INDIAN RIVER LAGOON

ECONOMIC VALUATION UPDATE

APPENDICES

2016

Indian River Lagoon Economic Valuation Update

APPENDICES

Prepared by
East Central Florida Regional Planning Council
Treasure Coast Regional Planning Council

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Appendix 1

FINAL
DATA & ANALYSIS

Indian River Lagoon
Economic Contributions Analysis

COUNTY DEMOGRAPHIC PROFILE

Indian River Lagoon Economic Contributions Analysis

Table 1-A: Demographic Trends & Forecasts, 2000 - 2020

Brevard County

Indian River Lagoon Economic Contributions Analysis

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	476,230	543,376	553,805		568,409		**14,604**	**0.52%**
As % of IRL Study Area	*35.2%*	*34.0%*	*33.8%*		*33.5%*			
Households	198,195	229,692	235,233		241,790		**6,557**	**0.55%**
Avg. HH Size	2.35	2.33	2.33		2.32			
Median Age		45.5	46.9		47.8			
Race								
White		450,927	451,978	82%	455,094	80%	3,116	0.1%
Black		54,799	58,367	11%	62,757	11%	4,390	1.5%
American Indian		2,118	2,370	0%	2,614	0%	244	2.0%
Asian		11,349	12,585	2%	14,096	2%	1,511	2.3%
Pacific Islander		514	557	0%	607	0%	50	1.7%
Other		9,299	11,227	2%	13,626	2%	2,399	3.9%
Two or More Races		14,370	16,721	3%	19,615	3%	2,894	3.2%
Total:		**543,376**	**553,805**		**568,409**		**14,604**	
Hispanic *(1)*		43,943	54,283	10%	67,386	12%	13,103	4.4%
Age Distribution								
0-14		86,641	83,417	15%	83,833	15%	416	0.1%
15-24		63,826	62,408	11%	57,858	10%	(4,550)	-1.5%
25-34		54,795	59,093	11%	62,744	11%	3,651	1.2%
35-44		62,148	57,903	10%	61,144	11%	3,241	1.1%
45-54		90,602	81,757	15%	70,733	12%	(11,024)	-2.9%
55-64		74,652	84,984	15%	91,364	16%	6,380	1.5%
65-74		57,686	67,181	12%	76,745	14%	9,564	2.7%
75+		53,026	57,062	10%	63,988	11%	6,926	2.3%
Income Profile								
Households by Income								
<$15,000			12.1%		11.2%			
$15,000 - $24,999			12.3%		9.0%			
$25,000 - $34,999			11.3%		9.1%			
$35,000 - $49,999			15.0%		13.9%			
$50,000 - $74,999			19.1%		21.3%			
$75,000 - $99,999			12.4%		15.9%			
$100,000 - $149,999			11.4%		11.7%			
$150,000 - $199,999			3.7%		4.9%			
$200,000+			2.6%		3.0%			
Median HH Income			$ 49,078		$ 55,760			**2.6%**
Average HH Income			$ 64,628		$ 72,932			**2.4%**
Education Profile								
Years of Education-Population 25 Years & Older (2014 American Community Survey/ACS)								
Less than 9th Grade			2.8%					
9th-12th Grade, No Diploma			6.7%					
High School Graduate (Includes Equivalancy)			29.6%					
Some College, No Degree			23.4%					
Associate Degree			10.8%					
Bachelor's Degree			16.6%					
Graduate/Professional Degree			10.0%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.
http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF

Source: ESRI Business Analyst; American Community Survey; WTL +a, March 2016.

Table 1-B: Demographic Trends & Forecasts, 2000 - 2020

Indian River County

Indian River Lagoon Economic Contributions Analysis

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	112,947	138,028	142,338		148,943		**6,605**	**0.91%**
As % of IRL Study Area	*8.4%*	*8.6%*	*8.7%*		*8.8%*			
Households	49,137	60,176	62,175		65,047		**2,872**	**0.91%**
Avg. HH Size	2.25	2.26	2.27		2.27			
Median Age		49.0	51.0		52.3			
Race								
White		116,346	118,476	83%	122,177	82%	3,701	0.6%
Black		12,397	13,081	9%	13,963	9%	882	1.3%
American Indian		408	491	0%	574	0%	83	3.2%
Asian		1,666	2,008	1%	2,463	2%	455	4.2%
Pacific Islander		51	53	0%	58	0%	5	1.8%
Other		4,909	5,548	4%	6,504	4%	956	3.2%
Two or More Races		2,251	2,681	2%	3,204	2%	523	3.6%
Total:		**138,028**	**142,338**		**148,943**		**6,605**	
Hispanic *(1)*		15,465	17,467	12%	20,482	14%	3,015	3.2%
Age Distribution								
0-14		20,995	20,298	14%	20,656	14%	358	0.4%
15-24		14,049	14,565	10%	13,820	9%	(745)	-1.0%
25-34		12,455	13,407	9%	14,708	10%	1,301	1.9%
35-44		14,215	13,112	9%	13,869	9%	757	1.1%
45-54		18,977	17,608	12%	15,941	11%	(1,667)	-2.0%
55-64		19,833	21,287	15%	22,307	15%	1,020	0.9%
65-74		18,036	21,232	15%	24,167	16%	2,935	2.6%
75+		19,468	20,829	15%	23,475	16%	2,646	2.4%
Income Profile								
Households by Income								
<$15,000			12.7%		11.8%			
$15,000 - $24,999			14.3%		10.5%			
$25,000 - $34,999			11.8%		9.8%			
$35,000 - $49,999			13.9%		13.2%			
$50,000 - $74,999			17.5%		19.7%			
$75,000 - $99,999			10.1%		12.9%			
$100,000 - $149,999			11.2%		12.3%			
$150,000 - $199,999			3.3%		4.2%			
$200,000+			5.1%		5.8%			
Median HH Income			$ 46,228		$ 54,353			**3.3%**
Average HH Income			$ 70,095		$ 79,522			**2.6%**
Education Profile								
Years of Education-Population 25 Years & Older (2014 American Community Survey/ACS)								
Less than 9th Grade			4.3%					
9th-12th Grade, No Diploma			8.5%					
High School Graduate (Includes Equivalancy)			29.4%					
Some College, No Degree			22.0%					
Associate Degree			9.1%					
Bachelor's Degree			16.8%					
Graduate/Professional Degree			9.9%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.
http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF

Source: ESRI Business Analyst; American Community Survey; WTL +a, March 2016.

Table 1-C: Demographic Trends & Forecasts, 2000 - 2020

Martin County

Indian River Lagoon Economic Contributions Analysis

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	126,731	146,318	149,980		156,063		**6,083**	**0.80%**
As % of IRL Study Area	*9.4%*	*9.1%*	*9.1%*		*9.2%*			
Households	55,288	63,899	65,483		68,228		**2,745**	**0.82%**
Avg. HH Size	2.23	2.23	2.23		2.23			
Median Age		49.7	51.8		53.8			
Race								
White		127,691	128,325	86%	130,855	84%	2,530	0.4%
Black		7,842	9,096	6%	10,366	7%	1,270	2.6%
American Indian		840	928	1%	1,018	1%	90	1.9%
Asian		1,540	1,871	1%	2,318	1%	447	4.4%
Pacific Islander		104	139	0%	171	0%	32	4.2%
Other		5,968	6,847	5%	8,020	5%	1,173	3.2%
Two or More Races		2,333	2,774	2%	3,315	2%	541	3.6%
Total:		**146,318**	**149,980**		**156,063**		**6,083**	
Hispanic *(1)*		17,881	20,661	14%	24,473	16%	3,812	3.4%
Age Distribution								
0-14		20,848	19,912	13%	19,851	13%	(61)	-0.1%
15-24		14,227	14,470	10%	13,552	9%	(918)	-1.3%
25-34		12,436	13,407	9%	14,678	9%	1,271	1.8%
35-44		15,429	13,846	9%	14,275	9%	429	0.6%
45-54		22,181	20,455	14%	18,018	12%	(2,437)	-2.5%
55-64		21,225	23,627	16%	25,315	16%	1,688	1.4%
65-74		19,475	22,418	15%	25,723	16%	3,305	2.8%
75+		20,497	21,845	15%	24,651	16%	2,806	2.4%
Income Profile								
Households by Income								
<$15,000			11.7%		10.6%			
$15,000 - $24,999			11.7%		8.5%			
$25,000 - $34,999			11.2%		9.1%			
$35,000 - $49,999			13.8%		12.8%			
$50,000 - $74,999			16.4%		17.8%			
$75,000 - $99,999			11.1%		13.0%			
$100,000 - $149,999			12.0%		13.6%			
$150,000 - $199,999			5.4%		6.9%			
$200,000+			6.7%		7.5%			
Median HH Income			$ 51,692		$ 60,147			**3.1%**
Average HH Income			$ 79,738		$ 90,742			**2.6%**
Education Profile								
Years of Education-Population 25 Years & Older (2014 American Community Survey/ACS)								
Less than 9th Grade			4.5%					
9th-12th Grade, No Diploma			6.5%					
High School Graduate (Includes Equivalancy)			26.4%					
Some College, No Degree			21.8%					
Associate Degree			9.6%					
Bachelor's Degree			19.2%					
Graduate/Professional Degree			11.9%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.
http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF

Source: ESRI Business Analyst; American Community Survey; WTL +a, March 2016.

Table 1-D: Demographic Trends & Forecasts, 2000 - 2020

St. Lucie County

Indian River Lagoon Economic Contributions Analysis

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	192,695	277,789	287,560		300,269		**12,709**	**0.87%**
As % of IRL Study Area	*14.3%*	*17.4%*	*17.5%*		*17.7%*			
Households	76,933	108,523	111,575		116,193		**4,618**	**0.81%**
Avg. HH Size	2.47	2.53	2.55		2.56			
Median Age		42.4	43.7		44.0			
Race								
White		199,336	201,436	70%	204,238	68%	2,802	0.3%
Black		53,036	56,992	20%	62,782	21%	5,790	2.0%
American Indian		1,123	1,228	0%	1,376	0%	148	2.3%
Asian		4,334	5,267	2%	6,525	2%	1,258	4.4%
Pacific Islander		161	219	0%	284	0%	65	5.3%
Other		12,512	13,939	5%	15,246	5%	1,307	1.8%
Two or More Races		7,287	8,479	3%	9,818	3%	1,339	3.0%
Total:		**277,789**	**287,560**		**300,269**		**12,709**	
Hispanic *(1)*		45,995	51,400	18%	56,355	19%	4,955	1.9%
Age Distribution								
0-14		51,139	49,819	17%	51,486	17%	1,667	0.7%
15-24		32,336	33,522	12%	32,051	11%	(1,471)	-0.9%
25-34		30,110	32,241	11%	36,735	12%	4,494	2.6%
35-44		34,617	32,446	11%	32,956	11%	510	0.3%
45-54		39,265	37,668	13%	34,466	11%	(3,202)	-1.8%
55-64		34,944	38,392	13%	40,895	14%	2,503	1.3%
65-74		29,395	34,184	12%	38,069	13%	3,885	2.2%
75+		25,983	29,288	10%	33,611	11%	4,323	2.8%
Income Profile								
Households by Income								
<$15,000			13.4%		12.6%			
$15,000 - $24,999			14.7%		11.0%			
$25,000 - $34,999			14.3%		11.7%			
$35,000 - $49,999			17.1%		16.3%			
$50,000 - $74,999			18.1%		20.8%			
$75,000 - $99,999			9.9%		12.7%			
$100,000 - $149,999			8.6%		9.8%			
$150,000 - $199,999			2.3%		3.1%			
$200,000+			1.7%		2.0%			
Median HH Income			$ 40,402		$ 48,068			**3.5%**
Average HH Income			$ 54,933		$ 62,968			**2.8%**
Education Profile								
Years of Education-Population 25 Years & Older (2014 American Community Survey/ACS)								
Less than 9th Grade			5.5%					
9th-12th Grade, No Diploma			9.0%					
High School Graduate (Includes Equivalancy)			34.0%					
Some College, No Degree			22.5%					
Associate Degree			10.0%					
Bachelor's Degree			12.4%					
Graduate/Professional Degree			6.6%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.
http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF

Source: ESRI Business Analyst; American Community Survey; WTL +a, March 2016.

Table 1-E: Demographic Trends & Forecasts, 2000 - 2020

Volusia County

Indian River Lagoon Economic Contributions Analysis

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	443,343	494,593	506,494		521,743		**15,249**	**0.60%**
As % of IRL Study Area	*32.8%*	*30.9%*	*30.9%*		*30.8%*			
Households	184,723	208,236	213,463		220,153		**6,690**	**0.62%**
Avg. HH Size	2.32	2.31	2.31		2.31			
Median Age		45.3	46.6		47.5			
Race								
White		408,256	410,958	81%	415,336	80%	4,378	0.2%
Black		51,791	55,185	11%	58,895	11%	3,710	1.3%
American Indian		1,778	1,975	0%	2,185	0%	210	2.0%
Asian		7,567	8,850	2%	10,408	2%	1,558	3.3%
Pacific Islander		204	237	0%	265	0%	28	2.3%
Other		14,487	16,880	3%	19,958	4%	3,078	3.4%
Two or More Races		10,510	12,409	2%	14,696	3%	2,287	3.4%
Total:		**494,593**	**506,494**		**521,743**		**15,249**	
Hispanic *(1)*		55,217	64,630	13%	76,800	15%	12,170	3.5%
Age Distribution								
0-14		76,079	73,486	15%	74,732	14%	1,246	0.3%
15-24		61,893	59,297	12%	55,633	11%	(3,664)	-1.3%
25-34		50,842	57,249	11%	60,800	12%	3,551	1.2%
35-44		56,611	53,502	11%	55,216	11%	1,714	0.6%
45-54		74,193	68,376	13%	61,601	12%	(6,775)	-2.1%
55-64		70,686	76,727	15%	80,298	15%	3,571	0.9%
65-74		53,767	64,309	13%	73,321	14%	9,012	2.7%
75+		50,522	53,548	11%	60,142	12%	6,594	2.3%
Income Profile								
Households by Income								
<$15,000			15.0%		14.2%			
$15,000 - $24,999			13.8%		10.3%			
$25,000 - $34,999			12.4%		10.2%			
$35,000 - $49,999			15.8%		15.0%			
$50,000 - $74,999			18.8%		21.1%			
$75,000 - $99,999			11.0%		14.1%			
$100,000 - $149,999			8.8%		9.5%			
$150,000 - $199,999			2.4%		3.2%			
$200,000+			2.1%		2.4%			
Median HH Income			$ 42,109		$ 50,261			**3.6%**
Average HH Income			$ 57,069		$ 64,866			**2.6%**
Education Profile								
Years of Education-Population 25 Years & Older (2014 American Community Survey/ACS)								
Less than 9th Grade			3.5%					
9th-12th Grade, No Diploma			8.4%					
High School Graduate (Includes Equivalancy)			33.4%					
Some College, No Degree			23.8%					
Associate Degree			9.6%					
Bachelor's Degree			13.6%					
Graduate/Professional Degree			7.7%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.
http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF

Source: ESRI Business Analyst; American Community Survey; WTL +a, March 2016.

Table 1-F: Demographic Trends & Forecasts, 2000 - 2020

IRL Study Area Roll-up

Indian River Lagoon Economic Contributions Analysis

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	1,351,946	1,600,104	1,640,177		1,695,427		**55,250**	**0.66%**
Households	564,276	670,526	687,929		711,411		**23,482**	**0.67%**
Avg. HH Size	2.32	2.33	2.34		2.34			
Median Age		46.4	48.0		49.1			
Race								
White		1,302,556	1,311,173	80%	1,327,700	78%	16,527	0.3%
Black		179,865	192,721	12%	208,763	12%	16,042	1.6%
American Indian		6,267	6,992	0%	7,767	0%	775	2.1%
Asian		26,456	30,581	2%	35,810	2%	5,229	3.2%
Pacific Islander		1,034	1,205	0%	1,385	0%	180	2.8%
Other		47,175	54,441	3%	63,354	4%	8,913	3.1%
Two or More Races		36,751	43,064	3%	50,648	3%	7,584	3.3%
Total:		**1,600,104**	**1,640,177**		**1,695,427**		**55,250**	
Hispanic *(1)*		178,501	208,441	13%	245,496	14%	37,055	3.3%
Age Distribution								
0-14		255,702	246,932	15%	250,558	15%	3,626	0.3%
15-24		186,331	184,262	11%	172,914	10%	(11,348)	-1.3%
25-34		160,638	175,397	11%	189,665	11%	14,268	1.6%
35-44		183,020	170,809	10%	177,460	10%	6,651	0.8%
45-54		245,218	225,864	14%	200,759	12%	(25,105)	-2.3%
55-64		221,340	245,017	15%	260,179	15%	15,162	1.2%
65-74		178,359	209,324	13%	238,025	14%	28,701	2.6%
75+		169,496	182,572	11%	205,867	12%	23,295	2.4%
Income Profile								
Households by Income (Average)								
<$15,000			13.0%		12.1%			
$15,000 - $24,999			13.4%		9.9%			
$25,000 - $34,999			12.2%		10.0%			
$35,000 - $49,999			15.1%		14.2%			
$50,000 - $74,999			18.0%		20.1%			
$75,000 - $99,999			10.9%		13.7%			
$100,000 - $149,999			10.4%		11.4%			
$150,000 - $199,999			3.4%		4.5%			
$200,000+			3.6%		4.1%			
Education Profile								
Years of Education-Population 25 Years & Older (2014 American Community Survey/ACS) (Average)								
Less than 9th Grade			4.1%					
9th-12th Grade, No Diploma			7.8%					
High School Graduate (Includes Equivalancy)			30.6%					
Some College, No Degree			22.7%					
Associate Degree			9.8%					
Bachelor's Degree			15.7%					
Graduate/Professional Degree			9.2%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.
http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF

Source: ESRI Business Analyst; American Community Survey; WTL +a, March 2016.

