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The Recreational and Economic Value of Beaches in Volusia County

Volusia County, Florida
October 2025

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Prepared for
Volusia County, FL

by

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EXECUTIVE SUMMARY

To assess the economic impact of Volusia County's beaches, Taylor Engineering conducted a comprehensive analysis of tourism's contributions to the local economy, with a focus on beach-related tourism. The findings confirm that **beach tourism is a primary economic driver**, as it is in all Florida counties with sandy shorelines. Beaches not only attract visitors but also stimulate business growth, generating significant economic benefits. Additionally, the protection of coastal infrastructure from storms further underscores the economic and environmental value of Volusia County's beaches. These findings align with broader trends observed across Florida and the United States, highlighting the essential role of beach-oriented tourism in sustaining the local economy.

Volusia County beaches are a recreational resource for residents and both in-state and out-of-state tourists. This is clearly depicted in the results of the annual visitor surveys run by the Daytona Beach Area Convention & Visitors Bureau (CVB) (2022a; 2024a), which reveal that:

- Volusia County residents visit the county's beaches almost 19 times more than county parks and trails, making beaches overwhelmingly the top recreational activity for residents (Daytona Beach Area CVB, 2024a; Volusia County, 2024a).
- More than twice as many people take day trips to Volusia County beaches than to Florida state parks, trails, and historic sites, which are located at 175 locations throughout Florida, making Volusia beaches an important recreational activity for Floridians (Daytona Beach Area CVB, 2024a; Florida State Parks Foundation, 2023).
- Beaches dominate Volusia County tourism, with an average of **79% of tourists from 2021-2023 saying that they were vacationing in the county because of the beaches**. This percentage is up a sharp 30% from the 2017-2019 average (Daytona Beach Area CVB, 2024a).
- During 2021-2023, an average of **97% of all tourists said they visited Volusia County beaches** regardless of their principal purposes for vacationing in the county, making beach tourism indisputably the driving force behind Volusia County tourism (Daytona Beach Area CVB, 2024a).

Within Volusia County, **beach-oriented tourists spent an average of \$4.3 billion annually** from 2021-2023, generating 30% of the county's annual sales taxes (Daytona Beach Area CVB, 2024a). This spending is equal to nearly \$28,000 in spending for each household living in a county homestead property. **Spending by beach-oriented tourists supports more jobs in the county than any other industry and almost as many jobs as the combined number of jobs in education, construction, and manufacturing**. The enormity of the spending is demonstrated by the fact that beach-oriented Volusia County tourists' annual spending is equal to about 70% of the annual value of all Florida-grown crops (Daytona Beach Area CVB, 2024a; Florida Department of Agriculture and Consumer Services, 2024).

Since 2016, Volusia County beaches have experienced an average shoreline retreat rate of 8.5 ft/yr with multiple communities experiencing rates beyond 12 ft/yr (Taylor Engineering, 2025a). This rate of retreat is significant and often affects everyday beach operations such as beach driving, lifesaving activities, and concessions. Within this report, we present two case studies of narrow beaches causing the collapse of tourism and loss of infrastructure protection from storms. However, these two case studies demonstrate that **when communities invest in their coastline, economies recover and storm protection is greatly enhanced**.

Compared to other coastal counties, collections of the Tourist Development Tax (TDT) in Volusia County significantly lagged from 2009-2019. However, prospects brightened considerably from 2021-2023, when there was a 30% jump in the number of beach tourists in Volusia County and a corresponding 50% jump in TDT collections versus 2017-2019. Although COVID-19 caused a collapse of general tourism in 2020 and 2021, Houston (2023) showed that beach tourism increased significantly in every coastal state after beaches were reopened because people perceived that the safest recreation during COVID-19 was outdoors in the sun and fresh air. This was true for Volusia County beaches, and the percentage of tourists arriving in Volusia County for beach vacations significantly increased. Moreover, the percentage of beach tourists has remained high relative to 2017-2019, apparently because tourists, particularly Florida residents, discovered (or rediscovered) the joy and affordability of beach vacations.

Unfortunately, in Volusia County the number of beach tourists, tourist spending, and TDT collections declined somewhat from 2022-2023. Many factors affect the number of tourists visiting Volusia County, but the counts of visitors to the International Speedway and special events in the county hit record levels; additionally, TDT collections in Panama City Beach, Brevard County, and Flagler County also hit record levels (Cobb, 2023; Cranis, 2024; FlaglerLive.com, 2025). The decline may have largely reflected the condition of Volusia County beaches and their supporting infrastructure (walkovers and access ramps) following the impacts of Hurricanes Ian and Nicole. Beach-oriented tourists have many options, and it is easy for them to visit other beaches if one falls into a state of disrepair or amenities are not comparable.

Ultimately, to maintain the economic and recreational benefits that Volusia County has historically enjoyed, the county must consider active maintenance of its beaches. As adjacent, Brevard County's executive director of the Space Coast Office of Tourism Peter Cranis stated, "The beaches are the number one reason people come to Brevard. We've got to keep sand on the beaches." Throughout the United States and the world, **communities have experienced that when they invest in their coasts, there are numerous economic and social benefits, including but not limited to increased tourism, job creation, property value increases, community engagement, and improved quality of life.**

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1 PURPOSE

To better understand the economic impact of the Volusia County beaches, Taylor Engineering conducted an economic assessment of tourism within the County, specifically the value of beach tourism and its impacts on the local economy. This study dives into Volusia County-specific tourism numbers (Section 2.2), tourism values directly related to beach activity and special events (Sections 2.2.3 and 2.2.4), in addition to development in the coastal area (Section 3) and the benefits provided by beaches (Section 4).

The data clearly demonstrate that beach-oriented tourism is a key economic driver in Volusia County, as it is in all Florida counties with sandy beaches. Beaches attract both Volusia County residents and tourists, businesses, and, therefore, provide prosperity. The economic value of beach-oriented tourism and infrastructure protection from storms in Volusia County mirrors its value throughout Florida and the United States.

To put Volusia County beach tourism and infrastructure protection in perspective, it is important to first discuss Florida general tourism, Florida beach-oriented tourism, and the storm damage protection that beaches provide. In addition, this report will compare data from other state and national beach locations to help illustrate the economic value of Volusia County beaches.

2 THE TOURISM INDUSTRY

Tourism is a booming industry in the United States and the world, and as this report shall show, sandy beaches are leading the boom— “Florida is the top travel destination in the world, relying on tourism to drive its economy more than any other state” (Danerotondo, 2018). If Florida were its own country, it would easily have the most tourist visits on the planet (WorldPopulationReview, 2023; Houston, 2024).

Tourism is the second-largest employer in Florida after health and social services, with more than 2.0 million jobs, including indirect and induced jobs that depend on tourism. This is about one out of every six private sector jobs. In-state and out-of-state tourists vacationing in Florida spent \$173 billion in 2023, and they added \$169 billion to Florida’s Gross Domestic Product (GDP). These tourists generated approximately \$48.7 billion in taxes in 2022, with \$26.1 billion going to the federal government, \$11.4 billion to local governments, and \$11.2 billion to the state government (Rockport Analytics, 2024; Houston, 2024). In-state tourists accounted for about 24% of the spending (Houston, 2024).

Notably, the tourism industry is often cited as having low wages, but in 2022, Florida had average tourism salaries that were 6-7% higher than average Florida manufacturing and construction salaries (Ziprecruiter, 2023 a,b,c).

2.1 FLORIDA BEACH TOURISM

A national Harris Poll found that “beaches (74%) was the most favored type of place to go on vacation” (Plansponsor.com, 2019). Of the ten sites on Skyscanner’s 2025 Travel Trend report, a report summarizing the top destinations searched over the past year, six are destinations with beaches (Skyscanner, 2025). Additionally, Minnaert (2022) reports that “66% of families plan a beach vacation in the next 12 months”, which shows that beaches are by far the number one vacation destination for families. Beach vacations will dominate in the future. They are the most preferred vacation in the U.S. by Generation Z (age 13-25) travelers (Bansal, 2022).

