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

Visitor Study: Selected Comparisons 1995-06 and 2007-08

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Office of National Marine Sanctuaries
National Ocean Service
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U.S. Department of Commerce

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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

The Monroe County Tourist Development Council (TDC)

Working Partners:

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
  - Data collection
  - Database construction
  - Quality analysis/quality control of data
  - Provide data analysis
  - Produce reports

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Introduction

This study is part of the Socioeconomic Research & Monitoring Program for the Florida Keys National Marine Sanctuary. See the following url for details on this program: http://sanctuaries.noaa.gov/science/socioeconomic/floridakeys/welcome.html

The baseline study for Recreation-Tourism in the Florida Keys was done for year 1995-96. The study was adopted in the Socioeconomic Research and Monitoring Program for the Florida Keys National Marine Sanctuary at a workshop attended by 50 social scientists and stakeholders in 1998. Stakeholders at this workshop recommended the study be replicated approximately every 10 years. We attempted to implement the study as a 10-year replication, but delays in funding resulted in a 12-year replication. The study serves as a "Census" of recreation-tourism in the Florida Keys. The full study includes both visitors to the Florida Keys/Monroe County and residents of the Florida Keys/Monroe County. Here only some preliminary information from the visitor portion of the study is reported.

Funding Partners: The funding partners included three offices within the National Ocean Service of the National Oceanic and Atmospheric Administration (NOAA): Office of National Marine Sanctuaries, Florida Keys, the National Centers for Coastal Ocean Science, and the Coral Reef Conservation Program. Local partners included the Monroe County Tourist Development Council and The Nature Conservancy, Florida Keys Program.

Working Partners: The Human Dimensions of Coastal and Marine Resources, University of Massachusetts-Amherst provided oversight of the conduct of both the visitor and resident surveys and database development and documentation. They will also be assisting with data analyses and reports. The Bicentennial Volunteers, Inc. provided survey personnel for the winter survey. Teachers and students from the Florida Keys Community College and some other local residents conducted the visitor surveys during the summer season.

Visitor Seasons: The visitor population is divided into two seasons: winter and summer. In 1995-96, the summer season was June – November 1995 and the winter season was December 1995 to May 1996. In 2007-08, the summer season was June – November 20008 and the winter season was December 2007 – May 2008. The summer season was sampled first in1995-96 while the winter season was sampled first in 2007-08.

Visitation Definitions: We measure visitation two ways: 1) person-trips/visits and 2) person-days. Person-trips/visits is often referred to locally as the number of visitors. Technically this is not correct since a single person may visit the Florida Keys multiple times during the year. However, the overwhelming majority of visitors do visit the Florida Keys just once per year, but the length of each visit measured in number of days varies widely. The number of person-days in the Florida Keys per season is our measure of intensity of visitation. Even though not technically correct, we use the term "number of visitors interchangeably with person-trips or visits.

Table C1. Visitation: 1995-96 versus 2007-08

	1995-96 (Millions)	2007-08 (Millions)	% Change	1995-96 Definition % Change
Person-trips/Visits				
All Visitors	3.06	3.27	6.86	
Recreating Visitors	2.54	3.01	18.5	14.96
Non Recreating Visitors	0.52	0.26	-50	-34.6
Person-days				
All Visitors	16.27	13.94	-14.32	
Recreating Visitors	13.3	12.82	-3.61	
Non Recreating Visitors	2.97	1.12	-62.29	

Key Findings:

Total Visitation:

- Total Visitation measured in person-trips/visits increased about 6.9% over the 12-year period.
- Total Visitation measured in person-days declined 14% over the 12-year period.

Recreating Visitors:

- Recreating Visitor Visitation measured in person-trips/visits increased 18.5% over the 12-year period.
- There was a change in definition of a recreating visitor in 2007-08. SPA, Health, and Wellness activities were added in 2007-08 and 2.86% of recreating visitors did only these activities.
- Using the 1995-96 definition of recreating visitors, recreating visitor visitation increase almost 15% over the 12-year period.
- The percent of visitors classified as recreating visitors increased from 83% to 92% over the 12-year period without adjustment for the change in definition of a recreating visitor.
- After adjusting to the 1995-96 definition, recreating visitors visitation increased from 83 percent to 89 percent over the 12-year period.