BUSINESS SUMMARY

Indian River Lagoon Economic Contributions Analysis

Table 2-A: Business Mix (By SIC Code), 2015

Brevard County

Indian River Lagoon Economic Contributions Analysis

Industry Category	Businesses No.	Businesses % of Total	Employees No.	Employees % of Total
Agriculture & Mining	**684**	2.8%	**2,905**	1.2%
Construction	**2,506**	10.3%	**13,241**	5.5%
Manufacturing	**684**	2.8%	**17,377**	7.2%
Transportation & Warehousing	**705**	2.9%	**5,238**	2.2%
Communications	**225**	0.9%	**3,858**	1.6%
Utilities	**59**	0.2%	**496**	0.2%
Wholesale & Retail Trade				
Wholesale	744		6,876	
Retail	5,306		57,463	
- Home Improvement	448		3,941	
- General Merchandise	165		6,962	
- Food Stores	480		7,275	
- Auto Dealers/Gas Stations	713		7,040	
- Apparel & Accessory Stores	232		1,334	
- Furniture/Home Furnishings	504		3,315	
- Eating & Drinking Places	1,314		19,593	
- Miscellaneous & Non-store Retail	1,450		8,003	
Subtotal - All Retail:	**6,050**	24.9%	**64,339**	26.8%
Finance/Insurance/Real Estate	**2,803**	11.5%	**13,345**	5.6%
Services				
- Hotel/Lodging	207		3,456	
- Automotive Services	756		3,057	
- Motion Pictures & Amusements	670		4,312	
- Health Services	1,436		30,157	
- Legal Services	373		1,790	
- Educational Institutions	383		14,888	
- Other Services	5,365		35,305	
Subtotal - Services:	**9,190**	37.9%	**92,965**	38.7%
Government	**639**	2.6%	**24,245**	10.1%
Unclassified Establishments	**733**	3.0%	**2,354**	1.0%
TOTAL:	**24,278**	**100.0%**	**240,363**	**100.0%**

ANALYSIS:	
2015 Employment	**240,363**
As % of IRL Study Area	**35.0%**
2015 Population	**553,805**
Jobs/Population Ratio	**0.43**

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, March 2016.

Table 2-B: Business Mix (By SIC Code), 2015

Indian River County

Indian River Lagoon Economic Contributions Analysis

Industry Category	Businesses No.	Businesses % of Total	Employees No.	Employees % of Total
Agriculture & Mining	**326**	4.1%	**2,384**	3.6%
Construction	**823**	10.3%	**4,773**	7.2%
Manufacturing	**121**	1.5%	**2,098**	3.2%
Transportation & Warehousing	**202**	2.5%	**1,244**	1.9%
Communications	**41**	0.5%	**416**	0.6%
Utilities	**19**	0.2%	**229**	0.3%
Wholesale & Retail Trade				
Wholesale	276		3,372	
Retail	1,686		16,748	
- Home Improvement	143		1,244	
- General Merchandise	48		1,648	
- Food Stores	141		1,798	
- Auto Dealers/Gas Stations	171		1,581	
- Apparel & Accessory Stores	138		821	
- Furniture/Home Furnishings	160		1,020	
- Eating & Drinking Places	361		5,040	
- Miscellaneous & Non-store Retail	524		3,596	
Subtotal - All Retail:	**1,962**	24.6%	**20,120**	30.3%
Finance/Insurance/Real Estate	**1,046**	13.1%	**5,111**	7.7%
Services				
- Hotel/Lodging	53		732	
- Automotive Services	203		688	
- Motion Pictures & Amusements	207		1,993	
- Health Services	476		8,451	
- Legal Services	117		666	
- Educational Institutions	84		2,822	
- Other Services	1,796		10,739	
Subtotal - Services:	**2,936**	36.8%	**26,091**	39.3%
Government	**189**	2.4%	**3,402**	5.1%
Unclassified Establishments	**305**	3.8%	**534**	0.8%
TOTAL:	**7,970**	**100.0%**	**66,402**	**100.0%**

ANALYSIS:	
2015 Employment	**66,402**
As % of IRL Study Area	**9.7%**
2015 Population	**142,338**
Jobs/Population Ratio	**0.47**

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, March 2016.

Table 2-C: Business Mix (By SIC Code), 2015

Martin County

Indian River Lagoon Economic Contributions Analysis

Industry Category	Businesses No.	Businesses % of Total	Employees No.	Employees % of Total
Agriculture & Mining	**271**	3.1%	**1,812**	2.4%
Construction	**877**	9.9%	**4,584**	6.0%
Manufacturing	**279**	3.1%	**3,713**	4.9%
Transportation & Warehousing	**275**	3.1%	**2,324**	3.1%
Communications	**70**	0.8%	**359**	0.5%
Utilities	**20**	0.2%	**240**	0.3%
Wholesale & Retail Trade				
Wholesale	278		2,269	
Retail	1,847		19,172	
- Home Improvement	176		1,797	
- General Merchandise	44		1,713	
- Food Stores	141		2,600	
- Auto Dealers/Gas Stations	263		1,972	
- Apparel & Accessory Stores	119		816	
- Furniture/Home Furnishings	205		1,349	
- Eating & Drinking Places	414		6,360	
- Miscellaneous & Non-store Retail	485		2,565	
Subtotal - All Retail:	**2,125**	24.0%	**21,441**	28.2%
Finance/Insurance/Real Estate	**1,148**	13.0%	**5,935**	7.8%
Services				
- Hotel/Lodging	49		833	
- Automotive Services	227		979	
- Motion Pictures & Amusements	272		2,812	
- Health Services	503		10,567	
- Legal Services	191		915	
- Educational Institutions	105		3,480	
- Other Services	1,923		10,232	
Subtotal - Services:	**3,270**	36.9%	**29,818**	39.2%
Government	**199**	2.2%	**4,735**	6.2%
Unclassified Establishments	**326**	3.7%	**1,052**	1.4%
TOTAL:	**8,860**	**100.0%**	**76,013**	**100.0%**

ANALYSIS:	
2015 Employment	**76,013**
As % of IRL Study Area	**11.1%**
2015 Population	**149,980**
Jobs/Population Ratio	**0.51**

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, March 2016.

Table 2-D: Business Mix (By SIC Code), 2015

St. Lucie County

Indian River Lagoon Economic Contributions Analysis

Industry Category	Businesses No.	Businesses % of Total	Employees No.	Employees % of Total
Agriculture & Mining	**380**	3.6%	**2,132**	2.3%
Construction	**1,081**	10.3%	**6,166**	6.8%
Manufacturing	**196**	1.9%	**3,853**	4.2%
Transportation & Warehousing	**337**	3.2%	**2,492**	2.7%
Communications	**65**	0.6%	**403**	0.4%
Utilities	**25**	0.2%	**224**	0.2%
Wholesale & Retail Trade				
Wholesale	356		4,378	
Retail	2,100		21,205	
- Home Improvement	173		1,617	
- General Merchandise	105		3,013	
- Food Stores	231		3,308	
- Auto Dealers/Gas Stations	307		2,914	
- Apparel & Accessory Stores	90		360	
- Furniture/Home Furnishings	165		639	
- Eating & Drinking Places	465		6,540	
- Miscellaneous & Non-store Retail	564		2,814	
Subtotal - All Retail:	**2,456**	23.4%	**25,583**	28.0%
Finance/Insurance/Real Estate	**1,170**	11.1%	**4,361**	4.8%
Services				
- Hotel/Lodging	69		703	
- Automotive Services	376		1,147	
- Motion Pictures & Amusements	290		1,870	
- Health Services	581		12,281	
- Legal Services	158		724	
- Educational Institutions	139		9,978	
- Other Services	2,409		12,521	
Subtotal - Services:	**4,022**	38.3%	**39,224**	43.0%
Government	**248**	2.4%	**6,008**	6.6%
Unclassified Establishments	**533**	5.1%	**809**	0.9%
TOTAL:	**10,513**	**100.0%**	**91,255**	**100.0%**

ANALYSIS:	
2015 Employment	**91,255**
As % of IRL Study Area	**13.3%**
2015 Population	**287,560**
Jobs/Population Ratio	**0.32**

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, March 2016.

Table 2-E: Business Mix (By SIC Code), 2015

Volusia County

Indian River Lagoon Economic Contributions Analysis

Industry Category	Businesses No.	Businesses % of Total	Employees No.	Employees % of Total
Agriculture & Mining	**780**	3.4%	**2,756**	1.3%
Construction	**2,561**	11.1%	**13,558**	6.4%
Manufacturing	**521**	2.3%	**8,120**	3.8%
Transportation & Warehousing	**597**	2.6%	**8,724**	4.1%
Communications	**172**	0.7%	**1,285**	0.6%
Utilities	**78**	0.3%	**1,227**	0.6%
Wholesale & Retail Trade				
Wholesale	707		6,948	
Retail	5,143		50,786	
- Home Improvement	405		3,390	
- General Merchandise	200		5,818	
- Food Stores	473		6,270	
- Auto Dealers/Gas Stations	650		5,574	
- Apparel & Accessory Stores	244		1,348	
- Furniture/Home Furnishings	438		2,159	
- Eating & Drinking Places	1,237		18,917	
- Miscellaneous & Non-store Retail	1,496		7,310	
Subtotal - All Retail:	**5,850**	25.3%	**57,734**	27.2%
Finance/Insurance/Real Estate	**2,681**	11.6%	**13,665**	6.4%
Services				
- Hotel/Lodging	319		5,679	
- Automotive Services	736		2,767	
- Motion Pictures & Amusements	670		7,198	
- Health Services	1,292		24,692	
- Legal Services	299		1,881	
- Educational Institutions	297		15,578	
- Other Services	4,897		30,026	
Subtotal - Services:	**8,510**	36.8%	**87,821**	41.4%
Government	**732**	3.2%	**15,020**	7.1%
Unclassified Establishments	**623**	2.7%	**2,112**	1.0%
TOTAL:	**23,105**	**100.0%**	**212,022**	**100.0%**

ANALYSIS:	
2015 Employment	**212,022**
As % of IRL Study Area	**30.9%**
2015 Population	**506,494**
Jobs/Population Ratio	**0.42**

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, March 2016.

Table 2-F: Business Mix (By SIC Code), 2015

IRL Study Area Roll-up

Indian River Lagoon Economic Contributions Analysis

Industry Category	Businesses No.	Businesses % of Total	Employees No.	Employees % of Total
Agriculture & Mining	**2,441**	3.3%	**11,989**	1.7%
Construction	**7,848**	10.5%	**42,322**	6.2%
Manufacturing	**1,801**	2.4%	**35,161**	5.1%
Transportation & Warehousing	**2,116**	2.8%	**20,022**	2.9%
Communications	**573**	0.8%	**6,321**	0.9%
Utilities	**201**	0.3%	**2,416**	0.4%
Wholesale & Retail Trade				
Wholesale	2,361		23,843	
Retail	16,082		165,374	
- Home Improvement	1,345		11,989	
- General Merchandise	562		19,154	
- Food Stores	1,466		21,251	
- Auto Dealers/Gas Stations	2,104		19,081	
- Apparel & Accessory Stores	823		4,679	
- Furniture/Home Furnishings	1,472		8,482	
- Eating & Drinking Places	3,791		56,450	
- Miscellaneous & Non-store Retail	4,519		24,288	
Subtotal - All Retail:	**18,443**	24.7%	**189,217**	27.6%
Finance/Insurance/Real Estate	**8,848**	11.8%	**42,417**	6.2%
Services				
- Hotel/Lodging	697		11,403	
- Automotive Services	2,298		8,638	
- Motion Pictures & Amusements	2,109		18,185	
- Health Services	4,288		86,148	
- Legal Services	1,138		5,976	
- Educational Institutions	1,008		46,746	
- Other Services	16,390		98,823	
Subtotal - Services:	**27,928**	37.4%	**275,919**	40.2%
Government	**2,007**	2.7%	**53,410**	7.8%
Unclassified Establishments	**2,520**	3.4%	**6,861**	1.0%
TOTAL:	**74,726**	**100.0%**	**686,055**	**100.0%**

ANALYSIS:	
2015 Employment	**686,055**
As % of IRL Study Area	**100.0%**
2015 Population	**1,640,177**
Jobs/Population Ratio	**0.42**

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, March 2016.

TRAVEL & TOURISM

Indian River Lagoon Economic Contributions Analysis

Table 3: Commercial Airports Passenger Statistics, 2009-2014

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

	2009	2010	2011	2012	2013	2014	Change: 2009-2014 Amount	Change: 2009-2014 %
Daytona Beach International (Small Hub)								
Total Enplanements	202,417	246,627	274,166	290,144	293,843	306,542	**104,125**	**51%**
% Annual Change	-	*21.8%*	*11.2%*	*5.8%*	*1.3%*	*4.3%*		
Annual Passengers	404,834	493,254	548,332	580,288	587,686	613,084	**208,250**	
Melbourne International (Small Hub)								
Total Enplanements	110,510	180,144	207,829	215,300	211,702	214,704	**104,194**	**94%**
% Annual Change	-	*63.0%*	*15.4%*	*3.6%*	*-1.7%*	*1.4%*		
Annual Passengers	221,020	360,288	415,658	430,600	423,404	429,408	**208,388**	
TOTAL - IRL Commercial Airports:								
Total Enplanements	**312,927**	**426,771**	**481,995**	**505,444**	**505,545**	**521,246**	**208,319**	**67%**
% Annual Change	-	*36.4%*	*12.9%*	*4.9%*	*0.0%*	*3.1%*		
Annual Passengers	**625,854**	**853,542**	**963,990**	**1,010,888**	**1,011,090**	**1,042,492**	**416,638**	

Source: Federal Aviation Administration, Commercial Airport Statistics; RDS/WTL+a, March 2016.

Table 4: Hotel Inventory by County, 2015
Indian River Lagoon Economic Contributions Analysis

				Reporting to STR			Not Reporting to STR					
										Under Construction		
County	All Properties	All Rooms	% of Study Area	Properties	Rooms	% Reporting	Properties	Rooms	% of Study Area	Properties	Rooms	Closed Properties
Brevard	107	8,844	32%	54	7,178	81%	27	1,513	21%	1	153	26
Indian River	32	1,716	6%	17	1,361	79%	8	355	5%	-	-	7
Martin	23	1,282	5%	8	1,016	79%	11	266	4%	-	-	4
St. Lucie	51	3,132	11%	27	2,353	75%	11	779	11%	-	-	13
Volusia	259	12,442	45%	71	8,301	67%	96	4,141	59%	-	-	92
TOTAL:	**472**	**27,416**	**100%**	**177**	**20,209**	**74%**	**153**	**7,054**	**26%**	**1**	**153**	**142**

Source: STR Global; WTL+a, March 2016.

Table 5-A: Hotel Market Performance, 2010-2015

Brevard County

Indian River Lagoon Economic Contributions Analysis

	2010	2011	2012	2013	2014	2015	Feb YTD 2016	CHANGE: 2010-2015 Average	CAGR
Performance Characteristics									*(1)*
Number of Rooms	9,016	8,837	8,813	8,838	8,758	8,707			
Available Room Nights (Supply)	3,290,585	3,225,384	3,216,846	3,225,881	3,196,631	3,178,196		3,222,254	-0.69%
Occupied Room Nights (Demand)	1,742,479	1,723,693	1,789,974	1,845,082	1,975,845	2,033,423		1,851,749	3.14%
Annual Occupancy (%)	**53.0%**	**53.4%**	**55.6%**	**57.2%**	**61.8%**	**64.0%**	**70.0%**	**57.5%**	3.86%
Average Daily Rate	$ 82.89	$ 85.58	$ 83.92	$ 84.07	$ 88.77	$ 96.57	$ 104.33	$ 87.22	3.10%
(2) Revenue Per Available Room	$ 43.89	$ 45.74	$ 46.70	$ 48.08	$ 54.87	$ 61.79	$ 73.08	$ 50.12	7.08%
Year-to-Year % Growth									
Annual Occupancy	-	0.9%	4.1%	2.8%	8.1%	3.5%	9.5%		
Average Daily Rate	-	3.3%	(1.9%)	0.2%	5.6%	8.8%	8.0%		
Revenue/Available Room	-	4.2%	2.1%	3.0%	14.1%	12.6%	18.3%		

			Distribution of Rooms by Class					
Location	**Rooms**	**% Dist.**	**Economy**	**Midscale**	**Upper Mid-scale**	**Upscale**	**Upper Upscale**	**Luxury**
Cape Canaveral	664	9%	0%	0%	35%	65%	0%	0%
Cocoa	460	6%	58%	26%	16%	0%	0%	0%
Cocoa Beach	2,286	32%	13%	19%	39%	17%	13%	0%
Melbourne	2,370	33%	16%	8%	18%	40%	18%	0%
Merritt Island	128	2%	100%	0%	0%	0%	0%	0%
Palm Bay	352	5%	34%	19%	47%	0%	0%	0%
Satellite Beach	104	1%	100%	0%	0%	0%	0%	0%
Titusville	814	11%	17%	45%	37%	0%	0%	0%
Total:	**7,178**	**100%**	**42%**	**15%**	**24%**	**15%**	**4%**	**0%**

(1) CAGR=Compound Annual Growth Rate.

