

Linking the Economy and the Environment of Florida
Keys/Key West

VISITOR PROFILES FOR KEY WEST VISITORS

2007-08

July 2010

Vernon R. Leeworthy

Office of National Marine Sanctuaries
National Ocean Service
National Oceanic and Atmospheric Administration
U.S. Department of Commerce



UMASS
AMHERST



Linking the Economy and the Environment of Florida Keys/Key West

VISITOR PROFILES FOR KEY WEST VISITORS

2007-08

Funding Partners:

NOAA/NOS

- Office of National Marine Sanctuaries (ONMS) HQ and Florida Keys National Marine Sanctuary
- National Centers for Coastal Ocean Science
- Coral Reef Conservation Program

The Nature Conservancy
's Florida Keys Program

Working Partners:

The Monroe County Tourist Development Council (TDC)

ONMS/TSPD

- Project Leadership
- Develop survey sample design/questionnaires
- Provide estimation of visitation
- Provide economic analysis
- Provide Report

Bicentennial Volunteers, Inc.

- Recruit volunteers for winter tourist interviews

Local Chamber of Commerce/TDC

- Provide list of sample sites for customer survey
- Enlist business support to survey at sites

University of Massachusetts-Amherst, Human Dimensions of Marine and Coastal Ecosystems Program

- Manage tourist survey efforts
 - o Data collection
 - o Database construction
 - o Quality analysis/quality control of data
 - o Provide data analysis
 - o Produce reports

Table of Contents

List of Tables.....	ii
List of Figures	ii
Introduction	1
Number of Person-trips (visits) and Person-days.....	1
Activity Participation in Key West	4
Within District (Key West) Activity Participation Rates	5
Water-based versus Land-based Activities	5
Person-days of Activities in Key West	6
Origin of Visitors	7
Number of Annual Visits and Length of Stay	10
Demographic Profiles	14
Expenditures	15
References	17

List of Tables

Table		Page
1	Person-trips and Person-days of Visitation by Recreating Visitors in Key West, 2007-08	3
2	Activity Participation in Key West by Season	4
3	Activity Participation in Key West by Season: Within District Participation Rates	5
4	Number of Days of Activity by Season in Key West (Thousands of Days)	6
5	Tot Six Foreign Countries by Season: Key West Visitors	8
6	Tot Five States by Season: Key West Visitors	9
7	Top Six Counties in Florida by Season: Key West Visitors	9
8	Average Expenditures Per Person Per Day in Monroe County by Season: Key West Visitors	16

List of Figures

Figure		Page
1	Average Length of Stay by Mode of Access and Season for Key West	3
2	Participation in water-based versus Land-based Activities by Season in Key West	5
3	Foreign versus Domestic Visitors by Season in Key West	7
4	Census Regions of Primary Residence by Season for Key West Visitors	8
5	Annual Visits (Trips) to the Florida Keys/Key West by Key West Visitors	10
6	Annual Days in the Florida Keys/Key West by Season: Key West Visitors	11
7	Length of Stay (# of Days) by Season: Key West Visitors	12
8	Number of Nights in the Florida Keys/Key West by Season: Key West Visitors	12
9	Average Number of Nights in Each Region (District) by Season: Key West Visitors	13
10	Average Total Trip Expenditures Per Person by Season: Key West Visitors	17

List of Appendix Tables

Table	Page
A.1 Country or Region of Primary residence by Season: Key West Visitors	18
A.2 Country of Primary Residence by Season: Key West Visitors	19
A.3 TDC Regions of Primary Residence by Season: Key West Visitors	20
A.4 Census Regions and Divisions of Primary Residence: Key West Visitors.....	21
A.5 State or Territory of Primary Residence by Season: Key West Visitors	22
A.6 Counties in Florida of Primary Residence by Season: Key West Visitors	24
A.7 Demographic Profiles: Auto, air, Cruise Ship and Ferry Visitors to Key West by Season	26
A.8 Demographic Profiles of CUSTOMER Sample – Visitors of All Ages by Season: Key West Visitors	28

Introduction

This report is a follow up effort to the Visitor Profiles for all visitors to the Florida Keys/Key West 2007-08 (Leeworthy, Loomis and Paterson 2010). The report is based on several requests for a report focused on Key West Visitors. Here summary information is provided on the number of visitors (person-trips or visits) and person-days of visitation in Key West, activity participation in Key West, origin or primary place of residence of visitors to Key West, the annual visits, days spent in the Florida Keys/Key West by Key West visitors, the length of stay on the interview trip by Key West visitors measured in number of nights and number of days and the number of nights in each of the five Florida Keys/Key West districts, demographic profiles, and expenditure profiles.

All the measures provided here are provided for two seasons of visitation: the winter season (December 2007 – May 2008) and the summer season (June – November 2008). The reason is that almost all measures for visitors differ significantly by season. Greater detail on activity participation and use can be obtained in the Visitor Profiles Report for all visitors to the Florida Keys/Key West (Leeworthy, Loomis and Paterson 2010).

Customized profiles for other Florida Keys districts can be obtained by request.

Number of Person-trips (visits) and Person-days

The sampling design used in the Auto, Air, Cruise Ship, and Ferry Survey made it possible to estimate the number of person-trips to the Florida Keys made by non-residents of Monroe County by season and mode of travel (access) to the Florida Keys. The measurement “person-trips” must be differentiated from the number of visitors and the number of visitor days or person-days.

Concept of a Person-trip. For any given day, the number of person-trips and the number of visitors is the same. But once the time period for estimation is expanded beyond one day, and then the possibility exists that the same person can make more than one trip (visit). Because visitors are interviewed as they are leaving the Florida Keys (ending their visit), a visitor is counted each time they visit the Florida Keys. This is the concept of a person-trip or visit. We can use these two terms interchangeably.

Number of Visitors. The number of person-trips (visits) and the number of visitors are two measurements that have long been a source of confusion. The State of Florida’s former Division of Tourism and now a quasi-public agency “Visit Florida” have long confused these two measurements. For the two measurements to be equivalent requires that for a given time period of estimation, each person only makes one visit (trip). Although this is true for the vast majority of visitors, it is not true for all visitors. In the Florida Keys/Key West, visitors during the January – May 2008 sampling period made on average 1.98 trips annually, while visitors during the June – November 2008 sampling period made on average 2.58 trips annually. Dividing the total number of person-trips (visits) by the average number of trips (visits), for any given period of time, yields an estimate of the separate number of visitors. That is, the separate number of different people that visited the Florida Keys/Key West during the given period of time. The separate number of trips (visits) made by visitors each sampling season was not obtained from the survey, so an estimate of the number of separate visitors by season cannot be estimated. An estimate for the annual period can be estimated; however, the estimate is not needed for the purposes of this study. For the purposes of this study, an estimate of the total number of person-trips (visits) during each season is required. This estimate made it possible to extrapolate average trip expenditures per person per trip into total expenditures during the time period for estimation. Also, when the percent of visitors that engaged in a certain activity was estimated, it then made it possible to extrapolate this into an estimate of the total number of visitors that did the activity during that period of time. It is acceptable to refer to the number of person-trips (visits) as the number of visitors as long as one does not make the mistake of then multiplying this number by the average number of visits per visitor. So the terms, “person-trips”, “visits” and “the number of visitors” will be used interchangeably in this report.

Number of Person-days. Another useful measurement is the number of person-days. Each visit (trip) may have a different length of stay. For day-trips, the concept of a person-day and a person-trip are thus equivalent. But many trips (visits) are for more than one day. In the Florida Keys/Key West, the average length of stay was 4.94 days per visit and 3.51 days per visit, for the January – May 2008 and June – August 2008 sampling periods, respectively.

For any given period of time, multiplying the average length of stay by the total number of person-trips (visits) yields an estimate of the total number of person-days. Dividing the estimate of the total number of person-days by the number of days in the time period yields an estimate of the average number of visitors in the Florida Keys/Key West for the average day during the time period. This latter estimate could be used in assessing the “functional population”, i.e., the number of people in the Florida Keys/Key West on a given day. The concept of a functional population is used in planning for facilities and services, and in the Florida Keys/Key West, for hurricane evacuation.

Summary: Person-trip (visits)

Table 1 summarizes the estimates of person-trips (visits) by recreating visitors that visited Key West by season and mode of access.

December 2007 – May 2008 (Winter Season). About 1.135 million person-trips (visits) were made by recreating visitors to Key West. About 47.9 percent came by auto, 7.8 percent by air, 39.5 percent by cruise ship, and 4.7 percent by ferry.

June – November 2008 (Summer Season). About 873.5 thousand person-trips (visits) were made by recreating visitors to Key West. About 60.9 percent came by auto, 6.8 percent by air, 29.6 percent by cruise ship, and 2.7 percent by ferry.

December 2007 – November 2008 (Annual total). A little over 2 million person-trips (visits) were made by recreating visitors to Key West. About 53.6 percent came by auto, 7.4 percent by air, 35.2 percent by cruise ship, and 3.8 percent by ferry.

