

USE OF CAPTIVA BEACHES
AND ECONOMIC IMPACT 1989-90

September 1, 1990

PREPARED BY:

REGIONAL RESEARCH ASSOCIATES
3350 N. W. BOCA RATON BLVD., SUITE 1-38
BOCA RATON, FL 33431
(407) 750-6761 BOCA RATON (407) 968-8486

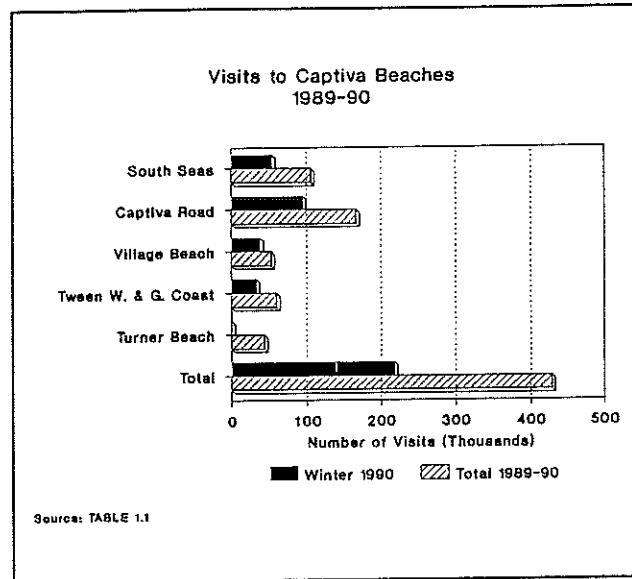
tbusersx.chp

Table of Contents

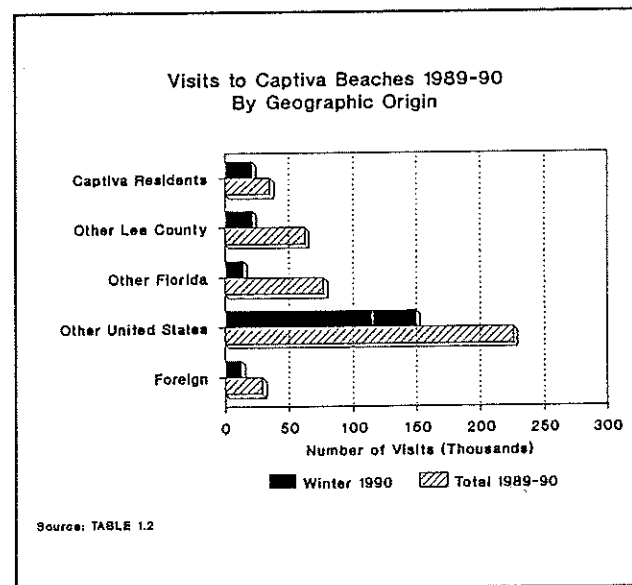
| | |
|---|----|
| Highlights | 1 |
| Introduction | 12 |
| Beach Use in 1989-90 | 13 |
| Beach User by Beach | 13 |
| Origin of Beach Users | 14 |
| Beach Visit Characteristics | 19 |
| Opinions about Captiva Beaches | 19 |
| Economic Impact of Beach Use on Captiva | 21 |
| Expenditures by Non-resident Beach Users | 21 |
| Employment and Payrolls | 22 |
| Economic Impact on Lee County | 26 |
| Spending by Out of County Beach Visitors | 26 |
| Spending by Main Destination Beach Visitors | 28 |
| Employment and Payrolls | 32 |
| Economic Impact on the State | 36 |
| Spending by Out of County Beach Visitors | 36 |
| Spending by Main Destination Beach Visitors | 40 |
| Employment and Payrolls | 45 |
| Beach Use and Spending in 1987 and 1989-90 | 48 |
| Beach Use | 48 |
| Spending | 49 |

Highlights

1. During 1989-90, there were a total of 428,400 visits made to Captiva's beaches. The number of visits to the public beaches would have been even higher except that Turner Beach was closed during the Winter months to facilitate construction of the new Blind Pass bridge.

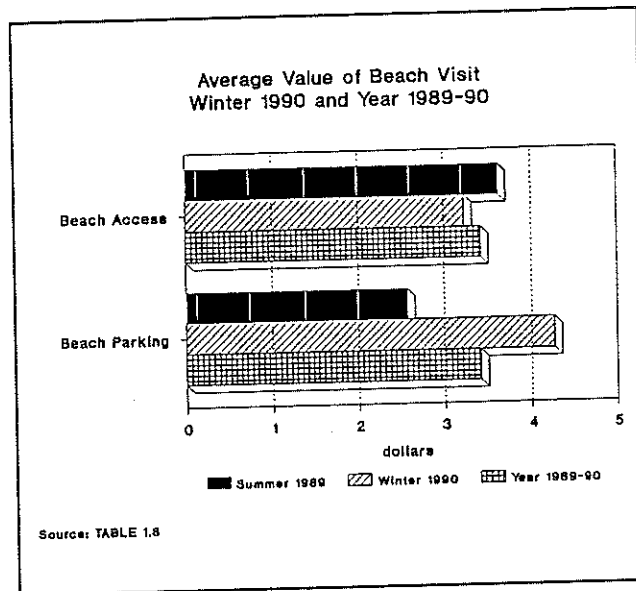


2. The vast majority of Captiva beach visits are not resident of the island (91.9 percent). The greatest use of the beach is made by out of state visitors, but there are also many visits from residents of other parts of Lee County. Florida visitors to Captiva's beaches comes from all around the state, with the largest group coming from Southeast Florida, and a little more coming from East Central than from West Central Florida. About 40 percent of the out of state beach visits were made by residents of

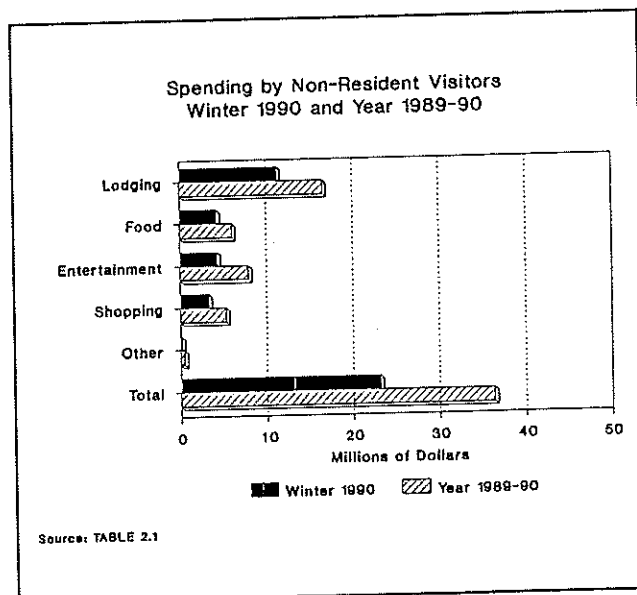


the Northeast United States, and a similar number were made by Midwest visitors.

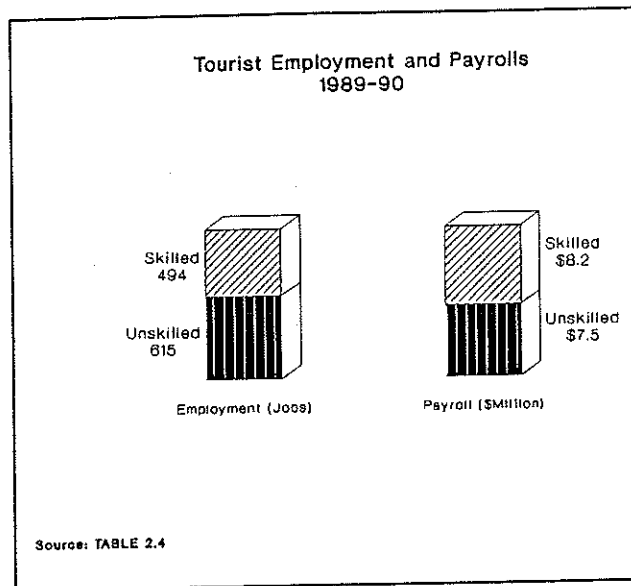
3. More than three of every four Captiva beach users rated Captiva's beach as one of the top three beaches that they had ever visited. They indicated that the value of their beach experience on the day interviewed was \$3.42, and they thought that a fair beach parking fee would have been \$3.41, or about \$1.00 for each hour they spent on the beach. Almost 87 per cent believed that the local County government pay to maintain Captiva's beaches.



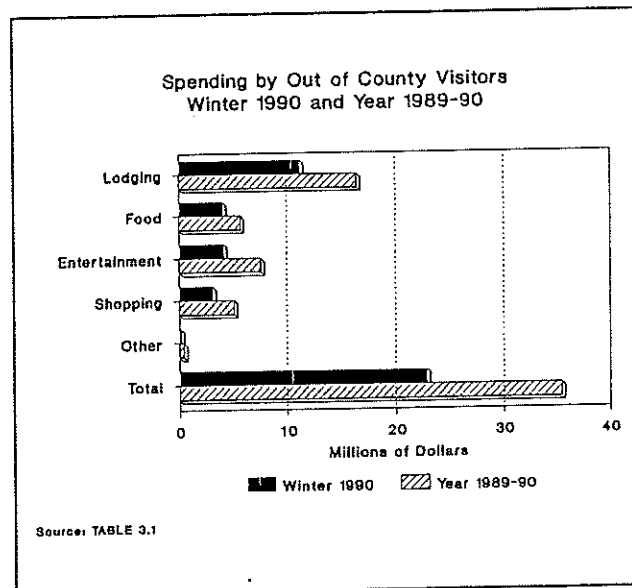
4. During 1989-90, non-residents visited Captiva's beaches a total of 393,742 times. They spent over \$36 million on the island during their stay (TABLE 2.1). About 46 percent of these expenditures were for lodging, with the rest for food, dining and entertainment.



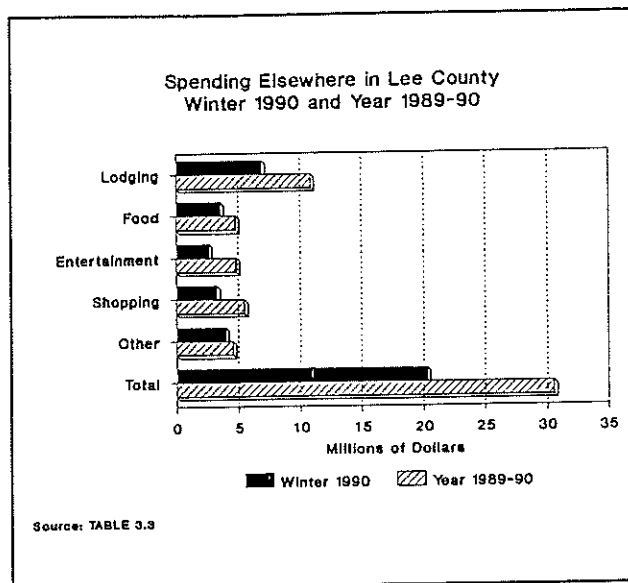
5. The \$36.3 million spent by non-resident beach users on Captiva directly results in \$15.8 million in payrolls. Although most communities experience some ripple effect of these expenditures, the nature of Captiva's economy make the ripple effect insignificant. This is because there are few local suppliers to the tourist industry and most of the labor force does not live on Captiva.



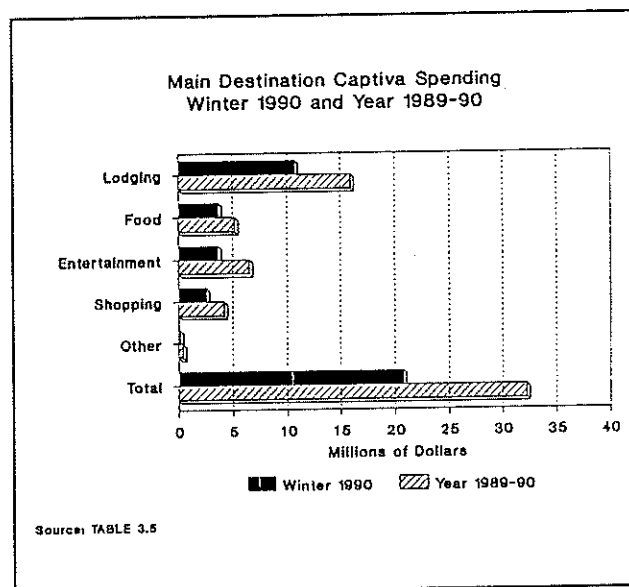
6. A total of 331,174 beach visits were made by non-residents of Captiva or elsewhere in Lee County. The island receives little economic impact from beach visitors who are residents of other parts of Lee County. Out of county beach visitors spent \$35.4 million on Captiva.



7. Out of county visitors to Captiva's beaches during 1989-90 spent \$30.6 million elsewhere in Lee County. This spending includes the spending of day visitors to Captiva's beaches who are staying elsewhere in the county. Many of these visitors stay on Sanibel.