(2) Revenue per available room is total annual room revenue divided by available rooms. It is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancies.

Source: STR Global; WTL+a, March 2016.

Table 5-B: Hotel Market Performance, 2010-2015

Indian River County

Indian River Lagoon Economic Contributions Analysis

	2010	2011	2012	2013	2014	2015	Feb YTD 2016	CHANGE: 2010-2015 Average	CHANGE: 2010-2015 CAGR
Performance Characteristics									***(1)***
Number of Rooms	1,642	1,650	1,650	1,641	1,625	1,694			
Available Room Nights (Supply)	599,454	602,250	602,316	599,075	593,063	618,240		602,400	0.62%
Occupied Room Nights (Demand)	286,903	315,263	306,777	322,036	339,369	373,453		323,967	5.41%
Annual Occupancy (%)	**47.9%**	**52.3%**	**50.9%**	**53.8%**	**57.2%**	**60.4%**	**68.1%**	**53.8%**	4.77%
Average Daily Rate	$ 97.12	$ 99.17	$ 105.43	$ 109.46	$ 119.41	$ 124.90	$ 138.76	$ 110.04	5.16%
(2) Revenue Per Available Room	$ 46.48	$ 51.92	$ 53.70	$ 58.84	$ 68.33	$ 75.45	$ 94.55	$ 59.18	10.17%
Year-to-Year % Growth									
Annual Occupancy	-	9.4%	(2.7%)	5.5%	6.5%	5.6%	12.8%		
Average Daily Rate	-	2.1%	6.3%	3.8%	9.1%	4.6%	11.1%		
Revenue/Available Room	-	11.7%	3.4%	9.6%	16.1%	10.4%	25.3%		

			Distribution of Rooms by Class					
Location	**Rooms**	**% Dist.**	**Economy**	**Midscale**	**Upper Mid-scale**	**Upscale**	**Upper Upscale**	**Luxury**
Sebastian	126	9%	0%	0%	44%	56%	0%	0%
Vero Beach	1,235	91%	34%	5%	37%	7%	17%	0%
Total:	**1,361**	**100%**	**0%**	**0%**	**44%**	**56%**	**0%**	**0%**

(1) CAGR=Compound Annual Growth Rate.

(2) Revenue per available room is total annual room revenue divided by available rooms. It is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancies.

Source: STR Global; WTL+a, March 2016.

Table 5-C: Hotel Market Performance, 2010-2015

Martin County

Indian River Lagoon Economic Contributions Analysis

	2010	2011	2012	2013	2014	2015	Feb YTD 2016	CHANGE: 2010-2015 Average	CHANGE: 2010-2015 CAGR
Performance Characteristics									***(1)***
Number of Rooms	1,260	1,245	1,282	1,282	1,282	1,282			
Available Room Nights (Supply)	459,765	454,298	468,081	467,930	467,930	467,930		464,322	0.35%
Occupied Room Nights (Demand)	237,379	255,680	255,975	274,085	295,899	319,708		273,121	6.14%
Annual Occupancy (%)	**51.6%**	**56.3%**	**54.7%**	**58.6%**	**63.2%**	**68.3%**	**79.4%**	**58.8%**	5.76%
Average Daily Rate	$ 83.71	$ 86.98	$ 85.71	$ 87.16	$ 93.00	$ 99.39	$ 116.55	$ 89.85	3.49%
(2) Revenue Per Available Room	$ 43.22	$ 48.95	$ 46.87	$ 51.05	$ 58.81	$ 67.91	$ 92.52	$ 52.85	9.46%
Year-to-Year % Growth									
Annual Occupancy	-	9.0%	(2.8%)	7.1%	8.0%	8.0%	16.2%		
Average Daily Rate	-	3.9%	(1.5%)	1.7%	6.7%	6.9%	17.3%		
Revenue/Available Room	-	13.3%	(4.2%)	8.9%	15.2%	15.5%	36.2%		

			Distribution of Rooms by Class					
Location	**Rooms**	**% Dist.**	**Economy**	**Midscale**	**Upper Mid-scale**	**Upscale**	**Upper Upscale**	**Luxury**
Stuart	1,016	100%	12%	20%	29%	12%	27%	0%
Total:	**1,016**	**100%**	**12%**	**20%**	**29%**	**12%**	**27%**	**0%**

(1) CAGR=Compound Annual Growth Rate.

(2) Revenue per available room is total annual room revenue divided by available rooms. It is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancies.

Source: STR Global; WTL+a, March 2016.

Table 5-D: Hotel Market Performance, 2010-2015

St. Lucie County

Indian River Lagoon Economic Contributions Analysis

	2010	2011	2012	2013	2014	2015	Feb YTD 2016	CHANGE: 2010-2015 Average	CHANGE: 2010-2015 CAGR
Performance Characteristics									*(1)*
Number of Rooms	3,615	3,519	3,511	3,503	3,449	3,137			
Available Room Nights (Supply)	1,319,356	1,284,435	1,281,400	1,278,746	1,258,728	1,145,033		1,261,283	-2.79%
Occupied Room Nights (Demand)	619,065	687,898	677,509	671,985	722,897	726,206		684,260	3.24%
Annual Occupancy (%)	**46.9%**	**53.6%**	**52.9%**	**52.6%**	**57.4%**	**63.4%**	**75.7%**	**54.3%**	6.21%
Average Daily Rate	$ 71.62	$ 73.02	$ 76.24	$ 78.07	$ 80.80	$ 85.91	$ 102.85	$ 77.82	3.70%
(2) Revenue Per Available Room	$ 33.61	$ 39.11	$ 40.31	$ 41.03	$ 46.41	$ 54.48	$ 77.85	$ 42.22	10.15%
Year-to-Year % Growth									
Annual Occupancy	-	14.1%	(1.3%)	(0.6%)	9.3%	10.4%	19.3%		
Average Daily Rate	-	1.9%	4.4%	2.4%	3.5%	6.3%	19.7%		
Revenue/Available Room	-	16.4%	3.1%	1.8%	13.1%	17.4%	42.9%		

			Distribution of Rooms by Class					
Location	**Rooms**	**% Dist.**	**Economy**	**Midscale**	**Upper Mid-scale**	**Upscale**	**Upper Upscale**	**Luxury**
Fort Pierce	1,136	48%	35%	29%	36%	0%	0%	0%
Jensen Beach	110	5%	0%	0%	0%	100%	0%	0%
Port St. Lucie	1,107	47%	14%	16%	28%	42%	0%	0%
Total:	**2,353**	**100.0%**	**16%**	**15%**	**21%**	**47%**	**0%**	**0%**

(1) CAGR=Compound Annual Growth Rate.

(2) Revenue per available room is total annual room revenue divided by available rooms. It is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancies.

Source: STR Global; WTL+a, March 2016.

Table 5-E: Hotel Market Performance, 2010-2015

Volusia County

Indian River Lagoon Economic Contributions Analysis

	2010	2011	2012	2013	2014	2015	Feb YTD 2016	CHANGE: 2010-2015 Average	CHANGE: 2010-2015 CAGR
Performance Characteristics									*(1)*
Number of Rooms	12,653	12,570	12,632	12,334	12,292	12,399			
Available Room Nights (Supply)	4,618,362	4,587,900	4,610,493	4,502,106	4,486,297	4,525,876		4,555,172	-0.40%
Occupied Room Nights (Demand)	2,157,947	2,228,879	2,323,656	2,378,356	2,477,928	2,717,294		2,380,677	4.72%
Annual Occupancy (%)	**46.7%**	**48.6%**	**50.4%**	**52.8%**	**55.2%**	**60.0%**	**61.7%**	**52.3%**	5.14%
Average Daily Rate	$ 90.63	$ 89.68	$ 90.58	$ 91.46	$ 96.44	$ 101.14	$ 118.57	$ 93.62	2.22%
(2) Revenue Per Available Room	$ 42.35	$ 43.57	$ 45.65	$ 48.31	$ 53.27	$ 60.72	$ 73.21	$ 48.93	7.48%
Year-to-Year % Growth									
Annual Occupancy	-	4.0%	3.7%	4.8%	4.6%	8.7%	2.8%		
Average Daily Rate	-	(1.0%)	1.0%	1.0%	5.4%	4.9%	17.2%		
Revenue/Available Room	-	2.9%	4.8%	5.8%	10.2%	14.0%	20.6%		

			Distribution of Rooms by Class					
Location	**Rooms**	**% Dist.**	**Economy**	**Midscale**	**Upper Mid-scale**	**Upscale**	**Upper Upscale**	**Luxury**
Daytona Beach	5,389	65%	24%	10%	20%	27%	20%	0%
Daytona Beach Shores	887	11%	0%	15%	36%	49%	0%	0%
Debary	76	1%	0%	0%	100%	0%	0%	0%
Deland	162	2%	0%	0%	100%	0%	0%	0%
Deltona	123	1%	100%	0%	0%	0%	0%	0%
Edgewater	45	1%	0%	100%	0%	0%	0%	0%
New Smyrna Beach	213	3%	0%	47%	53%	0%	0%	0%
Orange City	211	3%	18%	28%	54%	0%	0%	0%
Ormond Beach	1,036	12%	48%	40%	8%	4%	0%	0%
Port Orange	159	2%	0%	45%	55%	0%	0%	0%
Total:	**8,301**	**100%**	**19%**	**29%**	**43%**	**8%**	**2%**	**0%**

(1) CAGR=Compound Annual Growth Rate.

(2) Revenue per available room is total annual room revenue divided by available rooms. It is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancies.

Source: STR Global; WTL+a, March 2016.

Table 5-F: Hotel Market Performance, 2010-2015

IRL Study Area Roll-up

Indian River Lagoon Economic Contributions Analysis

	2010	2011	2012	2013	2014	2015	Feb YTD 2016	CHANGE: 2010-2015 Average	CHANGE: 2010-2015 CAGR
Performance Characteristics									***(1)***
Number of Rooms	28,186	27,820	27,889	27,599	27,407	27,219			
Available Room Nights (Supply)	10,287,522	10,154,267	10,179,136	10,073,738	10,002,649	9,935,275		(352,247)	-0.69%
Occupied Room Nights (Demand)	5,043,773	5,211,413	5,353,891	5,491,544	5,811,938	6,170,084		1,126,311	4.11%
Annual Occupancy (%)	**49.0%**	**51.3%**	**52.6%**	**54.5%**	**58.1%**	**62.1%**		**54.6%**	4.84%
Average Daily Rate	$ 85.19	$ 86.89	$ 88.38	$ 90.04	$ 95.68	$ 101.58	$ 116.21	$ 91.29	3.58%
(2) Revenue Per Available Room	$ 41.91	$ 45.86	$ 46.65	$ 49.46	$ 56.34	$ 64.07	$ 82.24	$ 50.71	8.86%
Year-to-Year % Growth									
Annual Occupancy	-	4.7%	2.5%	3.6%	6.6%	6.9%			
Average Daily Rate	-	2.0%	1.7%	1.9%	6.3%	6.2%	14.4%		
Revenue/Available Room	-	9.4%	1.7%	6.0%	13.9%	13.7%	28.4%		

(1) CAGR=Compound Annual Growth Rate.

(2) Revenue per available room is total annual room revenue divided by available rooms. It is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancies.

Source: STR Global; WTL+a, March 2016.

Table 6-A: Annual Bed Tax Receipts, 2013-2014

"Central East" Vacation Region

Indian River Lagoon Economic Contributions Analysis

County *(1)*	Bed Tax	2013	2014	2014 % of Central East	Change: 2013-2014
Brevard	5.0%	$ 8,916,378	$ 10,006,981	39%	12.2%
Indian River	4.0%	1,826,111	2,030,429	8%	11.2%
Martin	4.0%	1,238,172	1,428,113	6%	15.3%
St. Lucie	5.0%	2,668,252	3,021,076	12%	13.2%
Volusia	3.0%	7,913,193	8,790,666	34%	11.1%
Subtotal - IRL Study Area:		**$ 22,562,106**	**$ 25,277,265**	**99.1%**	**12.0%**
Okeechobee	3.0%	$ 210,000	$ 235,495	1%	12.1%
TOTAL - Central East:		**$ 22,772,106**	**$ 25,512,760**	**100%**	**12.0%**

(1) Each of the counties located in the study area self-administers the Tourist Development Tax; annual totals are provided to the Florida Department of Revenue by each county's Tax Collector.

Source: Florida Department of Revenue; WTL+a, March 2016.

Table 6-B: Estimated Lodging Revenues by County, 2014
Indian River Lagoon Economic Contributions Analysis

County	Tax Rate	Tourist Tax Collected	Estimated 2014 Lodging Revenues	As % of Central East
Brevard	5.0%	$ 10,006,981	$ 200,139,620	31.3%
Indian River	4.0%	2,030,429	50,760,725	7.9%
Martin	4.0%	1,428,113	35,702,825	5.6%
St. Lucie	5.0%	3,021,076	60,421,520	9.4%
Volusia	3.0%	8,790,666	293,022,200	45.8%
Subtotal - IRL Study Area:		**$ 25,277,265**	**$ 640,046,890**	**98.8%**
Okeechobee	3.0%	$ 235,495	$ 7,849,833	1.2%
TOTAL - Central East:		**$ 25,512,760**	**$ 647,896,723**	**100.0%**

Source: Visit Florida, Florida Visitor Study, 2014; D.K. Shifflet & Associates; RDS/WTL+a, April 2016.

Table 7: Visitor Profile, 2014

"Central East" Vacation Region

Indian River Lagoon Economic Contributions Analysis

	%	Annual Total
Total Estimated Annual Visitors		**7,500,000**
Purpose of Trip		
Leisure	**92%**	**6,900,000**
Visit Friends & Relations	43%	3,225,000
Vacation/Getaway Weekend	37%	2,775,000
Other Leisure	12%	900,000
Business	**8%**	**600,000**
Group Meetings	6%	450,000
Transient Business	2%	150,000
Average Travel Party Size		
Couples (Male/Female)	43%	
One Adult	39%	
Families	9%	
Other	9%	
Average Persons Per Trip		**1.9**
Median Persons per Trip		**1.7**
Seasonality		
Winter (Dec - Feb)	18%	1,350,000
Spring (Mar - May)	31%	2,325,000
Summer (Jun - Aug)	28%	2,100,000
Fall (Sept - Nov)	23%	1,725,000

Visitor Accommodations By Type (Leisure Travel, Statewide)

	2013	2014
Paid Accommodations	**61%**	**64%**
Hotel, Paid	42%	47%
Home, Apartment/Condo	10%	9%
Timeshare	6%	6%
Other Paid	3%	3%
Non-Paid Accommodations	**39%**	**36%**
Friends/Relatives Home (VFR)	33%	30%
Other Non-Paid	6%	6%
Subtotal-VFR/Other Accommodations:	**100%**	**100%**

Source: Visit Florida, Florida Visitor Study, 2014; D.K. Shifflet & Associates; RDS/WTL+a, April 2016.

Table 8: Expenditures Per Domestic Leisure Visitor, 2014

"Central East" Vacation Region

Indian River Lagoon Economic Contributions Analysis

	Statewide	Central East
Average Expenditure (Per Visitor Per Day)		
Including Transportation	$ 153	$ 141
Excluding Transportation	$ 108	$ 82

Average Per Person Expenditures by Length of Stay

		Total Spending Per Person/Trip		
	% of Total	Low	Medium	High
1 to 3 nights	55%	$ 141	$ 282	$ 423
4 to 7 nights	34%	$ 564	$ 705	$ 987
More than 8 nights	11%	$ 1,269	N/A	N/A

Average Expenditure Per Person Per Trip		
Average	4.1 Nights	$ 578
Median	3.0 Nights	$ 423

Source: Visit Florida, Florida Visitor Study, 2014; D.K. Shifflet & Associates; RDS/WTL+a, April 2016.

BOAT REGISTRATIONS

Indian River Lagoon Economic Contributions Analysis

Table 9-A: Boat Registrations, 2005-2015

Brevard County

Indian River Lagoon Economic Contributions Analysis

		2005		2010		2015		Change: 2005-2015	
Class	**Length**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**
Class A-1	< 12"	6,229	34	5,773	25	5,018	29	(1,211)	(5)
Class A-2	12-15'	9,843	177	8,611	139	7,709	131	(2,134)	(46)
Class 1	16-25'	18,903	543	17,255	487	16,408	493	(2,495)	(50)
Class 2	26-39'	2,544	158	2,432	139	2,229	134	(315)	(24)
Class 3	40-64'	400	45	359	39	356	26	(44)	(19)
Class 4	65-109'	9	16	9	11	7	7	(2)	(19)
Class 5	110' & Up	-	-	1	-	1	1	1	1
	Canoes	653	6	690	4	720	7	67	1
Subtotal - Pleas. & Comm'l:		**38,581**	**979**	**35,130**	**844**	**32,448**	**828**	**(6,133)**	**(151)**
Subtotal - Dealers Inventory:			**631**		**523**		**453**		**(178)**
TOTAL:			**40,191**		**36,497**		**33,729**		**(6,462)**
Change Over 5-Year Period					*(3,694)*		*(2,768)*		
Class A-1	< 12"	15%	0%	16%	0%	15%	0%		
Class A-2	12-15'	24%	0%	24%	0%	23%	0%		
Class 1	16-25'	47%	1%	47%	1%	49%	1%		
Class 2	26-39'	6%	0%	7%	0%	7%	0%		
Class 3	40-64'	1%	0%	1%	0%	1%	0%		
Class 4	65-109'	0%	0%	0%	0%	0%	0%		
Class 5	110' & Up	0%	0%	0%	0%	0%	0%		
	Canoes	2%	0%	2%	0%	2%	0%		
Subtotal - Pleas. & Comm'l:		**96.0%**	**2.4%**	**96.3%**	**2.3%**	**96.2%**	**2.5%**		
Subtotal - Dealers Inventory:			**1.6%**		**1.4%**		**1.3%**		

http://www.flhsmv.gov/dmv/TaxCollDocs/vesselstats2014.pdf

Source: Florida Highway Safety & Motor Vehicles; RDS/WTL+a, March 2016.

