

Linking the Economy and Environment of Florida Keys/Florida Bay

Executive Summary - Visitors Survey

The Monroe County Tourist Development Council (TDC), The Nature Conservancy, Florida Keys Initiative (TNC), and the National Oceanic and Atmospheric Administration (NOAA) have jointly funded a study to establish contributions made by tourism to Monroe County's economy, and to measure the importance of outdoor recreation and marine resources to the visitor industry.

A survey was conducted of visitors during two seasons: July - August 1995 and January - April 1996. Over 8,100 visitors were interviewed and over 11,000 questionnaires were completed which gathered information on visitors' characteristics, activities, spending habits, and importance and satisfaction ratings on 25 selected facilities, services and natural resource attributes. The sample design also allowed for the estimation of total visitation. Estimates are provided for two six-month periods: June - November 1995 and December 1995 - May 1996. Annual totals or weighted annual averages were also estimated for the June 1995 - May 1996 period. Estimates were also made by geographic region (Upper Keys, Middle Keys, Lower Keys, and Key West).

Visitation

June - November 1995: 1.17 million recreating visitors spent 4.9 million person-days in the Florida Keys/Key West. 85.3 percent came by auto, 12.4 percent by air (Key West and Marathon airports), and 2.2 percent by cruise ship (Key West). Key West received the most visitors with over 500 thousand, followed by the Upper Keys with almost 450 thousand, the Middle Keys with almost 350 thousand, and the Lower Keys with over 125 thousand.

December 1995 - May 1996: 1.37 million recreating visitors spent 8.4 million person-days in the Florida Keys/Key West. 74 percent came by auto, 10.4 percent by air, and 15.6 percent by cruise ship. Key West received the most visitors with over 894 thousand, followed by the Upper Keys with over 466 thousand, the Middle Keys with over 351 thousand, and the Lower Keys with over 178 thousand.

June 1995 - May 1996: 2.54 million recreating visitors spent 13.3 million person-days in the Florida Keys/Key West. 78.6 percent came by auto, 8.7 percent by air, and 12.6 percent by cruise ship. Key West received the most visitors with over 1.4 million, followed by the Upper Keys with over 911 thousand, the Middle Keys with about 697 thousand, and the Lower Keys with about 304 thousand. Visitors, on average, made 3.4 trips (visits) per year and spent, on average, 10.9 days per year in the Florida Keys/Key West.

Length of Stay Per Visit

Two measurements were made on the length of stay per visit: the number of days and the number of nights. Visitors that stayed for zero nights were classified as day-visitors.

June - November 1995: The average length of stay was 4.17 days and 3.6 nights, with 15.9 percent classified as day-visitors.

December 1995 - May 1996: The average length of stay was 6.03 days and 5.49 nights, with 20.6 percent classified as day-visitors.

June 1995 - May 1996: The average length of stay was 5.17 days and 4.62 nights, with 18.5 percent classified as day-visitors.

Origin of Visitors

June - November 1995: About 61 percent of visitors came from the South, with 45.9 percent from Florida. About 19 percent of visitors were foreign visitors, with Germany ranked number one and England ranked number two among foreign markets.

December 1995 - May 1996: About 33 percent of visitors came from the South, however the Midwest and Northeast became more important markets during this season with 23.1 and 22.8 percent, respectively. Florida was still the top-rated state with 16.4 percent. Foreign visitors were 15.2 percent, with Canada moving to the number-one foreign country, followed by Germany and England.

June 1995 - May 1996: About 46 percent of visitors came from the South, with 30 percent from Florida. About 17 percent were foreign visitors, with Germany ranked number one followed by Canada and England.

Demographic Profiles

Detailed information was gathered on age, race/ethnic background, sex, household income, household type, party size, type of recreation group, education, employment, and type of disabilities. Information was obtained from two separate samples. The first included only those 16 years of age or older and was obtained from the Auto, Air and Cruise Ship sample. The second sample included visitors of all ages and was obtained from the CUSTOMER sample, which is based on a survey of visitors at over 200 locations throughout the Florida Keys/Key West.

Auto, Air and Cruise Ship Survey (Visitors Age 16 and older)

- i Winter season visitors are older than summer season visitors. During the winter season, 26 percent are over 61, while only 8.5 percent of summer season visitors are over 61.
- i Household income of winter season visitors is significantly higher than that of summer season visitors.
- i Race/ethnicity is significantly different, with a higher proportion of Hispanics and Blacks during the summer season.
- i Party size is significantly smaller during the winter season and is comprised of a significantly higher proportion of adults. During the winter season, 92.1 percent had no children, versus 71 percent during the summer.