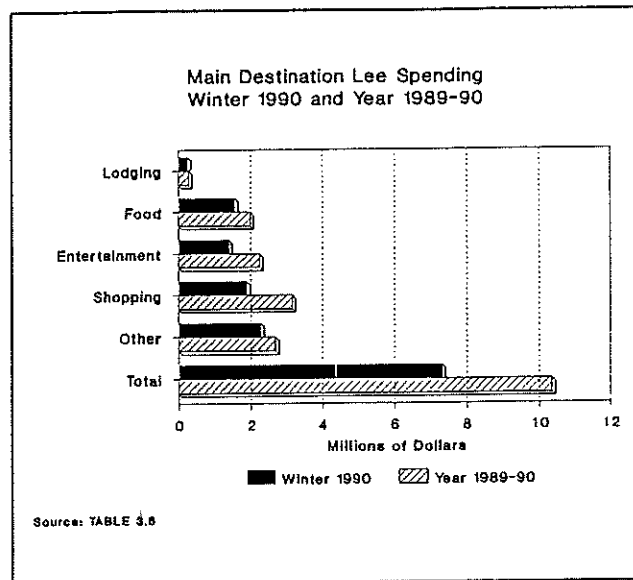


8. A total of 275,234 Captiva beach visits were made by out of county main destination visitors to Captiva. These account for 64 percent of all persons found on the beaches of Captiva during 1989-90 (428,400). About one in four of these main destination visitors were day visitors to the County, with the remaining

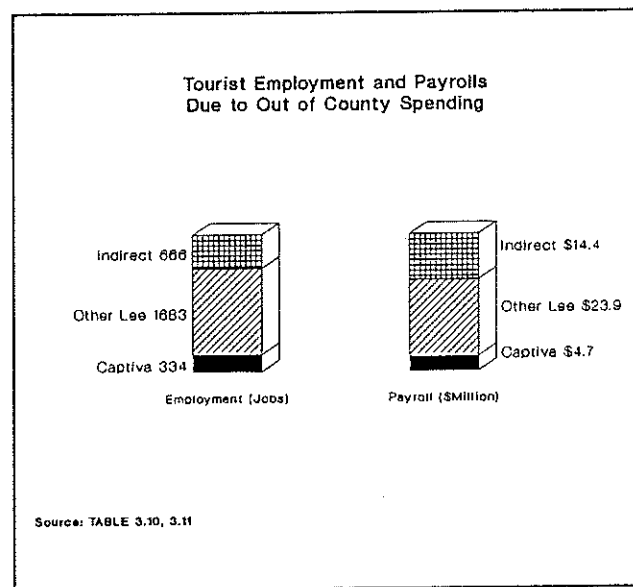


three fourths spending the majority of their lodging expenditures on the island. The economic impact on Captiva of casual visitors to the island is very small, since the main destination visitors' expenditures (\$32.2 million) account for 90.0 percent of total out of county spending on the island.

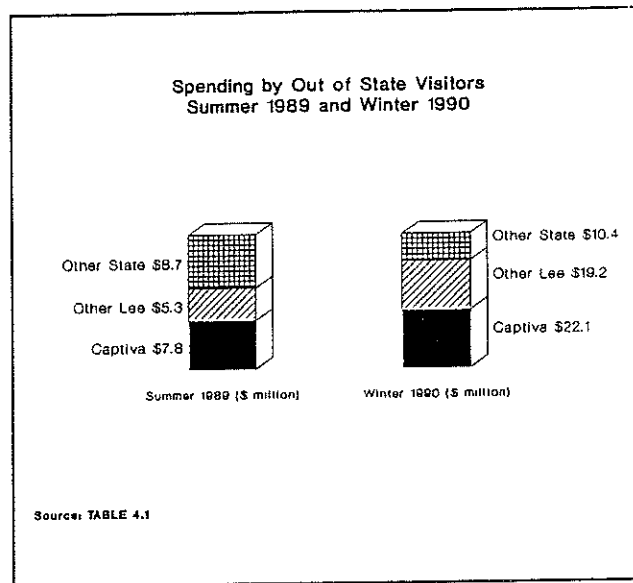
9. Out of county main destination visitors to Captiva spend \$42.6 million in Lee County during 1989-90. Of this, \$10.3 million was spent elsewhere in the county, so that about 25 cents of every dollar was spent off the island.



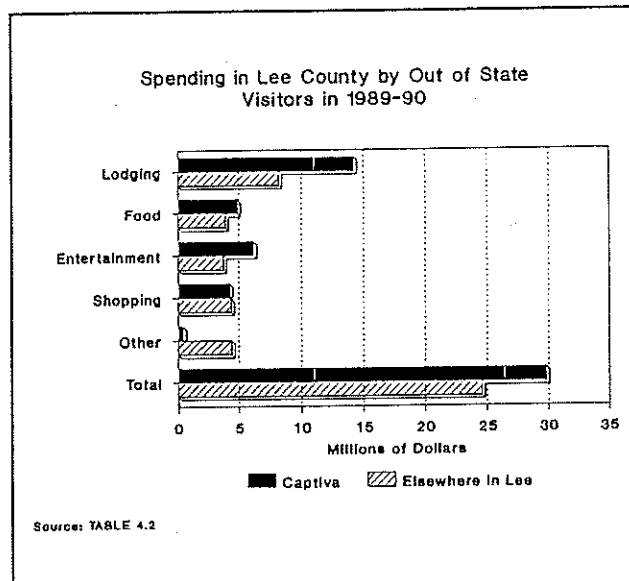
10. The total economic impact of out of county Captiva beach visitors in Lee County is approximately 2,700 jobs and a payroll of close to \$43 million. Main destination out of county visitors create about 1,800 jobs and generate a payroll of over \$27 million.



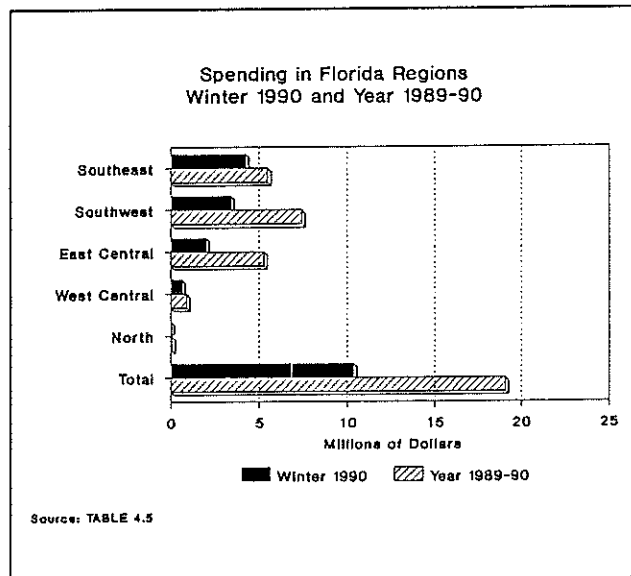
11. A total of 254,175 visits were made to Captiva's beaches by non-residents of the state during 1989-90. These out of state visitors to Captiva's beaches spent \$73.5 million during their stay in Florida. More than 40 percent of their spending occurred on Captiva, with about 33 percent spent elsewhere in Lee County.



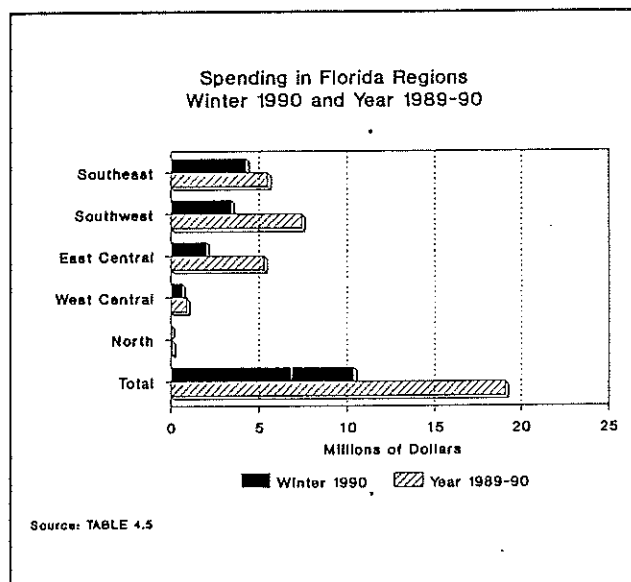
12. Out of state visitors spent \$54.4 million in Lee County during the year 1989-90. Spending on the island totalled \$29.8 million and spending in the rest of the County amounted to \$24,545,307.



13. Out of state visitors to Captiva's beaches spent \$19.1 million outside Lee County during 1989-90. The largest expenditures were made in the Southwest Florida region (\$7.4 million). Spending in Southwest Florida included spending in Sarasota and Naples, as well as Everglades trips.



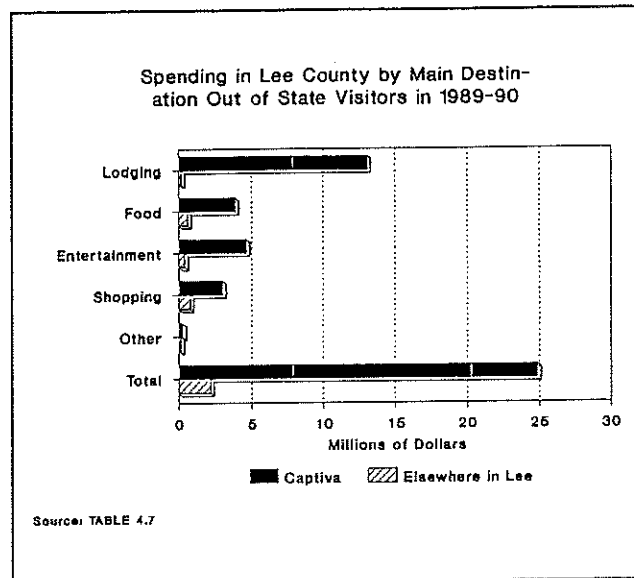
14. Almost one out of every four dollars spent in the state by out of state visitors to Captiva's beaches were accounted for by main destination visitors, that is, by individuals drawn to Florida directly by the beaches, or by events adjacent to the beaches on Captiva island. The bulk of



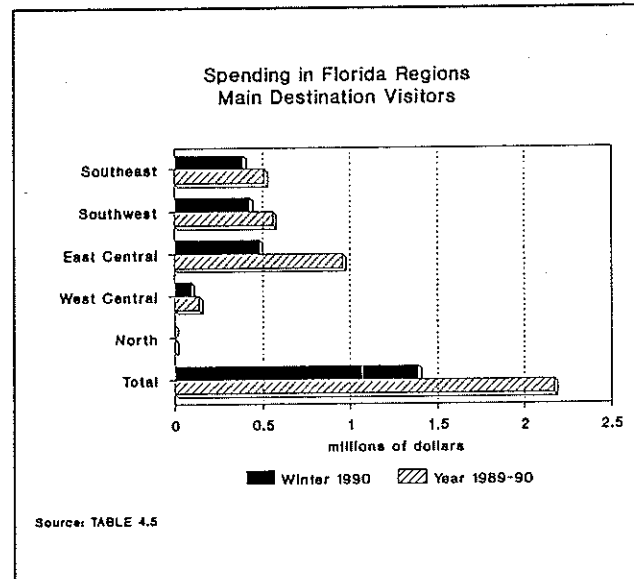
the spending of main destination beach visitors occurred on Captiva, but over \$2 million was spent elsewhere in Lee County, and another \$2 million was spent elsewhere in the state. Three-fourths of the expenditures made by main destination visitors occurred in the winter season. However, spending elsewhere in the state

accounted for a larger share of expenditures in the summer than in the winter.

15. Out of state main destination visitors spent \$27.1 million in Lee County during the year 1989-90. Spending on the island totalled \$24.9 million and spending in the rest of the County amounted to \$2.2 million.

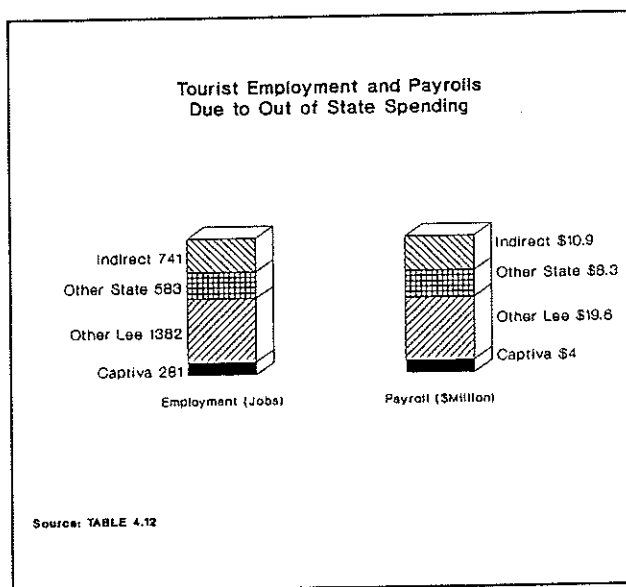


16. Spending elsewhere in the state outside Lee County by main destination out of state visitors to Captiva's beaches amounted to \$2.2 million. The largest expenditures were made in the East Central Florida region, amounting to about \$1.0 million. Spending in Southeast and Southwest Florida each amounted to approximately \$0.5 million. Spending was relatively small in the Tampa area, with virtually no spending in the north.

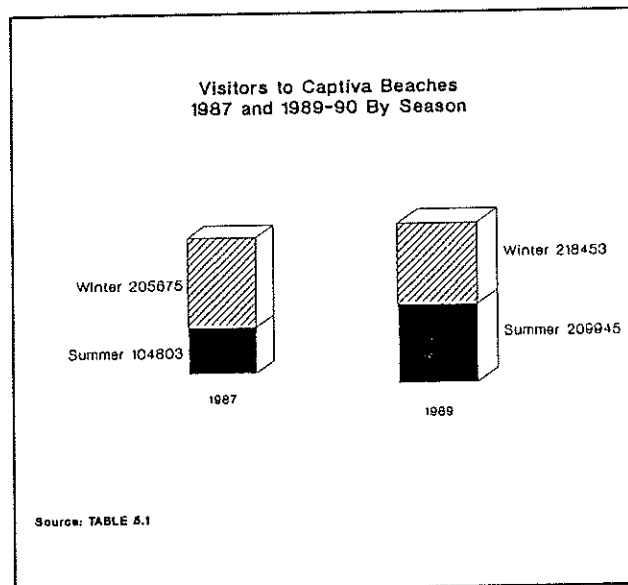


17. The total economic impact of out of state Captiva beach visitors is approximately 3,000 jobs with a payroll of \$48 million. Captiva residents hold 281 jobs, other Lee County residents hold 1,382 of the jobs and there are 583 jobs directly created by the spending of these visitors elsewhere in the state.