Summary: Person-days

As discussed above, the concept of a person-trip (visit) is important for several purposes in the study. However, person-trips (visits) are not of constant length. The person-trip (visit) measurement doesn't tell us much about the relative congestion or intensity of visitation in the Florida Keys/Key West during the different seasons. As Table 1 shows, there is only a small difference between the estimated number of person-trips (visits) for the winter and summer seasons (1.135 million versus 873.5 thousand). But anyone familiar with the Florida Keys/Key West would readily attest to the fact that, on average, it is much busier during the winter than the summer season.

Person-days is the appropriate measure to reflect the total demand placed on facilities and services by visitors to the Florida Keys/Key West. Person-days can be estimated for each season with measures obtained on the average length of stay for visitors by mode of access and season. Estimates of the average length of stay (measured in number of days) are summarized in Figure 1. These estimates were derived from the Auto, Air, Cruise Ship, and Ferry Survey on-site samples.

December 2007 – May 2008 (Winter Season). Person-days are derived by multiplying the estimates of person-trips (visits) by the average length of stay. During the Winter Season, it was estimated that there were over 3.566 million person-days of visitation in Key West.

June – November 2008 (Summer Season). For the summer season, almost 2.5 million person-days of visitation were estimated for Key West.

December 2007 – November 2008 (Annual total). A little over 6 million person-days of visitation were estimated for Key West.

Table 1. Person-trips and Person-days of Visitation by Recreating Visitors in Key West, 2007-08

Mode of Access	Dec. '07 - May '08		June - Nov. '08		Dec. '07 - Nov. '08	
	Person-trips	Percent	Person-trips	Percent	Person-trips	Percent
Auto	544,043	47.93	532,085	60.92	1,076,128	53.58
Air - Key West	89,018	7.84	59,452	6.81	148,470	7.39
Cruise Ship	448,456	39.51	258,532	29.60	706,988	35.20
Ferry	53,624	4.72	23,385	2.68	77,009	3.83
Total	1,135,141	100.00	873,454	100.00	2,008,595	100.00

Mode of Access	Dec. '07 - May '08		June - Nov. '08		Dec. '07 - Nov. '08	
	Person-days	Percent	Person-days	Percent	Person-days	Percent
Auto	2,218,063	62.19	1,604,822	64.29	3,822,885	63.05
Air - Key West	765,644	21.47	563,573	22.58	1,329,217	21.92
Cruise Ship	448,456	12.57	258,532	10.36	706,988	11.66
Ferry	134,274	3.76	69,448	2.78	203,722	3.36
Total	3,566,437	100.00	2,496,375	100.00	6,062,812	100.00

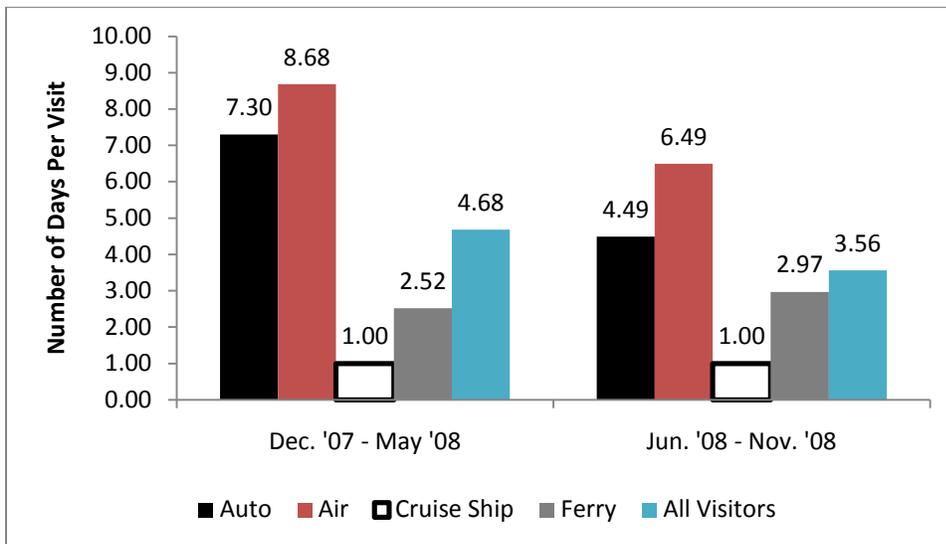


Figure 1. Average Length of Stay by Mode of Access and Season for Key West

Activity Participation in Key West

In Leeworthy, Loomis and Paterson (2010), details on participation in 71 activities aggregated into 42 categories is reported for all five districts in the Florida Keys/Key West by district and season. Here we present simple summaries for activity participation in Key West.

One cannot add number of participants across activities because visitors do multiple activities and it would include double-counting. We have eliminated this kind of double-counting in activities reported here. Table 2 summarizes activity participation in Key West by season for selected activities. The percents in Table 2 are the number of visitors doing the activity in Key West as a percent of all visitors to the Florida Keys/key West. Thus, for the summer season (June – November 2008), we estimate 14.92 percent of all visitors to the Florida Keys/Key West participated in snorkeling in Key West.

Table 2. Activity Participation in Key West by Season

Activity	Jun. - Nov. 08		Dec. '07 - May '08		Annual Total	
	Number of Visitors	Participation Rate (%)	Number of Visitors	Participation Rate (%)	Number of Visitors	Participation Rate (%)
Snorkeling	212,630	14.92	92,612	5.85	305,242	10.15
SCUBA Diving	39,202	2.75	14,960	0.95	54,162	1.80
Fishing	72,830	5.11	72,959	4.61	145,789	4.85
Wildlife Observation/ Nature Study	137,798	9.67	181,961	11.50	319,759	10.63
Beach Activities (including swimming)	266,307	18.69	228,958	14.47	495,265	16.47
Sightseeing & Attractions (paid & unpaid)	472,967	33.19	732,324	46.27	1,205,291	40.08
Visiting Museums & Historic Sites	481,825	33.82	622,149	39.31	1,103,974	36.71
Cultural Events (Fairs, Concerts, Plays)	131,821	9.25	95,332	6.02	227,153	7.55
All Camping	8,631	0.61	22,347	1.41	30,978	1.03
Personal Watercraft Use	57,176	4.01	30,046	1.90	87,222	2.90

1. Participation Rate is percent of all recreating visitors to all FloridaKeys/Key West.

Within District (Key West) Activity Participation Rates

Another way of expressing participation rates is the percent of all visitors to Key West that did an activity in Key West. So here we divide the total number of visitors doing an activity in Key West by the total number of visitors to Key West. These estimates are summarized in Table 3.

Table 3. Activity Participation in Key West by Season: Within District Participation Rates

Activity	Jun. - Nov. '08		Dec. '07 - May '08		Annual Total	
	Number of Visitors	Participation Rate (%)	Number of Visitors	Participation Rate (%)	Number of Visitors	Participation Rate (%)
Snorkeling	212,630	24.34	92,612	8.16	305,242	15.20
SCUBA Diving	39,202	4.49	14,960	1.32	54,162	2.70
Fishing	72,830	8.34	72,959	6.43	145,789	7.26
Wildlife Observation/ Nature Study	137,798	15.78	181,961	16.03	319,759	15.92
Beach Activities (including swimming)	266,307	30.49	228,958	20.17	495,265	24.66
Sightseeing & Attractions (paid & unpaid)	472,967	54.15	732,324	64.51	1,205,291	60.01
Visiting Museums & Historic Sites	481,825	55.16	622,149	54.81	1,103,974	54.96
Cultural Events (Fairs, Concerts, Plays)	131,821	15.09	95,332	8.40	227,153	11.31
All Camping	8,631	0.99	22,347	1.97	30,978	1.54
Personal Watercraft Use	57,176	6.55	30,046	2.65	87,222	4.34

1. Participation Rate is percent of all recreating visitors to Key West or the percent of visitors to Key West that did the activity in Key West.

Water-based versus Land-based Activities

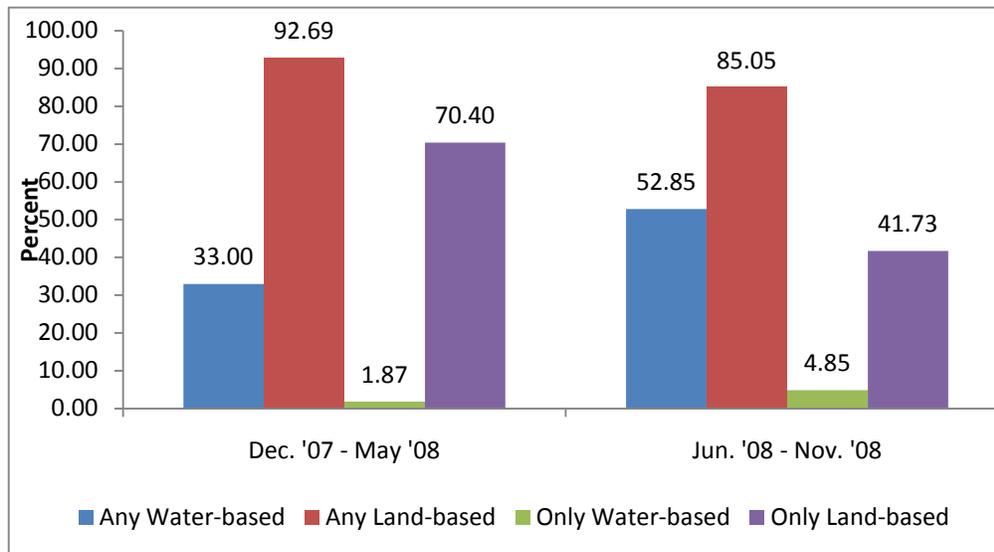


Figure 2. Participation in Water-based versus Land-based Activities by Season in Key West

Person-days of Activities in Key West

As we discussed in the introduction, person-days measures the intensity of visitation or activity participation. Table 4 summarizes the person-days by type of activity and season for Key West. Greater detail can be found in Leeworthy, Loomis and Paterson (2010).