Table C2. Visitation Shares by Mode of Access: 1995-96 versus 2007-08

	% of Person-trips		% of Person-days	
Mode of Access	1995-96	2007-08	1995-96	2007-08
Auto	78.69	68.7	83.4	83.4
Air	8.7	5.2	14.2	9.5
Cruise Ship	12.7	23.5	2.4	5.5
Ferry	0.0	2.6	0.0	1.6

Key Findings:

- Cruise Ship Visitation increased its share of visitation measured in person-trips/visits from 12.7% to 23.5% over the 12-year period.
- Visitation from all other modes of access, as measured by person-trips/visits, declined.
- The Ferries to Key West from Miami, Marco Island and Ft. Myers did not exist in 1995-96.
- When visitation is measured in person-days, the Auto mode of access held share, while the Air mode of access lost share. The Marathon Airport did not receive commercial airline flights in 2007-08. The Cruise Ship and Ferry modes of access increased their market share over the 12-year period.

Table C3. District Visitation: 1995-96 versus 2007-08

District/Region	1995-96 (Percent)	2007-08 (Percent)	% Change[1]
Key Largo	35.89	26.93	-8.96
Middle Keys:	27.44	19.5	-7.94
Islamorada	N/A	12.47	N/A
Marathon	N/A	8.47	N/A
Lower Keys	11.96	6.53	-5.43
Key West	**55.82**	**66.79**	**10.97**
Visit Only One District			
Key Largo Only	22.14	16.92	-5.22
Middle Keys Only:	14.21	9.70	-4.51
Islamorada Only	N/A	5.41	N/A
Marathon Only	N/A	3.72	N/A
Lower Keys Only	4.29	1.62	-2.67
Key West Only	**38.51**	**52.97**	**14.46**
Visit Two Districts			
Key Largo and Key West	5.1	3.91	-1.19
Visit All Districts	4.02	0.77	-3.25

1. Percent (%) change is a in percentage points or share of the total market (percent of all recreating visitors).

Key Findings:

- In 1995-96, visitation was estimated for four regions: Upper Keys, Middle Keys, Lower Keys, and Key West. In 2007-08, visitation was changed to correspond to the five Tourist Development Council Districts. Upper Keys is now Key Largo, the Middle Keys was divided into Islamorada and Marathon. The Lower Keys and Key West remained the same.
- Key West gained an almost 11 percentage point share of the market of recreating visitors over the 12-year period, while all other districts lost share.
- Almost 53 percent of all recreating visitors visited Key West Only in 2007-08 compared to 38.5 percent in 1995-96.
- Key Largo and Key West remains the most popular multi-district choice for recreating visitors.

Table C4. Activity Participation Rates: 1995-96 versus 2007-08

Activity	1995-96	2007-08	% Change[1]
Snorkeling	28.34	21.83	-6.51
SCUBA Diving	8.06	4.89	-3.17
All Diving	31.26	23.72	-7.54
Fishing	21.03	12.92	-8.11
Viewing Wildlife-Nature Study	28.61	19.89	-8.72
Boating	49.05	34.99	-14.06
Beach Use	32.48	27.62	-4.86
Camping	7.83	2.37	-5.46
Visiting Museums or Historic Areas	**32.95**	**41.32**	**8.37**
Sightseeing & Attractions (paid & unpaid)	55.25	45.04	-10.21
Cultural Events (Fairs, Concerts, Plays)	**7.4**	**8.98**	**1.58**
Outdoor Sports and Games	4.06	2.29	-1.77
Any Water-based Activities	65.89	53.03	-12.86
Any Land-based Activities	78.51	78.74	0.23
Only Water-based Activities	18.9	11.03	-7.87
Only Land-based Activities	**31.23**	**35.06**	**3.83**