Beaches also dominate vacations in Florida. “The #1 reason travelers come to the state of Florida is to visit the coastal communities and enjoy the award-winning beaches” (Govinfo.gov, 2017). A survey by the Florida Office of Economic and Demographic Research (FOEDR) showed that “beaches are the most important feature of Florida’s brand and have the strongest effect in terms of attracting tourists” (FOEDR, 2015). A FOEDR (2018) survey of Florida destination and marketing organizations showed that “beaches” was by far the most popular answer to the survey question, “What makes Florida attractive to tourists?” Respondents selected “outdoor recreation” and “federal and state parks” second and third, respectively. Amusement parks (e.g., Disney World and Universal Studios) ranked a distant sixth in the survey, and cruises did not garner enough survey responses to be ranked. A report by the Florida Department of Environmental Protection (FDEP) concluded that “the primary resource-based recreation activity in Florida is visiting the beach” (Kavanagh et al., 2011).

Florida is America’s recreational playground, having the most visited beaches in the United States, with 1.2 billion day visits to beaches in 2022 (Houston, 2024). To understand the significance of beach recreation in Florida, this study compares the Florida beach day visits to national recreational activities that are not beach-oriented in 2023-2025. During these times, there were:

- 332 million day visits to 424 National Park Service properties (National Park Service, 2025; National Park Foundation, 2023);
- 245 million day visits to all United States amusement parks (e.g., Disney World, Disneyland, Universal Studios, SeaWorld, and Six Flags over Texas, Themed Entertainment Association, 2024);
- 72 million attendees at games of the National Football League, Major League Baseball, and the National Basketball Association (ESPN, 2025abc);
- 84 million attendees to men’s college football, basketball, and baseball (National Football Foundation, 2023; NCAA, 2023; Jope, 2023);
- 19 million United States cruise line passengers are projected in 2025, and the average cruise is seven days long, yielding 133 million cruise days (Diaz, 2025);
- About 2 to 3.6 million attendees at races of the National Association for Stock Car Auto Racing (NASCAR) (Motorracingsports.com, 2023). Far more people watch NASCAR events on television, but viewership has declined. From 2015-2024, NASCAR viewership is down 44%, and from 2006-2024 viewership at the Daytona 500 has declined 66% (Brittle, 2024).

Combining these visits yields 868 million day visits compared to the 1.2 billion day visits to Florida beaches. Therefore, **the number of day visits to Florida beaches annually is 38% greater than day visits to all these attractions combined** (Figure 2.1).

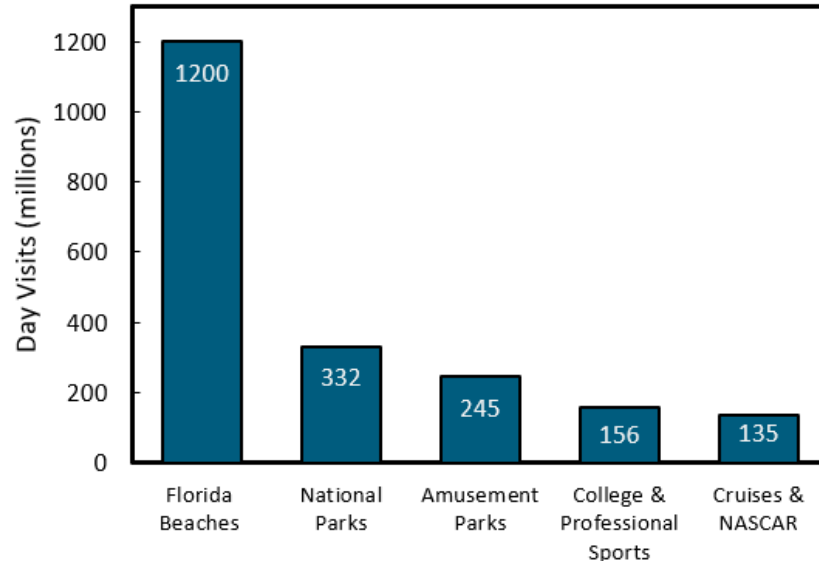


Figure 2.1 Number of Day Visits to Popular Outdoor Recreational Activities Nationally

Houston (2024) showed that about 50% of Florida tourists vacation in Florida primarily to go to the beach. These beach-oriented tourists are not those who go to the beach for the day with a cooler and rent an umbrella— they contribute much more to the local economies, they are tourists on vacation, staying in local condos and hotels, and eating in restaurants. For example, Figure 2.2 shows Panama City Beach during the summer when its resident population of 15,000 swells with tourists to 100,000 (Mendez, 2022). During this time, there is very limited room on the beach, and many of the tourists in Figure 2.2 are staying in the extensive line of condos and hotels seen in the photograph, eating in nearby restaurants, and paying for other local entertainment. Panama City Beach stretches for 18 miles, so beach-oriented tourist spending is immense, and its economy is dependent on beach tourism.



Figure 2.2 Panama City Beach on a Summer Day
(Fender, 2021)

With half of all Florida tourists seeking out a beach-oriented vacation, they spend \$82.5 billion of the \$165 billion that tourists spend annually in Florida and contribute \$80 billion to Florida's GDP (Houston, 2024). The magnitude of spending by beach-oriented tourists is demonstrated by comparing it with the revenues of other Florida industries. Florida offers significant tax incentives for manufacturing companies to locate infrastructure and plants in Florida. All manufacturing in Florida produces revenues of approximately \$59 billion, or 72% of beach-oriented tourist spending (National Association of Manufacturers, 2022). Moreover, in June 2022, the number of manufacturing jobs in Florida was about 6% below the 2006 level of approximately 430,000 jobs due to foreign competition and job losses during the severe 2008-2009 recession (FloridaTaxWatch, 2022). In contrast, tourism jobs increased by 85% during the same period (FloridaTaxWatch, 2006; Rockport Analytics, 2024). Residential construction is another major industry in Florida, but its revenues, including home remodeling, were \$39.9 billion in 2022, or only 48% of beach-

oriented tourist spending (Statista.com, 2023). To summarize, the above comparisons and statistics clearly demonstrate the importance of beaches and beach-related industries to Florida’s economy.

2.2 VOLUSIA COUNTY BEACH TOURISM

Volusia County beaches stretch 47 miles along the Atlantic Ocean coast and are some of the most iconic beaches in America. Since the 1920s, Daytona Beach has been known as the “World’s Most Famous Beach” (Figure 2.3). Ormond Beach earned the title “Birthplace of Speed” when beach racing started in 1902. In 1947, Bill France, Bill Tuthill, and 18 “racing men” met in Daytona Beach and formed NASCAR. In 1954, France signed a contract with Daytona Beach and Volusia County to build what would become the Daytona International Speedway, the home of the world-famous Daytona 500, an event larger than the Super Bowl (Langston, 2024).