There are an additional 741 jobs created by ripple effects throughout the state's economy.



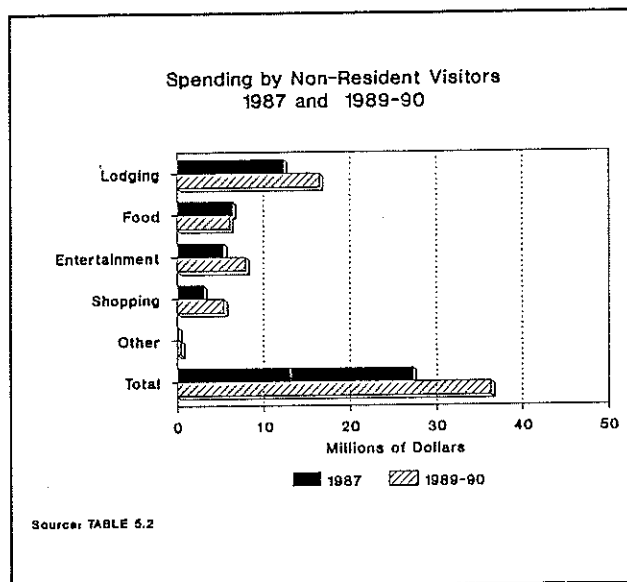
18. The number of users of Captiva's beaches grew from 310,478 to 428,398 between 1987 and 1989-90. There was a doubling of the number of beach visitors between the two summers. The increase in the winter season was only about 6 percent, but this reflected the closing of Turner Beach to



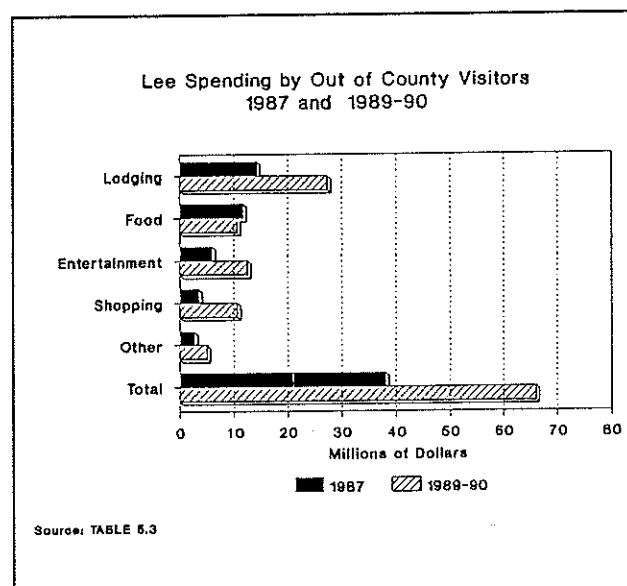
accommodate construction of the new Blind Pass bridge. If the same number of people had visited Turner Beach in the winter as in the summer (which appears to be about its capacity, given parking

constraints), winter use of the beaches would have increased by 27 percent.

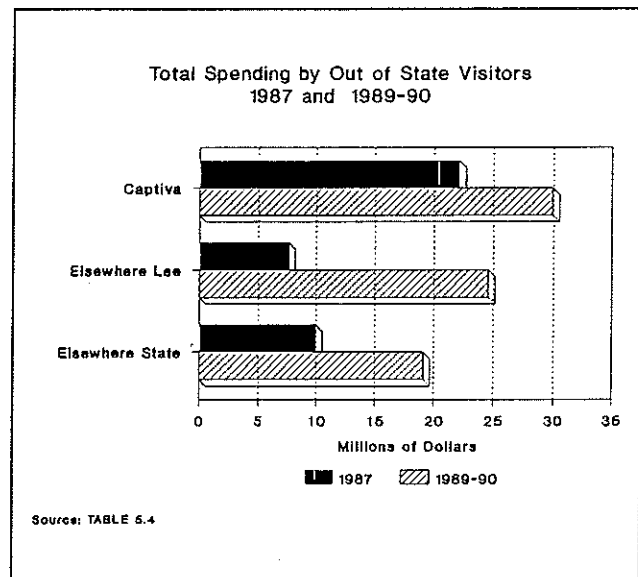
19. Between 1987 and the 1989-90 season, total spending by non-resident visitors to Captiva's beaches grew from \$27.2 million to \$36.3 million, a growth of 33.5 percent. Most of this increase occurred in the summer seasons where spending jumped from \$6.1 million to \$13.2 million.



20. Total spending in Lee County by out of county residents grew from \$38.0 million to \$66.0 million in 1989-90, an increase of 73.7 percent. This increase reflected a rise in beach use of close to 40 percent, and a rise in spending per beach user by over 30 percent.



21. Total spending by out of state beach visitors grew from \$40 million in 1987 to \$73.5 million in 1989-90. Spending in Captiva grew from \$22.1 million to \$29.9 million. Spending elsewhere in Lee County grew from \$7.6 million to \$24.5 million, and spending elsewhere in the State grew from \$10 million to \$19.1 million.



Introduction

This report summarizes the results of surveys of beach users on the gulf-front beaches of Captiva Island that were undertaken in the summer of 1989 and the winter of 1990.

The purpose of the surveys was to measure the economic impact of the beaches on the island, the county and the state. Additionally, the survey represents an updating of previous surveys of Captiva's beaches that were taken prior to the beach restoration project that was commenced in 1988 and was completed in April 1989. As a result, the surveys can be used to measure the effect of the beach restoration on beach use and its economic impact.

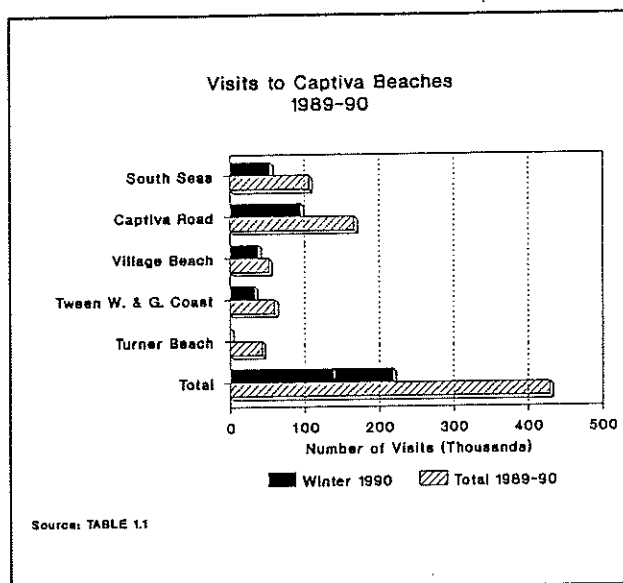
The survey consisted of interviews conducted on the beach with 624 persons during the ten day period ending with September 4, 1989, and 660 persons during the ten day period ending with March 23, 1990. Counts were made of the number of people on the beaches each day and the relationship of beach use during the survey period to hotel occupancy at the two major resorts on the island was used to extrapolate the results to the summer and winter seasons.

The report is divided into six sections. The first section provides estimates of the number of persons on each of Captiva's beaches. Included is a geographical breakdown of beach visitors, and a number of characteristics of their beach experience and opinions. The next three sections provide estimates of spending and its impact by non-resident beach users, out of county beach visitors and out of state visitors. The report concludes with comparisons of the 1987 and 1989-90 survey result.

Beach Use in 1989-90

Beach Use by Beach

During 1989-90, there were a total of 428,400 visits made to Captiva's beaches (TABLE 1.1). Of these, almost 50 percent were found within one-quarter mile each way of the public accesses at the end of Captiva Road and Turner Beach. The number of visits to the public beaches would have been



even higher except that Turner Beach was closed during the Winter months to facilitate construction of the new Blind Pass bridge.

TABLE 1.1
Visits to Captiva Beaches 1989-90

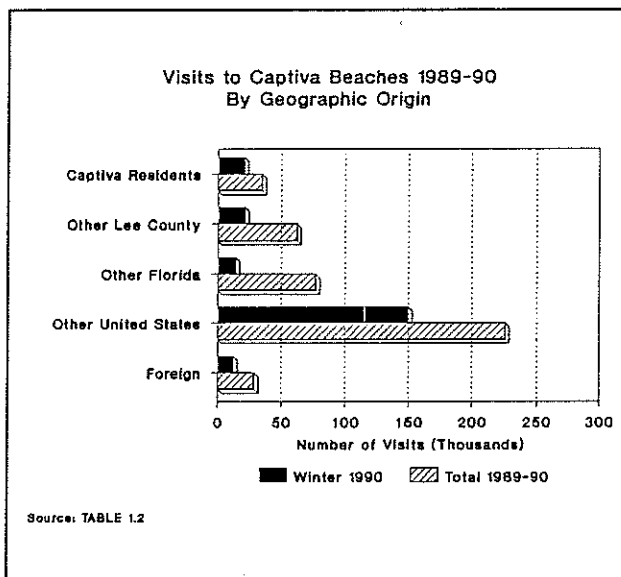
| Beach | Summer 1989 | | Winter 1990 | | Total | |
|---------------|----------------|--------------|----------------|--------------|----------------|--------------|
| | Number | Percent | Number | Percent | Number | Percent |
| South Seas | 52,665 | 25.1 | 53,614 | 24.6 | 106,279 | 24.8 |
| Captiva Road | 71,487 | 34.0 | 95,111 | 43.5 | 166,598 | 38.9 |
| Village | 15,237 | 7.3 | 37,340 | 17.1 | 52,577 | 12.3 |
| Tween Waters- | | | | | | |
| Gold Coast | 27,526 | 13.1 | 32,390 | 14.8 | 59,916 | 14.0 |
| Turner Beach | 43,030 | 20.5 | 0 | 0.0 | 43,030 | 10.0 |
| Total | 209,945 | 100.0 | 218,455 | 100.0 | 428,400 | 100.0 |

Notes: Summer consisted of May through October, and Winter consisted of November through April.

There are more visits made to Captiva's beaches in the winter than in the summer, except in South Seas Plantation where the number of visits remains about the same between the two seasons¹.

Origin of Beach Users

As shown in TABLE 1.2, the vast majority of Captiva beach visits are made by non-residents of the island (91.9 percent). There were almost twice as many visits made to Captiva's beaches by residents of other parts of Lee County as were made by Captiva residents, and there were even more beach visits made



by Floridians from outside Lee County. Almost 60 percent of beach visits were made by people from out of state. The number of beach visits made by foreigners was almost as large as the number of beach visits made by residents of the island.

¹The number of people staying on the South Seas Plantation property was 9 percent less in the summer than in the winter. However, those staying on South Seas Plantation in the summer visit the beach more often than those staying in the winter. This reflects warmer beach temperatures and the shorter Captiva stays of summer visitors.

TABLE 1.2
Visits to Captiva Beaches 1989-90
By Geographic Origin

| Geographic Origin | Summer 1989 | | Winter 1990 | | Total | |
|----------------------|-------------|---------|-------------|---------|---------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Captiva Residents | 13,833 | 6.6 | 20,825 | 9.5 | 34,658 | 8.1 |
| Other Lee County | 41,154 | 19.6 | 21,414 | 9.8 | 62,568 | 14.6 |
| Other Florida | 62,812 | 29.9 | 14,187 | 6.5 | 76,999 | 18.0 |
| Other United States | 75,969 | 36.2 | 149,607 | 68.5 | 225,576 | 52.6 |
| Foreign | 16,177 | 7.7 | 12,422 | 5.7 | 28,599 | 6.7 |
| Total | 209,945 | 100.0 | 218,455 | 100.0 | 428,399 | 100.0 |

The increase in the number of visits by Captiva residents to the beaches during the winter reflects the large number of seasonal residents on the island during that time. Most year round residents of Florida visit the state's beaches more frequently in the summer than in the winter. This is seen by the decline in the number of visits to Captiva's beaches by Lee County and Florida visitors in the winter months, although the decline in these numbers also reflects reduced access due to the closing of Turner beach.

Florida tourism, generally, is dependent on travel to the state by out of state residents during the winter months, and it is dependent on travel within the state by Florida residents during the summer months. This can be seen from the geographic origin of Captiva beach users, where the largest origin is within the state during the summer, and the largest origin is out of state during the winter months.

TABLE 1.3
Lee County Visitors To Captiva Beaches By City
1989-90

| Area of County | Summer 1989 | | Winter 1990 | | Total | |
|-------------------|---------------|--------------|---------------|--------------|---------------|--------------|
| | Number | Percent | Number | Percent | Number | Percent |
| Sanibel | 2,816 | 6.9 | 1,326 | 6.1 | 4,142 | 6.6 |
| Fort Myers | 25,814 | 62.7 | 16,484 | 77.0 | 42,298 | 67.6 |
| Cape Coral | 7,854 | 19.1 | 2,131 | 10.0 | 9,985 | 16.0 |
| Other Lee County | | | | | | |
| Outside Captiva | 4,670 | 11.3 | 1,473 | 6.9 | 6,143 | 9.8 |
| <u>Total</u> | <u>41,154</u> | <u>100.0</u> | <u>21,414</u> | <u>100.0</u> | <u>62,568</u> | <u>100.0</u> |

Notes: Numbers exclude Captiva residents.