1. Percent (%) change is a in percentage points or share of the total market (percent of all recreating visitors).

Key Findings:

- All water-based activities lost market share over the 12-year period.
- Only two activities gained market share over the 12-year period:
  1. Visiting Museums or Historic Areas
  2. Cultural Events (Fairs, Concerts, Plays)

- Only land-based activities gained market share – about one-quarter (27%) of this change is explained by the change in the definition of recreating visitors by the inclusion of SPA, Health and Wellness activities.

Table C5. Number of Participants by Activity: 1995-96 versus 2007-08

Activity	1995-96	2007-08	Change[1]	% Change[2]
Snorkeling	720,030	656,553	-63,477	-8.82
SCUBA Diving	204,644	146,961	-57,683	-28.19
All Diving	794,160	713,453	-80,707	-10.16
Fishing	534,388	388,406	-145,982	-27.32
Viewing Wildlife-Nature Study	726,766	598,221	-128,545	-17.69
Boating	1,246,186	1,096,544	-149,642	-12.01
Beach Use	825,203	830,734	5,531	**0.67**
Camping	198,845	71,138	-127,707	-64.22
Visiting Museums or Historic Areas	837,181	1,242,717	405,536	**48.44**
Sightseeing & Attractions (paid & unpaid)	1,403,617	1,354,527	-49,090	-3.50
Cultural Events (Fairs, Concerts, Plays)	188,029	270,015	81,986	**43.60**
Outdoor Sports and Games	103,065	68,745	-34,320	-33.30
Any Water-based Activities	1,673,826	1,594,895	-78,931	-4.72
Any Land-based Activities	1,994,580	2,368,062	373,482	**18.72**
Only Water-based Activities	480,169	308,879	-171,290	-35.67
Only Land-based Activities	793,481	1,109,740	316,259	**39.86**

1. Change is the absolute number of participants.
2. Percent (%) change is the percent change in total number of participants.

Key Findings:

- Generally, the number of participants shows the same pattern of change as market share (participation rates) with one exception.
- Exception: Beach Use had a decline in market share over the 12-year period (-4.86 point share), but a slight increase in the total number of participants.

Table C.6. Annual Number of Days of Activity: 1995-96 versus 2007-08

Activity	1995-96 Days (000's)	2007-08 Days (000's)	Percent Change
Snorkeling	1,702.5	1,854.4	8.92
SCUBA Diving	534.5	451.8	-15.47
All Diving	2,237.0	2,306.2	3.09
Fishing	1,949.8	1,312.1	-32.71
Personal Watercraft Use	378.4	264.6	-30.07
Sailing	217.7	162.6	-25.31
Other Boating	260.7	273.2	4.79
Viewing Nature & Wildlife from Land	1,789.8	1,524.5	-14.82
Viewing Nature & Wildlife from Water	855.4	661.0	-22.73
All Viewing Nature & Wildlife	2,645.2	2,185.5	-17.38
All Beach Activities	2,688.6	3,162.9	17.64
Windsurfing or Sail boarding	24.4	17.8	-27.05
Swimming in Outdoor Pools	2,489.2	2,379.3	-4.42
Visiting Museums & Historic Sites	1,695.3	2,592.6	52.93

Key Findings:

- Snorkeling, Other Boating and All Beach Activities were the only water-based activities that increased in intensity of use, as measured by person-days, over the 12-year period.

- Visiting Museums & Historic Sites was the fastest growing activity over the 12-year period.