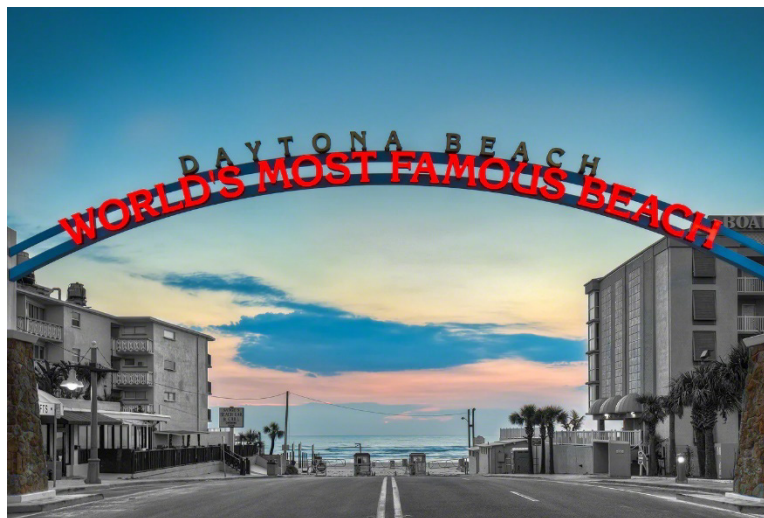


Figure 2.3 Daytona Beach, “The World’s Most Famous Beach”

Working for the Daytona Beach Area Convention & Visitors Bureau (CVB), Mid-Florida Marketing and Research, Inc. has conducted surveys of visitors to Volusia County since 2017. These surveys are perhaps the most detailed county-level visitor surveys in Florida. The surveys started in January 2017 and were conducted monthly through December 2019; surveys were not conducted in 2020 because of the COVID-19 pandemic; and the surveys resumed in 2021 and were conducted quarterly from April-December and quarterly from January-September in 2022 and 2023 (Daytona Beach Area CVB, 2022a; 2024a).

2.2.1 Beach-Oriented Tourism

The visitor surveys asked both out-of-state and Florida-resident tourists the purpose of their visits to Volusia County, which provided valuable data related to beach-oriented tourism. For this study’s analysis, the tourist responses for each year are weighted by the percentages of tourists who were from out-of-state versus Florida residents, as the mix of tourists has changed significantly in recent years.

Figure 2.4 shows that from 2017-2019, about 61% of all tourists surveyed said that the beach was their primary purpose for vacationing in Volusia County, and there was almost no change year-to-year. In 2020, there was no survey because of COVID-19, but when the survey resumed, there was a significant jump in

the percentage of beach tourists whose primary purpose of visiting the County was to visit the beach, jumping from 61% (2017-2019) to 79% (2021-2023)! Although COVID-19 caused a collapse of general tourism in 2020 and 2021, Houston (2023) showed that beach tourism increased significantly in every coastal state after beaches were reopened because people perceived that the safest recreation during COVID-19 was outdoors in the sun and fresh air. This was true for Volusia County beaches, and the percentage of tourists arriving in Volusia County for beach vacations went up significantly. Moreover, the percentage of beach tourists has remained high relative to 2017-2019, apparently because tourists, particularly Florida residents, discovered (or rediscovered) the joy and affordability of beach vacations.

There are many factors that impact the number of tourists visiting, but the decline from 81% in 2021 and 2022 to 76% in 2023 could be attributed to the conditions of the beaches and the closure of beach infrastructure, such as parks, walkovers, and access ramps, following Hurricanes Ian and Nicole (Florida Health Volusia County, 2024). Additionally, it could be related to other locations removing or decreasing restrictions following the COVID-19 pandemic. However, in 2023, the number of visitors to the International Speedway and special events in the county hit record levels, and TDT collections in Panama City Beach, Brevard County, and Flagler County also hit record levels (Cobb, 2023; Cranis, 2024; FlaglerLive.com, 2025). Beach-oriented tourists have many options, and it is easy for them to visit other beaches if one falls into a state of disrepair or amenities are not comparable.

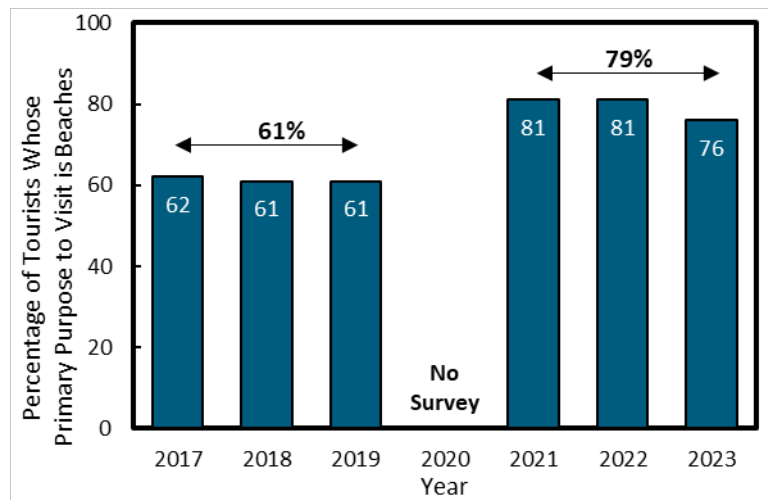


Figure 2.4 Percentage of Tourists in Volusia County Whose Primary Purpose to Visit is Beaches

The surveys also asked what activities the tourists engaged in, regardless of their purposes for vacationing in the county. Figure 2.5 shows that from 2017-2019, 88% of tourists went to the beach during their stay; for 2021-2023, the percentage jumped to 97%. Beach tourism is an indisputable driving force of tourism in Volusia County.

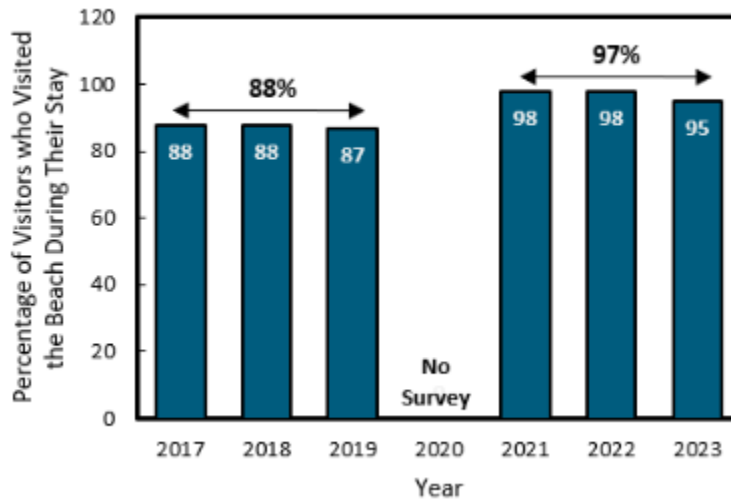


Figure 2.5 Percentage of Visitors who Visited the Beach During Their Stay

The Tourist Development Tax (TDT) in Volusia County is levied on beds, rooms, houses, condos, hotels, motels, recreational vehicles, watercrafts, and any similar rentals that are rented for six months or less. While the TDT is very important to Volusia County, data indicate the rate of growth related to hotel sales tax has lagged behind most other Florida counties. The *Daytona Beach News-Journal* said an analysis of “state hotel sales tax collections from 37 Florida coastal counties from 2009 through 2018 found Volusia County’s 56 percent growth rate (5.0% annual rate) actually ranked second-to-last, ahead of only the rural Levy County” (Abbott, 2019). Notably, Levy County has a population one-tenth the size of Volusia County and, without sandy beaches, is not a tourist magnet.

Figure 2.6 shows ratios of both Volusia County TDT collections and visitor numbers to a base year of 2017 (Volusia County, 2024c). TDT collections grew only 3.9% from 2017-2019, lagging even the slow growth from 2009-2018. In 2020, during the pandemic, there was a 28% decrease in the number of visitors but only an 11% drop in TDT. Then there were dramatic rises in TDT of 42%, 56%, and 50% in 2021, 2022, and 2023, respectively, relative to 2017. Quite frequently, those centering their vacations on the beach tend to stay at more expensive hotels and condos located on or near the beach. Therefore, the rise in TDT collections for 2021-2023 may be attributed to the increase in the number of beach tourists, Figure 2.6. As demand increases, hotels and condos commonly raise their rates, having a direct impact on the TDT. Again, the small decline in beach tourists in 2023 is reflected in a corresponding decline in TDT collections, as seen in Figure 2.6.