Table 4. Number of Days of Activity by Season in Key West (Thousands of Days)

Activity	Jun 08 - Nov. 08	Dec. 07 - May 08	Annual Total
Snorkeling	173.8	98.1	271.9
SCUBA Diving	59.3	18.0	77.3
Fishing	125.2	126.0	251.2
Wildlife Observation/ Nature Study	231.4	406.9	638.3
Beach Activities (including swimming)	415.9	611.9	1,027.8
Visiting Museums & Historic Sites	688.1	1,002.7	1,690.8
Personal Watercraft Use	68.8	34.2	103.0
Sailing	52.2	47.8	100.0
Other Boating	100.5	36.2	136.7
Swimming in an Outdoor Pool	410.7	498.2	908.9

Origin of Key West Visitors

One of the most important pieces of information for assessing market demand is the origin or primary place of residence of visitors. In the survey, very detailed information was gathered on the location of visitors' primary place of residence. For purposes of calculating distance for travel cost demand modeling, we gathered the zip-code, city and county for domestic visitors and city and country for foreign visitors.

For summary presentations and comparisons with other data (e.g., U.S. Bureau of Census and the Monroe County Tourist Development Council), this information was organized in several ways. For country, two appendix tables were developed. Table A.1 shows country or region at a more aggregated level (e.g. United Kingdom versus England, Scotland, Wales). Table A.2 shows the more detailed countries. Two separate percent distributions are reported for each country during each season. The first column reports the percent of all visitors to the Florida Keys/Key West from each country. The second column applies to foreign visitors only and reports the percent of all foreign visitors that come from each country.

Appendix Tables A.3, A.4 and A.5 show the detailed regions and states of primary residence for domestic visitors. Table A.3 organizes states into larger regions as reported by The Monroe County Tourist Development Council (TDC) and are called the TDC Regions. Table A.4 organizes the states into U.S. Bureau of the Census regions and divisions. Table A.5 reports the distributions for all 50 states plus the District of Columbia. As with the country tables, Tables A.3 to A.5 report two columns for each season. The first column reports the percent of all visitors to the Florida Keys/Key West from each state. The second column applies to domestic visitors only and reports the percent of all domestic visitors from each state.

Foreign Visitors. Foreign visitors made up about 15.84 percent of all visitors during the winter season and 22.85 percent during the summer season (Figure 3). Table 5 shows the top six countries rated based on annual visitation. Three of the six countries are among the top six in both seasons. Australia was rated number four during the winter season (0.5 percent of all foreign visitors during the winter and 0.49 percent of all foreign visitors during the summer). Canada and Germany are ranked number one and two during the winter season, while Germany moves to number one during the winter season. England is ranked number three in both seasons. Except for Canada and Australia, all top six countries are in Western Europe. It is important to note that the countries that make up the United Kingdom are reported separately in Table A.2. If the United Kingdom is ranked as a whole against other foreign countries, the United Kingdom is ranked number two during both seasons with 24.83 percent of all foreign visitors during the winter season and 14.82 percent of all foreign visitors in the summer season.

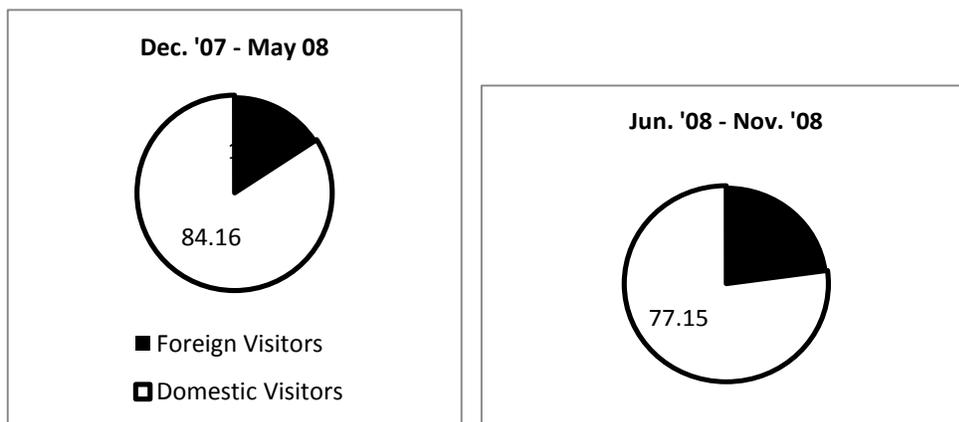


Figure 3. Foreign versus Domestic Visitors by Season in Key West

Table 5. Top Six Foreign Countries by Season: Key West Visitors¹

Country	December 2007 - May 2008			June 2008 - November 2008		
	All Visitors		Foreign Visitors Only	All Visitors		Foreign Visitors Only
	Rank	%	%	Rank	%	%
Canada	1	6.10	38.49	1	3.50	15.33
Germany	2	1.84	11.64	2	3.31	14.47
England	3	1.62	10.26	3	1.81	7.92
Holland	9	0.08	0.52	4	1.76	7.68
Norway	8	0.16	1.04	5	1.54	6.72
Italy	-	0.00	0.00	4	1.76	7.68

1. Top six chosen based on weighted annual average.

Domestic Visitors. Visitors from the South dominate both seasons, but the East and Midwest become much more important during the winter (Figure 4). Florida is the number one origin of all visitors during both seasons with 16.41 percent of all visitors during the winter season and 24.88 percent during the summer season (Table 6). New York is ranked second in both seasons. Beyond the top two states, New Jersey, which ranked fourth in the winter and fifth during the summer, the remaining top five states change significantly across seasons. Ohio, which was ranked number three in the winter drops to number 11 in the summer, while Illinois, which was ranked fifth in the winter drops to eighth in the summer. Pennsylvania, which was ranked number seven in the winter rose to number six in the summer.

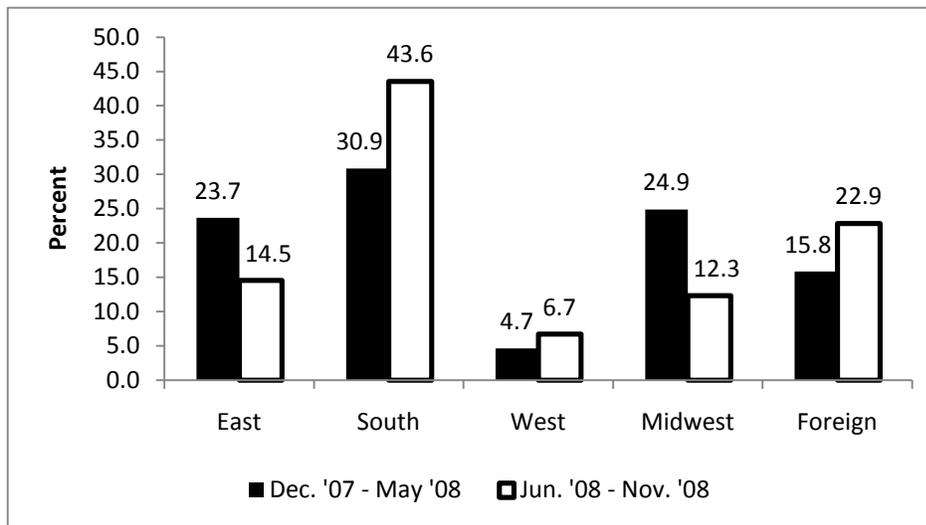


Figure 4. Census Regions of Primary Residence by Season for Key West Visitors

Table 6. Top Five States by Season: Key West Visitors¹

State	December 2007 - May 2008			June 2008 - November 2008		
	All Visitors		Domestic Visitors Only	All Visitors		Domestic Visitors Only
	Rank	%	%	Rank	%	%
Florida	1	16.41	19.50	1	24.88	32.25
New York	2	7.43	8.82	3	3.89	5.04
New Jersey	4	5.04	5.99	5	3.46	4.49
Ohio	3	5.76	6.85	11	2.40	3.11
Illinois	5	4.63	5.50	8	3.06	3.96
Pennsylvania	7	4.03	4.79	6	3.32	4.30

1. Top five chosen based on weighted annual average. California ranked second and North Carolina was ranked fourth in the summer season.