Table C7. Recreating Visitor Spending by Season: 1995-96 versus 2007-08

	1995- 96	2007-08	% Change
Per Person Per Trip[1] (2008 $)			
Winter (Dec. 07 - May '08)	$671.37	$668.71	-0.40
Summer (Jun. - Nov. '08)	$565.84	$535.74	-5.32
Annual Average	$622.60	$605.73	-2.71
Per Person Per Day[1] (2008 $)			
Winter (Dec. 07 - May '08)	$158.56	$135.82	-14.34
Summer (Jun. - Nov. '08)	$138.48	$155.12	**12.02**
Annual Average	$149.29	$144.96	-2.90

1. Amount of spending in Monroe County adjusted for inflation to 2008 dollars ($).

Table C7A. Recreating Visitor Spending by Mode of Access: 1995-96 versus 2007-08

Spending/Mode of Access	1995-96	2007-08	% Change
Per Person Per Trip[1] (2008 $)			
Auto	$692	$711	2.7
Air-Key West	$1,652	$1,716	3.9
Cruise Ship	$138	$84	-39.1
Ferry	N/A	$301	N/A
Per Person Per Day[1] (2008 $)			
Auto	$147	$158	7.5
Air- Key West	$201	$258	28.4
Cruise Ship	$129	$84	-34.9
Ferry	N/A	$115	N/A

1. Amount of spending in Monroe County adjusted for inflation to 2008 dollars ($).

Key Findings:

- Across All Modes of Access, Annual Average Spending Per Person Per Trip declined 2.7% over the 12-year period, after adjusting for inflation.
- For the Auto and Air Modes of Access, Annual Average Spending Per Person Per Trip increased 2.7% and 3.9%, respectively. For Cruise Ship passengers, Spending Per Person Per Trip declined 39 %.
- Annual Average Spending Per Person Per Day declined 2.9% over the 12-year period, after adjusting for inflation.
- For the Auto and Air Modes of Access, Annual Average Spending Per Person Per Day increased 7.5% and 28.4%, respectively. Cruise ship passenger spending declined 34.9%.
- Since Cruise Ship and Ferry passengers increased their share of the market and both spend less than Auto or Air visitors, their spending explains the overall decline in average spending across all modes of access.
- On a per person per trip basis, winter season visitors spent more than summer season visitors in both years.
- On a per person per day basis, winter season visitors spent more than summer season visitors in 1995-96, but this was reversed in 2007-08.

Table C8. Total Impact of Recreating Visitor Spending on the Monroe County Economy: 1995-96 versus 2007-08

Measurement	1995-96	2007-08	% Change	% Monroe County Economy 1995-96	% Monroe County Economy 2007-08
Total Spending (Billions 2008 $)	$1.63	$1.99	22.1		
Total Sales/Output[1] (Billions 2008 $)	$1.82	$2.23	22.5	60.5	59.9
Total Income[1] (Millions 2008 $)	$693	$970	40.0	45	43.8
Total Employment[1] (Thousands of full and part-time jobs)	21.8	32	46.8	46.5	55.3

1. Includes multiplier or ripple effects of spending.

Key Findings:

- Total Recreating Visitor Spending in Monroe County, after adjusting for inflation, increased 22% over the 12-year period.
- The Economic Impact or Contribution to the Monroe County Economy of this spending, including multiplier or ripple effects of this spending, include the following:
  1. Total Sales/Output - a 22% increase
  2. Income to Monroe County Residents – 40%
  3. Employment as measured by the number of full and part-time jobs – 47%
- As a share of the total Monroe County Economy, recreating visitor spending accounted for about the same share for Sales/Output, a slight decrease in share for Income, and a significant increase in share of Employment.