Table 9-B: Boat Registrations, 2005-2015

Indian River County

Indian River Lagoon Economic Contributions Analysis

		2005		2010		2015		Change: 2005-2015	
Class	**Length**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**
Class A-1	< 12"	1,286	15	1,294	12	1,162	8	(124)	(7)
Class A-2	12-15'	2,860	96	2,570	96	2,380	87	(480)	(9)
Class 1	16-25'	5,732	213	556	227	5,568	246	(164)	33
Class 2	26-39'	683	49	699	58	672	54	(11)	5
Class 3	40-64'	165	12	150	9	153	12	(12)	-
Class 4	65-109'	10	-	12	-	10	-	-	-
Class 5	110' & Up	1	-	1	-	2	-	1	-
	Canoes	172	3	181	2	170	3	(2)	-
Subtotal - Pleas. & Comm'l:		**10,909**	**388**	**5,463**	**404**	**10,117**	**410**	**(792)**	**22**
Subtotal - Dealers Inventory:			**75**		**61**		**60**		**(15)**
TOTAL:			**11,372**		**5,928**		**10,587**		**(785)**
Change Over 5-Year Period					*(5,444)*		*4,659*		
Class A-1	< 12"	11%	0%	22%	0%	11%	0%		
Class A-2	12-15'	25%	1%	43%	2%	22%	1%		
Class 1	16-25'	50%	2%	9%	4%	53%	2%		
Class 2	26-39'	6%	0%	12%	1%	6%	1%		
Class 3	40-64'	1%	0%	3%	0%	1%	0%		
Class 4	65-109'	0%	0%	0%	0%	0%	0%		
Class 5	110' & Up	0%	0%	0%	0%	0%	0%		
	Canoes	2%	0%	3%	0%	2%	0%		
Subtotal - Pleas. & Comm'l:		**95.9%**	**3.4%**	**92.2%**	**6.8%**	**95.6%**	**3.9%**		
Subtotal - Dealers Inventory:			**0.7%**		**1.0%**		**0.6%**		

http://www.flhsmv.gov/dmv/TaxCollDocs/vesselstats2014.pdf

Source: Florida Highway Safety & Motor Vehicles; RDS/WTL+a, March 2016.

Table 9-C: Boat Registrations, 2005-2015

Martin County

Indian River Lagoon Economic Contributions Analysis

		2005		2010		2015		Change: 2005-2015	
Class	**Length**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**
Class A-1	< 12"	2,223	11	2,052	11	2,088	13	(135)	2
Class A-2	12-15'	2,277	67	1,942	57	1,962	49	(315)	(18)
Class 1	16-25'	9,126	297	8,008	318	8,624	313	(502)	16
Class 2	26-39'	2,547	109	2,351	114	2,735	111	188	2
Class 3	40-64'	457	43	414	35	508	27	51	(16)
Class 4	65-109'	43	28	26	4	58	5	15	(23)
Class 5	110' & Up	5	1	2	-	1	-	(4)	(1)
	Canoes	96	-	88	-	103	1	7	1
Subtotal - Pleas. & Comm'l:		**16,774**	**556**	**14,883**	**539**	**16,079**	**519**	**(695)**	**(37)**
Subtotal - Dealers Inventory:			**374**		**230**		**238**		**(136)**
TOTAL:			**17,704**		**15,652**		**16,836**		**(868)**
Change Over 5-Year Period					*(2,052)*		*1,184*		
Class A-1	< 12"	13%	0%	13%	0%	12%	0%		
Class A-2	12-15'	13%	0%	12%	0%	12%	0%		
Class 1	16-25'	52%	2%	51%	2%	51%	2%		
Class 2	26-39'	14%	1%	15%	1%	16%	1%		
Class 3	40-64'	3%	0%	3%	0%	3%	0%		
Class 4	65-109'	0%	0%	0%	0%	0%	0%		
Class 5	110' & Up	0%	0%	0%	0%	0%	0%		
	Canoes	1%	0%	1%	0%	1%	0%		
Subtotal - Pleas. & Comm'l:		**94.7%**	**3.1%**	**95.1%**	**3.4%**	**95.5%**	**3.1%**		
Subtotal - Dealers Inventory:			**2.1%**		**1.5%**		**1.4%**		

http://www.flhsmv.gov/dmv/TaxCollDocs/vesselstats2014.pdf

Source: Florida Highway Safety & Motor Vehicles; RDS/WTL+a, March 2016.

Table 9-D: Boat Registrations, 2005-2015

St. Lucie County

Indian River Lagoon Economic Contributions Analysis

		2005		2010		2015		Change: 2005-2015	
Class	**Length**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**
Class A-1	< 12"	1,800	16	1,768	12	1,685	13	(115)	(3)
Class A-2	12-15'	2,870	75	2,359	84	2,181	87	(689)	12
Class 1	16-25'	7,409	247	7,220	272	7,064	300	(345)	53
Class 2	26-39'	1,024	88	980	81	1,061	85	37	(3)
Class 3	40-64'	173	27	154	17	187	10	14	(17)
Class 4	65-109'	2	1	1	1	15	1	13	-
Class 5	110' & Up	3	-	2	-	-	-	(3)	-
	Canoes	92	-	96	2	127	-	35	-
Subtotal - Pleas. & Comm'l:		**13,373**	**454**	**12,580**	**469**	**12,320**	**496**	**(1,053)**	**42**
Subtotal - Dealers Inventory:			**172**		**74**		**112**		**(60)**
TOTAL:			**13,999**		**13,123**		**12,928**		**(1,071)**
Change Over 5-Year Period					*(876)*		*(195)*		
Class A-1	< 12"	13%	0%	13%	0%	13%	0%		
Class A-2	12-15'	21%	1%	18%	1%	17%	1%		
Class 1	16-25'	53%	2%	55%	2%	55%	2%		
Class 2	26-39'	7%	1%	7%	1%	8%	1%		
Class 3	40-64'	1%	0%	1%	0%	1%	0%		
Class 4	65-109'	0%	0%	0%	0%	0%	0%		
Class 5	110' & Up	0%	0	0%	0%	0%	0%		
	Canoes	1%	0%	1%	0%	1%	0%		
Subtotal - Pleas. & Comm'l:		**95.5%**	**3.2%**	**95.9%**	**3.6%**	**95.3%**	**3.8%**		
Subtotal - Dealers Inventory:			**1.2%**		**0.6%**		**0.9%**		

http://www.flhsmv.gov/dmv/TaxCollDocs/vesselstats2014.pdf

Source: Florida Highway Safety & Motor Vehicles; RDS/WTL+a, March 2016.

Table 9-E: Boat Registrations, 2005-2015

Volusia County

Indian River Lagoon Economic Contributions Analysis

		2005		2010		2015		Change: 2005-2015	
Class	**Length**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**
Class A-1	< 12"	4,102	25	3,894	22	3,291	27	(811)	2
Class A-2	12-15'	8,351	190	7,388	189	6,642	196	(1,709)	6
Class 1	16-25'	15,459	339	14,867	351	14,217	410	(1,242)	71
Class 2	26-39'	1,345	67	1,306	63	1,218	61	(127)	(6)
Class 3	40-64'	226	46	218	35	222	19	(4)	(27)
Class 4	65-109'	14	6	11	6	11	4	(3)	(2)
Class 5	110' & Up	-	-	-	-	1	-	1	-
	Canoes	321	3	344	1	414	1	93	(2)
Subtotal - Pleas. & Comm'l:		**29,818**	**676**	**28,028**	**667**	**26,016**	**718**	**(3,802)**	**42**
Subtotal - Dealers Inventory:			**316**		**205**		**217**		**(99)**
TOTAL:			**30,810**		**28,900**		**26,951**		**(3,859)**
Change Over 5-Year Period					*(1,910)*		*(1,949)*		
Class A-1	< 12"	14%	4%	14%	3%	13%	4%		
Class A-2	12-15'	28%	28%	26%	28%	26%	27%		
Class 1	16-25'	52%	50%	53%	53%	55%	57%		
Class 2	26-39'	5%	10%	5%	9%	5%	8%		
Class 3	40-64'	1%	7%	1%	5%	1%	3%		
Class 4	65-109'	0%	1%	0%	1%	0%	1%		
Class 5	110' & Up	0%	0%	0%	0%	0%	0%		
	Canoes	1%	0%	1%	0%	2%	0%		
Subtotal - Pleas. & Comm'l:		**96.8%**	**2.2%**	**97.0%**	**2.3%**	**96.5%**	**2.7%**		
Subtotal - Dealers Inventory:			**1.0%**		**0.7%**		**0.8%**		

http://www.flhsmv.gov/dmv/TaxCollDocs/vesselstats2014.pdf

Source: Florida Highway Safety & Motor Vehicles; RDS/WTL+a, March 2016.

Table 9-F: Boat Registrations, 2005-2015

IRL Study Area Roll-up

Indian River Lagoon Economic Contributions Analysis

		2005		2010		2015		Change: 2005-2015	
Class	**Length**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**	**Pleasure**	**Comm'l**
Class A-1	< 12"	15,640	101	14,781	82	13,244	90	(2,396)	(11)
Class A-2	12-15'	26,201	605	22,870	565	20,874	550	(5,327)	(55)
Class 1	16-25'	56,629	1,639	47,906	1,655	51,881	1,762	(4,748)	123
Class 2	26-39'	8,143	471	7,768	455	7,915	445	(228)	(26)
Class 3	40-64'	1,421	173	1,295	135	1,426	94	5	(79)
Class 4	65-109'	78	51	59	22	101	17	23	(34)
Class 5	110' & Up	9	1	6	-	5	1	(4)	-
	Canoes	1,334	12	1,399	9	1,534	12	200	-
Subtotal - Pleas. & Comm'l:		**109,455**	**3,053**	**96,084**	**2,923**	**96,980**	**2,971**	**(12,475)**	**(82)**
Subtotal - Dealers Inventory:			**1,568**		**1,093**		**1,080**		**(488)**
TOTAL:			**114,076**		**100,100**		**101,031**		**(13,045)**
Change Over 5-Year Period					*(13,976)*		*931*		
Class A-1	< 12"	14%	3%	15%	3%	14%	3%		
Class A-2	12-15'	24%	20%	24%	19%	22%	19%		
Class 1	16-25'	52%	54%	50%	57%	53%	59%		
Class 2	26-39'	7%	15%	8%	16%	8%	15%		
Class 3	40-64'	1%	6%	1%	5%	1%	3%		
Class 4	65-109'	0%	2%	0%	1%	0%	1%		
Class 5	110' & Up	0%	0%	0%	0%	0%	0%		
	Canoes	1%	0%	1%	0%	2%	0%		
Subtotal - Pleas. & Comm'l:		**95.9%**	**2.7%**	**96.0%**	**2.9%**	**96.0%**	**2.9%**		
Subtotal - Dealers Inventory:			**1.4%**		**1.1%**		**1.1%**		

http://www.flhsmv.gov/dmv/TaxCollDocs/vesselstats2014.pdf

Source: Florida Highway Safety & Motor Vehicles; RDS/WTL+a, March 2016.

COMMERCIAL & RECREATIONAL FISHING

Indian River Lagoon Economic Contributions Analysis

Table 10-A: IRL Commercial Fishing Landings by County, 2004-2014

Fin Fish-All Counties

Indian River Lagoon Economic Contributions Analysis

County	2004		2009		2014		Change: 2004-2014			
	Weight (Lbs)	Value	Weight (Lbs)	Value	Weight (Lbs)	Value	Weight (Lbs)	%	Value	%
Brevard	1,430,017	$ 1,558,615	2,267,327	$ 3,400,629	2,116,330	$ 3,288,565	686,313	48%	$ 1,729,950	111%
Indian River	949,748	1,129,829	1,231,663	1,630,138	644,233	958,301	(305,515)	-32%	(171,528)	-15%
Martin	2,751,183	2,319,921	2,804,369	3,165,022	1,925,238	2,691,685	(825,945)	-30%	371,764	16%
St. Lucie	2,208,706	2,577,040	3,102,086	4,688,200	3,094,283	6,557,819	885,577	40%	3,980,779	154%
Volusia	723,488	1,035,940	1,395,227	2,116,517	1,836,902	3,342,718	1,113,414	154%	2,306,778	223%
Total-Study Area:	**8,063,142**	**$ 8,621,345**	**10,800,672**	**$ 15,000,506**	**9,616,986**	**$ 16,839,088**	**1,553,844**	**19%**	**$ 8,217,743**	**95%**
As % of State	*7.3%*	*4.6%*	*12.1%*	*9.6%*	*2.4%*	*6.5%*				
Total-Florida:	**110,037,688**	**$ 188,883,917**	**89,508,466**	**$ 155,563,823**	**395,688,818**	**$ 260,965,131**	**285,651,130**	**260%**	**$ 72,081,214**	**38%**

Source: NOAA Office of Science & Technology Commercial Fishing Statistics, 2015; RDS/WTL+a, March 2016.

Table 10-B: IRL Commercial Fishing Landings by County, 2004-2014

Shellfish/Invertebrates/Shrimp-All Counties

Indian River Lagoon Economic Contributions Analysis

	2004		2009		2014		Change: 2004-2014			
County	**Weight**	**Value**	**Weight**	**Value**	**Weight**	**Value**	**Weight (Lbs)**	**%**	**Value**	**%**
Brevard	6,027,533	$ 6,652,511	2,265,803	$ 2,696,795	1,082,627	$ 2,943,968	(4,944,906)	-82%	$ (3,708,543)	-56%
Indian River	7,182	19,500	19,850	44,475	2,880	31,910	(4,302)	-60%	12,410	64%
Martin	28,890	82,045	32,467	66,343	2,246	12,228	(26,644)	-92%	(69,817)	-85%
St. Lucie	70,418	111,080	219,170	410,053	158,425	457,739	88,007	125%	346,659	312%
Volusia	659,082	1,257,406	318,770	806,178	298,964	806,785	(360,118)	-55%	(450,621)	-36%
Total-Study Area:	**6,793,105**	**$ 8,122,542**	**2,856,060**	**$ 4,023,844**	**1,545,142**	**$ 4,252,630**	**(5,247,963)**	**-77%**	**$ (3,869,912)**	**-48%**
As % of State	*6.2%*	*4.3%*	*3.2%*	*2.6%*	*0.4%*	*1.6%*				
Total-Florida:	**110,037,688**	**$ 188,883,917**	**89,508,466**	**$ 155,563,823**	**395,688,818**	**$ 260,965,131**	**285,651,130**	**260%**	**$ 72,081,214**	**38%**

Source: NOAA Office of Science & Technology Commercial Fishing Statistics, 2015; RDS/WTL+a, March 2016.

Table 10-C: IRL Commercial Fishing Landings by County, 2004-2014

IRL Study Area Roll-up

Indian River Lagoon Economic Contributions Analysis

	2004		2009		2014		Change: 2004-2014			
County	**Weight**	**Value**	**Weight**	**Value**	**Weight**	**Value**	**Weight (Lbs)**	**%**	**Value**	**%**
Brevard	7,457,550	$ 8,211,126	4,533,130	$ 6,097,424	3,198,957	$ 6,232,533	(4,258,593)	-57%	$ (1,978,593)	-24%
Indian River	956,930	1,149,329	1,251,513	1,674,613	647,113	990,211	(309,817)	-32%	(159,118)	-14%
Martin	2,780,073	2,401,966	2,836,836	3,231,365	1,927,484	2,703,913	(852,589)	-31%	301,947	13%
St. Lucie	2,279,124	2,688,120	3,321,256	5,098,253	3,252,708	7,015,558	973,584	43%	4,327,438	161%
Volusia	1,382,570	2,293,346	1,713,997	2,922,695	2,135,866	4,149,503	753,296	54%	1,856,157	81%
Total-Study Area:	**14,856,247**	**$ 16,743,887**	**13,656,732**	**$ 19,024,350**	**11,162,128**	**$ 21,091,718**	**(3,694,119)**	**-25%**	**$ 4,347,831**	**26%**
As % of State	*13.5%*	*8.9%*	*15.3%*	*12.2%*	*2.8%*	*8.1%*				
Total-Florida:	**110,037,688**	**$ 188,883,917**	**89,508,466**	**$ 155,563,823**	**395,688,818**	**$ 260,965,131**	**285,651,130**	**260%**	**$ 72,081,214**	**38%**

Source: NOAA Office of Science & Technology Commercial Fishing Statistics, 2015; RDS/WTL+a, March 2016.