Table 7. Top Six Counties in Florida by Season: Key West Visitors¹

County	Dec. '07 - May '08			Jun. '08 - Nov. '08			Annual Average		
	Rank	All Visitors	Florida Visitors Only	Rank	All Visitors	Florida Visitors Only	Rank	All Visitors	Florida Visitors Only
		%	%		%	%		%	
Broward	1	2.53	15.47	1	4.12	16.66	1	3.21	16.10
Miami-Dade	2	2.44	14.91	2	3.11	12.55	2	2.73	13.66
Palm Beach	3	1.97	12.01	3	2.49	10.07	3	2.19	10.99
Hillsborough	8	0.56	3.43	5	1.34	5.40	4	0.89	4.47
Polk	5	0.78	4.78	7	1.03	4.17	4	0.89	4.46

1. Top six counties ranked on an annual basis. St. Lucie County was ranked number four in the winter season and number eleven during the summer season. Volusia County was ranked number six during the summer season, but only 10th in the winter season.

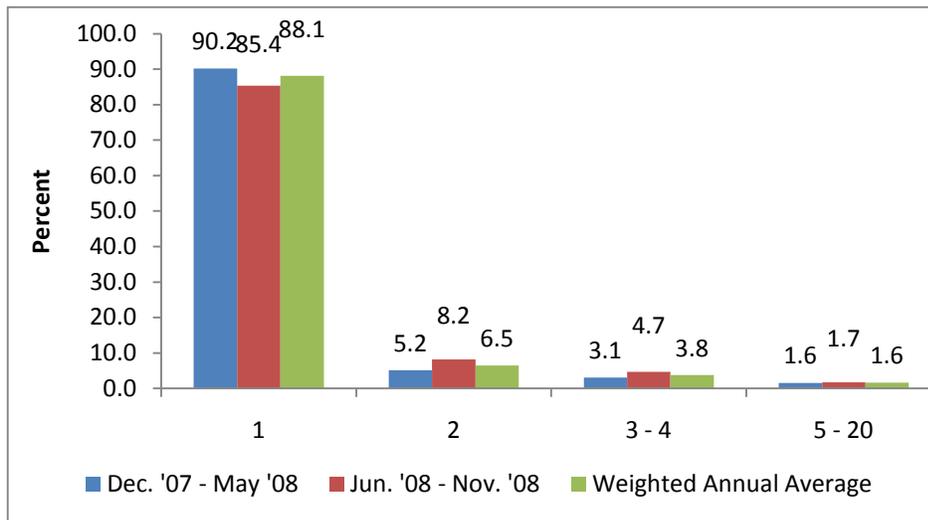
South Florida is the dominant source of visitors from Florida. Miami-Dade, Broward and Palm Beach counties are ranked numbers one, two, and three among all Florida counties during both seasons. Of the remaining top five counties, there is a bit of a change between seasons. Hillsborough (Tampa is in Hillsborough) is ranked number four

in the summer falls to number eight during the winter. Polk County (Lakeland and Lake Wales are located in Polk County) is tied with Hillsborough during the summer and drops to number five during the winter.

Number of Annual Visits and Length of Stay

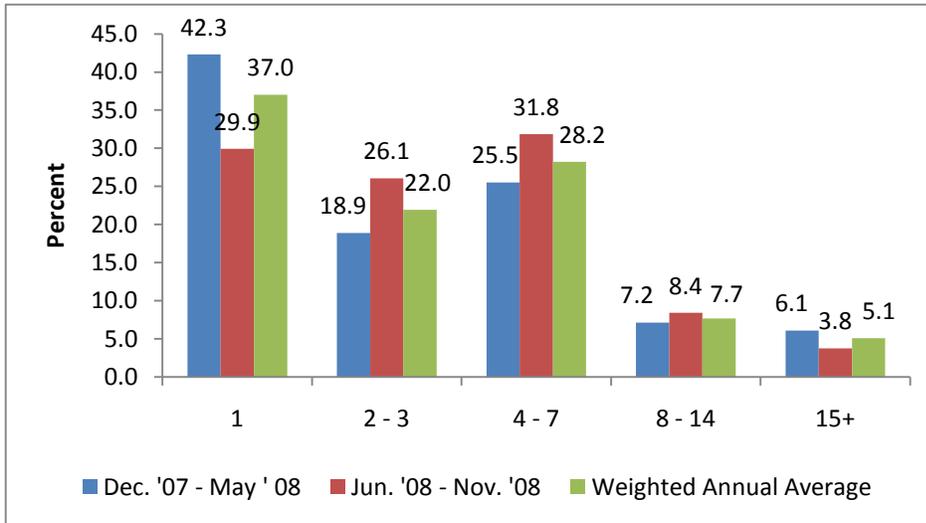
In section one of this chapter, the number of person-trips (visits) and person-days by season and mode of access were reported. It was also shown how length of stay (number of days per visit) was used to derive the number of person-days of visitation. Here, some additional information with respect to repeat visitation is added. Another dimension to the length of stay measurement is also added. For repeat visitation, two measures are provided: the average annual number of visits (trips) and the average annual number of days that visitors spent in the Florida Keys/Key West. For those that make one visit annually, the annual number of days is equal to the length of stay of the interview visit. For length of stay, a separate measure is added—the number of nights.

Annual Visits and Days. Key West Visitors make, on average, 1.27 trips per year to the Florida Keys/Key West during which they engage in at least one recreation activity, and, on average, they spend about 5 days in the Florida Keys/Key West. Summer season visitors make more trips, but spend fewer days annually in the Florida Keys/Key West than winter season visitors (Figures 5 and 6). Visitors from South Florida account for the majority of repeat visitation.



	<u>Dec. '07 - May '08</u>	<u>Jun. '08 - Nov. '08</u>	<u>Weighted Annual Average</u>
Minimum	1	1	1
Maximum	20	20	20
Mean	1.24	1.30	1.27
Median	1	1	1
Mode	1	1	1

Figure 5. Annual Visits (Trips) to the Florida Keys/Key West by Key West Visitors



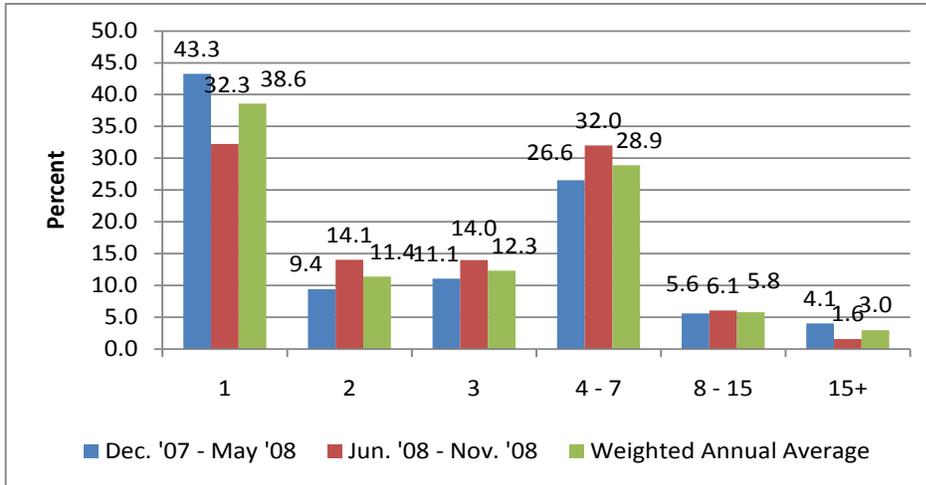
	<u>Dec. '07 - May '08</u>	<u>Jun. '08 - Nov. '08</u>	<u>Weighted Annual Average</u>
Minimum	1	1	1
Maximum	197	90	197
Mean	5.55	4.48	5.09
Median	2	3	3
Mode	1	3	1

Figure 6. Annual Days in the Florida Keys/Key West by Season: Key West Visitors

Length of Stay (Days) vs Number of Nights. One might normally think of length of stay as expressed as the number of days being a simple and straightforward measurement. It is not. A few examples will help clarify this. Take a person who arrives in Key Largo at 11 pm, checks into a hotel, gets up the next morning to go snorkeling, and leaves the Florida Keys/Key West before noon. The question is, how many days did that person spend in the Florida Keys/Key West? Some might count this as one day since the visitor did nothing on the night of arrival. This would be recorded as one day and one night in the Florida Keys/Key West. But what if the person decided to go fishing on a bridge all night and left by noon the next day? Would this still be one day and one night?