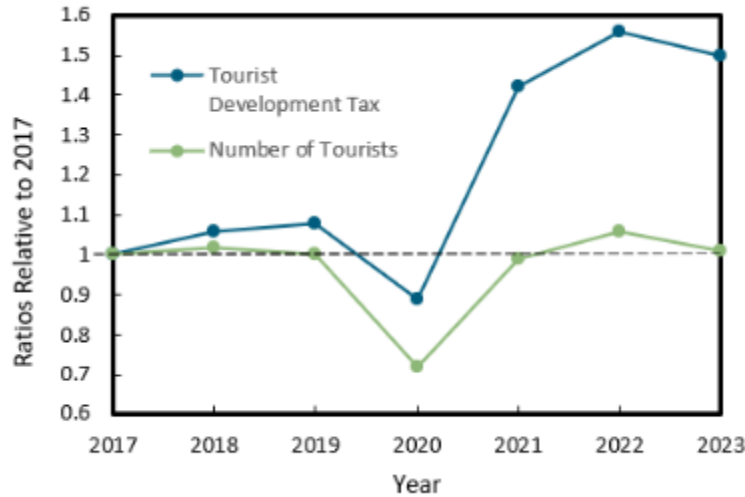


Figure 2.6 Ratios of TDT Collections and Tourist Numbers Relative to 2017

Figure 2.7 details how the main purposes identified by tourists for vacationing in Volusia County have changed from 2017-2023. Percentages are somewhat greater than 100% in 2022 and 2023 because some people gave more than one purpose. It is notable that the people visiting the county primarily to attend conventions declined after the pandemic and has not recovered. Those saying they were visiting to attend the International Speedway did not recover until 2022. The percentage of people saying that they were in the county for special events (covered in Section 2.2.4) was greater in 2021 than pre-pandemic in 2019 and has continued to increase.

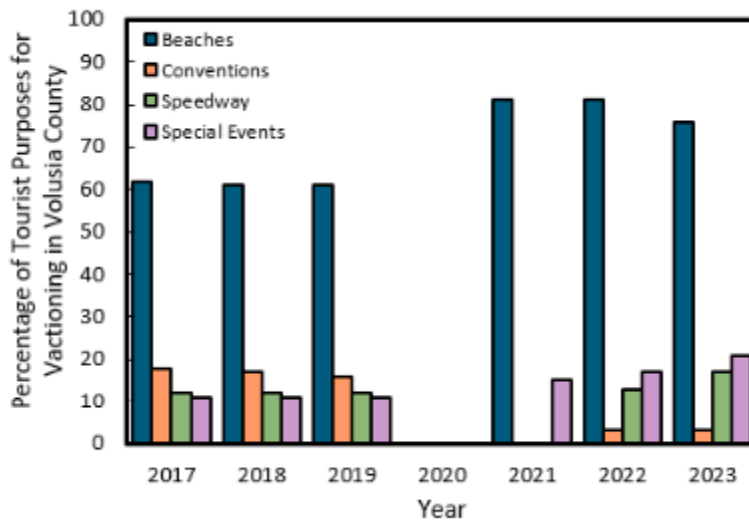


Figure 2.7 Reasons to Visit Volusia County Given by Tourists from 2017 to 2023

As noted earlier, there was a 6.2% decrease in the number of beach-oriented tourists in 2023 compared to 2022, which was likely due to the impact of Hurricanes Ian and Nicole on beaches and their associated infrastructure. This drop should have reduced tourist spending proportionally in 2023 (6.2%), or about \$285 million, but the actual reduction was \$300 million. Additionally, in 2023, the Ocean Center set

attendance records, bringing many people beachside for events and significantly contributing to local spending. Therefore, the notable increases in 2023 of those vacationing in Volusia County to attend the International Speedway or special events did not make up for the decline in beach-oriented tourist spending. This may be due to beach-oriented tourists spending more per capita than non-beach-oriented tourists and illustrates how dominant beach tourism is in Volusia County.

2.2.2 Volusia County Vacationers

Although the total number of tourists visiting Volusia County has remained stable since 2020, there has been a significant change in the mix of out-of-state and Florida-resident tourists in Volusia County, as seen in Figure 2.8. Before 2020, a steady 34% of tourists to Volusia County were Florida residents, with 66% of tourists coming from out of state. But in 2021, the percentage of Florida-resident tourists increased from 34% in 2019 to 61%, with a corresponding drop in the percentage of out-of-state tourists (Daytona Beach Area CVB, 2022a; 2024a).

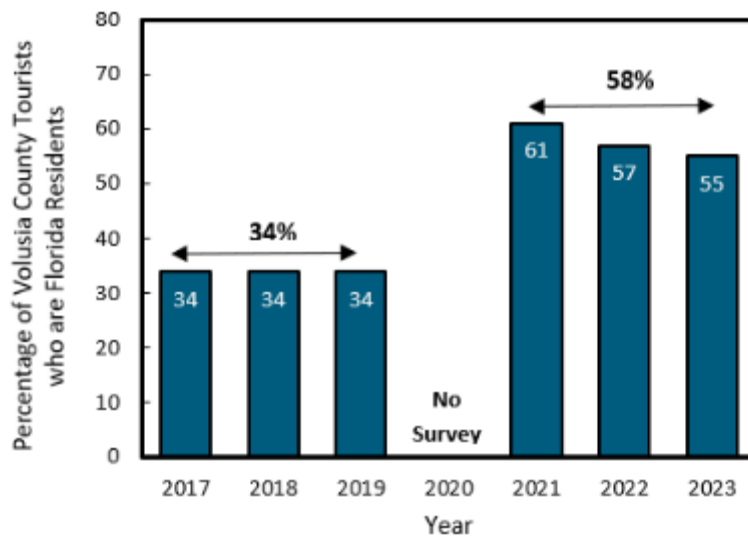


Figure 2.8 Percentage of Volusia County Tourists who are Florida Residents by Year

The increase in the number of Florida residents vacationing in Volusia County appears to be correlated with an increased desire for beach vacations following the COVID-19 pandemic. From 2017-2019, only an average of 34% of Florida-resident tourists said that the beach was their purpose for vacationing in Volusia County, but this almost doubled to an average of 58% from 2021-2023 (Figure 2.9). This is a remarkable increase and appears to be a new vacation paradigm for Volusia County because the percentage has remained high for three consecutive years. As such, advertisements directed at Florida residents emphasizing the joys of Volusia County beaches could be highly effective. Interestingly, a 2002 survey of Florida residents vacationing at Daytona Beach found that 78% of these tourists were in the city to enjoy the beach, so perhaps this is just a return to a previous paradigm (Soskin and Braun, 2002).

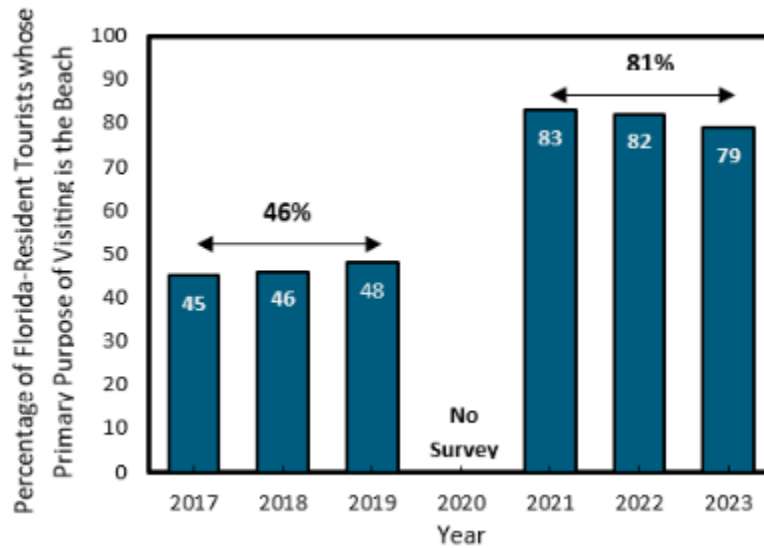


Figure 2.9 Percentage of Florida-Residents Who Visted Volusia County for the Beach

During COVID-19, air travel dropped significantly, resulting in a sharp drop in the number of out-of-state tourists visiting Florida. Figure 2.10 shows that the number of out-of-state tourists to Volusia County dropped by 3.8 million during the height of the pandemic in 2020, but the number of Florida-resident tourists increased by about 1 million, a new record number. The number of Florida residents further increased by about 1.6 million tourists by 2021, with the number of out-of-state tourists rebounding to about 1 million. The number of Florida-resident tourists in 2023 was about 2.1 million higher than in 2017, and the number of out-of-state tourists was 2.1 million lower, with the total number of tourists about the same in 2023 as in 2017. It could be inferred that Florida residents had forgotten the pleasures of Volusia's beaches, and once they were rediscovered, they returned to vacationing in Volusia County. Vacationers have returned to air travel, and out-of-state tourists are once again likely to consider Volusia County beaches. Reading between the lines, they would be good targets to market to and attract to the area.

