21.0 7.8 8.6
Main Purpose for Visit	Enjoy the outdoors Spending time with family Entertaining guests Enjoy the wildlife

62.6% 21.0 7.8 8.6

Enjoy the outdoors Spending time with family Entertaining guests Enjoy the wildlife

\$4.51
Willingness to Pay for Access to Private Springs

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad Post Graduate Degree High School Graduate Technical School	46.3% 14.3 11.5	Male Female	43.4% 56.6	Married Single Divorced/Widowed No Apswer	76.7% 19.0 3.5	Caucasian Hispanic African-American Other	83.5% 3.3 11.0	Under \$20,000 \$20,000-\$49,999 \$50,000-\$79,999	4.8% 25.1 40.1
	1.05			NO VIEWO		Onio	7:7	000,000	2.

Silver Glen Springs Visitors Study 2003-2004

Appendix C

ate	Expenditures	Avg. Nights	Avg.	# In Party	Lik	ikely To Return:	ikely To Return:	Will Not	Is This
	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos. Do	6 Mos. Don't Know	Return	Your First Visit?
2003-2004	\$44.31	1.6	3.5	5.6	27.8%	55.0%	12.3%	2.0%	Yes 21.5% No 78.5%

Top Visitor County Origin		Avera
Marion Lake Volusia Sumter Alachua Citrus Hillsborough Polk Pinellas	48.0% 13.0 7.3 7.3 7.3 7.3 7.3 7.3 7.3 7.3 7.3 7.3	Grocer Restau Admiss Shopp Evenin Lodgin Groun Other I

	Average Daily Expenditures	
	Groceries	\$15.40
	Restaurants	9.14
	Admission Fees	9.34
	Shopping	2.85
	Evening Entertainment	2.55
	Lodging	2.14
	Ground Transportation	0.14
	Other Items	2.76
•	Total Avg. Daily Expenditure	\$44.31

59.0% 4 88.8 4 55.8 32.0 20.0 19.0 12.8 4.5

Picnicking Boating Swimming Water Sports Fishing View Wildlife Photography Snorkeling Scuba Diving Archeology

Top Visitor Activities

	4.36
	Rate your Visit to the Springs

3.95	
Rate Importance of Springs to Your Quality of Life	(On a 1-5 Scale, with 5 being the highest)

67.3% 26.0 6.7

No Overnight Stay Locally Another County

Where Stayed Overnight

\$4.1
Willingness to Pay for Access to Private Springs

	67.2% 17.5 9.3 6.0
Main Purpose for Visit	Enjoy the outdoors Spending time with family Entertaining guests Enjoy the wildlife

80.5% 20.6 4.0 1.5

Repeat Visitor Family/Friends Internet Brochure

	Total	%8.9
	Income	Under \$20,000
	Total	87.8%
]	Ethnicity	Caucasian
	Total	75.0%

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad	48.5%	Male	32.0%	Married	75.0%	Caucasian	82.8%	Under \$20,000	%8.9
Post Graduate Degree	7.8	Female	68.0	Single	17.5	Hispanic	3.8	\$20,000-\$49,999	33.5
High School Graduate	16.8			Divorced/Widowed	4.5	African-American	8.5	\$50,000-\$79,999	37.8
Technical School	27.0			No Answer	3.0	Other	0.0	\$80,000 or More	15.3

Silver Springs Visitors Study 2003-2004

Appendix D

Is This	Your First Visit?	
Will Not	Return	
nrn:	os. Don't Know	;
ikely To Reture	6 Mos.	;
Í	Next Year	;
# In Party	Not Resident	;
Avg.	Party Size	
Avg. Nights	Spent	
Expenditures	Per Party	
	Date	

Average Daily Expenditures	Admission Fees Restaurants Shopping Lodging Ground Transportation Other Items Groceries Evening Entertainment Total Avg. Daily Expenditure	
Top Visitor County Origin	₹/Z	