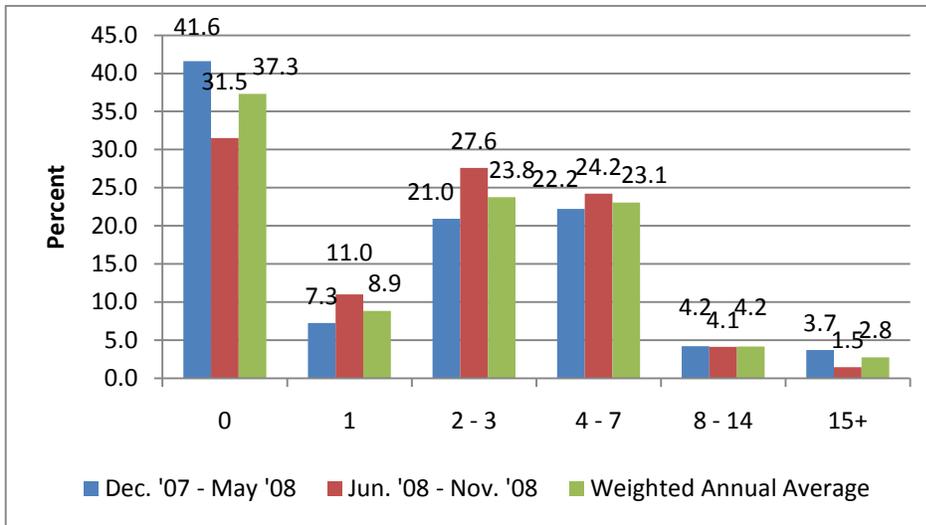
The number of days was calculated according to a set of rules. Information was obtained on the date and time of arrival, and because exit interviews were conducted, the date and time of departure were recorded (people were only interviewed as they were leaving or ending their visit). The rule for calculating the number of days was that if they arrived after 10 pm that day was not counted. If they departed before noon, that day was not counted. For those that arrived after 10 and left before noon the next day, one day was assigned. Therefore, all visitors spent at least one day in the Florida Keys/Key West. Defining day visitors as those whose length of stay is one day would be misleading if a separate measure for the number of nights was not provided. The number of nights is important in assessing the demand for hotels, motels, campgrounds and vacation rentals. This is why the number of days and number of nights are separately reported. A day visitor is defined as someone who spent zero nights in the Florida Keys/ Key West, not a person who spent one day.

Average length of stay (number of days) is much longer in the winter season and is largely accounted for by visitors who stay longer than two weeks or seasonal visitors (Figure 7). The same is of course true for the number of nights (Figure 8). Day visitation, as defined by zero number of nights, is significantly lower proportion of total visitation than that suggested by length of stay equal to one day. The average number of nights is higher during the winter season. Cruise ship and ferry passengers are mostly day visitors as reflected in the concentration at one day and zero nights.



	<u>Dec. '07 - May '08</u>	<u>Jun. '08 - Nov. '08</u>	<u>Weighted Annual Average</u>
Minimum	1	1	1
Maximum	197	46	197
Mean	4.68	3.56	4.20
Median	2	3	3
Mode	1	3	1

Figure 7. Length of Stay (# of Days) by Season: Key West Visitors



	<u>Dec. '07 - May '08</u>	<u>Jun. '08 - Nov. '08</u>	<u>Weighted Annual Average</u>
Minimum	0	0	0
Maximum	196	46	196
Mean	3.90	2.80	3.43
Median	2	2	2
Mode	0	3	0

Figure 8. Number of Nights in the Florida Keys/Key West by Season: Key West Visitors

Key West visitors do visit other regions (districts) in the Florida Keys/Key West and do overnight visits in the other districts (Figure 9). Overnight visitation is primarily limited to those who access the Florida Keys/key West via the auto and air modes with a few from the ferry in Key West.

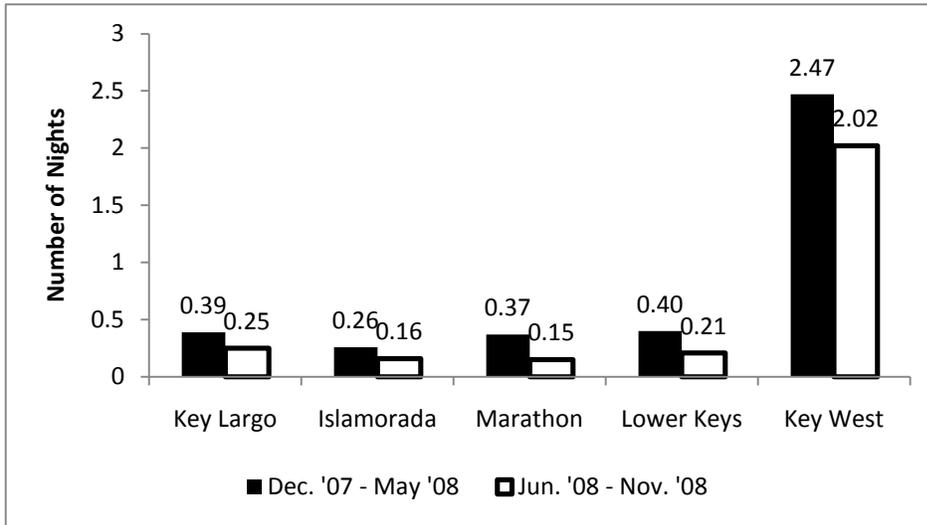


Figure 9. Average Number of Nights in Each Region (District) by Season: Key West Visitors

Demographic Profiles

Demographic Profiles

Demographics were collected for two separate surveys of visitors. The Auto, Air, Cruise Ship, and Ferry Survey was a stratified random sample of all visitors to the Florida Keys/Key West, while the CUSTOMER Survey was a stratified random sample of visitors, but local knowledge was used to stratify the samples across 200 sites throughout the Florida Keys/Key West. The CUSTOMER Survey did not include many cruise ship passengers, with zero during the winter season and only eight in the summer season. Cruise ship passengers are on extremely short stays and would not participate in a long survey as CUSTOMER.

The Air, Auto, Cruise Ship, and Ferry Survey sample is limited to the demographic profiles of those ages 16 and older. The CUSTOMER Survey gathers information on up to eight people in the recreation party and covers visitors of all ages. The Auto, Air, Cruise Ship and Ferry Survey contained information on 1,299 Key West visitors during the winter season and 720 during the summer season, while the CUSTOMER Survey contained information on 482 Key West visitors during the winter season and 931 during the summer season. The CUSTOMER Survey is primarily limited to auto and air visitors. The CUSTOMER sample has been weighted to reflect the proper mix by auto and air mode of access (see Leeworthy, 2010).

Two Appendix Tables were prepared detailing the distributions for each demographic characteristic. Table A.7 summarizes the information for the Auto, Air, Cruise Ship and Ferry sample by season with a weighted annual average. Table A.8 summarizes the information for the CUSTOMER Survey by mode of access and season. The statistically significant differences in these distributions between seasons are highlighted in bullet form below.

Auto, Air, Cruise Ship, and Ferry Survey

- Race/Ethnicity is significantly different with a significantly higher proportion of Hispanics and Blacks during the summer season.
- Household Income was not significantly different by season, except for higher refusals in the summer season.
- There was a significantly higher proportion of males during the summer season..
- Winter season visitors were significantly older than summer season visitors with an average age of 54 in the winter and 45 during the summer. About 37 percent of winter season visitors were 61 or over, while only about 12.15 percent of summer season visitors were 61 or over.
- Party size was significantly larger in the summer versus the winter season with a mean party size of 3.29 in the summer and 2.41 in the winter. During the winter season, 93.91 percent had no children versus 77.46 percent in the summer.

CUSTOMER Survey

- Race/Ethnicity is significantly different with a significantly higher proportion of Hispanics and Blacks during the summer season.
- Household Income was significantly higher for summer season visitors.
- There was a significantly higher proportion of males during the summer season.
- Winter season visitors were significantly older than summer season visitors with an average age of 49 for the winter versus 34 for the summer. About 32 percent of winter season visitors were 61 or over versus only 7.2 percent for summer season visitors.
- Party size was significantly larger in the summer season versus the winter season with a mean party size of 3.74 in the summer versus 2.63 in the winter.
- 40.07 percent of summer season visitors come from households with children, while only 16.79 percent come from households with children in the winter.

- A significantly higher proportion of winter season visitors are retired (8.13 percent) than summer season visitors (2.82 percent).
- Summer season visitors had a higher level of education than winter season visitors.
- There were significant differences in the amount of those with disabilities for winter season visitors versus summer season visitors.

For more details on the information in this section see Appendix Tables A.7 and A.8.

Expenditures

Detailed spending information was gathered in the expenditure mail back survey of the Auto, Air, Cruise Ship and Ferry Survey. The questionnaire was the same one used in the 1995-96 study with one change in providing a shorter version for those on day-trips similar to what was used in 1995-96 for cruise ship visitors who are all on day trips (no overnight stays). The questionnaire was adapted from the standard CUSTOMER expenditure mail back questionnaire that has been used since 1985 by seven Federal agencies and over 30 state agencies to estimate the economic contribution that visitation to parks, forests, beaches and other outdoor recreation areas makes to local and regional economies in terms of local sales, output, income, and jobs.

The general spending categories of the expenditure mail back are designed to link with the U.S. Forest Service's IMPLAN input-output model. An input-output model is an accounting tool showing how different industries/businesses are linked through inter-industry relationships and therefore account for the secondary economic impacts (multiplier impacts) of direct spending associated with any activity. IMPLAN is a micro computer-based model and can be constructed for any county or aggregation of counties in the U.S. Two models were constructed based on two definitions of the study area for impact analysis. One model was built for Monroe County and one for South Florida (Miami-Dade, Broward, and Monroe Counties). We were unable to properly calibrate the Monroe County model so an alternative approach was used for Monroe County. These models and results will be presented in Leeworthy and Ehler (2010). Here, average expenditures are reported for establishing spending profiles.

Several expenditure categories were modified in the detailed portion of the expenditure list to capture many of the special features of the Florida Keys/Key West. The details can be found in Appendix Tables A.2.33 to A.2.36 in Leeworthy, Loomis and Paterson (2010).