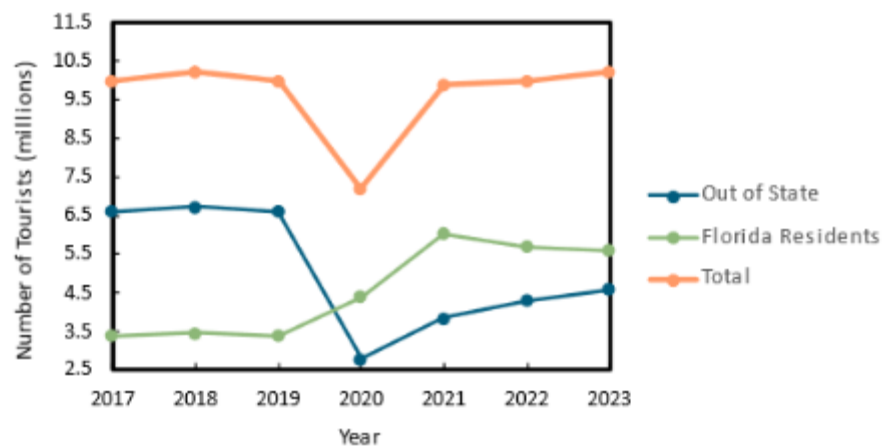


Figure 2.10 Numbers of Out-of-State and Florida-Resident Tourists Who Visited Volusia County

Although the number of out-of-state tourists to Volusia County from 2021-2023 is down from 2017-2019, the percentage who are visiting the county for beach vacations has increased. The percentage has always been high, as seen in Figure 2.11 with 69% in 2017-2019 vacationing in Volusia County, primarily to go to the beach. However, the percentage increased to 77% from 2021-2023. This is just below the average of 81% of Florida residents on beach vacations and shows how focusing on beaches and beach conditions is important for both out-of-state and Florida-resident tourists.

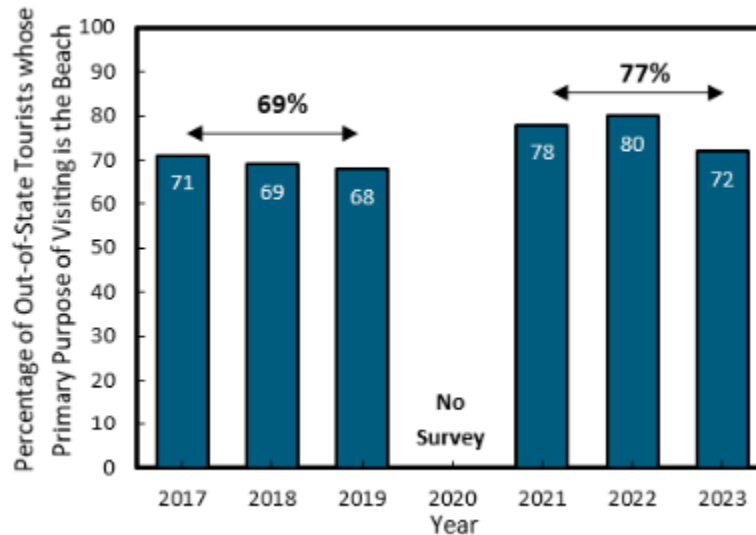


Figure 2.11 Percent of Out-of-State Tourists Who Visited Volusia County for the Beach

People reacted to COVID-19 by heading to beaches for vacation, as was seen in Figure 2.4, and there has been an increase of about 30% in the number of beach-oriented tourists in Volusia County in 2021-2023 relative to 2017-2019. In contrast, non-beach tourism crashed throughout the United States. For example, Disney World attendance was down 68% in 2020 relative to 2019, and it still had 17% fewer visitors in 2023 than in 2019 (Figure 2.12; Magic Guides, 2024). It is expected that attendance in 2024 will be less than in 2023 (Magic Guides, 2024). The attendance decline is not just confined to Disney World but also at other theme parks. By 2023, the worldwide attendance at theme parks (e.g., Disney World, Universal Studios, Six Flags Over Texas, theme parks in Europe) still had not reached pre-pandemic levels of 2019 (Themed Entertainment Association, 2023; 2024). The number of people taking cruises in 2020 and 2021 fell 80% and 84%, respectively, compared to 2019, and by 2023, the number of passengers was only 6.7% greater than 2019 (Statista, 2024).

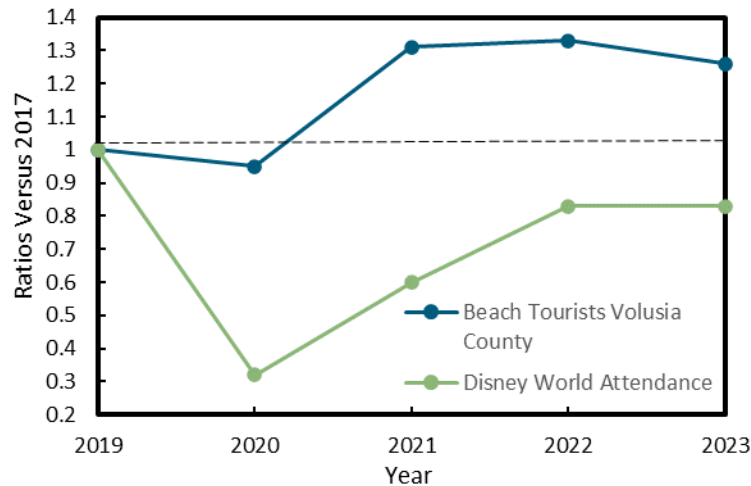


Figure 2.12 Volusia County Beach Tourists & Disney World Visitors Normalized to 2017 Values

2.2.3 Economic Impact of Volusia County Beach Tourism

From 2021-2023, an average of 10.2 million tourists visited Volusia County, spent \$5.5 billion, paid 39% of the county's sales tax, and supported 39,700 employees in the tourism industry (Daytona Beach Area CVB, 2024a). Visit New Smyrna Beach reported similar numbers for 2024 with the visitors spending \$5.5 billion and supporting 39,900 jobs in the County, with the Southeast Volusia County region accounting for approximately 8% of the economic impact and associated jobs (VisitNSB, 2024). **The tourism industry is the leading employer in the county, supporting 24% of the jobs** (39,700 out of 162,743 jobs) (Florida Bureau of Workforce Statistics and Economic Research, 2024; Daytona Beach Area CVB, 2024a). Notably, the percentage rises to about 40% in Daytona Beach, and this is an undercount because it only considers employees of "Hotels and Lodgings" (Daytona Beach Area CVB, 2022b).