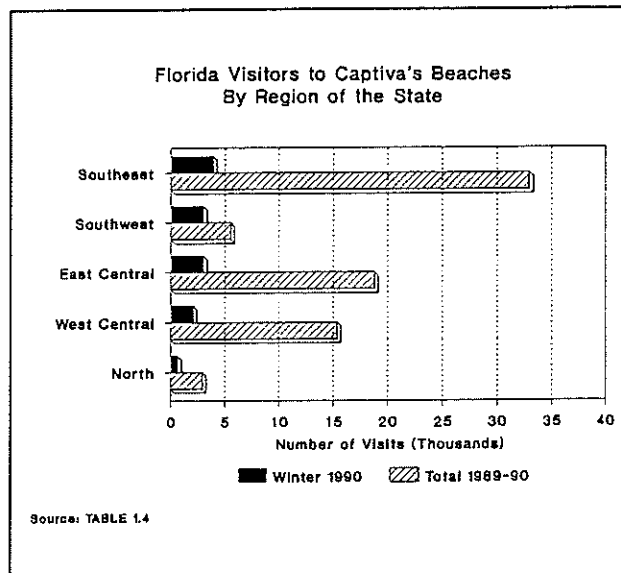
Within Lee County, 42,298 of the 62,568 visits to Captiva's beaches were made by residents of the Fort Myers area (TABLE 1.3). This number was much larger than the number of visits to the island's beaches made by Captiva residents (34,658).

TABLE 1.4
Florida Visitors to Captiva By Region
1989-90

| Region of State | Summer 1989 | | Winter 1990 | | Total | |
|---|---------------|--------------|---------------|--------------|---------------|--------------|
| | Number | Percent | Number | Percent | Number | Percent |
| Southeast (inc. Dade, Broward) | 29,011 | 46.2 | 3,934 | 27.7 | 32,945 | 42.7 |
| Southwest (inc. Naples, Sarasota) | 2,518 | 4.0 | 3,005 | 21.2 | 5,523 | 7.2 |
| East Central (inc. Orlando, Daytona) | 15,790 | 25.1 | 3,003 | 21.2 | 18,793 | 24.4 |
| West Central (inc. Tampa, St. Pete.) | 12,281 | 19.6 | 3,094 | 21.8 | 15,375 | 20.0 |
| North (inc. JAX, Pensacola) | 2,284 | 3.6 | 642 | 4.5 | 2,926 | 3.8 |
| Unknown | 928 | 1.5 | 509 | 3.6 | 1,437 | 1.9 |
| <u>Total</u> | <u>62,812</u> | <u>100.0</u> | <u>14,187</u> | <u>100.0</u> | <u>76,999</u> | <u>100.0</u> |

Notes: Southwest Florida figures exclude Lee County residents.

A breakdown of visitors to Captiva's beaches from areas of Florida outside Lee County is provided in TABLE 1.4. Florida visitors to Captiva's beaches come from all around the state, with the largest group coming from southeast Florida, and a little more coming from east central than from west central



Florida. A much smaller number of visits is made to Captiva's beaches made by other residents of southwest Florida outside Lee County.

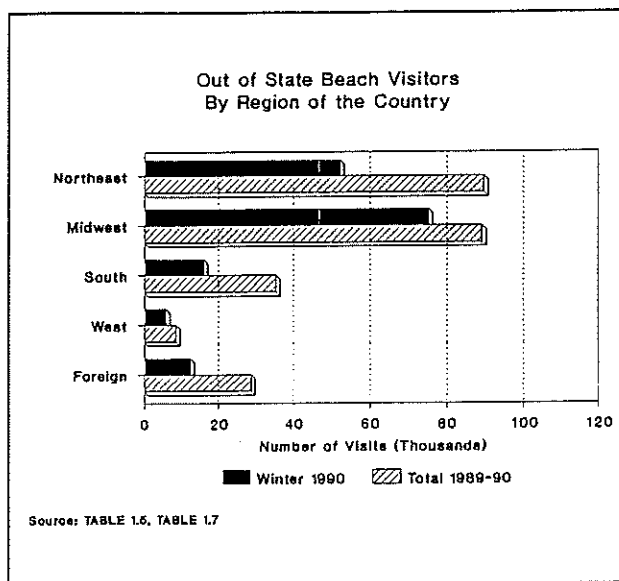
TABLE 1.5
U.S. Visitors to Captiva
1989-90

| Region of Nation | Summer 1989 | | Winter 1990 | | Total | |
|------------------|-------------|---------|-------------|---------|---------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Northeast | 37,487 | 49.3 | 52,173 | 34.9 | 89,660 | 39.8 |
| Midwest | 13,826 | 18.2 | 75,321 | 50.3 | 89,147 | 39.5 |
| South | 19,271 | 25.4 | 16,013 | 10.7 | 35,284 | 15.6 |
| West | 2,728 | 3.6 | 5,919 | 4.0 | 8,647 | 3.8 |
| Unknown | 2,657 | 3.5 | 181 | 0.1 | 2,838 | 1.3 |
| Total | 75,969 | 100.0 | 149,607 | 100.0 | 225,576 | 100.0 |

Notes: Figures exclude Florida residents.

Captiva also draws visitors to its beaches from a large number of states in the nation (TABLE 1.5). About 40 percent of the out of state beach visits were made by residents of the northeast United States, and a similar number were made by midwest visitors.

The northeast supplies about 50 percent of the out of state visitors to Captiva in the summer, and the midwest supplies about 50 percent of the out of state visitors to Captiva during the winter. More people from the southern United States visit Captiva's beaches in the summer than in the winter.



There were 28,599 visits made by residents of foreign countries to Captiva's beaches during 1989-90 (TABLE 1.6). Three countries accounted for over 90 percent of these visits (the United Kingdom 35.3 percent, West Germany 29.4 percent and Canada 25.9 percent). British use of the beaches declined between the summer and the winter, while Canadian use increased. German use of the beaches remained fairly stable though the year. There was little use of the beaches by Central and South Americans.

TABLE 1.6
Foreign Visitors to Captiva By Country
1989-90

| Country | Summer 1989 | | Winter 1990 | | Total | |
|----------------|-------------|---------|-------------|---------|--------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| United Kingdom | 8,193 | 50.6 | 1,903 | 15.3 | 10,096 | 35.3 |
| Germany | 3,793 | 23.5 | 4,602 | 37.0 | 8,395 | 29.3 |
| Canada | 2,311 | 14.3 | 5,090 | 41.0 | 7,401 | 25.9 |
| Other Foreign | 1,880 | 11.6 | 827 | 6.7 | 2,707 | 9.5 |
| Total | 16,177 | 100.0 | 12,422 | 100.0 | 28,599 | 100.0 |

Beach Visit Characteristics

A number of characteristics of the beach visit are summarized in TABLE 1.7. Over 80 percent of beach users came for swimming or sunning. Swimming or sunning was relatively more popular in the

TABLE 1.7
Characteristics of the Beach Visit
Summer 1989 and Winter 1990

| Visit Purpose | Summer Percent | Winter Percent | Other Characteristics | Summer | Winter |
|---------------------|----------------|----------------|---------------------------------|--------|--------|
| Swimming or Sunning | 90.1 | 83.2 | Average Party Size | 3.3 | 3.4 |
| Walking or Shelling | 7.3 | 12.1 | Average Hours Spent | 3.5 | 3.4 |
| Other | 2.7 | 4.6 | Percent Who Parked At the Beach | 46.5 | 37.5 |
| Total | 100.0 | 100.0 | | | |

summer, with walking or shelling rising in popularity in the winter months. The average number of persons in a beach party was about 3.3 in both the winter and the summer. The average length of time spent on the beach was between just under 3.5 hours, with beachstays a little longer in the summer months. Almost 50 percent parked at the beach in the summer, and this percentage declined in the winter as Turner Beach was closed. During the year as a whole 42 percent of beach visits were made by persons who had parked at the beach.

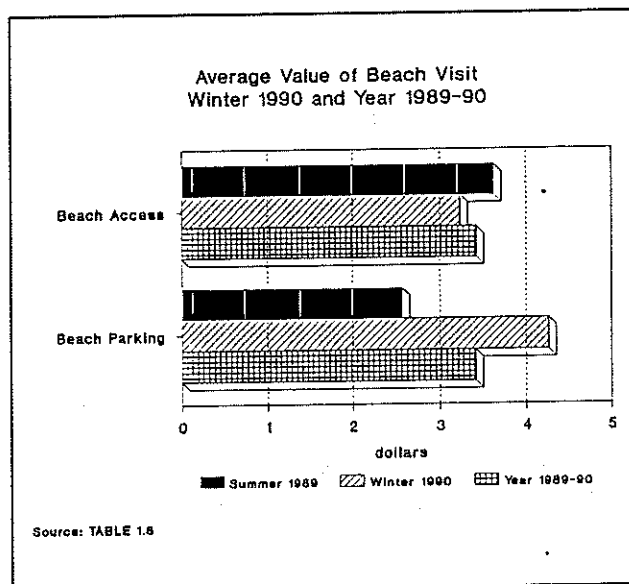
Opinions About Captiva Beaches

More than three of every four Captiva beach users rated Captiva's beach as one of the top three beaches that they had ever visited (TABLE 1.8), with higher ratings received in the summer

TABLE 1.8
Opinions About Captiva's Beaches
Winter 1989-90

| | Summer | Winter | Total |
|---|---------|---------|---------|
| Average Opinion of Fair Beach Parking Fee | \$ 2.57 | \$ 4.26 | \$ 3.41 |
| Average Willingness to Pay for Beach Day Access | \$ 3.62 | \$ 3.23 | \$ 3.42 |
| Percent Rating Captiva One of Three Favorite Beaches | 81.7 | 73.5 | 77.5 |
| Percent Who Believe County Should Pay for Beach Maintenance | 85.6 | 86.8 | 86.2 |

than in the winter². They indicated that the value of their beach experience on the day interviewed was \$3.42, and they thought that a fair beach parking fee would have been \$3.41, or about \$1.00 for each hour they spent on the beach. Almost 87 per cent believed that the local County government pay to maintain Captiva's beaches.



²Summer visitors contained a larger share of Floridians who may be less well traveled than the out of State visitors who predominate in the winter months.

Economic Impact of Beach Use on Captiva

Non-resident beach users have a positive impact on Captiva's economy by creating sales and, as result, employment and income for Captiva's businesses.

Expenditures by Non-Resident Beach Users

During 1989-90, non-residents visited Captiva's beaches a total of 393,742 times. They spent over \$36 million on the island during their stay (TABLE 2.1). About 46 percent of these expenditures were for lodging, with most of the rest for food, dining and entertainment.

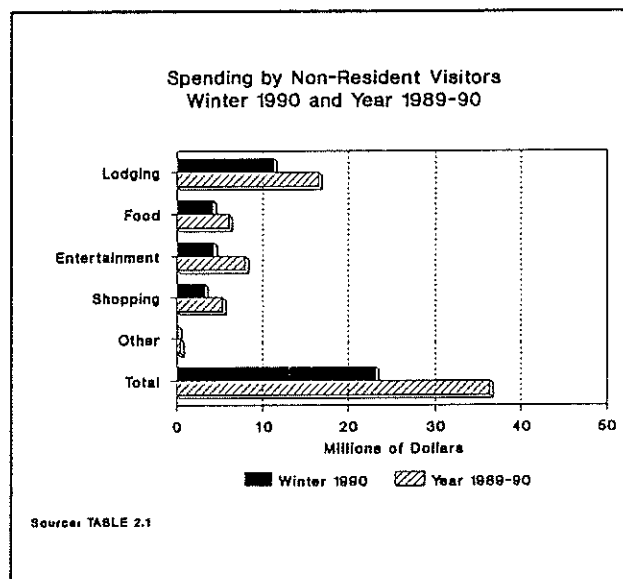


TABLE 2.1
Spending on Captiva by Non-Resident Beach Visitors
1989-90

| Type | Summer | Winter | Total |
|---------------|--------------|---------------|---------------|
| Lodging | \$ 5,305,470 | \$ 11,244,539 | \$ 16,550,009 |
| Food | 1,852,745 | 4,206,462 | 6,059,207 |
| Entertainment | 3,596,045 | 4,284,821 | 7,880,866 |
| Shopping | 2,074,241 | 3,259,029 | 5,333,270 |
| Other | 323,123 | 149,595 | 472,718 |
| Total | 13,151,624 | 23,144,446 | 36,296,070 |

Although lodging accounted for the largest share of spending, TABLE 2.2 shows that close to 50 percent of winter Captiva Beach visits were made by day visitors. This number would have been even higher if Turner beach was not closed. About one in three beach visitors stayed in condominium or interval apartments.

TABLE 2.2
Lodging of Non-Resident Captiva Beach Visitors
1989-90

| <u>Lodging Type</u> | <u>Summer</u> | <u>Winter</u> | <u>Total</u> | <u>Percent</u> |
|---------------------|----------------|----------------|----------------|----------------|
| No Lodging i.e. | | | | |
| Day Visitor | 97,759 | 78,185 | 175,944 | 44.7 |
| Hotel-Motel | 11,128 | 23,064 | 34,192 | 8.7 |
| Condominium | | | | |
| inc. Interval | 79,658 | 61,223 | 140,881 | 35.8 |
| House or Room | 7,568 | 35,155 | 42,724 | 10.9 |
| <u>Total</u> | <u>196,112</u> | <u>197,629</u> | <u>393,741</u> | <u>100.0</u> |

Note: this lodging breakdown refers to persons counted on the beaches. Tourists on Captiva did not, on average, visit the beach every day. In the summer months, Captiva tourists visited the beach approximately two out of every three days. In the winter months, Captiva tourists, on average, visited the beach approximately once every two days.

Over 140,000 beach visitors stayed in condominium apartments. Of these, 30,376 stayed in interval units which generated about 280 beach visits per each of 106 units, compared to about 180 beach visits per each of 607 wholly owned condominium units.¹

Employment and Payrolls

The vast majority of all employment on Captiva Island is

¹53 Sunset Captiva units were included in the condominium total.

directly or indirectly related to the beach. A business survey undertaken in the winter of 1990 identified 1,219 jobs on the island (TABLE 2.3). Of these, 1,129 were full-time and 90 were part-time. There was little decline in employment reported in the summer season.