Table C9. Socioeconomic/Demographic Profiles: 1995-96 versus 2007-08

Item	1995-96	2007-08	Statistically Significant Difference
Length of Stay (Days per trip)			
Winter	6.03	4.94	YES
Summer	4.17	3.51	YES
Annual Average	5.17	4.26	YES
Party Size			
Winter	2.40	2.40	NO
Summer	2.92	3.17	NO
Annual Average	2.64	2.76	NO
Number of Children			
Winter	0.14	0.12	NO
Summer	0.53	0.51	NO
Annual Average	0.32	0.31	NO
Percent with Zero Children			
Winter	92.10	92.77	NO
Summer	71.00	71.89	NO
Annual Average	82.40	82.75	NO
Sex (% Male - Respondent)			
Winter	71.6	63.3	YES
Summer	74.3	65.6	YES
Annual Average	72.8	64.4	YES
Age (Respondent)			
Winter	49.55	54.26	YES
Summer	42.16	44.23	YES
Annual Average	46.13	49.53	YES
Race/Ethnicity (Respondent)			
White not Hispanic	92.5	89.7	YES
Black not Hispanic	1.8	3.5	YES
Hispanic	4.8	5.8	YES
Asian/Pacific Islander	0.5	0.9	YES
Other	0.4	0.08	YES
Household Income			
Less than $20,000	5.0	3.5	YES
$20,000 - $39,999	17.6	5.6	YES
$40,000 - $59,999	20.9	14.0	YES
$60,000 - $99,999	24.6	22.4	YES
$100,000 or more	12.8	47.3	YES
No Answer	19.1	7.1	YES

Key Findings:

- Average length of stay declined in both seasons over the 12-year period.
- Average Party Size, Number of Children Per Party, and percent parties with zero children did not significantly change over the 12-year period.
- A higher proportion of survey respondents were female in 2007-08.
- The average age of survey respondents increased over the 12-year period.

- Respondents Race/Ethnicity distribution changed significantly over the 12-year period. Less White not Hispanic, more Black not Hispanic, more Hispanic, more Asian/Pacific Islanders and more that responded "other".
- Household Income of survey respondents was higher in 2007-08. Although some of this change might be explained by inflation, visitors with incomes over $100,000 increased very significantly.

Table C9A. Average Length of Stay Per Trip by Mode of Access: 1995-96 versus 2007-08[1]

	1995-96		2007-08	
Mode of Access	Summer	Winter	Summer	Winter
Auto	4.24	6.82	3.95	6.51
Air	7.65	9.04	6.40	8.63
Cruise Ship	1.00	1.00	1.00	1.00
Ferry	N/A	N/A	2.97	2.50

1. Average length of stay in measured in number of days.

Key Findings:

- Average length of stay per trip declined for Auto and Air visitors over the 12-year period, however the decline was not statistically significant.

- Ferry visitors, which did not exist in 1995-96, have significantly shorter stays than Auto or Air visitors, and unlike Auto and Air visitors have longer stays during the summer than winter.

Table C10. Place of Residence of Recreating Visitors: 1995-96 versus 2007-08

	1995-96	2007-08	Statistically Significant Difference
Foreign Visitors (%)			
Winter	15.29	15.55	NO
Summer	18.8	19.62	NO
Annual Average	16.86	17.47	NO
Canada (%)			
Winter	4.8	6.2	YES
Summer	1.1	2.8	YES
Annual Average	3.1	4.6	YES
United Kingdom (%)			
Winter	2.8	3.6	YES
Summer	4.2	3.0	YES
Annual Average	3.5	3.3	NO
Germany (%)			
Winter	3.8	1.8	YES
Summer	3.8	3.0	YES
Annual Average	3.8	2.3	YES
Florida Residents (%)			
Winter	16.37	18.71	YES
Summer	45.93	35.46	YES
Annual Average	30.01	26.64	YES
South Florida Residents (%)			
(Miami-Dade, Broward, Palm Beach)			
Winter	8.8	9.6	YES
Summer	27.0	20.7	YES
Annual Average	17.2	14.9	YES

Key Findings:

- No significant difference in the proportion of foreign visitors over the 12-year period.
- Market share of Canadian visitors increased in both seasons over the 12-year period.
- Market share of UK visitors increased for the winter season, but declined for the summer season over the 12-year period. The increase in the winter season market share offset the decline in the summer season market share with the annual average remaining about the same over the 12-year period.
- Market share of Floridians increased for the winter season, but declined for the summer season and the annual average over the 12-year period.
- Market share for South Florida residents (Miami-Dade, Broward and Palm Beach counties) increase for the winter season, but declined for the summer season and the annual average over the 12-year period.