The on-site survey identified whether a visitor was paying their own expenses, was sharing expenses or if someone else was paying their expenses. If they were paying their own expenses, they were asked how many others they were paying for on this trip, and if they were sharing expenses, with how many others they were sharing expenses. When someone else was paying their expenses, interviewers asked to speak with that person and asked them if they would fill out the expenditure mail back. The questions above were repeated in the mail back questionnaire and it was emphasized that we wanted to know about the expenses for which they actually paid and for how many people they were paying. The objective was to get an estimate of spending per person per trip. This estimate can then be linked to the estimates of person-trips to estimate total expenditures.

Zero expenditure is a legitimate response only if the visitor did not spend anything. If someone else paid their expenses, the visitor was asked to identify the paying person and have them fill out the questionnaire. There were a few legitimate zero-expenditure visitors. Most were from the cruise ships and they noted on the questionnaires that they were only in Key West for a few hours, did no shopping and purchased no food or beverages. There were also a few day-trippers from South Florida who purchased everything near home. These expenditures would show up in the estimates for South Florida.

The questionnaire was designed to get expenditure for each item for the total trip, the amount spent in South Florida, and the amount spent in the Florida Keys (Monroe County). As noted above, this allowed us to link expenditures directly to the IMPLAN models for these economies. The averages per person per trip and the proportion of total trip spending that takes place in the Florida Keys/ Key West (Monroe County) are reported here. Also reported here is the average expenditure per person per day. This spending profile will allow for comparisons with information

collected by other destinations to assess the relative affordability of different destinations. The Monroe County Tourist Development Council reports visitor expenditures on a per-person per-day basis.

Here, only trip-related expenditures are reported. Annual expense items that can be normalized to per person per trip amounts were reported in Leeworthy, Loomis and Paterson (2010) for all visitors to the Florida Keys/Key West and are used in estimating the total economic contribution of recreating visitors to the Monroe County and South Florida economies in Leeworthy and Ehler (2010). Additional information was gathered on spending for major equipment items such as scuba-diving equipment, boats, motors, RVs and motor homes, etc. However, not enough information was obtained for most of these items to reliably estimate expenditures. In fact, our experience suggests that visitor survey methods are not practical for estimating these types of expenditures. It would simply require sample sizes that would not be affordable. The best approach for these types of items is to directly survey the business establishments that sell such equipment.

Per Person Per Day. Table 8 summarizes the average expenditures per person per day for the summer and winter seasons, along with a weighted annual average. Although the summer season average is higher than the winter season average for total expenditures (\$146.79 versus \$139.12), this difference is not statistically significant. Expenditures for lodging and for activities related to fishing and diving are also higher in the summer than in the winter, and these differences are statistically significant. Differences for all other expenditure categories in Table 8 are not statistically significant. In Chapter 3 of Leeworthy, Loomis and Paterson (2010), averages are reported by mode of access, cruise-ship passengers have significantly lower expenditures and they are a higher proportion of visitation during the winter season, which brings the average for the winter down. This also explains the lower average lodging expenditure in the winter versus the summer season. These are average expenditures, not prices, since those with zero spending for lodging are averaged in with those with positive lodging expenditures.

Table 8. Average Expenditures Per Person Per Day in Monroe County by Season: Key West Visitors

Category	Dec. '07 - May '08 \$	Jun. '08 - Nov. '08 \$	Weighted Annual Average \$
Lodging	38.92	42.66	40.52
Food & Beverage	51.87	41.49	47.43
Transportation	9.76	11.04	10.31
Boating	3.46	3.20	3.35
Fishing	1.31	8.05	4.20
Diving	2.03	7.39	4.32
Sightseeing	8.39	8.63	8.50
Other Activity	3.43	6.01	4.54
Miscellaneous	19.83	18.30	19.18
Services	0.10	0.01	0.06
Total	139.12	146.79	142.40

Per Person Per Trip. Figure 10 (next page) summarizes the average total trip expenditures per person per trip for each season by Key West Visitors. Winter season expenditures on a per-person per-trip basis are higher than summer season expenditures, and these differences are statistically significant. During the winter season about 65 percent of all trip-related expenditures are spent in the Florida Keys/Key West (Monroe County), while in the summer it is about 71 percent. The proportion spent in South Florida is lower in the winter than the summer (78 percent versus 89 percent).

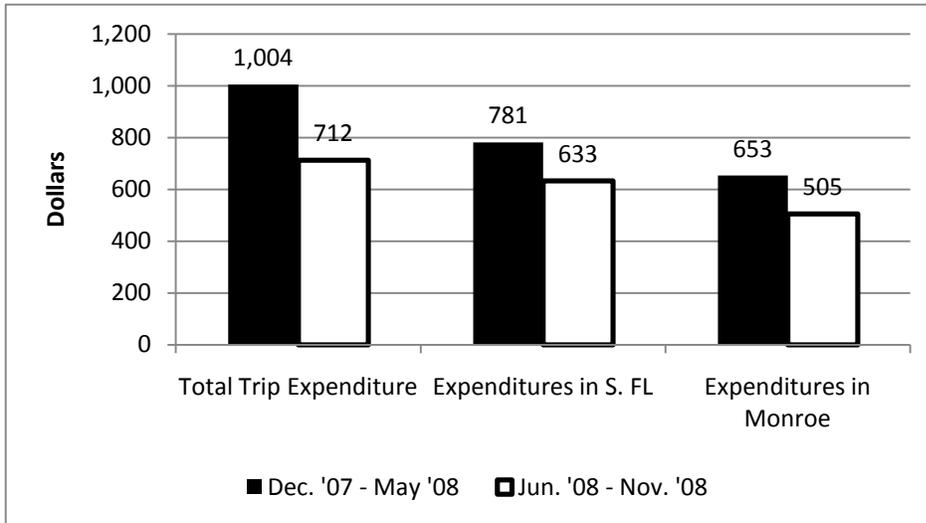


Figure 10. Average Total Trip Expenditures Per Person by Season: Key West Visitors

References

Leeworthy, Vernon R. 2010. "Technical Appendix: Sampling Methodologies and Estimation Methods Applied to the Florida Keys/Key West Visitor Surveys 2007-08." Silver Spring, MD: National Oceanic and Atmospheric Administration. Available at

<http://sanctuaries.noaa.gov/science/socioeconomic/floridakeys/recreation/linking08.html>

Leeworthy, Vernon R. and Rod Ehler. 2010. "Economic Contribution of Recreating Visitors to the Florida Keys/Key West." Silver Spring, MD: National Oceanic and Atmospheric Administration. Available at

<http://sanctuaries.noaa.gov/science/socioeconomic/floridakeys/recreation/linking08.html>

Leeworthy, Vernon R., David K. Loomis and Shona K. Paterson. 2010. "Visitor Profiles: Florida Keys/Key West 2007-08". Silver Spring, MD: National Oceanic and Atmospheric Administration. Available at

<http://sanctuaries.noaa.gov/science/socioeconomic/floridakeys/recreation/linking08.html>

Table A.1. Country or Region of Primary Residence by Season: Key West Visitors

Country or Region	Dec. 07 - May 08		Jun. 08 - Nov. 08		Annual	
	All	Foreign	All	Foreign	All	Foreign
	Visitors	Visitors Only	Visitors	Visitors Only	Visitors	Visitors Only
	%	%	%	%	%	%
U.S.A.	84.16	N/A	77.15	N/A	81.18	N/A
Canada	6.10	38.49	3.50	15.33	4.99	26.52
Central/South America	0.11	0.71	0.22	0.96	0.16	0.84
Australia	0.50	3.18	0.49	2.14	0.50	2.65
Other Far East	0.02	0.13	0.00	0.00	0.01	0.06
United Kingdom	3.93	24.83	3.39	14.82	3.70	19.65
Other Europe	4.96	31.33	15.02	65.72	9.25	49.11
Middle East	0.03	0.19	0.00	0.00	0.02	0.09
Africa	0.00	0.00	0.23	1.02	0.10	0.53
Other	0.18	1.14	0.00	0.00	0.10	0.55