Table 11-A: Average Annual Expenditures for Recreational Fishing Activities, 2006

"East Florida"

Indian River Lagoon Economic Contributions Analysis

Expenditure Type	Fishing Mode	Resident Anglers: Avg. Spend Per Person	Resident Anglers: Total Per Resident Spend	Non-Resident Anglers: Avg. Spend Per Person	Non-Resident Anglers: Total Per Non-Resident Spend
Travel & Trip Expenditures					
Access & Parking	Party/Charter	$ -	$ -	$ 0.10	$ 8,000
	Private/Rental	0.50	2,975,000	0.15	87,000
	Shore	0.85	4,541,000	1.33	1,493,000
Auto Rental	Party/Charter	$ -	$ -	$ 27.51	$ 2,208,000
	Private/Rental	0.06	368,000	3.09	1,811,000
	Shore	0.02	102,000	5.43	6,104,000
Bait	Party/Charter	$ 0.98	$ 92,000	$ 0.28	$ 22,000
	Private/Rental	3.41	20,198,000	1.54	902,000
	Shore	2.70	14,322,000	2.47	2,776,000
Boat & Equipment Rental	Party/Charter	$ -	$ -	$ -	$ -
	Private/Rental	0.04	220,000	1.09	640,000
	Shore	-	-	0.01	10,000
Boat Fuel	Party/Charter	$ 9.56	$ 56,542,000	$ 4.09	$ 2,395,000
Catch Processing	Party/Charter	$ -	$ -	$ 0.74	$ 60,000
	Private/Rental	0.01	35,000	-	-
	Shore	-	5,000	-	-
Charter Crew Tips	Party/Charter	$ 4.12	$ 384,000	$ 4.22	$ 339,000
Charter Fees	Party/Charter	$ 123.75	$ 11,533,000	$ 137.64	$ 11,049,000
Food from Grocery Stores	Party/Charter	$ 9.33	$ 869,000	$ 7.57	$ 608,000
	Private/Rental	3.90	23,060,000	7.28	4,261,000
	Shore	2.17	11,547,000	7.24	8,147,000
Food from Restaurants	Party/Charter	$ 5.24	$ 488,000	$ 35.98	$ 2,889,000
	Private/Rental	1.33	7,893,000	10.27	6,015,000
	Shore	0.85	4,537,000	7.96	8,980,000
Gifts & Souvenirs	Party/Charter	$ -	$ -	$ 3.73	$ 300,000
	Private/Rental	-	18,000	21.02	12,312,000
	Shore	0.08	414,000	0.10	116,000
Ice	Party/Charter	$ 0.04	$ 4,000	$ 0.05	$ 4,000
	Private/Rental	0.88	5,178,000	0.52	307,000
	Shore	0.28	1,507,000	0.02	212,000
Lodging	Party/Charter	$ 3.18	$ 297,000	$ 25.48	$ 2,045,000
	Private/Rental	-	6,000	8.92	5,222,000
	Shore	0.04	186,000	18.85	21,206,000
Private Transportation	Party/Charter	$ 8.48	$ 790,000	$ 14.18	$ 1,139,000
	Private/Rental	6.12	36,213,000	16.83	9,855,000
	Shore	5.70	30,283,000	15.73	17,695,000
Public Transportation	Party/Charter	$ -	$ -	$ 18.92	$ 1,519,000
	Private/Rental	-	-	4.42	2,588,000
	Shore	0.03	182,000	6.32	7,104,000
Tackle Used on Trip	Party/Charter	$ 5.44	$ 507,000	$ 0.03	$ 2,000
	Private/Rental	3.97	22,901,000	13.78	8,070,000
	Shore	2.70	14,321,000	4.03	4,528,000
Tournament Fees	Party/Charter	$ -	$ -	$ -	$ -
	Private/Rental	0.18	1,072,000	-	-
	Shore	-	24,000	0.05	60,000
Mode Subtotal:	Party/Charter	$ 140.56	$ 14,963,000	$ 276.45	$ 22,192,000
	Private/Rental	29.86	176,680,000	92.99	54,464,000
	Shore	15.43	8,197,000	69.72	78,429,000
TOTAL-Travel & Trip Spending:		**$ 185.85**	**$ 273,613,000**	**$ 439.16**	**$ 155,086,000**

Source: NOAA, Dept. of Science & Technology, 2006 National Recreational Fishing Survey; RDS/WTL+a, March 2016.

Table 11-B: Average Annual Expenditures for Recreational Fishing Activities, 2006

"East Florida"

Indian River Lagoon Economic Contributions Analysis

Expenditure Type	Resident Anglers: Avg. Spend Per Person	Resident Anglers: Total Per Resident Spend	Non-Resident Anglers: Avg. Spend Per Person	Non-Resident Anglers: Total Per Non-Resident Spend
Equipment Expenditures				
Accessory Purchases-New	$ 153.00	$ 254,008,000	$ 1.34	$ 1,251,000
Accessory Purchases-Used	0.20	330,000	-	-
Binoculars	5.52	9,158,000	8.58	8,015,000
Boat Purchases-New	1,760.96	2,923,145,000	15.76	14,724,000
Boat Purchases-Used	17.75	29,469,000	0.36	338,000
Camping Equipment	7.09	11,785,000	17.82	16,656,000
Canoe Purchases-New	0.16	258,000	-	-
Canoe Purchases-Used	-	-	-	-
Clothing	48.41	80,362,000	3.30	3,087,000
Club Dues	5.47	9,077,000	1.47	1,377,000
License Fees	21.77	36,138,000	18.83	17,601,000
Magazine Subscriptions	22.34	37,089,000	4.60	4,302,000
Other Gear	111.84	185,652,000	36.10	33,737,000
Rods and Reels	217.82	361,569,000	73.31	68,510,000
Tackle	140.56	233,334,000	35.77	33,427,000
Taxidermy	0.62	1,030,000	-	-
Subtotal-Equipment:	**$ 2,513.51**	**$ 4,172,404,000**	**$ 217.24**	**$ 203,025,000**
Other Fees & Expenses				
Boat Insurance	$ 171.36	$ 284,482,000	$ 1.49	$ 1,396,000
Boat Maintenance	132.90	220,618,000	2.48	2,316,000
Boat Registration	34.14	56,673,000	1.03	960,000
Boat Purchase Fees	24.54	40,732,000	-	-
Boat Storage	16.29	27,033,000	-	-
Home Purchase-New	-	-	-	-
Real Estate Commissions	-	-	-	-
Second Home Insurance	0.28	459,000	-	6,169,000
Second Home Maintenance	0.03	52,000	6.60	-
Second Home Property Tax	0.01	18,000	-	-
Second Home Purchase Fee	0.03	56,000	-	-
Vehicle Insurance	250.58	415,948,000	0.83	771,000
Vehicle Maintenance	106.04	176,031,000	0.83	1,783,000
Vehicle Purchase-Fees	23.13	38,396,000	0.84	-
Vehicle Purchase-New	895.32	1,486,200	23.10	21,592,000
Vehicle Purchase-Used	54.34	90,196,000	-	-
Subtotal-Other Fees & Expenses:	**$ 1,708.99**	**$ 1,352,180,200**	**$ 37.20**	**$ 34,987,000**
TOTAL ANNUAL SPENDING:	**$ 4,408.35**	**$ 5,798,197,200**	**$ 693.60**	**$ 393,098,000**

Source: NOAA, Dept. of Science & Technology, 2006 National Recreational Fishing Survey; RDS/WTL+a, March 2016.

Table 12: Recreational Fishing Licenses, by County, 2015
Indian River Lagoon Economic Contributions Analysis

Location	Fresh Water Licenses	% of Total	Salt Water Licenses	% of Total	TOTAL Amount	TOTAL % by County
Brevard County	18,294	36%	64,774	35%	83,068	35%
Indian River County	4,644	9%	18,294	10%	22,938	10%
Martin County	4,338	8%	23,622	13%	27,960	12%
St. Lucie County	7,194	14%	29,952	16%	37,146	16%
Volusia County	16,687	33%	48,025	26%	64,712	27%
Total - Study Area:	**51,157**	**22%**	**184,667**	**78%**	**235,824**	**100%**
As % of State	*8%*		*9%*		*9%*	
State of Florida:						
Total Recreational Fishing Licenses	**623,296**	**23%**	**2,134,056**	**77%**	**2,757,352**	**100%**
Out-of-State Licenseholders	63,433	10%	407,078	19%	470,511	17%

Source: Florida Fish & Wildlife Commission; RDS/WTL+a, April 2016.

RETAIL SALES TAX TRENDS

Indian River Lagoon Economic Contributions Analysis

Table 13-A: Annual Sales Tax Revenues in Selected Visitor Categories, 2005-2015

Brevard County

Indian River Lagoon Economic Contributions Analysis

Sales Tax Category	2005 Amount	2005 %	2010 Amount	2010 %	2015 *(1)* Amount	2015 *(1)* %	Change: 2005-2015 Amount	Change: 2005-2015 %
Food & Beverage Stores	$ 25,267,096	27%	$ 25,336,563	28%	$ 30,694,687	26%	$ 5,427,592	21%
Eating & Drinking Places	448,295	0%	654,538	1%	1,286,646	1%	838,351	187%
Restaurants/Lunchrooms/Catering Services	41,362,755	43%	42,669,374	47%	55,041,137	47%	13,678,382	33%
Drinking Places	5,247,194	6%	4,806,972	5%	4,946,653	4%	(300,541)	-6%
Gasoline Service Stations	1,804,138	2%	1,755,676	2%	1,600,841	1%	(203,297)	-11%
Boat Dealers	4,996,510	5%	1,331,830	1%	2,042,685	2%	(2,953,825)	-59%
Hotel/Motel Accommodations, Other Lodging	11,561,303	12%	10,559,586	12%	15,594,879	13%	4,033,576	35%
Admissions/Amusements, Recreation Services	3,491,732	4%	3,594,047	4%	4,530,772	4%	1,039,039	30%
Private Parking Lots/Boat Docks/Aircraft Hangers	1,004,687	1%	982,643	1%	918,745	1%	(85,943)	-9%
Total-Study Area:	**$ 95,183,711**	**100%**	**$ 91,691,228**	**100%**	**$ 116,657,045**	**100%**	**$ 21,473,334**	**23%**
As % of State	*2.3%*		*2.1%*		*1.9%*			
Total of Selected Categories-Statewide:	**$ 4,224,217,362**		**$ 4,417,142,942**		**$ 6,148,129,061**		**$ 1,923,911,698**	**46%**

(1) 2015 totals include sales tax collections through November; December has been annualized based on 2014 total proportions by sales tax category.

Source: Florida Department of Revenue; WTL+a, March 2016.

Table 13-B: Annual Sales Tax Revenues in Selected Visitor Categories, 2005-2015

Indian River County

Indian River Lagoon Economic Contributions Analysis

Sales Tax Category	2005 Amount	2005 %	2010 Amount	2010 %	2015 *(1)* Amount	2015 *(1)* %	Change: 2005-2015 Amount	Change: 2005-2015 %
Food & Beverage Stores	$ 7,291,824	25%	$ 7,381,200	25%	$ 9,400,305	24%	$ 2,108,482	29%
Eating & Drinking Places	76,732	0%	122,681	0%	357,499	1%	280,767	366%
Restaurants/Lunchrooms/Catering Services	10,838,301	37%	10,876,689	36%	15,056,401	39%	4,218,100	39%
Drinking Places	1,693,919	6%	775,706	3%	1,041,366	3%	(652,553)	-39%
Gasoline Service Stations	775,580	3%	684,987	2%	738,568	2%	(37,012)	-5%
Boat Dealers	899,346	3%	307,628	1%	467,457	1%	(431,888)	-48%
Hotel/Motel Accommodations, Other Lodging	2,763,245	9%	3,065,824	10%	4,896,148	13%	2,132,903	77%
Admissions/Amusements, Recreation Services	4,580,380	16%	6,075,996	20%	5,756,418	15%	1,176,038	26%
Private Parking Lots/Boat Docks/Aircraft Hangers	489,010	2%	808,268	3%	978,049	3%	489,039	100%
Total-Study Area:	**$ 29,408,335**	**100%**	**$ 30,098,979**	**100%**	**$ 38,692,211**	**100%**	**$ 9,283,876**	**32%**
As % of State	*0.7%*		*0.7%*		*0.6%*			
Total of Selected Categories-Statewide:	**$ 4,224,217,362**		**$ 4,417,142,942**		**$ 6,148,129,061**		**$ 1,923,911,698**	**46%**

(1) 2015 totals include sales tax collections through November; December has been annualized based on 2014 total proportions by sales tax category.

Source: Florida Department of Revenue; WTL+a, March 2016.

Table 13-C: Annual Sales Tax Revenues in Selected Visitor Categories, 2005-2015

Martin County

Indian River Lagoon Economic Contributions Analysis

Sales Tax Category	2005 Amount	2005 %	2010 Amount	2010 %	2015 *(1)* Amount	2015 *(1)* %	Change: 2005-2015 Amount	Change: 2005-2015 %
Food & Beverage Stores	$ 8,804,888	20%	$ 8,869,038	23%	$ 12,093,958	23%	$ 3,289,070	37%
Eating & Drinking Places	1,538,968	4%	222,203	1%	400,757	1%	(1,138,211)	-74%
Restaurants/Lunchrooms/Catering Services	13,934,117	32%	13,802,520	36%	19,139,347	36%	5,205,230	37%
Drinking Places	1,165,226	3%	909,633	2%	941,710	2%	(223,517)	-19%
Gasoline Service Stations	716,026	2%	506,736	1%	291,001	1%	(425,025)	-59%
Boat Dealers	10,194,991	23%	4,936,072	13%	8,651,213	16%	(1,543,778)	-15%
Hotel/Motel Accommodations, Other Lodging	2,684,922	6%	2,341,464	6%	3,461,003	6%	776,080	29%
Admissions/Amusements, Recreation Services	3,858,899	9%	5,494,530	14%	6,585,331	12%	2,726,432	71%
Private Parking Lots/Boat Docks/Aircraft Hangers	838,784	2%	1,052,967	3%	1,891,891	4%	1,053,106	126%
Total-Study Area:	**$ 43,736,822**	**100%**	**$ 38,135,163**	**100%**	**$ 53,456,210**	**100%**	**$ 9,719,389**	**22%**
As % of State	*1.0%*		*0.9%*		*0.9%*			
Total of Selected Categories-Statewide:	**$ 4,224,217,362**		**$ 4,417,142,942**		**$ 6,148,129,061**		**$ 1,923,911,698**	**46%**

(1) 2015 totals include sales tax collections through November; December has been annualized based on 2014 total proportions by sales tax category.

Source: Florida Department of Revenue; WTL+a, March 2016.

Table 13-D: Annual Sales Tax Revenues in Selected Visitor Categories, 2005-2015

St. Lucie County

Indian River Lagoon Economic Contributions Analysis

Sales Tax Category	2005 Amount	2005 %	2010 Amount	2010 %	2015 *(1)* Amount	2015 *(1)* %	Change: 2005-2015 Amount	Change: 2005-2015 %
Food & Beverage Stores	$ 11,317,454	33%	$ 13,247,089	36%	$ 16,428,480	34%	$ 5,111,026	45%
Eating & Drinking Places	-	0%	-	0%	191,356	0.4%	191,356	N/A
Restaurants/Lunchrooms/Catering Services	13,436,616	39%	14,950,581	41%	20,661,529	43%	7,224,913	54%
Drinking Places	903,823	3%	1,021,059	3%	1,085,751	2%	181,928	20%
Gasoline Service Stations	831,793	2%	817,389	2%	726,361	1%	(105,432)	-13%
Boat Dealers	1,370,231	4%	622,132	2%	1,532,856	3%	162,626	12%
Hotel/Motel Accommodations, Other Lodging	4,310,982	12%	2,713,624	7%	4,581,027	9%	270,045	6%
Admissions/Amusements, Recreation Services	2,186,815	6%	2,974,348	8%	3,116,808	6%	929,993	43%
Private Parking Lots/Boat Docks/Aircraft Hangers	269,223	1%	161,483	0%	279,538	1%	10,315	4%
Total-Study Area:	**$ 34,626,936**	**100%**	**$ 36,507,704**	**100%**	**$ 48,603,706**	**100%**	**$ 13,976,770**	**40%**
As % of State	*0.8%*		*0.8%*		*0.8%*			
Total of Selected Categories-Statewide:	**$ 4,224,217,362**		**$ 4,417,142,942**		**$ 6,148,129,061**		**$ 1,923,911,698**	**46%**

(1) 2015 totals include sales tax collections through November; December has been annualized based on 2014 total proportions by sales tax category.

Source: Florida Department of Revenue; WTL+a, March 2016.