Table C.11. Comparison of Visitor Importance Ratings 1995-96 versus 2007-08

Item	1995-96 Mean[1]	2007-08 Mean[1]	Increase/ Decrease	Statistically Significant[2]
Natural Resources				
Clear Water (high visibility)	4.07	4.05	decrease	NO
Amount of living coral on reefs	3.84	3.93	Increase	NO
Many different kinds of fish and sea life to view	3.77	3.84	increase	NO
Many different kinds of fish and sea life to catch	2.88	2.69	**decrease**	**YES**
Large numbers of fish	3.50	3.46	decrease	NO
Opportunity to view large wildlife (manatees, whales, dolphins, sea turtles)	3.62	3.72	increase	NO
Quality of beaches	4.17	4.21	increase	NO
Natural Resource Facilities				
Parks and specially protected areas	3.93	4.02	increase	NO
Shoreline access	3.82	3.88	increase	NO
Designated swimming/beach areas	3.72	3.90	**increase**	**YES**
Mooring buoys near coral reefs	3.35	3.16	**decrease**	**YES**
Marina facilities	2.67	2.45	**decrease**	**YES**
Boat ramps/launching facilities	2.56	2.35	**decrease**	**YES**
Other Facilities				
Historic preservation (historic landmarks, house, etc.)	3.72	3.86	**increase**	**YES**
Parking	3.29	3.42	**increase**	**YES**
Public transportation	2.27	2.39	increase	NO
Directional signs, street signs, mile markers	3.72	3.67	decrease	NO
Condition of bike paths and sidewalks	3.51	3.59	increase	NO
Conditions of roads and streets	3.64	3.66	increase	NO
Availability of public restrooms	3.82	4.05	**increase**	**YES**
Cleanliness of streets and sidewalks	3.79	3.91	**increase**	**YES**
Uncrowded conditions	3.52	3.58	increase	NO
Services				
Maps, brochures, and other tourist information	3.39	3.49	increase	NO
Customer Service and Friendliness of people	4.14	4.29	**increase**	**YES**
Value for the price	4.12	4.25	**increase**	**YES**
All Items	3.55	3.59	increase	NO

1. Mean scores. Scores 1 to 5 with 5 meaning extremely important.
2. Yes means statistically significant difference in mean scores at 0.05 level of significance or 95% confidence. Test using proc ttest in SAS.

Table C.12. Comparison of Visitor Satisfaction Ratings 1995-96 versus 2007-08

Item	1995-96 Mean[1]	2007-08 Mean[1]	Increase/ Decrease	Statistically Significant[2]
Natural Resources				
Clear Water (high visibility)	3.82	3.96	**increase**	**YES**
Amount of living coral on reefs	3.73	3.75	Increase	NO
Many different kinds of fish and sea life to view	3.77	3.81	increase	NO
Many different kinds of fish and sea life to catch	3.59	3.67	increase	NO
Large numbers of fish	3.52	3.56	increase	NO
Opportunity to view large wildlife (manatees, whales, dolphins, sea turtles)	3.34	3.40	increase	NO
Quality of beaches	3.45	3.51	increase	NO
Natural Resource Facilities				
Parks and specially protected areas	3.75	3.85	**increase**	**YES**
Shoreline access	3.35	3.42	increase	NO
Designated swimming/beach areas	3.38	3.43	increase	NO
Mooring buoys near coral reefs	3.83	3.83	same	NO
Marina facilities	3.71	3.79	increase	NO
Boat ramps/launching facilities	3.61	3.67	increase	NO
Other Facilities				
Historic preservation (historic landmarks, house, etc.)	3.88	4.05	**increase**	**YES**
Parking	3.34	3.27	decrease	NO
Public transportation	3.35	3.49	increase	NO
Directional signs, street signs, mile markers	3.64	3.72	increase	NO
Condition of bike paths and sidewalks	3.64	3.67	increase	NO
Conditions of roads and streets	3.62	3.65	increase	NO
Availability of public restrooms	3.30	3.40	**increase**	**YES**
Cleanliness of streets and sidewalks	3.66	3.69	increase	NO
Uncrowded conditions	3.43	3.60	**increase**	**YES**
Services				
Maps, brochures, and other tourist information	3.85	3.96	**increase**	**YES**
Customer Service and Friendliness of people	3.91	3.99	**increase**	**YES**
Value for the price	3.28	3.44	**increase**	**YES**
All Items	3.59	3.66	increase	NO