The largest industry on the island consists of the resorts, with 862 employees accounting for over 70 percent of all jobs on

TABLE 2.3
Employment in Captiva By Industry
1989-90

| Industry | Full-time | Part-time | Total |
|-------------------------------------|-----------|-----------|-------|
| Finance, Insurance & Real Estate | 15 | 16 | 31 |
| Government & Institutional | 11 | 3 | 14 |
| Resorts | 842 | 20 | 862 |
| Restaurants | 189 | 3 | 192 |
| Services | 19 | 1 | 20 |
| Stores | 53 | 47 | 100 |
| Total Winter | 1,129 | 90 | 1,219 |
| Total Summer | 1,114 | 81 | 1,195 |
| Average Annual Emp. | 1,121 | 86 | 1,207 |
| Tourist Employment | 1,030 | 79 | 1,109 |

the island. Restaurants are the second largest industry employing 192 persons, and there are 100 jobs in stores. These are the businesses most impacted by tourist spending and they account for about 95 percent of the jobs.

Tourists on Captiva create 1,109 of the 1,207 jobs on the island.² These 1,109 jobs had an estimated payroll of \$15.75

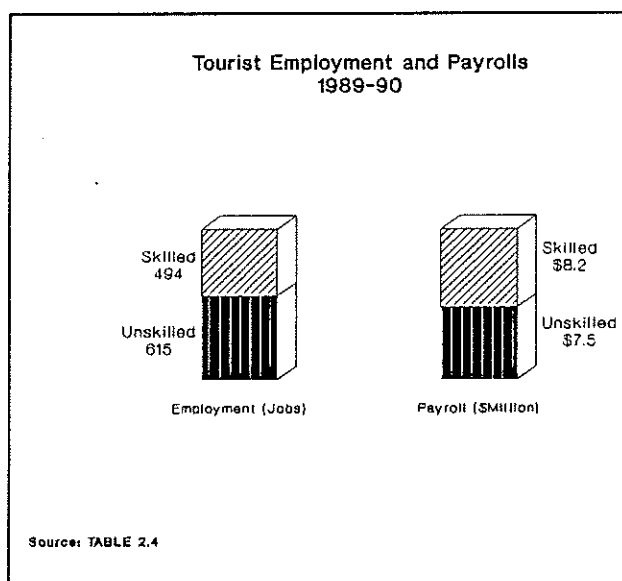
²The percentage of beach visits accounted for by residents was used to estimate the percent of jobs on Captiva due to the spending of residents. The average tourist visits the beach more often than the average resident, since frequency of beach use declines with

million.³

TABLE 2.4
Payroll in Captiva Due to Tourism
1989-90

| Item | Unskilled | Skilled | Total |
|------------------|--------------|--------------|--------------|
| Jobs | 615 | 494 | 1,109 |
| Average Reported | | | |
| Annual Wage | \$ 12,255 | \$ 16,627 | \$ 14,202 |
| Total Wages | \$ 7,536,825 | \$ 8,213,738 | \$15,750,563 |

The spending figure in TABLE 2.1 and the payroll figure in TABLE 2.4 show that the \$36.3 million spent by non-resident beach users on Captiva directly results in \$15.8 million in payrolls. Although most communities experience some ripple effect of these expenditures, the nature of



length of stay on the island. However, the average tourist spends more per day than does the average resident, so that residents' share of beach visits will be close to residents' share of spending.

³Data on wages and earnings are difficult to obtain, particularly for trade and service industries which predominate on Captiva. The survey provided some information on skill levels and average wages. It showed average annual earnings reported to be \$12,255 in unskilled jobs and \$16,627 in skilled jobs. The overall average was \$14,202. This can be compared with average earnings reported for Lee County of \$16,769 in 1987. The island's greater dependence on trade and service industries is consistent with a lower average wage. In addition, the employees in these industries may receive tips or commissions, and subsidized housing and food.

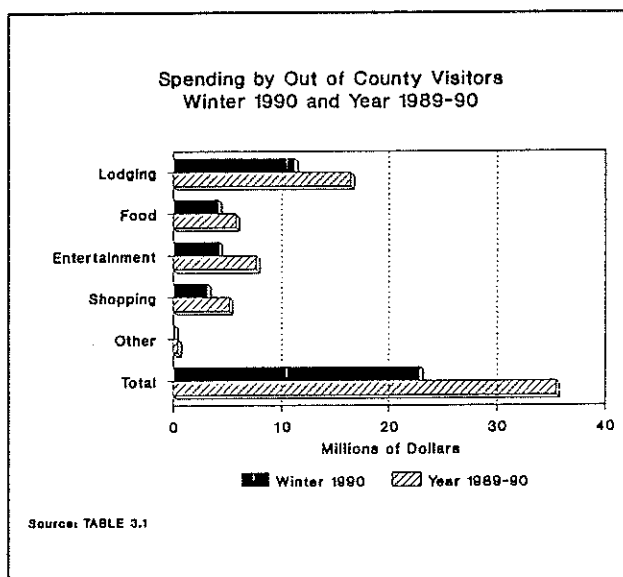
Captiva's economy make the ripple effect insignificant. This is because there are few local suppliers to the tourist industry and most of the labor force does not live on Captiva.

Economic Impact on Lee County

Captiva's beach visitors make expenditures in other parts of Lee County as well as on Captiva itself. When these expenditures are made by out of county residents, they create employment and income elsewhere in the County.

Spending by Out of County Beach Visitors:

A total of 331,174 beach visits were made by non-residents of Captiva or elsewhere in Lee County. Although these out of county beach visitors accounted for 84 percent of non-resident beach visits, their spending on Captiva (\$35.4 million) was 97.0 percent of total non-resident



spending. The island receives little economic impact from beach visitors who are residents of other parts of Lee County.

TABLE 3.1
Spending on Captiva by Out of County Beach Visitors
1989-90

| Type | Summer | Winter | Total |
|---------------|--------------|---------------|---------------|
| Lodging | \$ 5,215,373 | \$ 11,244,170 | \$ 16,459,543 |
| Food | 1,672,321 | 4,081,193 | 5,753,514 |
| Entertainment | 3,442,757 | 4,188,153 | 7,630,910 |
| Shopping | 2,003,732 | 3,141,950 | 5,145,682 |
| Other | 289,985 | 150,413 | 440,398 |
| Total | 12,624,168 | 22,805,879 | 35,430,047 |

TABLE 3.2
Lodging of Out of County Captiva Beach Visitors
1989-90

| Lodging Type | Summer | Winter | Total | Percent |
|-----------------|---------|---------|---------|---------|
| No Lodging i.e. | | | | |
| Day Visitor | 58,732 | 57,160 | 115,892 | 35.0 |
| Hotel-Motel | 10,080 | 23,064 | 33,144 | 10.0 |
| Condominium | | | | |
| inc. Interval | 78,914 | 61,223 | 140,137 | 42.3 |
| House or Room | 7,232 | 34,768 | 42,000 | 12.7 |
| Total | 154,958 | 176,215 | 331,173 | 100.0 |

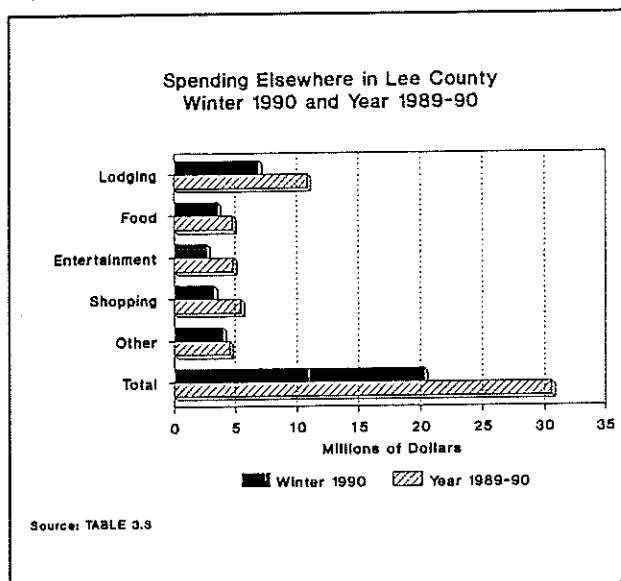
TABLE 3.2 shows that even a significant proportion of the out of county beach visitors do not stay overnight on Captiva (35.0 percent). This is because Captiva's beaches draw day visitors from outside the county, as well as drawing tourists staying in other parts of Lee County. More than 42 percent of out of county visitors to Captiva stay in a condominium or interval unit, about 10 percent stay in hotels and one in eight stays in a private residence.

TABLE 3.3
Spending Elsewhere in Lee County by
Out of County Captiva Beach Visitors
1989-90

| Type | Summer | Winter | Total |
|---------------|--------------|--------------|---------------|
| Lodging | \$ 4,020,547 | \$ 6,885,550 | \$ 10,906,097 |
| Food | 1,271,138 | 3,522,995 | 4,794,133 |
| Entertainment | 2,191,242 | 2,653,945 | 4,845,187 |
| Shopping | 2,186,881 | 3,265,623 | 5,452,504 |
| Other | 590,872 | 3,964,205 | 4,555,077 |
| Total | 10,260,680 | 20,292,318 | 30,552,998 |

TABLE 3.3 shows that out of county visitors to Captiva's beaches during 1989-90 spent \$30.6 million elsewhere in Lee County. The amount spent outside Captiva is relatively large because many visitors to Lee County make only a day visit to Captiva so that their island spending is only a small

fraction of their total spending in the County. Three fourths of their spending is made on Sanibel.



Spending by Main Destination Beach Visitors:

A more conservative concept of economic impact focuses on the main destination of beach visitors. A main destination visitor to Captiva is an individual who spends more on lodging on Captiva than elsewhere in the County, or who is a day visitor to the county who visits Captiva's beaches. Such an individual can be presumed to have visited the county as a result of being attracted by Captiva.

TABLE 3.4 shows that 275,234 Captiva beach visits were made by out of county main destination visitors to Captiva. These accounted for 64 percent of all persons found on the beaches of Captiva during 1989-90 (428,400). About one in four of these main

TABLE 3.4
Lodging of Out of County Main Destination
Captiva Beach Visitors
By Type
1989-90

| Lodging Type | Summer | Winter | Total | Percent |
|-----------------|---------|---------|---------|---------|
| No Lodging i.e. | | | | |
| Day Visitor | 32,586 | 33,816 | 66,672 | 24.2 |
| Hotel-Motel | 10,080 | 21,312 | 31,392 | 11.5 |
| Condominium | | | | |
| inc. Interval | 78,914 | 57,712 | 136,626 | 49.6 |
| House or Room | 7,232 | 33,312 | 40,544 | 14.7 |
| Total | 129,082 | 146,152 | 275,234 | 100.0 |

destination visitors were day visitors to the county, with the remaining three fourths spending the majority of their lodging expenditures on the island.

TABLE 3.5
Spending on Captiva by Out of County
Main Destination Captiva Beach Visitors
1989-90

| Type | Summer | Winter | Total |
|---------------|--------------|---------------|---------------|
| Lodging | \$ 5,217,117 | \$ 10,721,181 | \$ 15,938,298 |
| Food | 1,506,527 | 3,679,039 | 5,185,566 |
| Entertainment | 2,880,463 | 3,619,986 | 6,500,449 |
| Shopping | 1,623,744 | 2,568,832 | 4,192,576 |
| Other | 249,807 | 144,681 | 394,488 |
| Total | 11,477,658 | 20,733,719 | 32,211,377 |

The economic impact on Captiva of casual visitors to the island is very small, since the main destination visitors' expenditures (\$32.2 million) accounted for 90.7 percent of total out of county spending on the island. Spending of main destination visitors is almost twice as large in the winter than in the summer months.

In 1989-90, main destination visitors spent \$32.2 million on Captiva, with almost of these expenditures accounted for by lodging. Entertainment was the second largest component of spending (\$6.5 million), followed by food (\$5.2 million) and shopping (\$4.2 million). The distribution of spending across categories was similar in each of the two seasons.

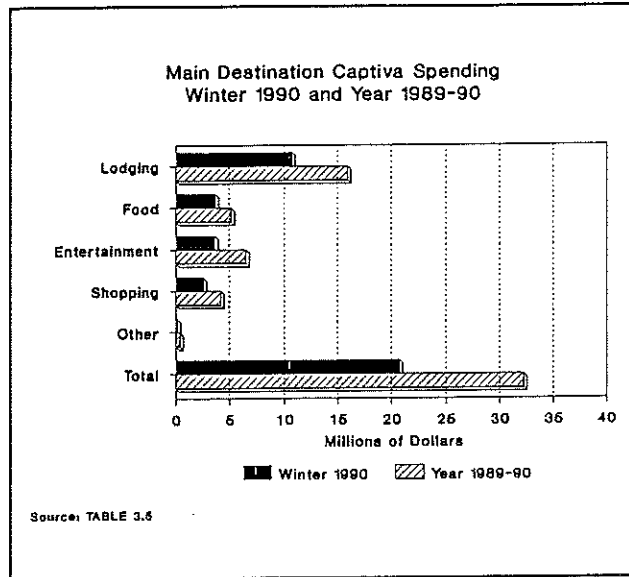


TABLE 3.6
Spending Elsewhere in Lee County by Out of County
Main Destination Captiva Beach Visitors
1989-90

| Type | Summer | Winter | Total |
|---------------|-----------|------------|------------|
| Lodging | \$ 32,667 | \$ 250,978 | \$ 283,645 |
| Food | 426,593 | 1,547,204 | 1,973,797 |
| Entertainment | 866,637 | 1,378,902 | 2,245,539 |
| Shopping | 1,293,230 | 1,869,046 | 3,162,276 |
| Other | 418,907 | 2,264,706 | 2,683,613 |
| Total | 3,038,034 | 7,310,836 | 10,348,870 |

Main destination visitors to Captiva spent \$10.3 million elsewhere in Lee County during 1989-90. This amounted to 33.7 percent of the spending elsewhere in Lee County by out of county visitors to Captiva's beaches (\$30.5 million).

