

Responsive Management™



ECONOMIC IMPACT ANALYSIS OF THE COLLABORATIVE FOREST LANDSCAPE RESTORATION PROGRAM

**Conducted for the Collaborative Forest Landscape
Restoration Program**

by Southwick Associates and Responsive Management

2013

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EXECUTIVE SUMMARY

This study was conducted to provide estimates of the economic significance of the Collaborative Forest Landscape Restoration Program (CFLR Program) to the three regions specified for the study. The regions include the three-county area adjacent to the Osceola National Forest (Baker, Union, and Columbia counties), the state of Florida, and lastly, the U.S. economy as a whole. This report is based on expenditure data provided by the U.S. Forest Service.

Three separate models were created to estimate the economic contributions: a model of the combined Baker, Columbia and Union county economies known as the Forest region, the Florida statewide economy and the U.S. national economy. Annual expenditures in each region were analyzed separately for 2010, 2011 and 2012. The combined results largely reflect the sum of the annual impacts.

Within the Osceola area, the total economic output for all three years is over \$3 million including multiplier effects. Program expenditures also generated \$1.8 million in salaries and wages over the course of the three years within the same region of Florida and contributed \$459,000 in local, state and federal tax revenues.

For the state of Florida, the CFLR Program produced over \$11 million in economic output from 2010 through 2012. It also produced over \$1 million in federal tax revenue. Compared to only the Osceola area, the economic impact to the state economy was 3.5 times greater in terms of total economic activity, and had three times more jobs.

Economic contributions of Osceola National Forest operations on the U.S. economy generated over \$16.6 million of economic output. The magnitude of change from the state of Florida's economic contributions compared to the National level does not match the level of change from the Osceola area to the state of Florida; however, large increases were noted across all categories. The economic output produced from the CFLR Program on the National level exceeded the Florida level by a factor of 1.4, and jobs increased a further 16%. Contributions to Gross Domestic Product at the national level were 1.3 times larger. Economic impacts become

larger as the region under study expands as a greater percentage of the economic activity stimulated by the CFLR Program are captured in the analysis.

Overall, from 2010 through 2012, \$6.7 million was spent by the Osceola CFLR Program. These expenditures created a total of 137 jobs across the U.S. This program has also contributed over \$10 million to Gross Domestic Product, over \$1 million in state and local tax revenue, \$1.2 million in federal tax revenues were returned to the federal government, and \$7 million in salaries and wages were generated. The CFLR Program is responsible for over \$16.6 million in economic activity over the past three years (Table 1).

Table 1. Results of Osceola National Forest operations on the U.S. economy, 2010-2012.

Impacts/Contributions	
Cost (CFLR dollars spent, 2010-2012)	\$6,722,204
Economic Output Generated (Sales)	\$16,655,673
Employment ¹	137
Salaries and Wages	\$7,257,131
Contribution to GDP	\$10,316,009
State & Local Tax Revenues	\$1,078,392
Federal Tax Revenues	\$1,222,430

¹ Full-time and part-time jobs. Includes total jobs reported across all three years (2010-2012), and does not imply that all jobs existed each year.

TABLE OF CONTENTS

Introduction.....	1
Study Purpose	1
Relevant Economic Concepts	1
Methodology.....	3
Economic Contribution.....	5
Conclusion	11
About Southwick Associates	12
About Responsive Management	13

INTRODUCTION

STUDY PURPOSE

This study was conducted to provide estimates of the economic significance of the Osceola's Collaborative Forest Landscape Restoration Program (CFLR Program) to the three regions identified in the study. The regions include the three-county area adjacent to the Osceola National Forest (Baker, Union, and Columbia counties), the State of Florida, and lastly, the U.S. This report is based on expenditure data provided by the U.S. Forest Service that reported the total amounts spent, by activity, on CFLR Programs from 2010 through 2012. The economic impact estimates were constructed using well-established modeling procedures. The results show the jobs, income, and tax revenues within each of the study regions that are supported by the annual expenditures of Collaborative Forest Landscape Restoration Program.