Table A.2. Country of Primary Residence by Season: Key West Visitors

Country	Dec. '07 - May '08		Jun. '08 - Nov. '08		Annual	
	All	Foreign	All	Foreign	All	Foreign
	Visitors %	Visitors Only %	Visitors %	Visitors Only %	Visitors %	Visitors Only %
Argentina	0.03	0.19	0.00	0.00	0.02	0.09
Australia	0.50	3.18	0.49	2.14	0.50	2.65
Austria	0.16	1.04	0.44	1.92	0.28	1.49
Belgium	0.26	1.66	0.22	0.96	0.24	1.30
Belize	0.08	0.52	0.00	0.00	0.05	0.25
Brazil	0.00	0.00	0.22	0.96	0.09	0.50
Canada	6.10	38.49	3.50	15.33	4.99	26.52
China	0.02	0.13	0.00	0.00	0.01	0.06
Czech Republic	0.08	0.52	0.00	0.00	0.05	0.25
Denmark	0.27	1.68	1.32	5.76	0.71	3.79
England	1.62	10.26	1.81	7.92	1.70	9.05
Egypt	0.00	0.00	0.22	0.96	0.09	0.50
Finland	0.16	1.04	0.22	0.96	0.19	1.00
France	0.26	1.66	1.32	5.76	0.71	3.78
Germany	1.84	11.64	3.31	14.47	2.47	13.10
Holland/Netherlands	0.08	0.52	1.76	7.68	0.79	4.22
Ireland	0.22	1.41	0.96	4.20	0.54	2.85
Italy	0.00	0.00	1.76	7.68	0.75	3.97
Kenya	0.00	0.00	0.01	0.06	0.01	0.03
Kuwait	0.03	0.19	0.00	0.00	0.02	0.09
Norway	0.16	1.04	1.54	6.72	0.75	3.98
Other Europe	0.74	4.66	0.00	0.00	0.42	2.25
Other UK	2.23	14.05	1.58	6.90	1.95	10.36
Other	0.18	1.14	0.00	0.00	0.10	0.55
Poland	0.00	0.00	0.44	1.92	0.19	0.99
Slovenia	0.00	0.00	0.22	0.96	0.09	0.50
Spain	0.18	1.14	0.22	0.96	0.20	1.05
Sweden	0.08	0.52	0.88	3.84	0.42	2.24
Switzerland	0.26	1.66	0.44	1.92	0.34	1.80
Ukraine	0.18	1.14	0.00	0.00	0.10	0.55
USA	84.16	N/A	77.15	N/A	81.18	N/A
Wales	0.08	0.52	0.00	0.00	0.05	0.25

Table A.3. TDC Regions of Primary Residence by Season: Key West Visitors

TDC Region ¹	Dec. '07 - May '08		Jun. '08 - Nov. '08		Annual	
	All	Domestic	All	Domestic	All	Domestic
	Visitors	Visitors Only	Visitors	Visitors Only	Visitors	Visitors Only
	%	%	%	%	%	%
Florida	16.41	19.50	24.88	32.25	20.02	24.66
New England/North Atlantic	24.12	28.66	14.63	18.97	20.08	24.73
Middle and South Atlantic	11.39	13.54	12.39	16.06	11.82	14.56
North Central and Midwest	24.88	29.57	12.32	15.96	19.53	24.06
South West/West/Pacific	7.36	8.74	12.92	16.75	9.73	11.99
Foreign	15.84	N/A	22.85	N/A	18.82	N/A

1. Definitions of TDC regions:

New England/North Atlantic = ME, NH, VT, MA, RI, CT, NY, NJ, PA, DE

Middle and South Atlantic = DC, WV, MD, VA, NC, SC, GA, TN, AL, FL, MS

North Central and Midwest = MI, OH, IN, KY, MT, ND, SD, MN, IA, WI, MO, IL, KS, NE

South West/West/Pacific = AK, OK, TX, LA, AR, ID, WY, NV, UT, CO, AZ, NM, CA, OR, WA, HI

U.S. Territories/Puerto Rico = Only observed people from Puerto Rico in 2007-2008

Table A.4. Census Regions and Divisions of Primary Residence: Key West Visitors

Region/Division	Dec. '07 - May '08		Jun. '08 - Nov. '08		Annual	
	All	Domestic	All	Domestic	All	Domestic
	Visitors %	Visitors Only %	Visitors %	Visitors Only %	Visitors %	Visitors Only %
EAST	23.75	28.21	14.54	18.84	19.82	24.42
New England	7.24	8.61	3.87	5.02	5.81	7.16
Mid-Atlantic	16.50	19.61	10.66	13.82	14.02	17.26
SOUTH	30.87	36.67	43.56	56.46	36.27	44.68
West South Central	2.26	2.69	4.75	6.16	3.32	4.09
East South Central	0.99	1.18	3.00	3.89	1.85	2.28
South Atlantic	27.61	32.80	35.80	46.41	31.10	38.31
MIDWEST	24.88	29.57	12.32	15.96	19.53	24.06
East North Central	18.44	21.91	8.22	10.65	14.09	17.36
West North Central	6.44	7.65	4.10	5.31	5.44	6.70
WEST	4.67	5.55	6.74	8.74	5.55	6.84
Pacific	3.26	3.88	4.46	5.78	3.77	4.65
Mountain	1.40	1.67	2.28	2.96	1.78	2.19
Foreign	15.84	N/A	22.85	N/A	18.82	N/A

1. Definitions of Census Divisions:

New England = ME, NH, VT, MA, RI, CT

Mid-Atlantic = NY, NJ, PA

West South Central = AR, LA, OK, TX

East South Central = KY, TN, MS, LA

South Atlantic = WV, VA, DC, MD, DE, NC, SC, GA, FL

Pacific = CA, OR, WA, AK, HI

Mountain = ID, MT, WY, UT, CO, NM, AZ, NV

East North Central = MI, MN, IL, IN, OH

West North Central = WI, IA, MO, ND, SD, KS, NE

U.S. Territories/Puerto Rico = Only observed Puerto Rico in 2007-08

Table A.5. State or Territory of Primary Residence by Season: Key West Visitors

State or Territory	Dec. '07 - May '08		Jun. '08 - Nov. '08		Annual	
	All	Domestic	All	Domestic	All	Domestic
	Visitors %	Visitors Only %	Visitors %	Visitors Only %	Visitors %	Visitors Only %
Alabama	0.43	0.51	1.43	1.86	0.86	1.05
Alaska	0.19	0.23	0.04	0.05	0.13	0.16
Arkansas	0.36	0.43	0.16	0.21	0.28	0.34
Arizona	0.35	0.41	0.82	1.06	0.55	0.68
California	1.99	2.36	3.91	5.07	2.81	3.46
Colorado	0.43	0.51	0.81	1.05	0.59	0.73
Connecticut	1.34	1.59	0.71	0.92	1.07	1.32
District of Columbia	0.83	0.98	0.04	0.05	0.49	0.61
Delaware	0.37	0.44	0.09	0.12	0.25	0.31
Florida	16.41	19.50	24.88	32.25	20.02	24.66
Georgia	1.19	1.42	1.51	1.96	1.33	1.64
Hawaii	0.18	0.22	0.00	0.00	0.10	0.13
Idaho	0.18	0.22	0.00	0.00	0.10	0.13
Illinois	4.63	5.50	3.06	3.96	3.96	4.88
Indiana	1.78	2.11	0.79	1.03	1.36	1.67
Iowa	0.88	1.05	0.94	1.22	0.91	1.12
Kansas	0.36	0.43	0.05	0.07	0.23	0.28
Kentucky	0.76	0.91	0.59	0.76	0.69	0.85
Louisiana	0.21	0.25	1.46	1.90	0.75	0.92
Maine	0.99	1.17	0.00	0.00	0.57	0.70
Maryland	2.47	2.93	1.19	1.54	1.92	2.37
Massachusetts	3.56	4.23	2.56	3.32	3.14	3.87
Michigan	4.10	4.87	1.71	2.21	3.08	3.79
Minnesota	2.41	2.87	0.30	0.39	1.51	1.86
Mississippi	0.11	0.13	0.00	0.00	0.06	0.08
Missouri	1.44	1.71	1.73	2.25	1.56	1.93
Montana	0.00	0.00	0.00	0.00	0.00	0.00
Nebraska	0.22	0.27	0.48	0.62	0.33	0.41
Nevada	0.26	0.31	0.22	0.28	0.24	0.30
New Hampshire	0.85	1.01	0.08	0.11	0.52	0.64
New Jersey	5.04	5.99	3.46	4.49	4.37	5.38
New Mexico	0.00	0.00	0.22	0.28	0.09	0.12
New York	7.43	8.82	3.89	5.04	5.92	7.29
North Carolina	2.56	3.04	3.70	4.80	3.04	3.75
Ohio	5.76	6.85	2.40	3.11	4.33	5.34

Table A.5. State or Territory of Primary Residence by Season: Key West Visitors (continued)

State or Territory	Dec. '07 - May '08		Jun. '08 - Nov. '08		Annual	
	All	Domestic	All	Domestic	All	Domestic
	Visitors %	Visitors Only %	Visitors %	Visitors Only %	Visitors %	Visitors Only %
Oklahoma	0.22	0.27	0.38	0.49	0.29	0.36
Oregon	0.25	0.30	0.00	0.00	0.15	0.18
Pennsylvania	4.03	4.79	3.32	4.30	3.73	4.59
Rhode Island	0.14	0.17	0.52	0.67	0.30	0.37
South Carolina	0.63	0.75	0.86	1.11	0.73	0.89
South Dakota	0.37	0.43	0.00	0.00	0.21	0.26
Tennessee	0.45	0.54	1.57	2.03	0.93	1.14
Texas	1.46	1.74	2.74	3.56	2.01	2.48
Utah	0.10	0.12	0.22	0.28	0.15	0.19
Vermont	0.37	0.43	0.00	0.00	0.21	0.26
Virginia	3.10	3.68	3.22	4.18	3.15	3.88
Washington	0.65	0.77	0.51	0.66	0.59	0.72
West Virginia	0.05	0.06	0.30	0.39	0.16	0.19
Wisconsin	2.18	2.59	0.26	0.34	1.36	1.68
Wyoming	0.08	0.10	0.00	0.00	0.05	0.06
Foreign	15.84	N/A	22.85	N/A	18.82	N/A