Employment and Payrolls

Jobs and payrolls are created for Lee County residents who do not live on Captiva as a result of spending by Captiva tourists elsewhere in the county and also as a result of their spending creating jobs and payroll for Lee County residents who commute to Captiva for work. The business survey showed that 69 percent of the jobs on Captiva itself are held by residents of other parts of Lee County.

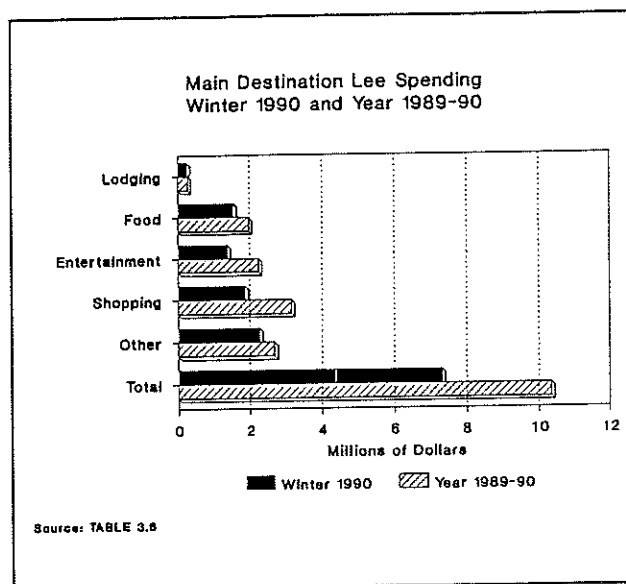
TABLE 3.8
Employment and Payrolls Elsewhere in Lee County
Created by Out of County Captiva Beach Visitors
1989-90

| Type | Captiva | Elsewhere in County | Total |
|------------|---------------|------------------------|------------|
| Spending | \$ 24,517,593 | 30,552,998 | 55,070,591 |
| Employment | 749 | 934 | 1,683 |
| Payrolls | \$ 10,637,298 | 13,264,668 | 23,901,966 |

Note: Spending that creates jobs for non-residents on Captiva is 69.2 percent of total spending on Captiva by non-residents. The Captiva jobs and payrolls per dollar of tourist spending are applied throughout the County.

Out of county visitors to Captiva's beaches created 1,683 jobs for county residents who do not live on Captiva as a result of their spending (TABLE 3.8). A total of 749 jobs were created on Captiva itself, and an additional 934 were created elsewhere in the county. A minimum estimate of the payroll created was \$23.9 million.

The largest category of spending was shopping (\$3.2 million) and lodging expenditures were relatively insignificant, since main destination visitors either stay on Captiva or outside Lee County. Over 70 percent of the spending by main destination visitors elsewhere in Lee County occurred during the winter season.



Adding spending on Captiva to spending elsewhere in the County, TABLE 3.7 shows that out of county main destination visitors to Captiva spent over \$42 million in Lee County during 1989-90. In other words, people attracted to the county by Captiva and, therefore, by Captiva's beaches, spent over \$42 million in the county during 1989-90. These visitors spent about 25 cents of every dollar elsewhere in the county outside Captiva.

TABLE 3.7
Total Spending in Lee County by Out of County
Main Destination Captiva Beach Visitors
1989-90

| Type | Captiva | Elsewhere in County | Total |
|---------------|---------------|------------------------|---------------|
| Lodging | \$ 15,938,298 | \$ 283,645 | \$ 16,221,943 |
| Food | 5,185,566 | 1,973,797 | 7,159,363 |
| Entertainment | 6,500,449 | 2,245,539 | 8,745,988 |
| Shopping | 4,192,576 | 3,162,276 | 7,354,852 |
| Other | 394,488 | 2,683,613 | 3,078,101 |
| Total | 32,211,377 | 10,348,870 | 42,560,247 |

TABLE 3.9
Employment and Payrolls Elsewhere in Lee County
Created by Main Destination Captiva Beach Visitors
1989-90

| Type | Captiva | Elsewhere in County | Total |
|------------|---------------|------------------------|------------|
| Spending | \$ 22,290,273 | 10,348,870 | 32,639,143 |
| Employment | 681 | 316 | 997 |
| Payrolls | \$ 9,671,562 | 4,487,832 | 14,159,394 |

Note: See previous TABLE.

Main destination Out of county visitors to Captiva's beaches created 997 jobs for county residents who do not live on Captiva as a result of their spending (TABLE 3.9). A total of 681 jobs were created on Captiva itself, and an additional 316 were created elsewhere in the county. A minimum estimate of the payroll created was \$14.2 million.

TABLE 3.10
Total Employment and Payrolls in Lee County
Created by Out of County Captiva Beach Visitors
1989-90

| Type | Captiva Residents | Other Lee Residents | Total |
|--------------------------------------|----------------------|------------------------|------------|
| <u>Out of County Beach Visitors:</u> | | | |
| Employment | 334 | 1,683 | 2,017 |
| Payrolls | \$ 4,743,468 | 23,901,966 | 28,645,434 |
| <u>Main Destination Visitors:</u> | | | |
| Employment | 303 | 997 | 1,300 |
| Payrolls | \$ 4,303,206 | 14,159,394 | 18,462,600 |

TABLE 3.10 combines the jobs created for Captiva residents with those created for residents of other parts of the county. Out

of county Captiva beach visitors created 2,017 jobs in the county in 1989-90 and directly generated a payroll of \$28.6 million. Main destination visitors created 1,300 jobs with a payroll of \$18.5 million.

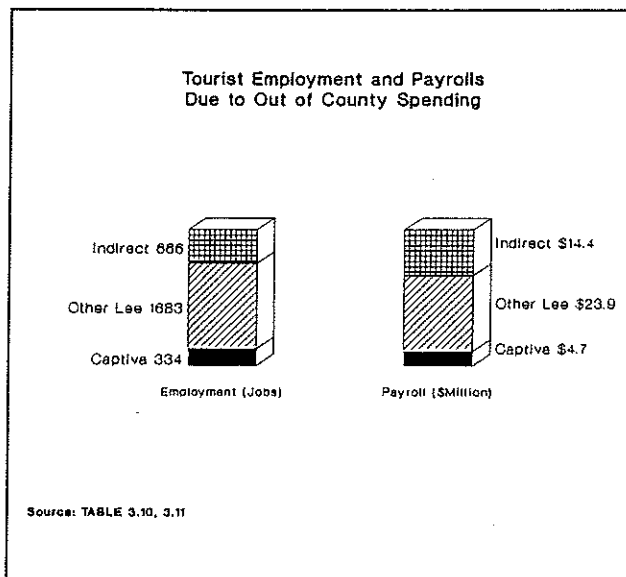
The employment and payroll estimates given in TABLE 3.10 can be increased as a result of the ripple or multiplier effect of additional employment and payrolls in the supplying industries to the frontline tourist industries, as well as in the industries that supply consumer goods and services to the employees in industries which expand as a result of the spending of Captiva beach visitors.

TABLE 3.11
Total Employment and Payrolls in Lee County Created
by Out of County Captiva Beach Visitors
1989-90

| Type | Direct Impact | Multiplier | Total Impact |
|--------------------------------------|------------------|------------|-----------------|
| <u>Out of County Beach Visitors:</u> | | | |
| Employment | 2,017 | 1.33 | 2,683 |
| Payrolls | \$ 28,645,434 | 1.50 | 42,968,151 |
| <u>Main Destination Visitors:</u> | | | |
| Employment | 1,300 | 1.33 | 1,773 |
| Payrolls | \$ 18,462,600 | 1.50 | 27,693,900 |

Estimates of these ripple effects from other studies suggest that one additional job is created by the ripple effects for every three direct jobs created, and that payrolls expand by approximately 50 percent. Thus the appropriate multipliers are 1.33 for jobs and 1.50 for payrolls.

In sum, the total economic impact of out of county Captiva beach visitors in Lee County is approximately 2,700 jobs and a payroll of close to \$43 million. Main destination out of county visitors create about 1,800 jobs and generate a payroll of over \$27 million.

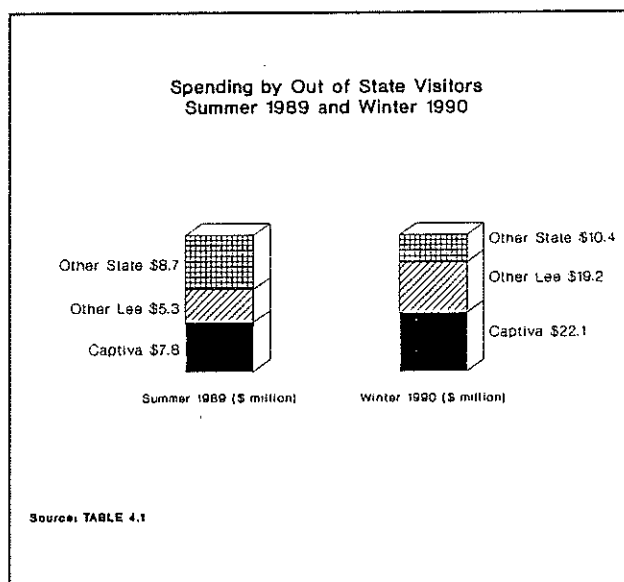


Impact on the State of Florida

Captiva's beaches are also an attraction to out of state visitors. Such beach users make expenditures not only on Captiva or elsewhere in Lee County, but also elsewhere in the state. These expenditures create employment, income and government revenues beyond Lee County.

Spending by Out of State Beach Visitors:

A total of 254,175 visits were made to Captiva's beaches by non-residents of the state during 1989-90. TABLE 4.1 shows that these out of state visitors to Captiva's beaches spent \$73.5 million during their stay in Florida. More than 40 percent of their spending occurred on Captiva, with about 33 percent spent elsewhere in Lee County.



Out of state beach visitors spent \$19.0 million elsewhere in the state during 1989-90. This amounted to 25.8 percent of their total spending, or over 60 percent of the amount they spent on

TABLE 4.1
 Spending in Lee County and Statewide
 by Out of State Beach Visitors
 1989-90

| Location | Summer | Winter | Total |
|-------------------------|--------------|---------------|---------------|
| Captiva | \$ 7,776,047 | \$ 22,135,425 | \$ 29,911,472 |
| Elsewhere in Lee County | 5,349,325 | 19,195,982 | 24,545,307 |
| Total in Lee County | 13,125,372 | 41,331,407 | 54,456,779 |
| Elsewhere in the State | 8,720,234 | 10,366,024 | 19,086,258 |
| Total in the State | 21,845,606 | 51,697,431 | 73,543,037 |

Captiva. The amount spent by Captiva out of state beach visitors elsewhere in the state was more than 70 percent of what they spent elsewhere in Lee County.

A breakdown of out of state visitors' expenditures in Lee County by category is given in TABLE 4.2. These visitors spent \$54.4 million in Lee County during the year 1989-90. Spending on the island totalled \$29.8 million and spending in the rest of the County amounted to \$24,545,307. The largest category of expenditure was lodging, followed by food, entertainment and shopping.

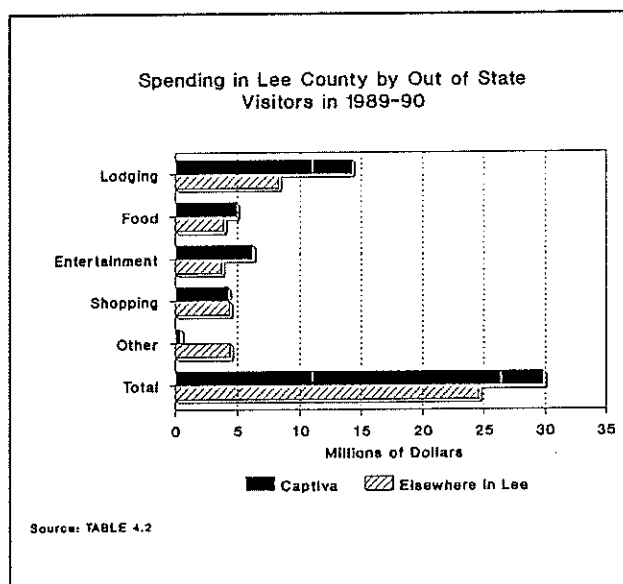


TABLE 4.2
Spending in Lee County
by Out of State Beach Visitors
Total 1989-90

| Type | Captiva | Rest of County | Total in County |
|------------------|---------------|-------------------|--------------------|
| Lodging | \$ 14,193,922 | \$ 8,230,302 | 22,424,224 |
| Food | 4,875,279 | 3,856,871 | 8,732,150 |
| Entertainment | 6,148,472 | 3,709,296 | 9,857,768 |
| Shopping | 4,242,831 | 4,349,625 | 8,592,456 |
| Gasoline & Other | 361,418 | 4,399,213 | 4,760,631 |
| Total | 29,821,922 | 24,545,307 | 54,367,229 |

Summer expenditures of out of state beach visitors amounted to \$13.1 million, of which the largest category was lodging, followed by entertainment and shopping (TABLE 4.3). Spending on Captiva exceeded spending elsewhere in the County by almost 50 percent. Shopping expenditures were higher in Lee County than on Captiva. All automobile gasoline expenditures were made off Captiva where there is no gas station.