\$61.85 53.53 45.06 35.27 20.20 11.64 8.61

\$248.60

Main Purpose for Visit	Where Stayed Overnight
N/A	N/A

Accommodation Used	No Overnight Stay 29.9%			
How Heard About the Springs		N/A		

Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
2	51.3%	Married		Caucasian	92.3%	Under \$20,000	4.3%
ш	48.7	Single		Hispanic	1.7	\$20,000-\$49,999	24.8
		Divorced/Widowed		African-American	6.0	\$50,000-\$79,999	32.5
		No Answer	0.9	Other	5.1	\$80,000 or More	14.5
42.7% 27.4 10.3 13.7		211	Male Female	Male 51.3% Married 82.1% Female 48.7 Single 8.5 Divorced/Widowed 3.4 No Answer 6.0	Male 51.3% Married 82.1% C Female 48.7 Single 8.5 H Divorced/Widowed 3.4 A No Answer 6.0	Male 51.3% Married 82.1% Female 48.7 Single 8.5 Divorced/Widowed 3.4 No Answer 6.0	Male 51.3% Married 82.1% Caucasian Female 48.7 Single 8.5 Hispanic Divorced/Widowed 3.4 African-American No Answer 6.0 Other

Alexander Springs Visitors Study 2003-2004

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Date	Expenditures	Avg. Nights	Avg.	# In Party	Lii	Likely To Retu	To Return:	Will Not	Is This
	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos. I	Mos. Don't Know	Return	Your First Visit?
2003-2004	\$43.85	1.2	3.7	2.0	21.0%	%8.99	11.0%	1.3%	Yes 20.0% No 80.0%

Top Visitor County Origin	
Lake	35.5%
Marion	14.8
Volusia	10.3
Citrus	4.0
Sumter	3.5
Polk	3.0
Seminole	3.0
Non Florida Resident	19.3

Average Daily Expenditures	
Admission Fees Groceries	\$11.03 11.01
Lodging Restaurants	6.54 6.54
Evening Entertainment Shopping	3.68 3.49
Ground Transportation Other Items	0.94 0.02
Total Avg. Daily Expenditure	\$43.85

Top Visitor Activities	
Picnicking 63	83.0%
Swimming 48	48.0
	2.5
<u>D</u> L	8.6
	9.5
Scuba Diving 16	6.5
Boating 16	16.0
Photography 16	0.9
	0.5
Archeology	0.6

Vhere Stayed Overnight	
No Overnight Stay	66.3%
_ocally	25.0
Another County	8.8

4.67	3.86	
Rate your Visit to the Springs	Rate Importance of Springs to Your Quality of Life	(On a 1-5 Scale, with 5 being the highest)

\$4.57	
Willingness to Pay for Access to Private Springs	

Main Purpose for Visit		
Enjoy the outdoors	58.5%	
Sperioring urne with ranning Enjoy the wildlife	10.0	
Entertaining guests	8.0	

	62.5%	27.5	8.0	1.8	0.3
Accommodation Used	No Overnight Stay	Campground	Private Home	Hotel/Motel	Other

75.5% 20.8 3.0 0.8

Repeat Visitor Family/Friends Internet Brochure

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad Post Graduate Degree High School Graduate Technical School	42.0% 8.3 14.5 35.3	Male Female	43.0% 57.0	Married Single Divorced/Widowed No Answer	75.8% 22.3 2.0 0.0	Caucasian Hispanic African-American Other	83.0% 6.0 11.0 0.0	Under \$20,000 \$20,000-\$49,999 \$50,000-\$79,999 \$80,000 or More	6.3% 33.3 44.5 14.3

Apopka Spring Visitors Study 2003-2004

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	Expenditures	Avg. Nights	Avg.	# In Party	Lil	ikely To Return:	kely To Return:	Will Not	Is This
	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos. Do	6 Mos. Don't Know	Return	Your First Visit?
₩	\$22.21	1.3	3.3	2.2	41.8%	29.3%	22.5%	6.5%	Yes 34.3% No 65.7%

Top Visitor County Origin	
Lake Polk Volusia Marion Sumter Citrus Orange	27.8% 0.0.0 0.0.0.3.8.8.8.8.8.8.8.8.8.8.8.8.8.8.8.8.
Non Florida Residents	32.0

Average Daily Expenditures	
Groceries	\$7.82
Lodging	5.12
Restaurants	4.91
Evening Entertainment	1.99
Shopping	1.40
Admission Fees	09:0
Other Items	0.32
Ground Transportation	0.00
Total Avg. Daily Expenditure	\$22.21

Top Visitor Activities	
Picnicking	68.0%
Swimming	50.3
View Wildlife	18.8
Photography	12.0
Water Sports	2.5
Fishing	1.3
Archeology	1.0
Boating	0.0
Snorkeling	0.0
Scuba Diving	0.0

	65.3% 32.3 2.3
Where Stayed Overnight	No Overnight Stay Locally Another County

59.5% 22.0 10.0 8.5

Enjoy the outdoors Spending time with family Enjoy the wildlife Entertaining guests