CUSTOMER Survey (Visitors of All Ages)

- i Winter season visitors are older than summer season visitors. During the winter, 13.2 percent were over 61, while only 4.4 percent of summer season visitors are over 61.
- i Household income of winter season visitors is significantly higher than that of summer season visitors.
- i Race/ethnicity is significantly different with a higher proportion of Hispanics and Blacks during the summer season.
- i Average party size is significantly smaller during the winter season with an average of 3.6 visitors per party during the summer and 2.9 visitors per party during the winter.
- i 47.8 percent of the summer season visitors come from households with children, while during the winter only 29.5 percent come from households with children.
- i A significantly higher proportion of winter season visitors are retired (16.9 percent) than summer season visitors (4.5 percent).
- i Winter season visitors are more highly educated than summer season visitors. This is true even among those 16 and over.

Recreation Activities

This was the most detailed part of the survey. Information was gathered on participation in 68 recreation activities during each season and in each of the four geographic regions of the Florida Keys/Key West. The report summarizes these 68 activities into 41 aggregated activities, eliminating double-counting across activities. Intensity of use was also measured for 39 activities. Intensity of use was measured by the number of days a visitor did the activity on their most recent visit and the number of hours they engaged in the activity.

June - November 1995: Snorkeling was the top-rated activity for the entire Florida Keys/Key West, with almost 42 percent of all visitors having participated in the activity. 76 percent of all visitors participated in

at least one water-based recreation activity. About 12.5 percent did scuba diving, about 26 percent participated in fishing, 27 percent participated in viewing wildlife or nature study, 32 percent did beach activities, and almost 28 percent visited museums or historic sites.

December 1995 - May 1996: Sightseeing and Attractions (paid and unpaid) was the top-rated activity during this season with over 65 percent of all visitors having participated. 57 percent of all visitors participated in at least one water-based recreation activity. About 17 percent participated in snorkeling, 4.25 percent did scuba diving, about 17 percent participated in fishing, almost 30 percent participated in viewing wildlife or nature study, almost 33 percent did beach activities, and 37.4 percent visited museums or historic areas.

June 1995 - May 1996: Sightseeing and Attractions (paid and unpaid) was the top-rated activity for the year with over 55 percent of all visitors having participated. 66 percent of all visitors did at least one water-based recreation activity. Over 28 percent participated in snorkeling, about 8 percent did scuba diving, 21 percent participated in fishing, 28.6 percent participated in viewing wildlife or nature study, over 32 percent did beach activities, and almost 33 percent visited a museum or historic area.

Visitor Spending

The survey gathered detailed information on 47 spending categories. Information was also gathered on total trip expenditures, the amount spent in South Florida (Dade, Broward and Monroe Counties), and the amount spent in the Florida Keys/Key West (Monroe County). Estimates were made for spending in Monroe County on a per person per day basis. Estimates were also made on a per person per trip basis for the total trip, the amount spent in South Florida, and the amount spent in Monroe County.

June - November 1995: On a **per person per day basis** visitors spent, on average, a total of \$101.08. Of this, \$32.86 was spent on lodging, \$28.53 on food & beverages, \$9.35 on transportation, \$17.79 on recreation activities, and \$12.57 on other items. On a **per person per trip basis** visitors spent, on average, \$877.63 on the total trip, \$619.72 in South Florida, and \$413.02 in Monroe County.

December 1995 - May 1996: On a **per person per day basis** visitors spent, on average, a total of \$115.74. Of this, \$39.28 was spent on lodging, \$30.82 on food & beverages, \$11.59 on transportation, \$18.51 on recreation activities, and \$15.53 on other items. On a **per person per trip basis** visitors spent, on average, \$922.48 on the total trip, \$667.18 in South Florida, and \$490.05 in Monroe County.

June 1995 - May 1996: On a **per person per day basis** visitors spent, on average, a total of \$108.97. Of this, \$36.31 was spent on lodging, \$29.76 on food & beverages, \$10.56 on transportation, \$18.18 on recreation activities, and \$14.17 on other items. On a **per person per trip basis** visitors spent, on average, \$901.76 on the total trip, \$645.25 in South Florida, and \$454.45 in Monroe County.

Economic Contribution

Visitor spending information was combined with visitation estimates to estimate total visitor spending in both Monroe County and South Florida. An input-output model was used to estimate impacts on the South Florida economy; a more simplified approach was used for Monroe County. The results are summarized here.