1. Mean scores. Scores 1 to 5 with 5 meaning extremely important.
2. Yes means statistically significant difference in mean scores at 0.05 level of significance or 95% confidence. Test using proc ttest in SAS.

Table C.13. Relative Importance-Satisfaction Changes 1995-96 to 2007-08

	1995-96 Quadrant[1]	2007-08 Quadrant[1]	Change[2]
Natural Resources			
Clear Water (high visibility)	2	2	
Amount of living coral on reefs	2	2	
Many different kinds of fish and sea life to view	2	2	
Many different kinds of fish and sea life to catch	3	4	+
Large numbers of fish	3	3	
Opportunity to view large wildlife (manatees, whales, dolphins, sea turtles)	1	1	
Quality of beaches	1	1	
Natural Resource Facilities			
Parks and specially protected areas	2	2	
Shoreline access	1	1	
Designated swimming/beach areas	1	1	
Mooring buoys near coral reefs	4	4	
Marina facilities	4	4	
Boat ramps/launching facilities	3	4	+
Other Facilities			
Historic preservation (historic landmarks, house, etc.)	2	2	
Parking	4	3	-
Public transportation	3	3	
Directional signs, street signs, mile markers	2	2	
Condition of bike paths and sidewalks	4	2	+
Conditions of roads and streets	2	1	-
Availability of public restrooms	1	1	
Cleanliness of streets and sidewalks	2	2	
Uncrowded conditions	3	3	
Services			
Maps, brochures, and other tourist information	4	4	
Customer Service and Friendliness of people	2	2	
Value for the price	1	1	
All Items			

1. Quadrants: 1=Relatively High Importance - Relatively Low Satisfaction - Concentrate Here
   2=Realtively High Importance - Relatively High Satisfaction - Keep up the Good Work
   3=Relatively Low Importance - Relatively Low Satisfaction - Low Priority
   4=Relatively Low Importance - Relatively High Satisfaction - Possible Overkill
2. + means an improvement in status and - means a decline in status

Key Findings for Importance – Satisfaction Ratings:

- **Four** items **decreased** in importance: Many different kinds of fish and sea life to catch, Mooring buoys near coral reefs, Marina facilities, and boat ramp/launching facilities.
- **Six** items **increased** in importance: Designated swimming areas/beaches, Historic preservation (historic landmarks, houses, etc.), Parking, Availability of public restrooms, Cleanliness of streets and sidewalks, Customer Service and Friendliness of people, and Value for the price.
- **Eight** items **increased** in satisfaction, while none of the 25 items had decreases in satisfaction. Items that increased in satisfaction scores included Clear water (high visibility), Parks and specially protected areas, Historic preservation (historic landmarks, houses, etc.), Availability of public restrooms, Uncrowded conditions, Maps, brochures, and other tourist information, Customer Service and Friendliness of the people, and Value for the price.
- **Three** items **increased** in their relative status. Of these, two went from "Low Priority" to "Possible Overkill" (Many different kinds of fish and sea life to catch and Boat ramps/launching facilities) and one went from "Possible Overkill" to "Keep up the Good Work" (Condition of the bike paths and sidewalks).
- **Two** items **decreased** in their relative status. Parking moved from "Possible Overkill" to "Low Priority" and Condition of the roads and streets moved from "Keep up the Good Work" to "Concentrate Here".

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