Main Purpose for Visit

ings 4.02	gs to 2.97	he highest)
Rate your Visit to the Springs	Rate Importance of Springs to Your Quality of Life	(On a 1-5 Scale, with 5 being the highest)

	%8'99	20.3	10.3	3.1	
Accommodation Used	No Overnight Stay	Campground	Private Home	Hotel/Motel	

63.0% 17.0 11.3 8.8

Repeat Visitor Brochure Family/Friends Internet

\$4.50
Willingness to Pay for Access to Private Springs

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad Post Graduate Degree High School Graduate Technical School	43.5% 8.5 16.5 31.5	Male Female	53.8.0% 46.3	Married Single Divorced/Widowed No Answer	82.8% 16.0 1.3 0.0	Caucasian Hispanic African-American Other	84.3% 5.0 10.8 0.0	Under \$20,000 \$20,000-\$49,999 \$50,000-\$79,999 \$80,000 or More	5.0% 25.8 42.8 7.8

Ponce de Leon Springs Visitors Study 2003-2004

Appendix G

Date	Expenditures Per Party	Avg. Nights Spent	Avg. Party Size	# In Party Not Resident	Lik Next Year	Likely To Return: 6 Mos. Dor	ly To Return: 6 Mos. Don't Know	Will Not Return	Is This Your First Visit?
2003-2004	\$43.50	<u>.</u>	3.7	2.3	39.0%	39.3%	13.0%	8.8%	Yes 43.8% No 56.3%
Top Visitor	Fop Visitor County Origin			Restaurants		\$12.38		Top Visitor Activities	Activities
				Groceries		8.31			
Volusia		32.0		Evening Entertainment	nment	6.16		Picnicking	26.5%
Seminole		6.5		Lodging		6.13		Swimming	
Polk		6.5		Shopping		5.54		Fishing	23.5
Marion		6.3		Admission Fees		3.73		Boating	
Lake		5.5		Other Items		1.26		View Wildlife	
Orange		5.3		Ground Transportation	tation	00.00		Photography	7
Brevard		4.5		-				Scuba Diving	1.5
Flagler		3.8		Total Avg. Daily Expenditure	=xpenditure	\$43.50		Archeology	8.0
)			_		-				•

6	\$12.38 8.31	Top Visitor Activities	
tertainment	6.16	Picnicking 56	56.5%
	6.13		8.0
	5.54		3.5
-ees	3.73		9.0
	1.26		3.5
nsportation	0.00	Photography 12	12.3
			5.
Daily Expenditure	\$43.50		9.0
			0.0
			0.0

Top Visitor Activities		Picnicking	Swimming	Fishing	Boating	View Wildlife	Photography	Scuba Diving	Archeology	Water Sports	Snorkeling	
\$12.38	8.31	6.16	6.13	5.54	3.73	1.26	0.00		\$43.50			
Restaurants	Groceries	Evening Entertainment	Lodging	Shopping	Admission Fees	Other Items	Ground Transportation		Total Avg. Daily Expenditure			

Non Florida Resident

3.96	3.47	
Rate your Visit to the Springs	Rate Importance of Springs to Your Quality of Life	4

76.0% 16.8 7.3

No Overnight Stay Locally Another County

Where Stayed Overnight

	\$4.59
On a 1-5 Scale, with 5 being the highest)	Willingness to Pay for Access to Private Springs

	54.9% 24.3 10.8 10.0
Main Purpose for Visit	Enjoy the outdoors Spending time with family Entertaining guests Enjoy the wildlife

	%0'92	9.3	7.5	6.5	0.8	
Accommodation Used	No Overnight Stay	Private Home	Hotel/Motel	Campground	Other	

54.9% 24.3 10.8 10.0

Repeat Visitor Family/Friends Internet Brochure

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad Post Graduate Degree High School Graduate Technical School	39.3% 27.3 3.5 23.0	Male Female	41.0% 59.0	Married Single Divorced/Widowed No Answer	69.5% 23.8 4.5 2.3	Caucasian Hispanic African-American Other	73.8% 6.8 17.3 2.3	Under \$20,000 \$20,000-\$49,999 \$50,000-\$79,999 \$80,000 or More	3.3% 24.3 35.3 21.8

Gemini Springs Visitors Study 2003-2004

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	Date	Per Party	Spent	Party Size	Not Resident	Next Year	6 Mos.	Don't Know	Return	Your First Visit?
Per Party Spent Party Size Not Resident I		Expenditures	Avg. Nights	Avg.	# In Party	Ė	ikely To Return:	nrn:	Will Not	Is This