RELEVANT ECONOMIC CONCEPTS

Economic impacts measure the changes within an economy that result from some positive or negative economic stimulus. From a technical standpoint, economic "impact" is a term normally reserved to describe the growth or contraction in an economy caused by the entry or loss of revenue from or to outside sources. Outside sources include tourists bringing dollars into a local economy or the sale of services and products to people outside of the region. Sales and other transactions between people and businesses within an economy typically do not result in economic growth but is mainly a redistribution of resources. However, this form of economic activity is still important and sustains jobs and more. This broader form of economic activity is often referred to as "economic contributions." This study measures the economic impact for the local forest area and the State of Florida as the dollars are brought into these economies from the outside. The national effects are considered economic contributions.

Economic impacts and contributions can be expressed in terms of jobs, income, output (expenditures) and tax revenues. Economic contributions and impacts, for the purpose of economic modeling, can be divided into three standard components: direct, indirect and induced effects. The indirect and induced effects are the two components of the "**multiplier**" or "**ripple**" effect. Each of these is considered when estimating the overall effects of any activity on the economy. A **direct effect** is defined as the result of the initial purchase made by the consumer.

Only the amount of the purchase that remains in the region under study is retained as the direct effect. For example, when a person buys a restaurant meal for \$20, there is a direct effect to the restaurant and the local economy of \$20 assuming all of the supplies needed for the meal were provided locally. However, recognizing much of the consumed food and supplies were likely bought from sources outside of the region of study, a lower amount, for example, \$10, actually remains in the local economy as a direct effect. **Indirect effects** measure how sales in one industry affect the various other industries providing supplies and support. For example, the restaurateur must purchase additional food and supplies, plus pay costs such as power, rent, etc.; local food suppliers must buy more product, and so on. Therefore, the original direct effect of \$10 benefits many other industries within the regions. An **induced effect** results from the wages and salaries paid by the directly and indirectly impacted industries. The employees of these industries then spend their incomes. These expenditures are induced effects that, in turn, create a continual cycle of indirect and induced effects.

The sum of the direct, indirect and induced effects is the **total economic impact** or **contribution**. As the original retail purchase (direct effect) goes through round after round of indirect and induced effects, the economic contribution of the original purchase is multiplied, benefiting many industries and individuals. Likewise, the reverse is true. If a particular item or industry is removed, the economic loss is greater than the original retail sale. Once the original retail purchase is made, each successive round of spending is smaller than the previous round. When the economic benefits are no longer measurable, the economic examination ends.

An economic measure not considered in this report but commonly used in resource allocation studies is **economic value**. Economic value measures the personal or intrinsic value held by users of a resource, or people affected by an action or item. This term basically measures the quality of life effects, or how much one is better or worse off intrinsically. For example, a person may spend \$100 to go on raft trip, but the trip was worth \$125 intrinsically to that individual. That person was better off by \$25 after taking the trip, and \$25 is the net economic value of the trip. While an important measure, economic value is complex and not considered in this report.

METHODOLOGY

The researchers coordinated with the U.S. Forest Service to review accounting and expenditures under the Collaborative Forest Landscape Restoration Program. The data were parceled into two categories: (1) vendors within the Osceola National Forest region and (2) all other Florida counties. After expenditure data were received from the U.S. Forest Service, the data were sorted by the type of expenditure: transportation, salary and wages, accommodations and food services, etc. A table was created for each year, 2010, 2011 and 2012 (Table 2, Table 3, Table 4). The expenditures were then categorized by the region where the expenditure was made.

USFS CFLR contractors were then contacted by telephone to determine where within the three regions (Osceola area, the state of Florida, or outside of Florida) their CLFR funds were eventually spent. The percentage given was then applied to the overall expenditure and applied to the corresponding region. For example, if company “X” was paid \$100,000 for a service and they reported spending 25% within the Osceola area, 25% within the state of Florida, and the remaining 50% outside the state of Florida, \$25,000 was assigned to the Osceola area, and so on.