Table 13-E: Annual Sales Tax Revenues in Selected Visitor Categories, 2005-2015

Volusia County

Indian River Lagoon Economic Contributions Analysis

Sales Tax Category	2005 Amount	2005 %	2010 Amount	2010 %	2015 *(1)* Amount	2015 *(1)* %	Change: 2005-2015 Amount	Change: 2005-2015 %
Food & Beverage Stores	$ 25,347,641	25%	$ 27,908,915	28%	$ 33,196,091	26%	$ 7,848,451	31%
Eating & Drinking Places	337,982	0%	455,378	0%	547,908	0%	209,926	62%
Restaurants/Lunchrooms/Catering Services	39,044,661	38%	40,620,733	40%	53,523,881	42%	14,479,220	37%
Drinking Places	5,523,844	5%	4,278,695	4%	4,571,326	4%	(952,518)	-17%
Gasoline Service Stations	1,018,240	1%	1,032,448	1%	1,272,640	1%	254,400	25%
Boat Dealers	2,768,885	3%	1,245,171	1%	2,284,569	2%	(484,316)	-17%
Hotel/Motel Accommodations, Other Lodging	22,699,440	22%	19,162,665	19%	25,952,950	20%	3,253,510	14%
Admissions/Amusements, Recreation Services	5,177,073	5%	5,551,666	6%	6,574,697	5%	1,397,624	27%
Private Parking Lots/Boat Docks/Aircraft Hangers	634,068	1%	388,965	0%	397,033	0%	(237,036)	-37%
Total-Study Area:	**$ 102,551,833**	**100%**	**$ 100,644,637**	**100%**	**$ 128,321,094**	**100%**	**$ 25,769,261**	**25%**
As % of State	*2.4%*		*2.3%*		*2.1%*			
Total of Selected Categories-Statewide:	**$ 4,224,217,362**		**$ 4,417,142,942**		**$ 6,148,129,061**		**$ 1,923,911,698**	**46%**

(1) 2015 totals include sales tax collections through November; December has been annualized based on 2014 total proportions by sales tax category.

Source: Florida Department of Revenue; WTL+a, March 2016.

Table 13-F: Annual Sales Tax Revenues in Selected Visitor Categories, 2005-2015

IRL Study Area Roll-up

Indian River Lagoon Economic Contributions Analysis

Sales Tax Category	2005 Amount	2005 %	2010 Amount	2010 %	2015 *(1)* Amount	2015 *(1)* %	Change: 2005-2015 Amount	Change: 2005-2015 %
Food & Beverage Stores	$ 78,028,902	26%	$ 82,742,805	28%	$ 101,813,522	26%	$ 23,784,620	30%
Eating & Drinking Places	2,401,976	0.8%	1,454,801	0.5%	2,784,166	0.7%	382,190	16%
Restaurants/Lunchrooms/Catering Services	118,616,450	39%	122,919,896	41%	163,422,294	42%	44,805,844	38%
Drinking Places	14,534,006	5%	11,792,064	4%	12,586,806	3%	(1,947,201)	-13%
Gasoline Service Stations	5,145,777	2%	4,797,236	2%	4,629,411	1%	(516,365)	-10%
Boat Dealers	20,229,962	7%	8,442,832	3%	14,978,780	4%	(5,251,182)	-26%
Hotel/Motel Accommodations, Other Lodging	44,019,892	14%	37,843,163	13%	54,486,007	14%	10,466,115	24%
Admissions/Amusements, Recreation Services	19,294,899	6%	23,690,587	8%	26,564,026	7%	7,269,126	38%
Private Parking Lots/Boat Docks/Aircraft Hangers	3,235,773	1%	3,394,327	1%	4,465,255	1%	1,229,482	38%
Total-Study Area:	**$ 305,507,638**	**100%**	**$ 297,077,711**	**100%**	**$ 385,730,266**	**100%**	**$ 80,222,629**	**26%**
As % of State	*7.2%*		*6.7%*		*6.3%*			
Total of Selected Categories-Statewide:	**$ 4,224,217,362**		**$ 4,417,142,942**		**$ 6,148,129,061**		**$ 1,923,911,698**	**46%**

(1) 2015 totals include sales tax collections through November; December has been annualized based on 2014 total proportions by sales tax category.

Source: Florida Department of Revenue; WTL+a, March 2016.

ANALYSIS & FINDINGS

Indian River Lagoon Economic Contributions Analysis

Table 15: Summary of Key Economic Indicators

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

	2015 Population		2015 Employment			2014 Employment in Selected NAICS		
County	**Amount**	**% of Total**	**Amount**	**Jobs-to-Pop Ratio**	**% of Study Area**	**Amount**	**% of County**	**% of Study Area**
Brevard	553,805	34%	240,363	0.43	35%	13,308	5.54%	56%
Indian River	142,338	9%	66,402	0.47	10%	2,120	3.19%	9%
Martin	149,980	9%	76,013	0.51	11%	2,163	2.85%	9%
St. Lucie	287,560	18%	91,255	0.32	13%	1,580	1.73%	7%
Volusia	506,494	31%	212,022	0.42	31%	4,404	2.08%	19%
Total:	**1,640,177**	**100%**	**686,055**	**0.42**	**100%**	**23,574**	**3.4%**	**100%**

Source: ESRI (2015 population estimates); Dun & Bradstreet, Inc. (2015 employment estimates); Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment & Wages Program; WTL+a, updated August 2016.

Table 16: Summary of Employment, by NAICS Industry Sector

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

	Living Resources		Marine Industries		Recreation/Visitor		Defense/Aerospace		Resource Management		TOTAL	
County	**Amount**	**% of Total**	**Amount**	**% of Total**	**Amount**	**% of Total**	**Amount**	**% of Total**	**Amount**	**% of Total**	**Amount**	**% of Total**
Brevard	34	51%	1,189	29%	2,780	37%	9,100	80%	205	52%	13,308	56%
Indian River			196	5%	966	13%	865	8%			2,120	9%
Martin			780	19%	631	8%	720	6%			2,163	9%
St. Lucie			815	20%	726	10%					1,580	7%
Volusia			1,184	28%	2,490	33%					4,404	19%
Total:	**66**	**0.3%**	**4,164**	**18%**	**7,593**	**32%**	**11,354**	**48%**	**396**	**2%**	**23,574**	**100%**

Blank cells indicate confidential data.

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment & Wages Program; WTL+a, updated August 2016.

Table 17: Expenditures Per Domestic Leisure Visitor, 2014

"Central East" Vacation Region

Indian River Lagoon Economic Contributions Analysis

	Statewide	Central East
Average Expenditure (Per Visitor Per Day)		
Including Transportation	$ 153	$ 141
Excluding Transportation	$ 108	$ 82

Average Per Person Expenditures by Length of Stay

		Total Spending Per Person/Trip		
	% of Total	Low	Medium	High
1 to 3 nights	55%	$ 141	$ 282	$ 423
4 to 7 nights	34%	$ 564	$ 705	$ 987
More than 8 nights	11%	$ 1,269	N/A	N/A

Average Expenditure Per Person Per Trip		
Average	4.1 Nights	$ 578
Median	3.0 Nights	$ 423

Source: Visit Florida, Florida Visitor Study, 2014; D.K. Shifflet & Associates; RDS/WTL+a, April 2016.

Table 18: Leisure Visitor Spending by Category, 2014 *(1)*

State of Florida & "Central East" Vacation Region

Indian River Lagoon Economic Contributions Analysis

Category	State Average	Central East	% of Total	Est. Total Annual Leisure Spending by Category
Statewide Average, All Categories (Inc. Transp.)	**$ 153.10**	**$ 141.00**		
% of State Total	*100%*	*92%*		
Estimated Visitors to Central East Region, 2014		**7,500,000**		
Leisure Visitors as % of Total		92%		
		6,900,000		
Totals Per Day Per Visitor, All Categories				
Lodging (Paid: hotels, condos, other rental housing)	$ 56.00	$ 51.52	30.0%	$ 355,488,000
Lodging Services (Internet, room service, parking, etc.)	10.30	9.48	5.5%	65,384,400
Transportation total (excluding airfare)	25.70	23.64	13.8%	163,143,600
Transportation - Other (taxi, bus, gas, etc.)	16.90	15.55	9.1%	107,281,200
Food & Beverage	33.90	31.19	18.2%	215,197,200
Shopping	20.70	19.04	11.1%	131,403,600
Entertainment & Recreation	18.50	17.02	9.9%	117,438,000
Other Expenses	4.70	4.32	2.5%	29,835,600
Total - All Categories:	**$ 186.70**	**$ 171.76**		**$ 1,185,171,600**
Total without Lodging *(2)*:	**$ 120.40**	**$ 110.77**		

(1) Analysis assumes that proportional spending by category in Central East remain the same as statewide (i.e., 92% across all categories.

(2) The difference reflects Visiting Friends & Relatives (VFR) spending versus Paid Lodging Visitors.

Source: VisitFlorida, Florida Visitor Survey, 2014; RDS/WTL+a, April 2016.

Table 19: Estimated Visitor Spending - IRL Water-related Leisure Activities, 2014

"Central East" Vacation Region

Indian River Lagoon Economic Contributions Analysis

		Amount
Leisure Visitors - Central East		
Estimated Total Overnight Visitors to Florida, 2014 ***(1)***		**100,000,000**
Allocation to Central East Vacation Region		7.5%
Estimated Visitors to Central East:		**7,500,000**
% of Central East Visitors on Leisure Travel		92%
Estimated Central East Leisure Visitors:		**6,900,000**
Average Length of Stay (In Nights) *(2)*		4.1
Average Daily Visitor Spending (Inc. Transportation) *(2)*	$	141
Estimated Annual Leisure Visitor Spending:	**$**	**3,988,890,000**
Leisure Visitor IRL Water-related Experience Preferences - Central East		
Fishing (Recreational)		
% of Respondents		12%
Estimate of Leisure Visitors - Fishing:		**828,000**
Estimated Spending by Leisure Visitors - Fishing		
(As Share of Total @ 100% Applicability)	**$**	**478,666,800**
Ocean/Waterfront Experiences		
% of Respondents		56%
Estimate of Leisure Visitors - Ocean/Waterfront:		**3,864,000**
Estimated Spending by Leisure Visitors - Ocean/Waterfront		
(As Share of Total @ 50% Applicability)	**$**	**1,116,889,200**
Subtotal - IRL Water-related Visitor Spending:	**$**	**1,595,556,000**
Proportion of IRL Water-related Visitor Spending		
Estimated Total Visitor Spending - Central East:	**$**	**3,988,890,000**
Estimated IRL Water-related Visitor Spending:	**$**	**1,595,556,000**
IRL Water-related Visitor Spending:		**40.0%**
(As % of Total Central East Visitor Spending)		

(1) In 2014, VisitFlorida estimates that there were 98.5 million overnight visitors to the state.

(2) From Florida Visitor Survey, 2014, Visitor Profile to Central East (Tables 8 and 17).

Source: VisitFlorida, Florida Visitor Survey, 2014; RDS/WTL+a, April 2016.

Table 20: Summary of IRL-related Visitation by Visit Nights

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

County	Occupied Roomnights	Average People Per Room	Paid Hotel Visit Nights	VFR & Others Not Staying at a Paid Hotel	Visit Nights Not in a Paid Hotel	Total Annual Visit Nights
All Visits	*(1)*	*(2)*		*(2)*		
Brevard	1,975,845	1.90	3,754,106	53%	4,233,353	7,987,459
Indian River	339,369	1.90	644,801	53%	727,116	1,371,917
Martin	295,899	1.90	562,208	53%	633,979	1,196,187
St. Lucie	722,897	1.90	1,373,504	53%	1,548,845	2,922,350
Volusia	2,477,928	1.90	4,708,063	53%	5,309,093	10,017,156
Total:	**5,811,938**	**1.90**	**11,042,682**	**53%**	**12,452,386**	**23,495,069**

County	Business Visits	% of Business Visits Attributable to IRL	IRL-related Business Visits
Business Visits		*(3)*	
Brevard	300,328	5.54%	16,628
Indian River	51,584	3.19%	1,647
Martin	44,977	2.85%	1,280
St. Lucie	109,880	1.73%	1,902
Volusia	376,645	2.08%	7,823
Total:	**883,415**	**15.38%**	**29,279**

County	Leisure Visits	% of Leisure Visits Attributable to IRL	IRL-related Leisure Visits
Leisure Visits		*(4)*	
Brevard	7,687,130	40%	3,074,852
Indian River	1,320,333	40%	528,133
Martin	1,151,211	40%	460,484
St. Lucie	2,812,469	40%	1,124,988
Volusia	9,640,511	40%	3,856,204
Total:	**22,611,654**	**40%**	**9,044,662**

(1) This reflects occupied roomnights of all hotels/motels reporting performance data to STR Global (Table 5).
(2) As reported in the Florida Visitor Survey, 2014, Central East Vacation Region (Table 7).
(3) Based on NAICS data in selected industry sectors (Tables 14 & 15).
(4) As estimated in the analysis of IRL water-related leisure preferences (Table 19).

Source: ESRI Business Analyst; Florida Department of Economic Opportunity; WTL+a, April 2016.

Table 21: Recreation & Visitor-related Jobs Attributable to the IRL

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

NAICS Code	Industry Sector	Proportion IRL-related	IRL-related Employees	IRL-related Combined Wages
Recreation & Visitor-related				
487210	**Scenic & Sightseeing Water Transport**	100.0%		
532292	**Recreational Goods Rentals**	100.0%		
713990	**All Other Amusement & Recreation Industries *(1)***			
	Brevard County	23.6%	149	$ 19,884,291
	Indian River County	23.6%	42	817,737
	Martin County	23.6%	17	366,732
	St. Lucie County	23.6%	3	167,586
	Volusia County	23.6%	39	682,540
72110	**Hotels & Motels, Except Casino Hotels *(2)***			
	Brevard County	38.7%	814	$ 17,315,954
	Indian River County	38.6%	299	6,698,345
	Martin County	38.6%	211	5,816,678
	St. Lucie County	38.6%	272	5,194,565
	Volusia County	38.6%	836	17,330,533
	Visitor Spending on Food and Beverage *(3)*			
	Brevard County	N/A	9,948	$ 222,151,263
	Indian River County	N/A	1,549	35,975,870
	Martin County	N/A	1,401	29,072,725
	St. Lucie County	N/A	3,666	97,900,182
	Volusia County	N/A	12,660	300,667,623

(1) The consultant team identified those industries in the 713990 NAICS classification that are representative of IRL-related activities in this sector. This estimates suggests that IRL-related jobs in the Amusement & Recreation industries account for approximately 24% of total jobs in this sector.

(2) Jobs in Hotels & Motels are derived from business and leisure visitors staying in hotels as a proportion of all visitors (Table 20).

(3) Jobs in Food & Beverage are derived in Table 22; corresponding wages are based on IMPLAN multipliers.

Source: ESRI Business Analyst; Florida Department of Economic Opportunity; WTL+a, April 2016.

Table 22: Accommodation & Food Service Jobs Attributable to the IRL

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

County	Leisure Visits Attributable to IRL	Ratio of Visits to Accommodation & Food Service Jobs	Accommodation & Food Service Jobs Attributable to IRL	Accommodation Jobs Attributable to IRL	Food Service Jobs Attributable to IRL
Total Visitors		***(1)***		***(2)***	
Brevard	3,074,852	0.35%	10,762	814	9,948
Indian River	528,133	0.35%	1,848	299	1,549
Martin	460,484	0.35%	1,612	211	1,401
St. Lucie	1,124,988	0.35%	3,937	272	3,666
Volusia	3,856,204	0.35%	13,497	836	12,660
Total:	**9,044,662**	**0.35%**	**31,656**	**2,432**	**29,225**

(1) This ratio is based on findings from the Center for Competitive Florida and Florida Tax Watch Investing in Tourism: Analyzing the Economic Impact of Expanding Florida Tourism , 2013.

(2) This is the estimate of IRL-related employees in the hotel and motel industry (Table 21).

Source: ESRI Business Analyst; Florida Department of Economic Opportunity; Center for Competitive Florida, Florida Tax Watch; WTL+a, April 2016.

TOTAL COMBINED INDUSTRY IMPACTS

Indian River Lagoon Economic Contributions Analysis

Table 24: Total Economic Impacts by Industry Group, 2014

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

Impact Type	Employment *(1)*	Labor Income *(2)*	Value Added (Sales - Costs)	Output (Total Sales)
Living Resources				
Direct Effect	66	$ 9,178,012	$ 28,989,238	$ 41,578,705
Indirect Effect	45	2,317,423	3,081,513	6,461,872
Induced Effect	57	2,060,271	3,766,762	6,618,530
Subtotal - Living Resources:	**169**	**$ 13,555,706**	**$ 35,837,513**	**$ 54,659,107**
As % of County Total	*0.23%*	*0.44%*	*0.81%*	*0.61%*
Marine Industries				
Direct Effect	4,164	$ 209,100,851	$ 282,289,117	$ 712,778,903
Indirect Effect	1,416	58,609,350	90,603,793	171,896,392
Induced Effect	1,422	50,560,443	93,572,152	165,060,129
Subtotal - Marine Industries:	**7,001**	**$ 318,270,644**	**$ 466,465,062**	**$ 1,049,735,424**
As % of County Total	*9.73%*	*10.23%*	*10.55%*	*11.71%*
Recreation & Visitor-Related				
Direct Effect	32,143	$ 840,300,661	$ 949,408,915	$ 1,544,116,520
Indirect Effect	2,179	75,563,462	139,933,699	263,693,857
Induced Effect	4,966	178,067,680	329,828,354	580,560,145
Subtotal - Recreation & Visitor-Related:	**39,288**	**$ 1,093,931,803**	**$ 1,419,170,968**	**$ 2,388,370,522**
As % of County Total	*54.58%*	*35.17%*	*32.11%*	*26.65%*
Defense & Aerospace				
Direct Effect	11,353	$ 1,087,891,505	$ 1,546,847,184	$ 3,727,080,970
Indirect Effect	5,885	284,207,916	404,539,887	764,662,218
Induced Effect	7,506	271,998,237	492,252,273	869,819,057
Subtotal - Defense & Aerospace:	**24,743**	**$ 1,644,097,658**	**$ 2,443,639,344**	**$ 5,361,562,245**
As % of County Total	*34.38%*	*52.86%*	*55.28%*	*59.83%*
Resource Management				
Direct Effect	397	$ 26,079,204	$ 31,454,791	$ 62,104,281
Indirect Effect	207	8,178,200	11,877,741	24,715,678
Induced Effect	175	6,435,207	11,741,726	20,580,045
Subtotal - Resource Management:	**779**	**$ 40,692,611**	**$ 55,074,258**	**$ 107,400,004**
As % of County Total	*1.08%*	*1.31%*	*1.25%*	*1.20%*
TOTAL - IRL STUDY AREA:				
Direct Effect	**48,123**	**$ 2,172,550,233**	**$ 2,838,989,245**	**$ 6,087,659,379**
Indirect Effect	**9,731**	**428,876,351**	**650,036,633**	**1,231,430,017**
Induced Effect	**14,126**	**509,121,838**	**931,161,267**	**1,642,637,906**
TOTAL ECONOMIC IMPACTS: ***(3)***	**71,980**	**$ 3,110,548,422**	**$ 4,420,187,145**	**$ 8,961,727,302**

(1) Direct effect employment figures generated by IMPLAN are based on 2014 NAICS data provided by FDEO, LMS, QCEW.