	48.0% 13.0 7.3 7.3 8.5 1.5 1.5 18.5	
Top Visitor County Origin	Marion Lake Volusia Sumter Alachua Citrus Hillsborough Polk Pinellas	

Average Daily Expenditures	
Restaurants	\$12.73
Shopping	4.77
Lodging	4.27
Groceries	4.18
Admission Fees	3.42
Evening Entertainment	3.01
Other Items	1.72
Ground Transportation	0.00
Total Avg. Daily Expenditure	\$34.10

64.3% 23.5% 113.8 5.8 0.0 0.0 0.0 0.0 0.0 6.8

Picnicking View Wildlife Fishing Boating Photography Swimming Scuba Diving Archeology Water Sports Snorkeling Other

Top Visitor Activities

	1
	4.1
	e Springs
	Rate your Visit to the Springs
	Rate you
ĺ	

Rate Importance of Springs to Your Quality of Life 3.33 (On a 1-5 Scale, with 5 being the highest)

	63.5% 28.5 8.0 0.0
Main Purpose for Visit	Enjoy the outdoors Spending time with family Enjoy the wildlife Entertaining guests

79.3% 18.0 2.8	
No Overnight Stay Locally Another County	

Where Stayed Overnight

\$4.67	
Willingness to Pay for Access to Private Springs	

79.5% 14.8 5.5 0.3

Accommodation Used
No Overnight Stay
Private Home
Hotel/Motel
Campground

he Springs	77.8% 17.3 3.3 1.3
How Heard About the Springs	Repeat Visitor Family/Friends Internet Brochure

Education	Total	Sex	Total	Marital Status	Total	Ethnicity	Total	Income	Total
Some College/College Grad Post Graduate Degree High School Graduate Technical School	51.0% 15.8 8.3 18.0	Male Female	40.0% 60.0	Married Single Divorced/Widowed No Answer	78.3% 15.3 6.5 0.0	Caucasian Hispanic African-American Other	72.5% 7.5 12.5 4.5	Under \$20,000 \$20,000-\$49,999 \$50,000-\$79,999 \$80,000 or More	1.5% 17.8 44.3 15.3

APPENDIX I: FLORIDA SPRINGS VISITOR SURVEY

Survey	or's Initials		During the past 24 hours, please indicate the amount spent
Q01	Date:		by your party:
Q02	Site (circle one): WS IS HS VB	Q18 Q19	\$ Lodging \$ Restaurant Meals/Beverages \$ Creary/Convenience Stores
Q03	Gender: 1=Male 2=Female	Q20 Q21 Q22	\$ Grocery/Convenience Stores \$ Admission Fees \$ Evening Entertainment
Q04	What is your: City:	Q23 Q24	\$ Ground Transportation \$ Shopping
Q05	County:	Q25	\$ All Other
Q06	State: Country:	Q27	Ethnicity: 1= Caucasian
Q07	Zip Code:		2= African-American 3= Hispanic 4= Asian
Q08	What best describe your reason for today's visit?		5= Other
Q8B	What activities have you pursued during this visit?	Q28	Education: 1= High School Graduate 2= Technical School 3= Some College/College Graduate 4= Post Graduate Degree
Q09	Number of nights spent in the area during this trip:	Q29	Total Household Income: 1=Under \$20,000
Q10	Where did you stay overnight? 1= Locally	Q30	Marital Status: 1=Married 2=Single 3=Widowed/Divorced
	2= In another county	021	
	3= Other (specify)	Q31	If privately owned springs in this area were opened to the public on a limited access basis, how much would you be
Q11	Accommodations Used: 1= No nights spent in area 2= Hotel/Motel		willing to spend on the entrance fee for each visit if you knew the money would go to the protection of those natural springs? \$
	3= Condominium 4= Private Home	Q32	Please rate the importance Florida springs have upon your
	5= Other	Q32	quality of life: Extremely 1 2 3 4 5 6 7 Extremely
Q12	How many people are in your travel party?		Important Unimportant
Q13	How many in your travel party are NOT county residents?		
Q14	Is this your first visit to this spring? Y N		Thank you for your help
Q15	If Y, how did you hear about this spring?		
Q16	Will you come back to this spring in the near future? Y N		
Q17	If Y, Within the next 6 months? Y N Within the next year? Y N		
Q26	Please rate your visit to this spring: Poor 1 2 3 4 5 Excellent		