Because 79% of tourists surveyed in 2021-2023 said that a beach vacation was their purpose for visiting Volusia County, they are designated as beach-oriented tourists. Assuming these beach-oriented tourists spend at the same per capita rate as other Volusia County tourists (although they likely spend more, as noted in Section 5.2.1), they spend 79% of the \$5.4 billion spent in the county, or about \$4.3 billion. This spending leads to the employment of 31,400 people (19% of the jobs in the county and 32% in Daytona Beach) and payment of 31% of Volusia County's sales tax. Spending by beach-oriented tourists alone supports more jobs in the county than any other industry and almost as many jobs as the combined number of jobs in education, construction, and manufacturing (Figure 2.13; Florida Bureau of Workforce Statistics and Economic Research, 2024). There are 153,617 residential homestead properties in Volusia County, **making the \$4.3 billion in annual spending by beach-oriented tourists nearly \$28,000 in spending for every household in a homestead property in the county** (Volusia County Property Appraiser, 2024).

Spending by beach oriented tourists alone supports more jobs in the county than any other industry and almost as many jobs as the combined number of jobs in education, construction, and manufacturing.

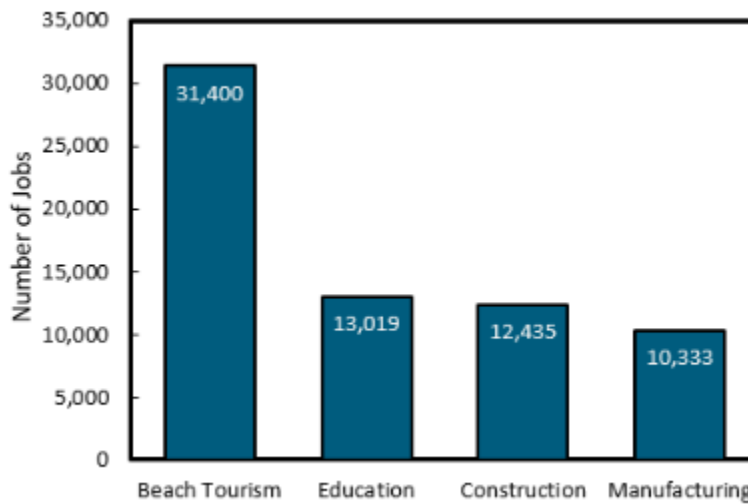


Figure 2.13 Volusia County Jobs in Tourism, Education, Construction, and Manufacturing

The enormity of spending by beach-oriented tourists in Volusia County is demonstrated by comparing it with receipts from Florida agricultural crops. Total crop receipts are about \$6.2 billion annually (Florida Department of Agriculture and Consumer Services, 2024). Therefore, beach-oriented tourists spending \$4.3 billion annually in Volusia County is equal to almost 70% of the production of all croplands in Florida.

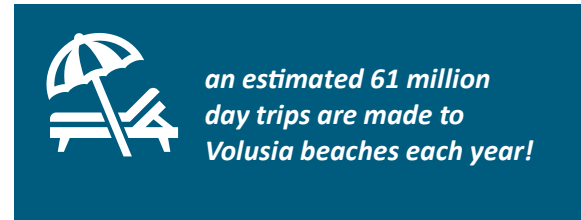
In an analysis of Florida tourism, Rockport Analytics (2024) showed that tourist spending increases the GDP of Florida by an amount equal to 97% of spending. Therefore, beach-oriented tourists contribute \$4.3 billion to Volusia County's GDP, and this is 17% of Volusia County's GDP of \$24 billion (Federal Reserve Economic Database, 2023b).

It is clear that Volusia County residents understand the importance of beaches to Volusia County. Volusia County (2025) recently surveyed 12,156 residents of Volusia County (about 2% of the estimated population of 603,000, U.S. Census Bureau, 2025). The survey asked residents how strongly they agreed with the following statement: "The condition and quality of Volusia County's beaches significantly impacts tourism and the local economy." Over 64% strongly agreed, 27% agreed, and only 1.4% disagreed or strongly disagreed. Similarly, over 1,000 business owners were asked how strongly they agreed with the statement: "The success of my business depends on the strength and vibrancy of the beach community." About 46% strongly agreed or agreed, and only about 26% disagreed or strongly disagreed. Volusia County beaches are recreational havens for out-of-state tourists, Florida residents, and Volusia County residents. Ultimately, about 61 million take day trips to Volusia County beaches each year. This number comes from several sources, as calculated below:

- From 2021-2023, 10.2 million tourists spent an average of 4.7 days in Volusia County (accounting for out-of-state tourists staying about a day longer at Volusia Beach than Florida residents). Assuming beach-oriented tourists visit beaches once a day and 79% of tourists are beach-oriented, these tourists made 37.9 million day trips to the beach.
- Over 97% of all tourists, regardless of their reason for vacationing in Volusia County, went to the beach during their stay. Assuming the 21% of tourists, who did not mainly come to Volusia County to go to the beach (but clearly did go), spent parts of 2 days at the beach, this adds 4.3 million day trips.

- The Volusia County survey (2025) asked how often residents visited the beach. The residents could mark weekly, monthly, a few times a year, once a year, every few years, or never. Assuming a few times a year is three times a year and every few years is every three years; the calculated number of resident day trips is 18.8 million.
- Summing these day trips (37.9 million + 4.3 million + 18.8 million), **about 61 million day trips are made to Volusia beaches each year.**

About 30 million visitors annually visit Florida's 175 state parks, trails, historic sites, and the 100 miles of beach managed by the parks (Florida State Parks Foundation, 2023). State parks are funded at a level of \$100 million annually (Florida State Parks Foundation, 2023). Comparatively, **more than twice as many people make day trips to Volusia County beaches than to all Florida state park system facilities.** Similarly, about 1 million people, most of whom are Volusia County residents, make day trips to Volusia County parks and trails annually (Volusia County, 2024a). With Volusia County residents making 18.8 million day trips to beaches, almost 19 times as many Volusia County residents go to county beaches as to county parks. The Parks, Recreation, and Culture Department of Volusia County has a fiscal year 2024-2025 community services budget of \$21.2 million, and includes operation and capital costs such as grant funding, impact fees, etc. (Volusia County, 2024a).



2.2.4 Economic Impact of Major Special Events in Volusia County

The Daytona Beach Area CVB commissioned a study of the economic impacts of major special events in 2023 on Volusia County and the Daytona area (Mid-Florida Marketing and Research, Inc., 2023). Table 2.1 shows the events, dates in chronological order in 2023, and the base economic impact (spending).

Table 2.1 Major Special Events in Volusia County and their Economic Impact for 2023

Event	Dates	Duration (days)	Economic Impact (Spending)
Speedweeks	January/February 2023	7	\$129,700,000
Bike Week	March 2023	10	\$121,480,000
Jeep Beach Week	April 2023	8	\$124,410,000
Welcome to Rockville	May 2023	4	\$30,400,000
Coke Zero Sugar 400	August 2023	1	\$52,000,000
Biketoberfest	October 2023	4	\$17,900,000
Total	-	34	\$475,890,000

Speedweeks has three visitor components: 'The Rolex 24 At Daytona', various qualifying races, and the 'Daytona 500'. The three components last 23 days, including qualifying races, but the main events last approximately one week. 'Bike Week' lasts 10 days and attracts those with motorcycles. 'Jeep Beach Week' attracts jeep owners and vendors and lasts eight days (expanded to 10 days in 2025). 'Welcome to Rockville' is a four-day hard rock and heavy metal music festival that started in 2021. 'The Coke Zero Sugar 400' is a one-day, 400-mile NASCAR race. And the last major event is 'Biketoberfest', which lasts four days and attracts motorcycle enthusiasts.

Total attendee spending in 2023 during these major special events was \$475.9 million or 8.8% of annual tourism spending in Volusia County and 11% of the spending by beach-oriented tourists (\$4.3 billion). **Figure 2.14** compares spending by event. Biketoberfest is notable for the low spending of its participants. It generates about \$4.5 million a day versus the \$52 million a day of the Coke Zero Sugar 400.