TABLE 4.3
Spending in Lee County
by Out of State Beach Visitors
Summer 1989-90

| Type | Captiva | Rest of County | Total in County |
|------------------|--------------|-------------------|--------------------|
| Lodging | \$ 3,200,088 | \$ 1,659,781 | 4,859,869 |
| Food | 917,247 | 628,199 | 1,545,446 |
| Entertainment | 2,105,558 | 1,231,989 | 3,337,547 |
| Shopping | 1,278,237 | 1,363,024 | 2,641,261 |
| Gasoline & Other | 232,523 | 466,332 | 698,855 |
| Total | 7,733,653 | 5,349,325 | 13,082,978 |

Winter expenditures amounted to \$41.3 million, about three times the level of summer expenditures (TABLE 4.4). Spending on Captiva exceeded spending elsewhere in the County by about 15 percent. The closing of Turner beach reduced the number of out of state day visitors to Captiva, so that a higher proportion of out of state visitors were staying elsewhere in the county.

TABLE 4.4
Spending in Lee County
by Out of State Beach Visitors
Winter 1989-90

| Type | Captiva | Rest of County | Total in County |
|------------------|---------------|-------------------|--------------------|
| Lodging | \$ 10,993,834 | \$ 6,570,521 | 17,564,355 |
| Food | 3,958,032 | 3,228,672 | 7,186,704 |
| Entertainment | 4,042,914 | 2,477,307 | 6,520,221 |
| Shopping | 2,964,594 | 2,986,601 | 5,951,195 |
| Gasoline & Other | 128,895 | 3,932,881 | 4,061,776 |
| Total | 22,088,269 | 19,195,982 | 41,284,251 |

TABLE 4.5 shows spending elsewhere in the state outside Lee County by out of state visitors to Captiva's beaches. The largest expenditures were made in the Southwest Florida region (\$7.4 million). Spending in Southwest Florida included spending in Sarasota and Naples, as well as Everglades trips.

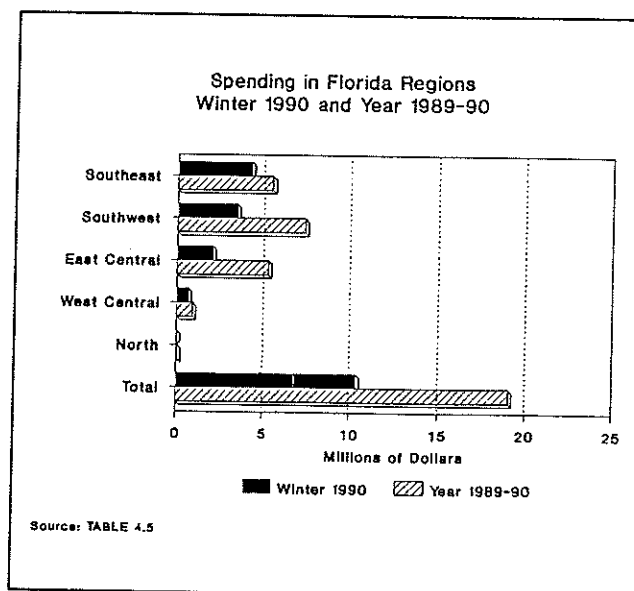


TABLE 4.5
 Spending in Florida Outside Lee County
 by Out of State Beach Visitors to Captiva

| <u>Region</u> | <u>Summer</u> | <u>Winter</u> | <u>Total Spending</u> |
|----------------------|------------------|-------------------|---------------------------|
| Southeast Florida | 1,243,551 | 4,238,882 | 5,482,433 |
| Southwest Florida | 3,949,045 | 3,428,769 | 7,377,814 |
| East Central Florida | 3,252,759 | 2,021,537 | 5,274,296 |
| West Central Florida | 253,078 | 659,185 | 912,263 |
| North Florida | 21,801 | 17,651 | 39,452 |
| <u>Total</u> | <u>8,720,234</u> | <u>10,366,258</u> | <u>19,076,258</u> |

Spending was over \$5.0 million in Southeast Florida and also in East Central Florida. In addition to spending in Miami, Fort Lauderdale and West Palm Beach, this region also included spending in the Florida Keys, an additional destination cited by many visitors to Captiva. Spending in East Central Florida included spending at Disneyworld and other theme parks, as well as spending in the Cape Kennedy area.

Spending in the Tampa area (West Central Florida) was relatively small, and there was almost no spending in North Florida (St. Augustine was the only named attraction).

Spending by Captiva Main Destination Visitors:

Once again, it is possible to use the more conservative main destination concept for examining economic impact. It was not possible to distinguish main destination visitors on the basis of lodging expenditures, since a breakdown of expenditures elsewhere

in the state was not obtained during personal interviews. Instead, main destination out of state visitors were defined to be those who spent the largest amount at their Captiva destination, compared to the other parts of the state they visited.

A total of 151,119 visits were made to Captiva's beaches by non-residents of the state whose main destination was Captiva during 1989-90. These amounted to almost 60 percent of the beach visits made by non-residents of the state.

TABLE 4.6
Spending in Lee County and Statewide
by Out of State Main Destination Beach Visitors
1989-90

| <u>Location</u> | <u>Summer</u> | <u>Winter</u> | <u>Total Spending</u> |
|-----------------|---------------|---------------|---------------------------|
| Captiva | \$ 6,363,443 | \$ 18,523,717 | \$ 24,887,160 |
| Elsewhere in | | | |
| Lee County | 530,288 | 1,658,976 | 2,189,264 |
| Total in | | | |
| Lee County | 6,893,731 | 20,182,693 | 27,076,424 |
| Elsewhere in | | | |
| the State | 758,423 | 1,390,813 | 2,149,236 |
| Total in | | | |
| the State | 7,652,154 | 21,573,506 | 29,225,660 |

TABLE 4.6 shows that out of state main destination visitors to Captiva's beaches spent \$29.2 million during their stay in Florida in 1989-90. Comparing this to the data for all out of state Visitors to Captiva's beaches, shows that almost one out of every four dollars spent in the state by out of state visitors to Captiva's beaches were accounted for by main destination visitors,

that is, by individuals drawn to Florida directly by the beaches, or by events adjacent to the beaches on Captiva island. The bulk of the spending of main destination beach visitors occurred on Captiva, but over \$2 million was spent elsewhere in Lee County, and another \$2 million was spent elsewhere in the state. Three-fourths of the expenditures made by main destination visitors occurred in the winter season. However, spending elsewhere in the state accounted for a larger share of expenditures in the summer than in the winter.

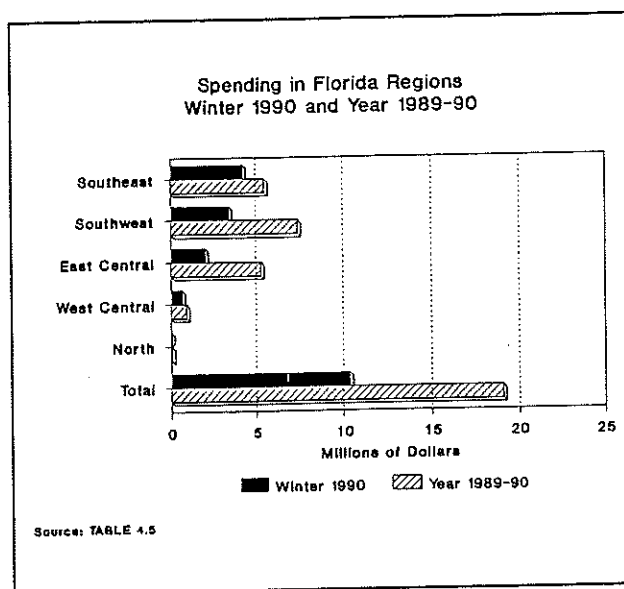
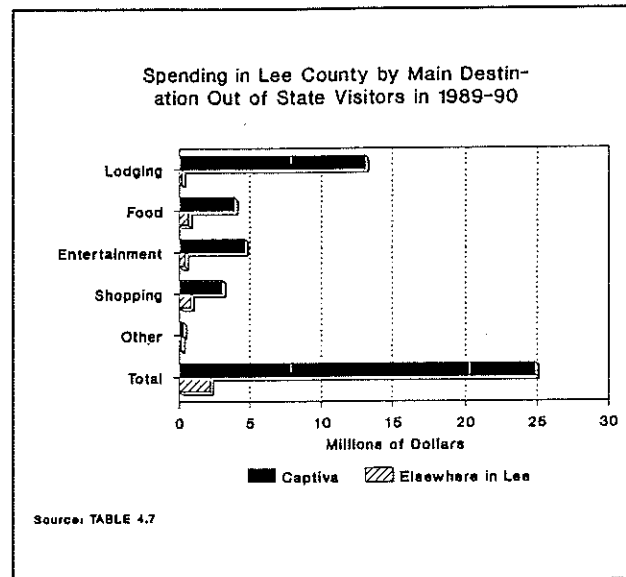


TABLE 4.7
Spending in Lee County
by Out of State Main Destination Beach Visitors
1989-90

| Type | Captiva | Rest of County | Total in County |
|------------------|---------------|-------------------|--------------------|
| Lodging | \$ 13,080,767 | \$ 188,389 | 13,269,156 |
| Food | 3,885,331 | 640,946 | 4,526,277 |
| Entertainment | 4,615,022 | 410,627 | 5,025,649 |
| Shopping | 3,028,160 | 799,930 | 3,828,090 |
| Gasoline & Other | 277,880 | 149,372 | 427,252 |
| Total | 24,887,160 | 2,189,264 | 27,076,424 |

A breakdown of out of state main destination visitors' expenditures in Lee County by category is given in TABLE 4.7. These visitors spent \$27.1 million in Lee County during the year 1989-90. Spending on the island totalled \$24.9 million and spending in the rest of the County amounted to \$2.2 million.



The largest category of expenditure was lodging, followed by food, entertainment and shopping.

TABLE 4.8
Spending in Lee County
by Out of State Main Destination Beach Visitors
Summer 1989-90

| Type | Captiva | Rest of County | Total in County |
|------------------|--------------|----------------|-----------------|
| Lodging | \$ 3,022,373 | \$ 15,674 | 3,038,047 |
| Food | 751,457 | 70,531 | 821,988 |
| Entertainment | 1,481,148 | 140,191 | 1,621,339 |
| Shopping | 905,580 | 279,511 | 1,185,091 |
| Gasoline & Other | 202,885 | 24,381 | 227,266 |
| Total | 6,363,443 | 530,288 | 6,893,731 |

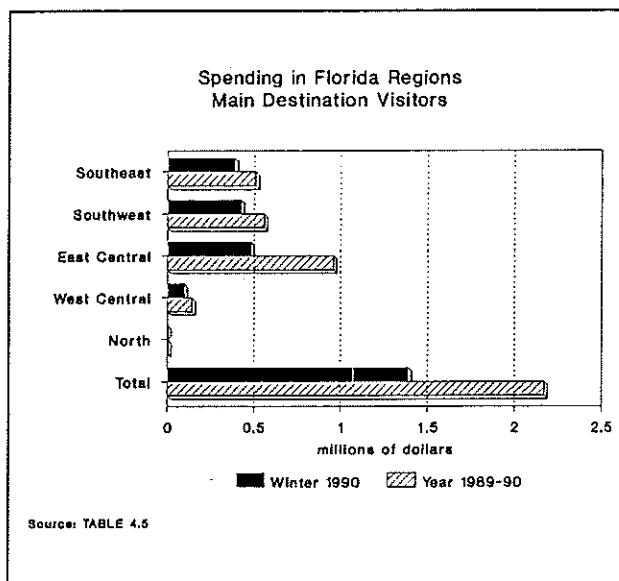
Summer expenditures of out of state beach visitors amounted to \$6.9 million, of which the largest category was lodging, followed by entertainment and shopping (TABLE 4.8). Spending on Captiva was more than ten times spending elsewhere in the County.

TABLE 4.9
Spending in Lee County
by Out of State Main Destination Beach Visitors
Winter 1989-90

| Type | Captiva | Rest of County | Total in County |
|------------------|---------------|-------------------|--------------------|
| Lodging | \$ 10,058,394 | \$ 172,715 | 10,231,109 |
| Food | 3,133,874 | 570,415 | 3,704,289 |
| Entertainment | 3,133,874 | 270,436 | 3,404,310 |
| Shopping | 2,122,580 | 520,419 | 2,642,999 |
| Gasoline & Other | 74,995 | 124,991 | 199,986 |
| Total | 18,523,717 | 1,658,976 | 20,182,693 |

Winter expenditures amounted to \$20.2 million, about three times the level of summer expenditures (TABLE 4.9). As in the summer, spending on Captiva was more than ten times spending elsewhere in the County.

TABLE 4.10 shows spending elsewhere in the state outside Lee County by main destination out of state visitors to Captiva's beaches. The largest expenditures were made in the East Central Florida region, amounting to about \$1.0 million. Spending in Southeast and Southwest Florida each amounted



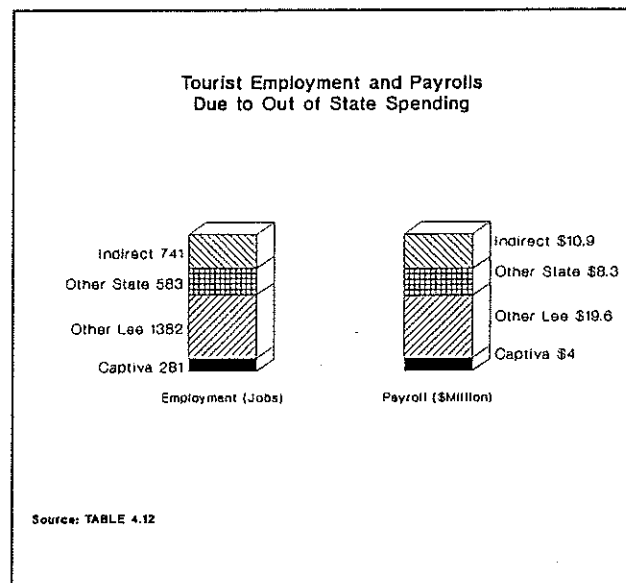
to approximately \$0.5 million. Spending was relatively small in the Tampa area, and there was virtually no spending in the north.