Table 2. Expenditure by Category and Region, 2010

Industry Description	Within Baker, Union and Columbia	Other Florida counties	Outside of Florida	TOTAL
Agriculture, Forestry, Fishing and Hunting	\$261,415	\$623,266	\$65,675	\$950,356
Retail Trade	\$1,070	\$1,070	\$1,070	\$3,211
Accommodation and Food Services	\$706	\$353	\$353	\$1,413
Pay – Program Staff	\$30,049	\$39,154	\$13,011	\$82,214
Total	\$293,241	\$663,843	\$80,109	\$1,037,193

Table 3. Expenditure by Category and Region, 2011

Industry Description	Within Baker, Union and Columbia	Other Florida counties	Outside of Florida	TOTAL
Agriculture, Forestry, Fishing and Hunting	\$146,799	\$691,880	\$221,998	\$1,060,677
Retail Trade	\$66,650	\$33,980	\$24,686	\$125,316
Transportation and Warehousing	\$93,376			\$93,376
Accommodation and Food Services	\$46,710	\$18,518	\$60,145	\$125,373
Government and Institutions		\$10,000		\$10,000
Pay – Program Staff	\$609,178	\$360,954	\$109,063	\$1,079,195
Total	\$962,713	\$1,115,332	\$415,892	\$2,493,937

Table 4. Expenditure by Category and Region, 2012

Industry Description	Within Baker, Union and Columbia	Other Florida counties	Outside of Florida	TOTAL
Agriculture, Forestry, Fishing and Hunting	\$228,943	\$835,737	\$305,836	\$1,370,516
Retail Trade	\$58,663	\$28,522	\$23,522	\$110,707
Transportation and Warehousing	\$127,936	\$42,381	\$33,882	\$204,199
Accommodation and Food Services	\$29,585	\$11,274	\$37,020	\$77,878
Pay – Program Staff	\$737,315	\$481,266	\$209,192	\$1,427,773
Total	\$1,182,442	\$1,399,180	\$609,452	\$3,191,073

The expenditures were analyzed by the IMPLAN model to estimate the economic contributions associated with the Collaborative Forest Landscape Restoration Program. IMPLAN[®], developed by the Minnesota IMPLAN Group, Inc. of Stillwater, Minnesota, is an economic impact modeling system. This system allows the user to assess the economic impacts created by consumer and business expenditures at the local, state, regional and national levels. IMPLAN is an input-output model that explains the flow of goods and dollars from commodity suppliers, to manufacturers to intermediaries and finally to the end user.

Three separate models were created to estimate the economic contributions: a model of the combined Baker, Columbia and Union county economies, the Florida statewide economy and the U.S. national economy. Annual expenditures in each region were analyzed separately for 2010, 2011 and 2012. The combined results reflect the sum of the annual impacts.

ECONOMIC CONTRIBUTION

Tables 5 through 8 present the direct economic impacts and the multiplier effects that are the result of expenditures by the Collaborative Forest Landscape Restoration Program in *only* the Osceola-area counties. The first table shows the economic effects of the program in 2010, the following table in 2011, and so on. The last table is the total of all three years, 2010 through 2012. Within the Osceola area, the total economic output for all three years is over \$3 million including multiplier effects (Table 8). Program expenditures also generated \$1.8 million in salaries and wages over the course of the three years within the same region of Florida and contributed \$459,000 in local, state and federal tax revenues.

Table 5. Economic impacts of Osceola National Forest operations on the Osceola-area* economy, 2010.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$293,241	\$61,850	\$355,091
Employment	8	1	9
Salaries and Wages	\$113,301	\$27,434	\$140,735
Contribution to GDP	\$98,451	\$51,314	\$149,765
State & Local Tax Revenues	\$7,973	\$5,406	\$13,379
Federal Tax Revenues	\$17,940	\$6,074	\$24,014

*Includes Baker, Columbia and Union counties.

Table 6. Economic impacts of Osceola National Forest operations on the Osceola-area* economy, 2011.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$962,713	\$301,938	\$1,264,651
Employment	9	4	13
Salaries and Wages	\$671,557	\$101,293	\$772,850
Contribution to GDP	\$757,165	\$214,990	\$972,155
State & Local Tax Revenues	\$29,296	\$22,827	\$52,123
Federal Tax Revenues	\$115,960	\$24,049	\$140,009

*Includes Baker, Columbia and Union counties.