(2) Labor Income includes both employee compensation and proprietor income.

(3) Totals are different from the totals in Table 23 because these include impacts of Food Service.

Source: Florida Department of Economic Opportunity; Bureau of Labor Market Statistics, Quarterly Census of Employment & Wages Program; IMPLAN; WTL+a, updated August 2016.

Table 25: Total Top Ten Industries Affected, 2014

IRL STUDY AREA

Indian River Lagoon Economic Contributions Analysis

Industry Type (IMPLAN Classification)	Employment *(1)*	Labor Income *(2)*	Value Added (Sales - Costs)	Output (Total Sales)
All food and drinking places	31,425	$ 813,830,273	$ 873,833,875	$ 1,420,493,380
Search, detection, and navigation instruments manufacturing	3,724	342,617,709	446,109,736	1,183,390,158
Hotels and motels, including casino hotels	2,451	56,885,183	125,866,440	214,195,376
Scientific research and development services	2,191	241,641,887	314,558,170	686,670,919
Real estate	2,115	18,476,608	133,479,077	250,512,759
* Employment and payroll of federal govt, military	2,086	162,298,277	314,318,899	314,318,911
Boat building	1,803	99,700,913	113,846,519	409,742,054
Guided missile and space vehicle manufacturing	1,628	180,818,643	249,025,520	539,169,917
Wholesale trade	1,219	86,871,778	172,055,789	260,552,705
Scenic and sightseeing transportation and support activities for t	1,061	42,887,932	54,193,151	116,462,003
TOTAL TOP 10 INDUSTRIES - IRL STUDY AREA:	**71,979**	**$ 3,110,548,420**	**$ 4,420,187,143**	**$ 8,961,727,297**

(1) Direct effect employment figures generated by IMPLAN are based on 2014 NAICS data provided by FDEO, LMS, QCEW.

(2) Labor Income includes both employee compensation and proprietor income.

Source: Florida Department of Economic Opportunity; Bureau of Labor Market Statistics, Quarterly Census of Employment & Wages Program; IMPLAN; WTL+a, updated August 2016.

Table 26: Total Fiscal Impacts, 2014

IRL STUDY AREA

Indian River Lagoon Economic Contributions Analysis

Tax Description	Employee Compensation	Proprietor Income	Tax on Production & Imports	Households	Corporations
State & Local Tax Impacts					
Dividends	$ -	$ -	$ -	$ -	$ 701,350
Social Ins Tax- Employee Contribution	1,349,662	-	-	-	-
Social Ins Tax- Employer Contribution	2,636,058	-	-	-	-
Tax on Production and Imports: Sales Tax	-	-	192,956,316	-	-
Tax on Production and Imports: Property Tax	-	-	134,456,535	-	-
Tax on Production and Imports: Motor Vehicle Lic	-	-	3,376,210	-	-
Tax on Production and Imports: Severance Tax	-	-	249,075	-	-
Tax on Production and Imports: Other Taxes	-	-	20,085,378	-	-
Tax on Production and Imports: S/L Non-Taxes	-	-	10,699,038	-	-
Corporate Profits Tax	-	-	-	-	6,827,407
Personal Tax: Income Tax	-	-	-	-	-
Personal Tax: Non-Taxes (Fines- Fees)	-	-	-	14,292,548	-
Personal Tax: Motor Vehicle License	-	-	-	3,243,601	-
Personal Tax: Property Taxes	-	-	-	1,245,071	-
Personal Tax: Other Tax (Fish/Hunt)	-	-	-	200,652	-
Total State & Local Tax Impacts:	**$ 3,985,720**	**$ -**	**$ 361,822,552**	**$ 18,981,872**	**$ 7,528,757**
Federal Tax Impacts					
Social Ins Tax- Employee Contribution	$ 179,717,525	$ 11,784,579	$ -	$ -	$ -
Social Ins Tax- Employer Contribution	176,970,465	-	-	-	-
Tax on Production and Imports: Excise Taxes	-	-	28,061,011	-	-
Tax on Production and Imports: Custom Duty	-	-	10,414,683	-	-
Tax on Production and Imports: Fed Non-Taxes	-	-	2,959,667	-	-
Corporate Profits Tax	-	-	-	-	56,072,297
Personal Tax: Income Tax	-	-	-	253,246,420	-
Total Federal Tax Impacts:	**$ 356,687,990**	**$ 11,784,579**	**$ 41,435,361**	**$ 253,246,420**	**$ 56,072,297**

Source: IMPLAN; WTL+a, April 2016.

COUNTY COMPARISON OF INDUSTRY IMPACTS

Indian River Lagoon Economic Contributions Analysis

Table 27: County Comparison of Total Economic Impacts, 2014

IRL STUDY AREA

Indian River Lagoon Economic Contributions Analysis

County	Employment *(1)*	Labor Income *(2)*	Value Added (Sales - Costs)	Output (Total Sales)
Brevard County	36,399	$ 1,882,040,333	$ 2,736,850,802	$ 5,353,605,910
Indian River County	4,346	183,028,186	272,920,078	797,562,586
Martin County	4,484	183,867,582	263,626,902	609,128,748
St. Lucie County	6,390	204,452,064	273,927,998	549,660,385
Volusia County	20,361	657,160,257	872,861,365	1,651,769,673
Total Combined Economic Impacts:	**71,980**	**$ 3,110,548,422**	**$ 4,420,187,145**	**$ 8,961,727,302**

(1) Direct effect employment figures generated by IMPLAN are based on 2014 NAICS data provided by FDEO, LMS, QCEW.

(2) Labor Income includes both employee compensation and proprietor income.

Source: Florida Department of Economic Opportunity; Bureau of Labor Market Statistics, Quarterly Census of Employment & Wages Program; IMPLAN; WTL+a, updated August 2016.

Table 28: County Comparison of Total Fiscal Impacts, 2014

IRL STUDY AREA

Indian River Lagoon Economic Contributions Analysis

County	Total State & Local Tax Impacts	Total Federal Tax Impacts
Brevard County	$ 190,995,505	$ 434,731,608
Indian River County	24,963,009	42,575,167
Martin County	26,489,905	43,037,271
St. Lucie County	40,175,599	48,435,671
Volusia County	109,694,887	150,446,931
Total Combined Fiscal Impacts:	**$ 392,318,905**	**$ 719,226,648**

Source: IMPLAN; WTL+a, April 2016.

IMPACT COMPARISON BY INDUSTRY GROUP

Indian River Lagoon Economic Contributions Analysis

Table 29: Economic Impacts by Industry Group, 2014

IRL Study Area

Indian River Lagoon Economic Contributions Analysis

Industry Group	Employment *(1)* Amount	Employment *(1)* % of Total	Labor Income *(2)* Amount	Labor Income *(2)* % of Total	Value Added (Sales - Costs) Amount	Value Added (Sales - Costs) % of Total	Output (Total Sales) Amount	Output (Total Sales) % of Total
Living Resources	169	0.2%	$ 13,555,706	0.4%	$ 35,837,513	0.8%	$ 54,659,107	0.6%
Marine Industries	7,001	9.7%	318,270,644	10.2%	466,465,062	10.6%	1,049,735,424	11.7%
Recreation & Visitor-related	39,288	54.6%	1,093,931,803	35.2%	1,419,170,968	32.1%	2,388,370,522	26.7%
Defense & Aerospace	24,743	34.4%	1,644,097,658	52.9%	2,443,639,344	55.3%	5,361,562,245	59.8%
Resource Management	779	1.1%	40,692,611	1.3%	55,074,258	1.2%	107,400,004	1.2%
Total Combined Economic Impacts:	**71,980**		**$ 3,110,548,422**		**$ 4,420,187,145**		**$ 8,961,727,302**	

(1) Direct effect employment figures generated by IMPLAN are based on 2014 NAICS data provided by FDEO, LMS, QCEW.

(2) Labor Income includes both employee compensation and proprietor income.

Source: Florida Department of Economic Opportunity; Bureau of Labor Market Statistics, Quarterly Census of Employment & Wages Program; IMPLAN; WTL+a, updated August 2016.

Table 30: Comparison of IRL Impacts to Gross Domestic Product (GDP)
Indian River Lagoon Economic Contributions Analysis

County	2014 County GDP *(1)*	Total IRL-Related GDP *(1)*	As % of County GDP
Brevard County	$ 20,404,804,713	$ 2,736,850,802	13.4%
Indian River County	4,672,717,111	272,920,078	5.8%
Martin County	5,852,201,455	263,626,902	4.5%
St. Lucie County	6,783,040,978	273,927,998	4.0%
Volusia County	13,613,220,288	872,861,365	6.4%
Comparative Analysis:	**$ 51,325,984,545**	**$ 4,420,187,145**	**8.6%**

(1) GDP is defined as the contribution of each private industry and of government activity to an area's economic output. A jurisdiction's GDP is equivalent to the "Value Added" category (illustrated in previous tables), as defined by IMPLAN. GDP is equal to its gross output (which consists of sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (which consist of energy, raw materials, semi-finished goods, and services that are purchased from domestic industries or from foreign sources). Value Added includes four components: wages, business income, other income and indirect business taxes. Therefore, it accounts for the value of work, land and capital.

Source: IMPLAN; WTL+a, May 2016.

Appendix 2

Summary of Teleconference Between Grantee, Florida Department of Economic Opportunity and Subject Matter Experts to Review and Discuss Data Collection and Methodology for the Indian River Lagoon Economic Valuation Update
February 16, 2016

The meeting started at 10:03 a.m.

The following attended the meeting:

Duane DeFreese	Indian River Lagoon Council
Tara McCue	East Central Florida Regional Planning Council
Hugh Harling	East Central Florida Regional Planning Council
Luis Nieves-Ruiz	East Central Florida Regional Planning Council
Barbara Lenczewski	Florida Department of Economic Opportunity
George Foster	Florida Department of Economic Opportunity
James Stansbury	Florida Department of Economic Opportunity
Jerri Lindsey	Florida Fish & Wildlife Conservation Commission
Julian Hwang	Florida Fish & Wildlife Research Institute
Tom Moriarity	Retail Development Strategies, LLC
Kathy LaMartina	South Florida Water Management District
Michael Busha	Treasure Coast Regional Planning Council
Peter Merritt	Treasure Coast Regional Planning Council

Michael Busha opened the meeting and thanked everyone for attending. He indicated the purpose of meeting is to discuss data collection issues and review and discuss the document sent via email to each participant: Methodology for Estimating the Economic Contribution of the Indian River Lagoon. The proposed methodology is intended to mirror the method of analyses used in the 2013 Florida's Oceans and Coasts report prepared by the Florida Ocean Alliance (FOA). The economic contributions section of the report will be used as a template to provide more updated and detailed information directly relevant to the Indian River Lagoon (IRL) counties. This is to be an economic contribution analysis of the IRL by industry. The goal is to have a defendable methodology using data that can be easily updated and repeated for use in future economic valuation studies of the lagoon. The Florida Department of Economic Opportunity (DEO), East Central Florida Regional Planning Council (RPC) and subject matter experts are to examine the first draft of the economic contributions analyses during the next meeting scheduled in late April. Mr. Busha asked if anyone has objections to using the proposed methodology. Dr. Duane DeFreese pointed out the Florida Oceans and Coasts report is available at the FOA Website - http://www.floridaoceanalliance.org.

Dr. Defreese noted as an observation that to replicate the FOA approach is a good thing. If the FOA does move forward with their own update in the future, then we have sub-sector geographic comparison capability to what they might do on a statewide basis. He mentioned concerns with sectors that follow the North American Industrial Classification System (NAICS) codes. For example, under the marine industries, there is a whole marine construction sub-sector that might

be hard to tease-out from the NAICS codes. There are workers who are building docks and seawalls, etc., and workers and expenditures in port construction that may not appear. In other words, the folks who are doing major marine construction and port-related projects may need to be noted when identifying gaps in data needs. There are many sectors that are important job creators. One of them would be the independent non-governmental organization (NGO) sector. We have dozens of marine research institutions both public and private that create hundreds of jobs, but typically do not show up in this kind of analysis. The 2013 FOA report was interesting, but it didn't capture this sector as it relates to ocean and coastal systems.

Mr. Busha suggested we try to find the data on the independent contractors related to docks, seawalls, other marine construction, and port construction; and the independent NGOs that are doing research. Dr. DeFreese indicated that the FOA may have some of this information readily available.

Mr. Busha asked for information related to tourism data. Ms. Jerrie Lindsey and Mr. Julian Hwang said they would work with the group in providing whatever state-level data they have on tourism and recreational uses and expenditures. It was suggested that contact be made with the individual economic development organizations who might provide county-level tourism and recreational use data such as boating, fishing and wildlife viewing. Ms. Kathy LaMartina suggested the Marine Industry Associations may be a good source of information. Although the desire is for as accurate data as possible, county data is not always available. Mr. Busha indicated a desire to establish an economic profile by county. Where this is not possible, we can identify these as limitations or gaps in the data.

Upon the question of real estate being mentioned in the methodology, Mr. Busha said real estate is beyond our scope and budget. The National Board of Realtors or the Florida Board of Realtors may have done some recent work on the value of real estate along the waterways and how they are impacted by water quality. Maybe we can make some assumptions in a "sidebar" narrative about how that might affect the economic contributions of the lagoon. Additional discussion centered on the value of waterfront property and the importance of water quality affecting the value or de-valuation of real estate.

Dr. DeFreese talked about the importance of data quantifying the value of the lagoon, for example, Northrop Grumman Aerospace Systems who is about to hire 3,000 engineers. Mr. Busha indicated he will attempt to look at how the lagoon offers value to the defense industry and will provide a narrative on the results of that analysis to see if there is any evidence to suggest a possible connection.

Dr. DeFreese indicated the location of real estate, transportation capability, and the ability to launch rockets are paramount considerations in the relocation of companies such as Blue Origin, Space X and Northrop Grumman Aerospace Systems. He indicated the geography created by the lagoon is very important. He noted data from Brevard County on the crab/clam/oyster industries over the last 25 years and the collapse of these industries. He noted in the last 25 years those three fisheries have gone to almost zero. He agreed to send Mr. Busha this information. He also indicated we could probably get Brevard County to tease up the raw data for that as an example of how bad water quality can impact economics.

Mr. George Foster with DEO asked for a source for the six-digit NAICS codes industry employment. Mr. Moriarity has access, but prefers to have them vetted by a state agency. Mr. Foster will send Mr. Busha contact information which will require signing a confidentiality agreement to gain access to the NAICS data through DEO.

Mr. Busha stated that in the Florida Oceans and Coasts report, there are a number of tables related to coming up with a gross regional product that takes into account all the industries reliant on a healthy lagoon. In order to produce these numbers, we are planning to use the Regional Input/Output Modeling System (RIMS II), which the U.S. Bureau of Economic Analysis established and maintains. This is the same economic model used to produce gross regional product numbers found in the Florida Oceans and Coasts report. Mr. Foster noted that the methodology is very sound and that RIMS II is credible.

Mr. Busha noted the contributions will be based on all the industries we have identified that have some reliance or some connection to the IRL, including the defense industry. Mainly these are traditional coastal industries. We will try, through the six-digit NAICS codes, to identify the economic contributions by county as well.

Mr. Luis Nieves-Ruiz suggested looking at wholesale industries, especially in the fishing industry sector. Sometimes a lot of those wholesalers are actually big companies or big commercial fishing operations that may not show up in the NAICS data. Mr. Nieves-Ruiz will start checking for data on those wholesalers that are similar to the manufacturing sectors.

Mr. Foster recommended checking the NAICS coding manual for port construction values being mixed in with other industries. It was noted the Port Authorities have estimated capital investments and documented capital investments that could be used in the analysis. Dr. DeFreese indicated he is confident that Port Canaveral has accurate and detailed analyses of every aspect of the enterprise, and Florida's Port Council has the same for all 15 deepwater ports.

Mr. Busha indicated he plans to contact each Port to inquire about their 5-year capital improvements plans. He noted that we can make some assumptions about the annual expenditures for Canaveral and Fort Pierce, about what they plan to spend, and what to provide into the model. Mr. Busha indicated he will contact Toy Keller, with the Florida Ports Council, to find out if she has any expenditure reports and employment from the ports around the state. Port Canaveral recently hired a new executive director, and Mr. Busha will get his contact information. We may be able to include a sidebar narrative or factoid about the specific economic contributions and expenditures of our two ports.