TABLE 4.11
Employment and Payrolls Created by Out of State
Captiva Beach Visitors
1989-90

| Type | Spending | Employment | Payrolls |
|-------------------------------------|--------------|------------|--------------|
| <u>Out of State Beach Visitors:</u> | | | |
| Captiva Residents | \$ 9,212,733 | 281 | \$ 3,990,762 |
| Other Lee County | 45,244,046 | 1,382 | 19,627,164 |
| Total Lee County | 54,456,779 | 1,663 | 23,617,926 |
| Other State | 19,086,258 | 583 | 8,279,766 |
| Total State | 73,543,037 | 2,246 | 31,897,692 |
| <u>Main Destination Visitors:</u> | | | |
| Captiva Residents | \$ 7,665,245 | 234 | \$ 3,323,268 |
| Other Lee County | 19,411,179 | 593 | 8,421,786 |
| Total Lee County | 27,076,424 | 827 | 11,745,054 |
| Other State | 2,149,236 | 66 | 937,332 |
| Total State | 29,225,660 | 893 | 12,682,386 |

created was \$12.7 million, with \$3.2 million for island residents, \$8.4 million for other residents of Lee County, and \$0.9 million elsewhere in the state.

The employment and payroll estimates given in TABLE 4.11 can be increased as a result of the ripple or multiplier effect of additional employment and payrolls in the supplying industries to the frontline tourist industries, as well as in the industries that supply consumer goods and services to

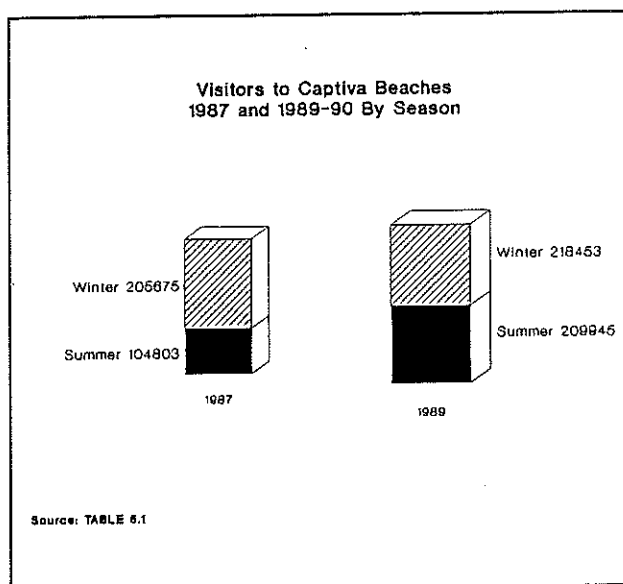


Beach Use and Spending in 1987 and 1989-90

Previous studies of beach use and expenditures were undertaken in 1987. The results of the 1987 studies were re-estimated using the newer methodologies developed for 1989.

Beach Use:

TABLE 5.1 shows that the number of users of Captiva's beaches grew from 310,478 to 428,398 between 1987 and 1989-90. There was a doubling of the number of beach visitors between the two summers. The increase in the winter season was only about 6 percent, but this reflected the closing of Turner



Beach to accommodate construction of the new Blind Pass bridge. If the same number of people had visited Turner Beach in the winter as in the summer (which appears to be about its capacity, given parking constraints), winter use of the beaches would have increased by 27 percent.

There was a significant increase in the number of beach users of the Captiva Road beach in the winter. This reflects three factors. First, available parking was increased at this beach.

TABLE 5.1
Visitors to Captiva Beaches
1987 and 1989-90

| Beach | 1987 | | | 1989 | | |
|---------------|---------|---------|---------|---------|---------|---------|
| | Summer | Winter | Total | Summer | Winter | Total |
| South Seas | 23,826 | 63,476 | 87,302 | 52,665 | 53,614 | 106,278 |
| Captiva Road | 32,342 | 46,626 | 78,968 | 71,488 | 95,111 | 155,598 |
| Village | 6,893 | 28,184 | 35,077 | 15,237 | 37,340 | 52,576 |
| Tween Waters- | | | | | | |
| Gold Coast | 12,453 | 22,680 | 35,133 | 27,526 | 32,389 | 59,915 |
| Turner Beach | 29,289 | 44,709 | 73,998 | 43,030 | 0 | 43,030 |
| Total | 104,803 | 205,675 | 310,478 | 209,945 | 218,453 | 428,398 |

Notes: 1987 summer data for South Seas and Tween Waters Gold Coast estimated using 1989 relationship to other beaches.

Second, some Turner Beach users came to Captiva Road. Third, the southern boundary of South Seas Beach was moved northward in the 1989 studies.

Spending by Beach Visitors:

Between 1987 and the 1989-90 season, total spending by non-resident visitors to Captiva's beaches grew from \$27.2 million to \$36.3 million, a growth of 33.5 percent (TABLE 5.2). Most of this increase occurred in the summer seasons where spending jumped from \$6.1 million to \$13.2 million.

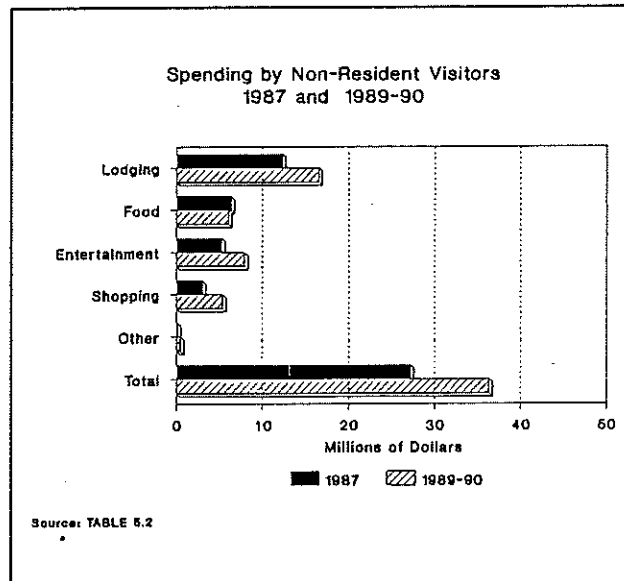


TABLE 5.2
Spending on Captiva by Non-Resident Beach Visitors
1987 and 1989-90

| Beach | Summer | 1987 Winter | Total | 1989 Summer | 1990 Winter | Total |
|------------|-----------|----------------|------------|----------------|----------------|------------|
| Lodging | 1,564,584 | 10,807,884 | 12,372,468 | 5,305,470 | 11,244,539 | 16,550,009 |
| Food | 2,637,444 | 3,715,560 | 6,353,004 | 1,852,745 | 4,206,462 | 6,059,207 |
| Entertain- | | | | | | |
| ment | 1,548,044 | 3,725,936 | 5,273,980 | 3,596,045 | 4,284,821 | 7,880,866 |
| Shopping | 387,586 | 2,684,741 | 3,072,327 | 2,074,241 | 3,259,029 | 5,333,270 |
| Other | 27,260 | 120,467 | 147,727 | 323,123 | 149,595 | 472,718 |
| Total | 6,164,918 | 21,054,588 | 27,219,506 | 13,151,624 | 23,144,446 | 36,296,070 |

Notes: 1987 summer data for South Seas and Tween Waters Gold Coast estimated using 1989 relationship to other beaches.

The growth in winter spending was relatively small because the closing of Turner Beach restricted access by non-residents, and because overnight lodging places had little room for expansion during the peak winter season. Although information on employment and payrolls was not collected for 1987, it can be estimated that payrolls generated on the island from beach users grew by the same rate as their spending, namely 33 percent.

Total spending in Lee county by out of county residents grew from \$38.0 million to \$66.0 million (TABLE 5.3), an increase of 73.7 percent. This increase reflected a rise in beach use of close to 40 percent, and a rise in spending per beach user by over 30 percent.

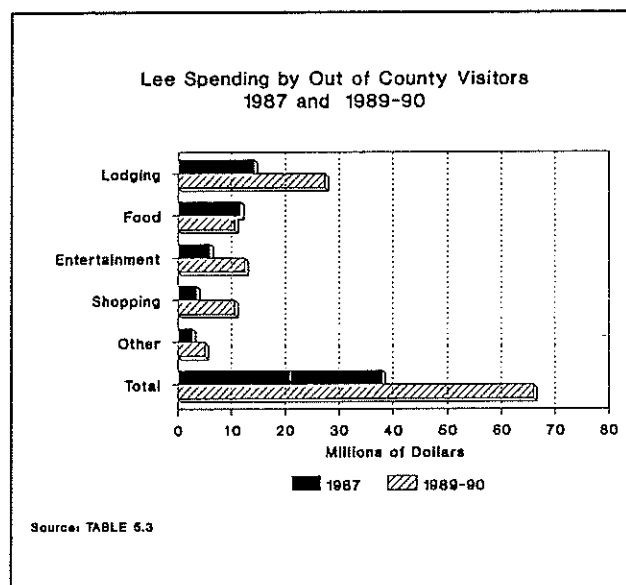


TABLE 5.3
Total Spending in Lee County by Out of County Beach Visitors
1987 and 1989-90

| Category | 1987 | | | 1989 | | | 1990 | | |
|---------------|------------|------------|------------|------------|------------|------------|---------|-----------|-------|
| | Captiva | Other Lee | Total | Captiva | Other Lee | Total | Captiva | Other Lee | Total |
| Accommodation | 12,230,330 | 2,005,268 | 14,235,598 | 16,459,543 | 10,906,097 | 27,365,640 | | | |
| Food | 5,932,587 | 5,738,420 | 11,671,007 | 5,753,514 | 4,845,187 | 10,598,701 | | | |
| Amusement | 4,982,988 | 910,515 | 5,893,503 | 7,630,910 | 4,845,187 | 12,476,097 | | | |
| Shopping | 2,859,734 | 671,109 | 3,530,843 | 5,145,682 | 5,452,504 | 10,598,186 | | | |
| Other | 131,058 | 2,535,578 | 2,666,636 | 440,398 | 4,555,077 | 4,995,475 | | | |
| Total | 26,136,697 | 11,860,890 | 37,997,587 | 35,430,047 | 30,552,998 | 65,983,045 | | | |

Spending on Captiva by non-residents of Lee County grew from \$26.1 million to \$35.4 million, an increase of 35.6 percent. The rate of increase in spending by these visitors was faster than the 33 percent increase for all non-residents of the island. Spending on elsewhere in Lee County by out of county residents grew from \$11.9 million to \$30.6 million, an increase of 137.1 percent. This rate of increase in spending was more than four times faster than the 33 percent increase in spending on Captiva.

Total spending by out of state beach visitors grew from \$40 million in 1987 to \$73.5 million in 1989-90 (TABLE 5.4). Spending in Captiva grew from \$22.1 million to \$29.9 million. Spending elsewhere in Lee County \$7.6 million to \$24.5 million, and spending elsewhere in the State grew from \$10 million to

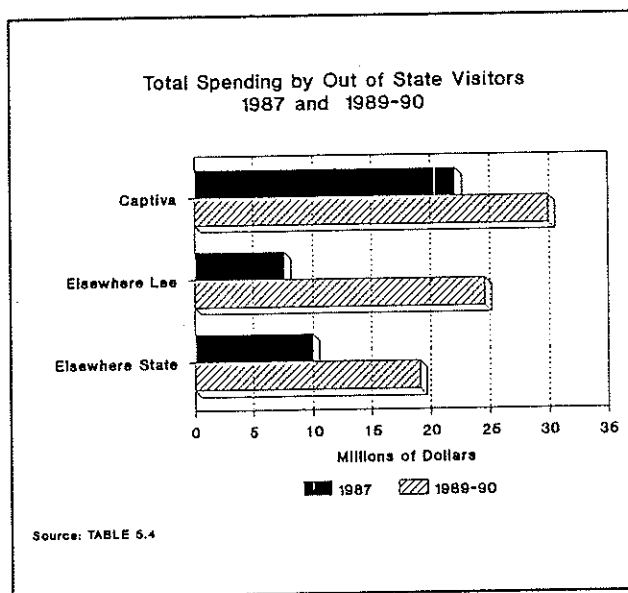


TABLE 5.4
Total Spending by Out of State Beach Visitors
1987 and 1989-90

| Beach | Summer | 1987 Winter | Total | 1989 Summer | 1990 Winter | Total |
|----------------------------|------------|----------------|------------|----------------|----------------|------------|
| Captiva | 2,614,926 | 19,471,592 | 22,086,518 | 7,776,047 | 22,135,425 | 29,911,472 |
| Elsewhere in Lee Co. | 3,454,048 | 4,165,471 | 7,619,519 | 5,349,325 | 19,195,982 | 24,545,307 |
| Total in Lee Co. | 6,068,974 | 23,637,063 | 29,706,037 | 13,125,325 | 41,331,407 | 54,456,779 |
| Elsewhere in State | 4,032,119 | 5,928,237 | 9,960,356 | 8,720,234 | 10,366,024 | 19,086,258 |
| Total in State | 10,101,093 | 29,565,300 | 39,666,393 | 21,845,606 | 51,697,431 | 73,543,037 |

\$19.1 million. Growth in spending was fastest elsewhere in Lee County (where it tripled), second fastest elsewhere in the state (where it almost doubled) and the least rapid growth occurred on Captiva where spending grew by about one-third.