Table 7. Economic impacts of Osceola National Forest operations on the Osceola-area* economy, 2012.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$1,182,442	\$381,860	\$1,564,302
Employment	12	4	16
Salaries and Wages	\$812,335	\$123,914	\$936,249
Contribution to GDP	\$902,965	\$262,457	\$1,165,422
State & Local Tax Revenues	\$32,730	\$27,824	\$60,554
Federal Tax Revenues	\$139,395	\$29,385	\$168,780

*Includes Baker, Columbia and Union counties.

Table 8. Economic impacts of Osceola National Forest operations on the Osceola-area* economy, 2010-2012.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$2,438,396	\$745,648	\$3,184,044
Employment ²	29	9	38
Salaries and Wages	\$1,597,193	\$252,641	\$1,849,834
Contribution to GDP	\$1,758,581	\$528,761	\$2,287,342
State & Local Tax Revenues	\$69,999	\$56,057	\$126,056
Federal Tax Revenues	\$273,295	\$59,508	\$332,803

*Includes Baker, Columbia and Union counties.

² Full-time and part-time jobs. Includes total jobs reported across all three years (2010-2012), and does not imply that all jobs existed each year.

Tables 9 through 12 present the direct economic impacts and the multiplier effects generated by the Collaborative Forest Landscape Restoration Program in *only* the state of Florida. The first table shows the economic effects of the program in 2010, the following table in 2011, and so on. The last table is the total of all three years, 2010 through 2012. The Collaborative Forest Landscape Restoration Program produced over \$11 million in economic output in the state of Florida (Table 12) during the three years of 2010 through 2012. It also produced over \$1 million in federal tax revenue. Compared to only the Osceola area, the state of Florida gained over \$8 million more in economic output, 77 more jobs, and contributed more than \$5 million to the GDP.

Table 9. Economic impacts of Osceola National Forest operations on the Florida economy, 2010.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$957,084	\$1,111,031	\$2,068,115
Employment	12	12	23
Salaries and Wages	\$422,799	\$411,227	\$834,026
Contribution to GDP	\$508,434	\$673,598	\$1,182,032
State & Local Tax Revenues	\$28,465	\$53,466	\$81,931
Federal Tax Revenues	\$81,349	\$95,212	\$176,561

Table 10. Economic impacts of Osceola National Forest operations on the Florida economy, 2011.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$2,078,045	\$2,044,524	\$4,122,569
Employment	22	20	42
Salaries and Wages	\$1,294,994	\$755,933	\$2,050,927
Contribution to GDP	\$1,512,936	\$1,307,531	\$2,820,467
State & Local Tax Revenues	\$58,526	\$107,323	\$165,849
Federal Tax Revenues	\$253,554	\$181,166	\$434,720

Table 11. Economic impacts of Osceola National Forest operations on the Florida economy, 2012.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$2,581,621	\$2,557,672	\$5,139,293
Employment	26	24	50
Salaries and Wages	\$1,583,584	\$936,044	\$2,519,628
Contribution to GDP	\$1,847,131	\$1,616,719	\$3,463,850
State & Local Tax Revenues	\$70,151	\$132,573	\$202,724
Federal Tax Revenues	\$309,310	\$224,095	\$533,405

Table 12. Economic impacts of Osceola National Forest operations on the Florida economy, 2010-2012.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$5,616,750	\$5,713,227	\$11,329,977
Employment ³	59	56	115
Salaries and Wages	\$3,301,377	\$2,103,204	\$5,404,581
Contribution to GDP	\$3,868,501	\$3,597,848	\$7,466,349
State & Local Tax Revenues	\$157,142	\$293,362	\$450,504
Federal Tax Revenues	\$644,213	\$500,473	\$1,144,686

³ Full-time and part-time jobs. Includes total jobs reported across all three years (2010-2012), and does not imply that all jobs existed each year.