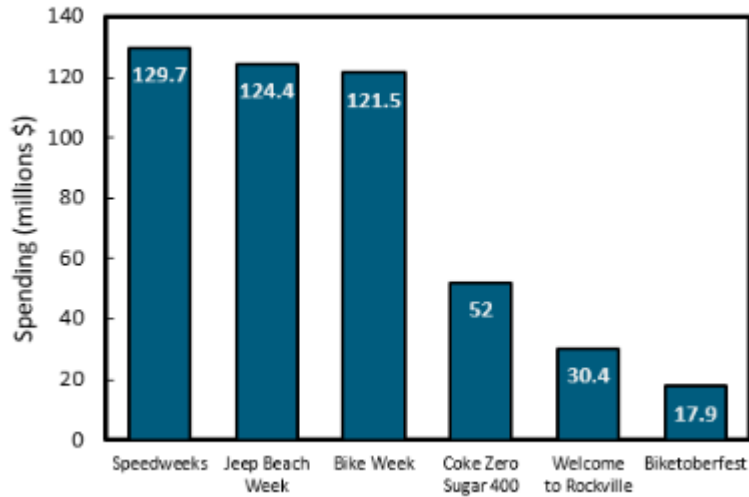


Figure 2.14 Major Special Event Spending by Tourists in 2023 for Volusia County

In addition to these events, Volusia County’s Ocean Center brings in numerous events that are attended by over half a million visitors, accounting for almost 90,000 hotel room stays across their 118 events, bringing in a revenue of \$11.5 million and supporting over 1,000 jobs (Ocean Center, 2025a). The Center advertises that it is “just steps from the magnificent beaches and rolling surf” (Ocean Center, 2025b). **The Ocean Center supports beaches, and beaches support the Ocean Center.** Without the beaches, some associations would likely not choose Volusia County for their conventions. Associations know that many attendees bring their families, and the availability of family recreation is important to attract attendees.

The Ocean Center supports beaches, and beaches support the Ocean Center

Although these special events bring revenue into the county, it is important to recognize the potential to market the other 331 days of the year as a family-friendly destination. Major special events generate 8.8% of tourist spending in Volusia County, whereas beaches generate at least 79%. Family tourism and beach tourism go hand in hand. To enhance family beach tourism, it may be advantageous to deemphasize special events that have activities near beaches. Events at the International Speedway do not concentrate people at beachside areas, and they provide complementary recreation that beach-oriented tourists can enjoy. Advertisements, such as the current “Beach On” and “Relax Already,” help emphasize family beach tourism (Figure 2.15).



Figure 2.15 Daytona Beach “Beach On” and New Smyrna Beach “Relax Already” Themed Advertising (Zimmerman Agency, 2025, and Visitnsbfl, 2025)

2.2.5 Economic Impact of Beach Driving and Off-Beach Parking

Driving on beaches in Volusia County has been occurring since at least the speed-racing days of 1902. This tradition continues on, and currently, approximately 15 miles of beach driving is available in the county.

Soskin and Braun (2002) published a paper that studied beach driving. They started with the opinion that cars on beaches were bad for tourism because they attracted those coming only for the day (‘day trippers’), many of whom they said prized “‘beach cruising’ as a recreational experience itself”. But they found that the main activity of 78% of day trippers was the beach, and their top activities could be classified as “attracted to activities involving quiet activities at the beach”. They were greatly surprised to find that day trippers who parked on the beach spent more per day than those who did not. Their surveys did not enable them to reach clear conclusions other than the need for more parking so that people did not need to drive on the beaches (Soskin and Braun, 2002).

Beach driving and on-beach parking provide visitors with a unique experience, offering convenience and accessibility while also presenting the opportunity for the County to create revenue. The Volusia County survey asked county residents how often they parked or drove on the sand when visiting county beaches, and 52% said they did so at least half the time, 24% infrequently, and 24% never (Volusia County, 2025).

About 1.1 million vehicles enter Volusia County beaches annually (Figure 2.16; Volusia County, 2024c). This is an average of about 3,100 vehicles per day. But during peak vacation days, the number of vehicles can be much greater. For example, 9,938 vehicles entered the beaches on July 2, 2023 (Volusia County,

2024c). Notably, the 2025 beach driving dataset provided by Volusia County yields that approximately 65% of the vehicles that entered the beach from January through Labor Day (September 3rd) had Florida license plates (Volusia County, 2024c). This aligns with the data presented in Section 2.2.2, where in recent years the percentage of Florida-resident tourists visiting Volusia County has exceeded the percentage of out-of-state visitors.

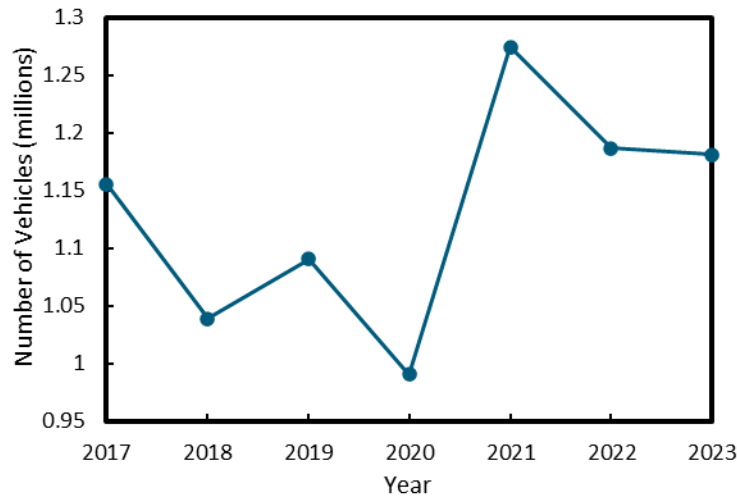


Figure 2.16 Number of Vehicles Entering Volusia County Beaches Annually
(Volusia County, 2024c)

Assuming each vehicle that enters the beach has three occupants on average, about 3.3 million people annually enter beaches in vehicles. Trends observed in Figure 2.16 are similar to those in Section 2.2.1, an increase in beach tourism from 2021-2023 relative to 2017-2019 caused an increase in vehicular beach entry from 2021-2023.

Beach driving is very important to the residents and the culture of Volusia County. Notably, beach driving fees brought in \$8.6 million in 2023. In 2024, the Volusia County Council voted 6-1 to eliminate beach driving fees for Volusia County residents, and fees were increased for non-residents (County Council of Volusia, 2024).

In addition to on-beach parking, there are several other methods that allow residents and visitors to access the beach and its amenities. There are 212 active public beach access points and 92 off-beach parking facilities. In addition, there are 12,000 hotel rooms and many rental condominiums with parking lots (DaytonaBeach.com, 2024).

Beginning on January 1, 2025, Volusia County began charging non-Volusia County residents for off-beach parking in County-owned off-beach parking lots (Gardner, 2025). Notably, these off-beach lots are not just designated for beach access; residents and visitors are also permitted to utilize the off-beach parking lots to visit restaurants in the area. The off-beach parking data is limited due to the newness of the program; however, based on the preliminary 2025 beach pass and off-beach parking data, since January 2025, approximately 808,700 vehicles entered the beach (including inlet park passes), while approximately 855,900 vehicles parked in off-beach parking lots. Therefore, based on the data collected between January 1st and September 3rd, 2025, on a typical month, approximately the same number of vehicles utilize on-beach and off-beach parking.

Overall, beach driving has proven to be a significant source of revenue for the County, and the introduction of off-beach parking fees is expected to further enhance these earnings. The County should continue to track and monitor the impact of the recent beach driving fee changes and the addition of off-beach parking lot fees to the overall revenue generated by the beach. Notably, although beach driving and parking are a significant source of revenue, additional funds will be required to support beach management measures.