Table A.6. Counties in Florida of Primary Residence: Key West Visitors

State or Territory	Dec. '07 - May '08		Jun. '08 - Nov. '08		Annual	
	All	Florida	All	Florida	All	Florida
	Visitors %	Visitors Only %	Visitors %	Visitors Only %	Visitors %	Visitors Only %
Alachua	0.11	0.68	0.47	1.91	0.27	1.33
Brevard	0.26	1.60	0.35	1.43	0.30	1.51
Broward	2.53	15.47	4.12	16.66	3.21	16.10
Charlottee	0.20	1.22	0.16	0.66	0.18	0.93
Citrus	0.03	0.18	0.22	0.88	0.11	0.55
Clay	0.00	0.00	0.04	0.16	0.02	0.09
Collier	0.74	4.54	0.98	3.97	0.85	4.24
DeSoto	0.02	0.12	0.01	0.06	0.02	0.09
Duval	0.18	1.10	0.26	1.05	0.21	1.07
Escambia	0.32	1.97	0.04	0.16	0.20	1.01
Flagler	0.18	1.10	0.00	0.00	0.10	0.52
Gulf	0.08	0.50	0.00	0.00	0.05	0.24
Hardee	0.02	0.12	0.00	0.00	0.01	0.06
Hernando	0.02	0.12	0.75	3.03	0.33	1.66
Highlands	0.00	0.00	0.03	0.11	0.01	0.06
Hillsborough	0.56	3.43	1.34	5.40	0.89	4.47
Indian River	0.26	1.60	0.44	1.76	0.34	1.69
Lake	0.16	1.00	0.73	2.96	0.41	2.04
Lee	0.70	4.28	0.33	1.32	0.54	2.71
Leon	0.03	0.18	0.00	0.00	0.02	0.09
Manatee	0.50	3.07	0.44	1.76	0.47	2.38
Marion	0.08	0.50	0.01	0.06	0.05	0.26
Martin	0.18	1.10	0.47	1.91	0.31	1.53
Miami-Dade	2.44	14.91	3.11	12.55	2.73	13.66
Nassau	0.18	1.10	0.22	0.88	0.20	0.99
Okaloosa	0.08	0.50	0.22	0.88	0.14	0.70
Orange	0.25	1.50	2.31	9.34	1.13	5.65
Osceola	0.08	0.50	0.04	0.16	0.06	0.32
Palm Beach	1.97	12.01	2.49	10.07	2.19	10.99
Pasco	0.10	0.62	0.11	0.44	0.10	0.53
Pinellas	0.20	1.24	0.58	2.35	0.37	1.83
Polk	0.78	4.78	1.03	4.17	0.89	4.46
St. Johns	0.65	3.99	0.23	0.94	0.47	2.38
St. Lucie	0.92	5.60	0.69	2.80	0.82	4.11
Santa Rosa	0.00	0.00	0.22	0.88	0.09	0.47

Table A.6. Counties in Florida of Primary Residence: Key West Visitors (continued)

State or Territory	Dec. '07 - May '08		Jun. '08 - Nov. '08		Annual	
	All	Florida	All	Florida	All	Florida
	Visitors	Visitors Only	Visitors	Visitors Only	Visitors	Visitors Only
	%	%	%	%	%	%
Sarasota	0.33	2.03	0.34	1.38	0.34	1.68
Seminole	0.02	0.12	0.04	0.16	0.03	0.14
Sumter	0.02	0.12	0.23	0.94	0.11	0.55
Volusia	0.49	3.01	1.17	4.72	0.78	3.92
Walton	0.18	1.10	0.47	1.91	0.31	1.53
Not Florida	83.59	N/A	75.22	N/A	79.98	N/A

Table A.7. Demographic Profiles: Auto, Air, Cruise Ship and Ferry Visitors, by Season
Key West Visitors

Characteristic	Dec. 07 - May 08 %	Jun. - Nov. 08 %	Weighted Average %
SEX (respondent only)			
Male	61.56	66.12	63.49
Female	38.44	33.88	36.51
RACE/ETHNICITY			
White, Not Hispanic	94.81	88.43	92.17
Black, Not Hispanic	2.36	6.45	4.06
Hispanic	1.89	4.38	2.92
Asian/Pacific Islander	0.83	0.46	0.68
Other	0.10	0.27	0.11
HOUSEHOLD INCOME			
< \$20,000	4.15	4.20	4.17
\$20,000 - \$39,999	5.29	4.75	5.06
\$40,000 - \$59,999	17.89	12.81	15.72
\$60,000 - \$100,000	22.85	20.12	21.69
> than \$100,000	46.39	40.58	43.91
No Answer	3.42	17.53	9.44
AGE (16 and older)			
16 - 25	2.89	6.69	4.49
26 - 35	8.95	19.45	13.37
36 - 45	13.95	24.63	18.45
46 - 60	37.14	37.08	37.11
61 and over	37.07	12.15	26.57
Mean	54.29	44.83	50.31
Median	56	45	50
Mode	61	50	61
Min	18	17	17
Max	91	85	91

Table A.7. Demographic Profiles: Auto, Air, Cruise Ship and Ferry Visitors, by Season
Key West Visitors (continued)

Characteristic	Dec. 07 - May 08 %	Jun. - Nov. 08 %	Annual Weighted Average %
PARTY SIZE			
1	7.27	5.20	6.39
2	73.92	49.79	63.63
3	4.86	15.83	9.54
4	8.62	16.08	11.80
5	2.27	4.76	3.33
6 and over	3.06	8.34	5.31
Mean	2.41	3.29	2.79
Median	2	2	2
Mode	2	2	2
Min	1	1	1
Max	19	37	37
NUMBER OF CHILDREN			
0	93.91	77.46	86.77
1	2.27	11.55	6.3
2	1.94	6.60	3.96
3	1.33	2.00	1.62
4	0.46	1.41	0.88
5 and over	0.09	0.97	0.47
Mean	0.09	0.43	0.24
Median	0	0	0
Mode	0	0	0
Min	0	0	0
Max	5	8	8

Table A.8.. Demographic Profiles of CUSTOMER Sample - Visitors of All Ages by Mode of Access and Season: Key West Visitors¹

Characteristics	Dece. 07 - May 08 %	June - Nov. 08 %
SEX		
Male	49.44	52.61
Female	50.56	47.39
RACE/ETHNICITY		
White Not Hispanic	95.89	80.62
Black Not Hispanic	1.46	8.55
Hispanic	1.61	8.51
Asian/Pacific Islander Not Hispanic	0.29	2.18
Other Not Hispanic	0.74	0.15
AGE		
1 - 15	9.15	20.16
16- 25	3.42	17.38
26 - 35	6.92	11.90
36 - 45	16.11	20.44
46 - 60	32.43	22.96
61 +	31.98	7.16
Mean	49.21	34.01
Median	53	36
Mode	65	40
Min	1	1
Max	99	85
HOUSEHOLD INCOME		
Less than \$20,000	0.99	1.71
\$20,000 - \$39,999	3.97	5.11
\$40,000 - \$59,999	11.80	7.68
\$60,000 - \$99,999	32.52	16.39
\$100,000 or more	50.71	69.12
TYPE OF HOUSEHOLD		
Single adult with no children	4.38	7.91
Single adult with children	1.82	4.89
Two adults with no children	68.06	40.61
Two adults with children	12.59	24.32
More than two adults no children	10.77	11.41
More than two adults with children	2.38	10.86

1. CUSTOMER Sample mostly auto and air visitors.

Table A.8. Demographic Profiles of CUSTOMER Sample - Visitors of All Ages by Mode of Access and Season: Key West Visitors¹ (continued)

Characteristics	Dec. 07 - May 08 %	June - Nov. 08 %
PARTY SIZE		
1	3.45	2.86
2	67.6	45.15
3	9.88	10.18
4	12.35	16.59
5	2.36	7.20
6 or more	4.37	18.02
Mean	2.63	3.74
Median	2	3
Mode	2	2
Min	1	1
Max	12	22
TYPE OF PARTY		
Group of family members	76.63	72.16
Group of two or more families	6.06	6.52
Group of family and friends	8.15	5.98
Organized group or club	0.72	3.01
Tour group	0.18	3.15
Unrelated friends	4.82	6.51
One person traveling alone	3.44	2.49
Coworkers	0.00	0.17
EMPLOYMENT STATUS		
Unemployed	0.44	0.71
Employed full-time	48.53	60.73
Employed part-time	8.13	2.82
Retired	29.02	5.81
Student	9.54	26.07
Homemaker	2.52	2.94
None of the above	1.82	0.92

Table A.8. Demographic Profiles of CUSTOMER Sample - Visitors of All Ages by Mode of Access and Season: Key West Visitors¹ (continued)

Characteristics	Dec. 07 - May 08 %	June - Nov. 08 %
EDUCATION COMPLETED		
8th grade or less	8.51	11.70
9th - 12th grade	12.58	11.01
13 - 15 years	22.75	19.73
16 years (college grad)	34.16	46.43
17 or more years (grad school)	22.00	11.12
DISABILITY (Percent Yes)		
Hearing impaired	0.86	0.01
Visually impaired	0.36	0.00
Mobility impaired	1.78	0.05
Mentally or learning impaired	0.29	0.11
None of the above	99.43	99.89