Tables 13 through 16 present the direct economic contributions and the multiplier effects that are the result of the direct expenditures made for the Collaborative Forest Landscape Restoration Program in the U.S. The first table shows the economic effects of the program in 2010, the following table in 2011, and so on. The last table is the total of all three years, 2010 through 2012. Economic contributions of Osceola National Forest operations on the U.S. economy generated over \$16.6 million of economic output (Table 16). The magnitude of change from the state of Florida's economic contributions compared to the National level, doesn't match the level of change from the Osceola area to the statewide region. However, large increases were noted across all categories. The economic output produced from the Collaborative Forest Landscape Restoration Program on the National level exceeded the Florida level by \$5 million, a total of 22 more jobs, and the contribution to GDP increased \$2.8 million. In larger regions, more financial transactions can be captured compared to smaller areas, resulting in greater economic impacts.

Table 13. Economic contributions of Osceola National Forest operations on the U.S. economy, 2010.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$1,037,193	\$1,698,456	\$2,735,649
Employment	11	13	24
Salaries and Wages	\$453,926	\$573,942	\$1,027,868
Contribution to GDP	\$521,744	\$967,189	\$1,488,933
State & Local Tax Revenues	\$38,413	\$90,666	\$129,079
Federal Tax Revenues	\$76,640	\$127,524	\$204,164

Table 14. Economic contributions of Osceola National Forest operations on the U.S. economy, 2011.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$2,493,937	\$3,620,964	\$6,114,901
Employment	23	27	51
Salaries and Wages	\$1,505,558	\$1,237,529	\$2,743,087
Contribution to GDP	\$1,746,483	\$2,144,655	\$3,891,138
State & Local Tax Revenues	\$107,190	\$450,752	\$557,942
Federal Tax Revenues	\$276,176	\$34,730	\$310,906

Table 15. Economic contributions of Osceola National Forest operations on the U.S. economy, 2012.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$3,191,073	\$4,614,050	\$7,805,123
Employment	28	34	62
Salaries and Wages	\$1,912,477	\$1,573,699	\$3,486,176
Contribution to GDP	\$2,210,386	\$2,725,552	\$4,935,938
State & Local Tax Revenues	\$132,125	\$259,246	\$391,371
Federal Tax Revenues	\$349,299	\$358,061	\$707,360

Table 16. Economic contributions of Osceola National Forest operations on the U.S. economy, 2010-2012.

State	Direct Economic Contribution	Multiplier Effects	Total Economic Contribution
Economic Output (Sales)	\$6,722,204	\$9,933,469	\$16,655,673
Employment ⁴	63	74	137
Salaries and Wages	\$3,871,961	\$3,385,170	\$7,257,131
Contribution to GDP	\$4,478,613	\$5,837,396	\$10,316,009
State & Local Tax Revenues	\$277,728	\$800,664	\$1,078,392
Federal Tax Revenues	\$702,115	\$520,315	\$1,222,430

⁴ Full-time and part-time jobs. Includes total jobs reported across all three years (2010-2012), and does not imply that all jobs existed each year.

CONCLUSION

This study determined the benefits to the surrounding economies as result of the CFLRP. The economic impacts associated with this program were determined using the expenditures made. Overall, from 2010 through 2012, \$6.7 million was spent by the Osceola CFLR Program. These expenditures created a total of 137 jobs across the U.S. This program has also contributed over \$10 million to Gross Domestic Product, over \$1 million in state and local tax revenue, \$1.2 million in federal tax revenues were returned to the federal government, and \$7 million in salaries and wages were generated. In economic output, which is the sum of all personal and business spending resulting from the CFLR Program, over \$16.6 million in activity has been stimulated by this project over the past three years. For every \$1 invested in this program, \$0.20 is returned to the federal government in tax revenues, \$1.50 in GDP is created, and \$2.40 in total economic activity is generated.