3 FLORIDA BEACH DEVELOPMENT AND ITS ECONOMIC IMPACT

Florida beaches attract residents who want to live near beaches, and these residents, in turn, attract and create economic development and prosperity. The University of Florida surveyed people (45.5% Florida residents and 54.5% out-of-state visitors) on highly- and moderately-developed and undeveloped beaches in Duval, St. Johns County, Okaloosa, and Walton counties. Survey results showed that 62.5% of respondents said the beach was the most important factor in determining where they lived or visited, 23.5% said very important, 9.0% said somewhat important, 2.6% said it was not very important, and 2.5% said it was not important at all (Dornsch et al., 2015). Because of its sandy beaches, Florida has the greatest per capita income of any southern state other than Virginia, which has a somewhat higher per capita income because of its Washington, D.C., suburbs (U.S. Bureau of Economic Development, 2023). Florida's sandy coastal and Orlando-area counties generate 95% of Florida's tourism and 88% of its GDP, with the remaining counties (more than half of Florida's 67 counties) generating only 12% of Florida's GDP (Federal Reserve Economic Database, 2023a; Rockport Analytics, 2024). A connection between tourism and economic development is apparent.

Florida's warm weather is sometimes considered a key reason for its prosperity. However, the adjacent southwest Florida counties of Hendry and Lee share the same basic weather, but Hendry County is landlocked, whereas Lee County has sandy ocean beaches. Lee County is far more prosperous, with a GDP that is 26 times greater than Hendry County and a per capita income 60% greater (Federal Reserve Economic Database, 2023a; U.S. Bureau of Economic Development, 2023). Having an ocean coast is helpful, but not the key contributor to prosperity. Lee County's 50 miles of sandy beaches have a GDP per mile about 30 times greater than the 120 miles of ocean coast to the north that lacks sandy beaches (Wakulla County to Levy County); additionally, it has a per capita income 50% greater than these counties (Federal Reserve Economic Database, 2023a).

It is clear that sandy ocean beaches are a major attraction for residents, private sector development, and prosperity. If Lee County did not have sandy beaches, it would have developed differently and would not be the prosperous county it is today. The same is true for Volusia County. Had Volusia County never had sandy beaches, it would have an economy more like inland counties that don't feature beaches and the associated tourism.

4 BENEFITS OF BEACHES

In addition to the recreation benefit and the associated tourism dollars, beaches also provide other significant benefits to their surrounding communities. These benefits include: critical habitat for species and storm damage risk reduction benefits, as they serve as a line of defense from flooding. This chapter investigates just how impactful a healthy beach is to local economies (Section 4.1) and discusses storm damage protection and the benefit it provides to a community (Section 4.2).

The County is currently conducting a feasibility assessment that is analyzing the risk of the shorefront, defining areas that are most vulnerable and in immediate need of further action, and providing recommendations for a long-term beach management plan. The University of Florida survey (Dornisch et al., 2015) asked what those surveyed thought were the most and least preferred methods to address beach erosion. About 84% said beach nourishment was their most preferred method, and 4% their least preferred method. About 13% said that retreat was their most preferred method, and 42% said it was their least. About 4% said that seawalls were their most preferred method, and 54% said it was their least.

Notably, many practitioners believe that beach nourishment is the best method to address beach erosion problems, and this method is frequently used throughout the state and across the Country. The 2024 Florida statute 161.101 states, “The Legislature recognizes that beach erosion is a statewide problem that does not confine its effects to local governmental jurisdictions and that beach erosion can be adequately addressed most efficiently by a state-initiated program of beach restoration and beach nourishment” (Florida Legislature, 2024).

4.1 THE IMPACT OF BEACH EROSION ON TOURISM DOLLARS—MIAMI BEACH CASE STUDY

Beaches that have narrowed too much due to erosion can cause significant economic impacts. About 9% of those surveyed by the University of Florida said that if a beach lost half of its width, they would go to a different beach, and about 45% said they would go to a different beach if a beach lost three-fourths of its width (Dornsch et al., 2015). With \$4.3 billion in annual spending by beach-oriented tourists, a 9% decrease would reduce tourist revenues in Volusia County by \$387 million. A 45% decrease would reduce revenues by over \$1.9 billion. Data shows that when communities invest in the management of their beaches, there is a great increase in tourism.

Miami Beach is a prime example of the collapse of tourism due to beach erosion and the positive effects of tourism following the mitigation of the erosion. By the mid-1970s, the beach at Miami Beach was almost gone due to erosion (Figure 4.1). As a result, tourist spending dropped, and hotels became run-down, with famous hotels declaring bankruptcy (Blumenthal, R. 1979). By 1977, *Time* (1977), referring to Miami Beach, said, “So rapidly has the seven-mile-long island degenerated that it can be fairly described as a seedy backwater of debt-ridden hotels.”

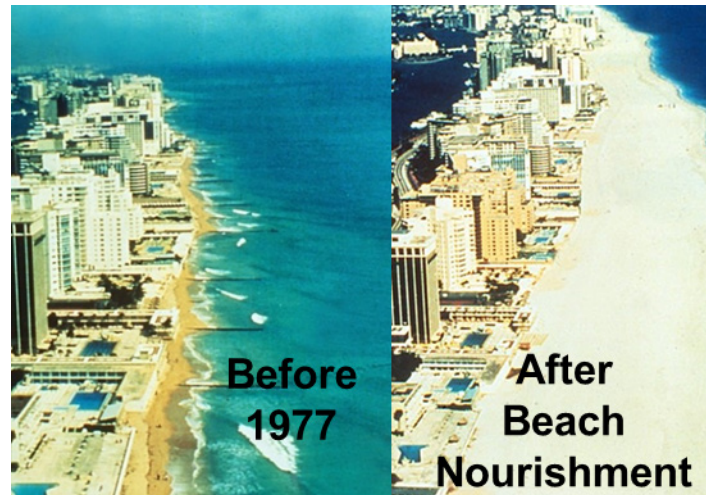


Figure 4.17 Miami Beach Before and After Beach Nourishment in 1977

In the first year after nourishment, tourism spending increased by \$290 million, more than five times the initial mitigation cost

Mitigation of the erosion through beach nourishment from 1978-1983 rejuvenated Miami Beach. In just the first year after nourishment, tourism spending increased by \$290 million, which was more than five times the \$51 million initial cost of the mitigation (Wiegel, 1992; Klein and Osleeb, 2010).

Today, Miami Beach is cited as the top-rated beach in the United States (McMurray, 2022). The total cost of beach management efforts for the 46 years from 1978 through 2023 has been approximately \$130 million in actual dollars, or \$240 million in 2022 dollars to include the effects of inflation (FDEP, 2023a; West Carolina University, 2024). Spreading the cost over the 46-year period, the average annual cost is approximately \$5.2 million in 2022 dollars. Tourists generated \$6.5 billion in tax revenues in Miami-Dade County in 2022, with Miami Beach accounting for about 45% of tax revenues, or \$2.9 billion (Greater Miami Convention and Visitors Bureau, 2022; Rockport Analytics, 2024). Therefore, **each year, Miami Beach tourists generate more than 10 times the funding spent over the past 46 years to restore the beach. For every \$1 spent annually to restore the beach, Miami Beach tourists generate more than \$550 annually just in tax revenues.** Restoration of the beach helped transform Miami Beach from a “seedy backwater of debt-ridden hotels” to the most valuable property of any of the 992 active ZIP codes in Florida, with an estimated value of \$29.2 billion (Bergstrom Applied Research, 2023). The value of real estate at Miami Beach is approximately 30% greater than the value of all croplands in Florida (Farmland Information Center, 2017; U.S. Department of Agriculture, 2022).

4.1.1 Volusia County Beach Erosion

Volusia County beaches have not recovered from the beach erosion caused in 2004 by Hurricanes Charley, Frances, and Jeanne, