

## Seasonality of Florida Tourism

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Florida began attracting tourists even before it became part of the United States, but it wasn't until this century, most particularly after World War II that tourism became of great importance to the state's economy. Until the 1950s most visitors came to the state during the winter. Not only did they find the heat and humidity of Florida summers insufferable, but many feared the occasional outbreaks of tropical diseases such as malaria and yellow fever. As May approached tourist hotels simply closed, not to reopen until October or November. There are still many residents of Miami Beach who remember shuttered hotels along Ocean and Collins Avenue.

The state's tourist industry long sought a way to extend its season, but it wasn't until well after World War II that its efforts were rewarded. The widespread adoption of air conditioning played a major role, helping to induce many young families to drive down from the north during the summer to enjoy Florida's beaches and other attractions, while experiencing the comfort of a cool room at night. The construction of the Magic Kingdom and other theme parks in Central Florida offered a further reason for parents to come with their children. By the 1950s over 80 percent of the visitors to the state came by auto, and the summer quarter had become the peak season for motor tourists, and the winter generally was the lowest. At that time the reverse was true of those who came by air. Although only 12 percent of the state's visitors came by air, winter was the peak season and summer the low.

Air traffic to Florida began to grow rapidly during the 1970s, and by the end of the decade air visitors accounted for nearly 40 percent of all visitors. By the 1990s there were years when their share rose above half. As the number of air visitors rose, the difference between the share of air visitors that arrived in the peak and that in the low season decreased. Although winter continues to be the high quarter and summer the low, by the mid 1990s only seven percentage points separated the two quarters. The fine balance between the

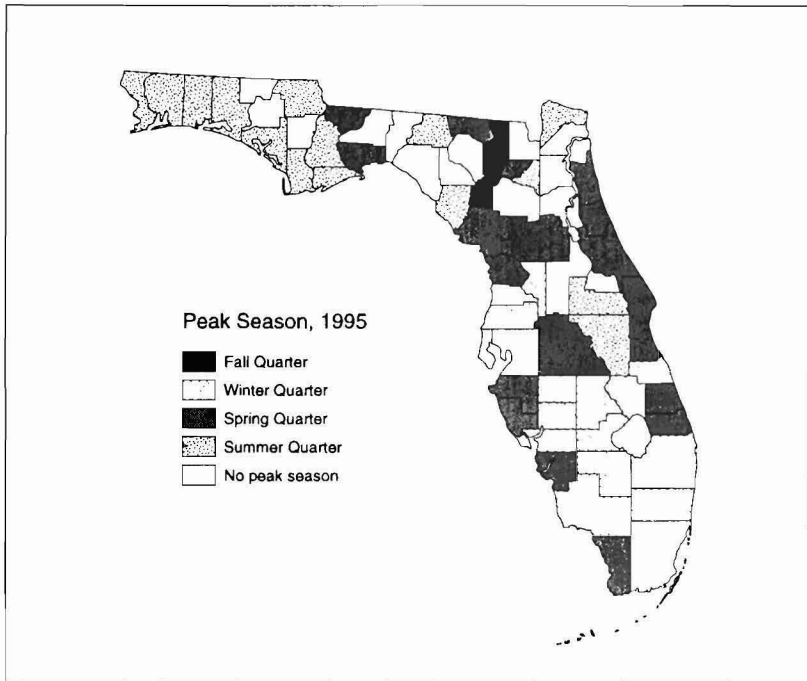
two seasons, in great part, was accomplished through a phenomenal growth in the number of summer air visitors who now are coming from abroad by air to visit the theme parks. The peak season for auto visitors has not been as stable as that for air visitors, but in most years the summer quarter continues to be the high one and the fall quarter the low. In most years the difference between the share of the peak season and that of the low for auto tourists is even lower than for air tourists.

No data are available to measure the degree of seasonality of a county's tourism. However, there are some interesting ways of determining it. Since tourists are more likely to eat in restaurants than permanent residents, seasonal changes in restaurant sales makes a good surrogate. Monthly data are available from the state's Department of Revenue. Monthly sales for every county here have been divided into four quarters of three months each, starting with the winter quarter (January, February and March). The percentage of restaurant sales in each quarter was then calculated, and the percentage point difference between the high and the low quarter determined. A county with a difference of only three percentage points or less was considered to have low seasonality, of four to nine percentage points moderate, and above nine points high. The results appear in Figure 1.

Since there is so little difference between the share of restaurant taxes collected in their peak season compared to their low one, counties with large cities such as Dade (Miami), Duval (Jacksonville), Hillsborough (Tampa), and Pinellas (St Petersburg) either are not of great interest to tourists, or attract approximately the same amount of tourists throughout the year. Most of the other counties within this group never have been identified with tourism. Today the vast majority of Florida's counties have only moderate differences between their high and low tourist seasons, even those that are closely identified with tourism (Orange, Osceola, Brevard, Broward, and Volusia).

There are, however, two parts of the state where tourism remains highly seasonal, the Panhandle and Southwest Florida (the latter includes the Naples and Key West areas). In 1995 there was a 14 percentage point difference between Collier County's (Naples) high and slow season, and a 10 percentage point difference between the two contrasting seasons in Monroe County (Key West). On the Panhandle, which has a brisk winter, the difference between the high and low seasons was greatest. For Walton County (Fort Walton Beach) it was 24 percentage points and there was a 14 point differ-

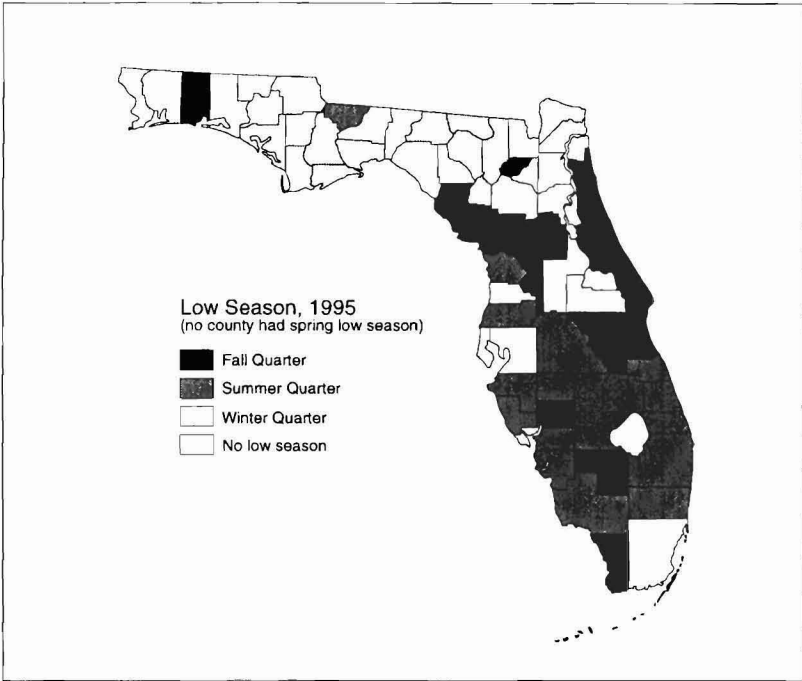
**Figure 1**



ence between the high and low seasons of Bay County (Panama City). Several other Panhandle counties have over ten point differences.

The peak and the low seasons clearly are temperature related. The peak season of almost all the Panhandle counties is summer, when many Georgia and Alabama visitors drive to Florida's "Red Neck Riviera". Summer is also the peak season for Nassau County (Fernandina Beach), and most importantly, the Orlando area. The Orlando area's summer peak is partially the result of it being the season when so many foreign visitors arrive, but also because school is out and families from the North can bring their children. Spring peaks are associated with many counties in the middle third of the state, and winter in the southern third. Monroe County (Key West) is a notable exception, since it has its peak in the spring, although there is very little difference between winter and spring restaurant sales. Only two counties have a fall peak that is markedly different from their low season. Both have few residents, and are in

Figure 2



the northern part of the state. Several restaurant owners in these counties attribute high fall restaurant sales to the hunting season. Not surprisingly, Alachua County (Gainesville) and Leon County (Tallahassee), home of two of the nation’s most powerful collegiate football teams, have fall restaurant peaks, but the difference between the share of taxes collected in the fall compared to their low seasons (winter) is very small.

The low season, like the high is associated with temperature (Figure 2). Most counties in North Florida have their low season in the winter. Most in the upper third of the peninsula have theirs in the fall, while many in the southern two-thirds of the peninsula in the summer. Since spring is a lovely time of the year in all parts of the state, no county has a spring low in restaurant sales.

In 1995 only two percentage points separated the shares of the peak and the low season of Florida’s total restaurant sales. This is an indication, at least from the point of view of the total economy of the state, that the tourist industry is now a twelve months a year

operation. Nonetheless, southwestern Florida and the Panhandle have slack seasons. Given the relative severity of the climate in both during their low seasons, it will probably continue to be a hard sell to get visitors to come to Naples during the summer, and to the Panhandle during the winter.