ABOUT SOUTHWICK ASSOCIATES

Southwick Associates specializes in economic, marketing and other business-related research for the fishing, hunting, outdoor recreation and conservation sectors. Current clients include nearly half of all state fish and wildlife agencies, the American Sportfishing Association, the Association of Fish and Wildlife Agencies, the National Shooting Sports Foundation, and many others. Southwick Associates is based in north Florida, and is supported by experienced Ph.Ds and statistical specialists all over the country.

Southwick Associates measures the economic impacts and values of outdoor recreation, including hunting, fishing, boating, wildlife viewing, trapping, and more; helps outdoor-related companies understand their share of the market, the products and pricing demanded by customers, and how to better reach current and potential new customers; quantifies outdoor recreation participation and trends; and determines natural resource, conservation and environmental valuation.

Southwick Associates has also conducted research measuring the jobs, tax revenues and other economic contributions from fish and wildlife recreation within local, state and national economies; assessed state license databases and company sales records to identify who is entering or exiting outdoor sports, and how to address these trends; and determined the value of fish and mussels lost to industrial uses and accidents.

Other projects include studies quantifying the value held by the public and recreational users natural resources, especially fish, wildlife and forest resources; assessing the likelihood of visitor frequency, boating accidents, annual revenues for outdoor-related businesses, and other statistical analyses; examining the trade volume, product flow and market shares for various outdoor-related industries; and measuring the net economic effects of planned government programs or construction projects.

Visit the Southwick Associates website at:

www.southwickassociates.com

ABOUT RESPONSIVE MANAGEMENT

Responsive Management is an internationally recognized public opinion and attitude survey research firm specializing in natural resource and outdoor recreation issues. Our mission is to help natural resource and outdoor recreation agencies and organizations better understand and work with their constituents, customers, and the public.

Utilizing an in-house, full-service telephone, mail, and web-based survey center with 50 professional interviewers, Responsive Management has conducted more than 1,000 telephone surveys, mail surveys, personal interviews, and focus groups, as well as numerous marketing and communication plans, needs assessments, and program evaluations.

Clients include the federal natural resource and land management agencies, most state fish and wildlife agencies, state departments of natural resources, environmental protection agencies, state park agencies, tourism boards, most of the major conservation and sportsmen's organizations, and numerous private businesses. Responsive Management also collects attitude and opinion data for many of the nation's top universities.

Specializing in research on public attitudes toward natural resource and outdoor recreation issues, Responsive Management has completed a wide range of projects during the past 22 years, including dozens of studies of hunters, anglers, wildlife viewers, boaters, park visitors, historic site visitors, hikers, birdwatchers, campers, and rock climbers. Responsive Management has conducted studies on endangered species; waterfowl and wetlands; and the reintroduction of large predators such as wolves, grizzly bears, and the Florida panther.

Responsive Management has assisted with research on numerous natural resource ballot initiatives and referenda and has helped agencies and organizations find alternative funding and increase their membership and donations. Additionally, Responsive Management has conducted major organizational and programmatic needs assessments to assist natural resource agencies and organizations in developing more effective programs based on a solid foundation of fact.

Responsive Management has conducted research on public attitudes toward natural resources and outdoor recreation in almost every state in the United States, as well as in Canada, Australia, the United Kingdom, France, Germany, and Japan. Responsive Management has also conducted focus groups and personal interviews with residents of the African countries of Algeria, Cameroon, Mauritius, Namibia, South Africa, Tanzania, Zambia, and Zimbabwe.

Responsive Management routinely conducts surveys in Spanish and has conducted surveys in Chinese, Korean, Japanese and Vietnamese and has completed numerous studies with specific target audiences, including Hispanics, African-Americans, Asians, women, children, senior citizens, urban, suburban and rural residents, large landowners, and farmers.

Responsive Management's research has been upheld in U.S. District Courts; used in peer-reviewed journals; and presented at major natural resource, fish and wildlife, and outdoor recreation conferences across the world. Company research has been featured in most of the nation's major media, including CNN, *The New York Times*, *The Wall Street Journal*, and on the front pages of *USA Today* and *The Washington Post*. Responsive Management's research has also been highlighted in *Newsweek* magazine.

Visit the Responsive Management website at:

www.responsivemanagement.com