Monroe County. For the period June 1995 - May 1996, 2.54 million visitors spent about \$1.2 billion in Monroe County, which had a total impact of \$1.33 billion in output/sales, \$506 million in income, and almost 22 thousand full and part-time jobs. Recreation/tourism accounted for over 60 percent of output/sales, 45 percent of income, and over 46 percent of employment in Monroe County.

South Florida (Dade, Boward and Monroe Counties). For the period June 1995 - May 1996, 2.54 million visitors spent \$1.67 billion in South Florida, which had a total impact of \$2.94 billion in output/sales, \$1.69 billion in income and almost 28,000 full-time equivalent jobs. The net to Dade and

Broward counties was \$1.61 billion in output/sales, \$1.37 billion in income, and about 8,300 full-time equivalent jobs.

Importance and Satisfaction Ratings

Visitors were asked to rate both the importance of and their satisfaction with, 25 selected facilities, services, and natural resource attributes. For 11 of the 25 items, visitors that had visited the Florida Keys/Key West at least five years ago were asked to rate their satisfaction with these 11 items five years ago. Visitors' current satisfaction ratings were then compared with their ratings of these items five years prior. Statistical tests were conducted to highlight significant differences.

For the June 1995 - May 1996 period, six items received relatively high importance scores and relatively low satisfaction scores. They were Shoreline access, Designated swimming/beach areas, Quality of beaches, Opportunity to view large wildlife (manatees, whales, dolphins, sea turtles), Availability of public restrooms, and Value for the price.

Nine items received relatively high importance scores and relatively high satisfaction scores. They were Clear water (high visibility), Amount of living coral on the reefs, Many different kinds of fish and sealife to view, Parks and specially protected areas, Historic preservation, Directional signs, street signs, and mile markers, Condition of the roads and streets, and Service and friendliness of the people.

Seven of the 11 items rated over time showed significant declines in satisfaction scores. They were Clear water, Amount of living coral on the reefs, Opportunity to view large wildlife, Uncrowded conditions, Shoreline access, and Value for the price. One item, Condition of the roads and streets, had a significantly higher satisfaction score.

Special Issue Questions

Several questions were added to the survey to address special issues.

- ï **Primary Purpose of the Trip.** 90 percent of all recreating visitors in both seasons responded that recreation or vacation was their primary purpose for visiting the Florida Keys/Key West. A higher proportion of winter season visitors came to visit family and/or friends (5.3 percent in the winter versus 3.3 percent during the summer).
- ï **Special Events.** Overall during the year, 2.9 percent attended a Monroe County TDC-sponsored event (2.6 percent during the summer and 3.2 percent during the winter). Of those that attended the events 38 percent said the events were somewhat to extremely important in their trip planning (48.4 percent during the summer and 30.6 percent during the winter).
- ï **Return Trips.** Summer season visitors were more likely to be return visitors than winter season visitors. Only 2.6 percent of summer season visitors and 1.6 percent of winter season visitors said they would not return. Summer season visitors are also likely to return sooner than winter season visitors.
- ï **Second Home Ownership.** Overall, 5.1 percent of all visitors said they owned a second home or time share in the Florida Keys/Key West (7.1 percent of the summer season visitors and 3.4 percent of the winter season visitors).
- ï **Use of Own Boat in Keys.** Overall, 14.4 percent said they used their own boats (22.5 percent of summer season visitors and 7.6 percent of winter season visitors). Of those that used their own boats, 95.8 percent trailered their boats to the Keys (95.1 percent during the summer and 97 percent during the winter).
- ï **Use of AM Information Radio Stations.** About 25 percent of all visitors said they used one of these stations (28.8 percent of summer season visitors and 21.4 percent of winter season visitors).
- ï **Environmental Concern Index.** Of all recreating visitors, 37.3 percent had scores over 65, meaning that they placed a very high priority on protection of the environment, and an additional 56.7 percent scored between 49 and 64, meaning that they were concerned about protection of the environment. Overall, then, 94 percent of all recreating visitors to the Florida Keys/Key West are concerned to very concerned about protecting the environment.

The results outlined here and much greater detail can be found in the following three reports:

Visitor Profiles: Florida Keys/Key West

Economic Contribution of Recreating Visitors to the Florida Keys/Key West

Importance and Satisfaction Ratings By Recreating Visitors to the Florida Keys/Key West

These reports are available on the World Wide Web at

<http://www-orca.nos.noaa.gov/projects/econkeys/econkeys.html>

Published copies will be available in January 1997 and can be obtained by contacting one of the following:

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