There was discussion about creating another "sidebar" narrative that would illustrate trends in commercial fishing employment and commercial landings over time. Dr. DeFreese mentioned that Rich Petrona with FFWCC might have historical and current data on the subject. Mr. Hwang said he could check with some of the fisheries people to see if they have good data on historic and current commercial landings and employment. Dr. DeFreese said he would send a graph he used in a recent PowerPoint presentation on the subject, which illustrates the decline over time of the crab, clam and oyster industry in Brevard County.

There was some discussion about how to capture the value of emerging industries related to mega yachts, water technology development, and some industries and occupations not present in the area today, but may play a role in future economies. There was an observation that the current NAICS code may not include some of these industries. Mr. Foster indicated that if we identify a situation like this with the NAICS, there is a process for submitting suggested updates to the NAICS and the Standard Occupation Classification System. Mr. Busha indicated we could identify any situations like this along with recommendations in the report to address them.

There was a brief discussion concerning funding related to completing the report. Dr. DeFreese suggested the funding still seems lean for the study and there may be an opportunity at his March 18th Council meeting to suggest some additional funding from the Council to support the study. Mr. Busha and Ms. Lenczewski thanked Dr. DeFreese for offering to assist in this regard, but there preference at this point is to move forward and complete the scope under the current budget.

Mr. Busha thanked everyone for attending the meeting. He noted there will be a summary of today's meeting provided to the attendees. He hoped everyone will stay involved during the production of the study and that our next scheduled call will be sometime during the third week of April 2016 to review the first draft of the report.

The meeting adjourned at 11:01 a.m.

Summary of Teleconference Between Grantee, Florida Department of Economic Opportunity and Subject Matter Experts to Review and Discuss Data Indian River Lagoon Economic Valuation Update
May 10, 2016

The meeting started at 2:03 p.m.

The following attended the meeting:

Duane DeFreese	Indian River Lagoon Council
Tara McCue	East Central Florida Regional Planning Council
Hugh Harling	East Central Florida Regional Planning Council
Luis Nieves-Ruiz	East Central Florida Regional Planning Council
Barbara Lenczewski	Florida Department of Economic Opportunity
George Foster	Florida Department of Economic Opportunity
Jerri Lindsey	Florida Fish & Wildlife Conservation Commission
Julian Hwang	Florida Fish & Wildlife Research Institute
Tom Moriarity	Retail Development Strategies, LLC
W. Thomas Lavash	WTL+a
Jon Stover	WTL+a
Michael Busha	Treasure Coast Regional Planning Council
Peter Merritt	Treasure Coast Regional Planning Council

Michael Busha opened the teleconference and thanked everyone for attending. Mr. Busha identified five different topics in the draft report needing the attention of the SME panel. These included:

- How should the economic contributions of the Defense and Aerospace industry sector be handled in the report?
- Is the 80/20 percent approach used in the draft report appropriate to segregate economic contribution for the IRL in Volusia County?
- Are there any issues/suggestions concerning the graphic conventions used in the draft report?
- How and where should the IRL Economic Statistics section be used in the report?
- What raw data and tables should be included in the Appendix section of the report?

Defense and Aerospace Industry

With regard to the Defense and Aerospace industry, there was an important question of whether the economic contribution of this industry sector should be added to the total economic output sum for the IRL.

Mr. Hugh Harling, East Central Florida RPC, said to leave it in. The IRL provides an economic draw due to the military and this entire industry sector locating in the region. The industry is here and is growing here in large part because of the IRL and all its attributes. It's one of the main things this industry likes about the area.

Dr. Duane DeFreese, Indian River Lagoon Council, suggested leaving it in with a couple of conditions. First, that the report clearly explain and illustrate the difference with and without the sector's economic contribution. And second, the report should tell the story about how such companies like the Harris Corporation and Northrup Grumman see the IRL as a positive attraction for employee recruitment and those innovative programs going beyond the standard Department of Defense work.

Dr. DeFreese suggested contacting Frank DiBello from Space Florida for their input. In addition, it was noted that it would be good to add a narrative about the lagoon's special geography, the potential for its contribution to the space and human exploration industry, and the lagoon's contribution to water technology industries. Mr. Busha was hopeful that Space Florida will have a story about their connection to the lagoon, including recruiting and future expansion of industries working in water technology, water chemistry, and underwater technology.

Dr. Barbara Lenczewski, Florida Department of Economic Opportunity, said to leave it in. The text and narrative can be expanded to address the above-mentioned concepts.

Julian Hwang, Florida Fish & Wildlife Research Institute, suggesting addressing the issue of the industry's impact on fisheries and water quality. In his opinion, the industry has had a negative impact, but the analysis simply does not present that information.

Dr. DeFreese noted that often military establishments have water quality issues. Groundwater contamination issues are well-documented and well-known. There is no direct data clearly relating the industry's negative effect on water quality in the lagoon.

Mr. Busha noted there are costs and water quality impacts absorbed by the lagoon from all marine-related industries referenced in the report, including visitor usage, which have never been thoroughly documented. This report is simply intended to place a value on the economic contribution of industries that are here because of the lagoon. Perhaps the report should note that there are impacts and costs associated with the various lagoon-related industries and point this out as missing or incomplete data that should be considered in future economic valuation studies.

Dr. DeFreese suggested adding a sentence or two in the introduction about not just what this report does and how it relates to the previous report, but also add language about what it does not do.

Mr. Busha again noted there is a section in the report that is not completed – missing and incomplete data and recommendations for future studies (Section 10, page 49). This issue can be addressed in this section as well.

Ms. Jerri Lindsey, Florida Fish & Wildlife Conservation Commission, noted that the defense industry piece and how to handle it in the report is important because it is a huge contributor in terms of the economic output of the lagoon region. It sounds like we are deciding to tell a story and explain why the values associated with that industry are attributed to a healthy lagoon – not only for the geographic piece, but also for recruitment and for future industry growth related to water, hoping other companies may want in. She further pointed out that Merritt Island National Wildlife Refuge does not own its own land and exists at the pleasure of that industry. There could definitely be some cost/ benefit issues here.

Mr. George Foster, Florida Department of Economic Opportunity, indicated he saw no reason to change what they have in the report. The tables look at the total economic output with and without the defense and aerospace industry sector contributions.

Volusia County Economic Contribution Calculations

Mr. Busha indicated that since 20 percent of the population lives south of Ponce de Leon Inlet which is the northern boundary of the IRL, the report only assigns 20 percent of the total economic contribution from Volusia County in the tables. Mr. Foster asked if the relationship of population to your other measures are founded? Dr. Merritt said yes and that the alternative would be to count the entire county. The 20 percent assumption was considered logical based on where the population was in relationship to the limits of the IRL. Mr. Foster asked if we are going to ratio out Volusia's gross product for the region based on population. Dr. Merritt said yes and noted this was based on learning that the coastal municipal populations in Volusia County had a ratio of 20 percent adjacent to the IRL; and 80 percent were adjacent to the Halifax River Lagoon. Mr. Foster said to state it up front or use a large footnote stating your assumption.

Mr. Harling asked to use caution when doing that because some of the Volusia County commissioners participate in the entire IRL-NEP, and they have asked to have the Halifax River Lagoon included in the NEP. There are water quality problems and economic contributions in each one of those estuarine areas in Volusia County.

Mr. Busha noted that data can be presented to show the total Volusia County picture for each of the marine industries, and that total economic output for Volusia County can be provided as well.

Dr. DeFreese noted that Volusia County asked the IRL Council to consider a boundary extension beyond Ponce Inlet, up the Halifax River, north to an area called High Bridge Road. It is a significant increase in planning boundary for Volusia County. If the report includes the entire county, someone is going to complain that it does not relate directly to the IRL. Be very clear by explaining why we chose the boundary and that we have data to show total economic output for the whole county in the Appendix. Dr. Lenczewski noted that Volusia is very active with the IRL, but we cannot include the entire county. Mr. Busha said a table can be established for Volusia County, so people can see what the total economic output is for all Volusia County.

Dr. Merritt noted that it would be easy to add another table like this. One concern is we have many tables as we go through this report, that show with and without scenarios (just like with defense and aerospace) that it may become confusing. Another alternative would be to break

Volusia in half and use 50 percent, but we have better justification for using the 20 percent population number for Volusia County.

Mr. Busha again noted we could add a table with complete Volusia County economic contributions data for anyone interested in viewing it. Dr. Lenczewski noted the simplicity of these graphs and tables to show legislators and people is what really matters. Mr. Harling noted that a logical split would be along I-95.

Dr. Merritt noted that the NAICS data is for the entire county. When we did the 80/20 split, we looked at the coastal population of the municipalities because it is data we can get that gave us an idea of how that population was actually distributed. We do not have a way of separating the data by I-95. Mr. Busha also noted there was not NAICS data by zip code.

Dr. DeFreese noted that we should meet with Commissioner Doug Daniels, Volusia County representative on the Indian River Lagoon Council, and go over our solution with him before the final draft. Dr. Lenczewski noted she will help with that. Mr. Busha noted he would like to talk to Commissioner Daniels on how to treat Volusia County. Dr. DeFreese said a phone call can be initiated with the Commissioner.

Dr. DeFreese noted the methodology does not need changing. In the narrative, say "20 percent contributed value is x number of dollars for Volusia; while recognizing the total economic impact of the coastal estuary, if that value were rolled up through all of Volusia County would increase to y."

Graphic Conventions of the Report

Mr. Busha noted they followed what was in the Florida Oceans and Coasts report to some extent, but some of the data did not lend itself to just pie charts or exploded pie charts. The Oceans and Coasts report used bar graphs as well, and so does this report. Mr. Busha asked if there were any problems with the way the report graphically displays the data and other information.

Dr. Merritt noted that every single page in the draft report has a table, and then there are one or two graphics associated with each table. We experimented with a variety of types of graphics. Mr. Busha is asking if you prefer a different type of graphic. Are they acceptable or are there certain kinds that you do not like? We used some two dimensional, some three dimensional graphics. Do you have preferences? Is there anything that you think we should avoid? Dr. Lenczewski noted the attractive graphics and tables stood out in the Florida Oceans and Coasts report, and that is what people will look at. She suggested three dimensional, more eye-catching graphs/charts.

Mr. Foster noted some scaling issues, but the tables tell enough; the graphics may not add anything. Another option would be to graph the top economic contributors only, such as boat building and boat dealers and not try to do all the smaller ones.

Dr. Defreese noted the maps are gorgeous. Mr. Hwang noted the graphics look okay as is; the simpler the better. Mr. Busha indicated they could make the images larger on the page. He

noted the Oceans and Coasts report devoted a half page to each pie chart. Mr. Foster suggested filling the white space with graphics.

Economic Statistics (Factoid) Section

Mr. Busha said this section was created to help express the value of the lagoon simple and concise terms -- to create a series of important “gee-whiz” facts or sound bites. For example, every time a tourist spends a $100 on a hotel room related to the lagoon it contributes $500 to the economy. Mr. Busha wanted to develop this idea, so readers will take away some easy to remember, but powerful factoids about the Lagoon. Mr. Foster noted it was a good idea to focus on fun facts. Mr. Busha asked if anyone had any factoids they would like to add. Mr. Foster suggested putting this in the front of the report, next to the Executive Summary. Dr. Lenczewski suggested all together, in front and center in the report.

Mr. Hwang looked at the total economic contribution by county table (p. 39). He questioned that he did not see the number of jobs supported by the industry.

Dr. Merritt noted that the number of jobs is in a different set of tables -- the comparable table would be on page 33. There we looked at the number of jobs, but we did not explain or correlate those two tables in the text. It will be explained in the breakdown. Page 33 is a similar table, except instead of showing the total economic output, it is showing the estimated number of jobs. Mr. Busha noted the total number of jobs is the result of the direct, indirect, and induced jobs calculated by the IMPLAN model. Mr. Foster noted these are standard economic concepts. Mr. Lavash asked if the direct, indirect and induced impact concept has been explained in the text, and that perhaps a footnote in the tables with the definitions of direct, indirect and induced should be added. Dr. Merritt noted that it is in a different part of the study, but will emphasize that in the discussion of that particular table.

Dr. Lenczewski did not know what those terms meant, and was a little lost. She had to go back in the text and look for it. Dr. Merritt noted they will get a definition of those terms in the discussion for that table. Mr. Foster noted it would be good to give some examples. Dr. Merritt noted on page 29, you will see how we did have a chance to do a little bit more of a discussion on that table, and that is what is lacking in the table on page 33.

Mr. Busha noted on page 9 of the report, second bullet under "Other Assumptions and Information," it does explain what each of these terms are and gives an example of what direct, indirect, and induced impacts are and how they are calculated. He noted the definition should be put in a couple different places in this report.

Appendices

Mr. Busha noted there was an enormous amount of raw data and not just economic data, but demographic profiles of each of the counties. Our recommendation is to put all the data tables in the appendices for general information purposes and because some of the tables are referenced in explaining the methodology we used. There are at least 30 different tables of raw data and demographic information.

Dr. Merritt noted these are large data tables that Tom Lavash and Tom Moriarity provided us. We took that data and simplified it for the presentation in the report, but we wanted to include the full set of tables; however, I am not sure how many pages that will be. Mr. Lavash noted approximately 78 pages. Dr. Merritt suggested packaging as a separate document. Dr. Lenczewski suggested putting it on a CD/DVD and have it available. Mr. Busha noted it could be made available on Council's FTP site as well. Dr. Merritt noted that in the Oceans and Coasts report, the appendices were in a separate PDF document. Dr. Lenczewski noted it should be available electronically, so if anyone wants to repeat anything or compare between years, they can access data that is readily available.

Mr. Foster indicated there may be some confidential data in the raw data tables and you have to be careful with the NAICS data. Mr. Lavash suggested creating a PDF of all the tables and send that out for review by DEO to determine what can be released. Mr. Foster suggested sending to Ms. Kathy Hughes of DEO before it is published and get her to sign off. Mr. Busha noted he will send it to Ms. Hughes before it is publically distributed. Mr. Busha suggested that all raw data tables be included that are not proprietary. These will be put into an appendix and made available electronically. Mr. Foster noted that is what should be done. Part of that is providing the background data and documentation.

Mr. Busha asked the group if they had other things they wanted to discuss.

Dr. DeFreese noted there is a section called: An IRL-Dependent Industry in Decline. Dr. DeFreese asked what was the source of the fin-fish and shellfish data. Mr. Busha noted the source of the 1990 data on harvested clams, oysters, crab, and shrimp came from the 1996 IRL economic assessment that was commissioned by the IRL NEP, but most of the data comes from NOAA and FFWCC sources.

Dr. DeFreese noted that Brevard County has been publicly sharing their fin-fish and shellfish data and he has been using this data. It is a different data set, and it was based on recorded landings. The numbers are substantially different in percent decline. I don't recall exactly, but clams, oysters, crab, and shrimp showed a 90 percent decline based on just landings, not value.

Mr. Busha noted he would send Dr. DeFreese the sourced information used to create the table in the draft report. Mr. Busha pointed out that the decline noted in the draft report is for the entire region, not just Brevard County.

Data was gathered all the way back to 1990 based on pounds landed, trips, average price and estimated value. Data prior to 1990 is inconsistent. The steepest decline measured for this marine industry since 1990 is in Brevard County. Dr. DeFreese suggested in the narrative to site the source. Mr. Busha noted some parts of the region, like St. Lucie County, did not get hit nearly as hard.

Dr. Lenczewski suggested the tables have source data as a footnote. Mr. Busha agreed. This is very significant, an 80% decline region-wide. Mr. Busha noted the value decline from $20

million in 1990, to about $4 million in 2015. Mr. Foster noted that this tells the story of an ecological decline.

Ms. Lindsey noted that she did not know if all of that should be attributed to ecological decline. Some of this is our regulatory controls that have been put in place to rebuild the fishery. Mr. Busha noted when the net ban went into effect for management purposes, it had a big effect.

Dr. DeFreese noted he would have to ask Brevard County for the data. Mr. Busha noted if there is a source, he can go back and note that there is also data suggesting the decline is even more significant. Dr. DeFreese said to stick with what you can count on. I think the citations in the narrative are important.

Dr. Lenczewski has a concern about referring to the Florida Oceans and Coasts document because it was so different. Mr. Busha agreed that a general reference to this report is probably appropriate. Mr. Busha suggested the group mark up the document with edits, questions and comments. Dr. Lenczewski asked if it was okay to share with others to get their input? Mr. Busha indicated yes.

Mr. Busha noted the section called: Cost of a Sustainable IRL Economy. This section contains an analysis of what it costs to keep the lagoon clean and sustainable (i.e., the cost of implementing the four IRL BMAPs) versus what the total economic output is from the lagoon. The result of this analysis is a return on investment that is remarkable. Dr. Lenczewski noted she liked the idea of using the cost of implementing the BMAPs and meeting the TMDLs as a basis for ROI calculations. Mr. Busha noted that is all we have to estimate the cost over time for creating a sustainable seagrass-based estuary. Those are presumptive water quality targets we need to meet to achieve a healthy IRL. Dr. Lenczewski noted she liked that a lot because it brings everything back full circle of why we are carrying out the BMAPs. Mr. Busha noted the idea comes from the original work DEO funded last year.

The meeting adjourned at 3:30 p.m.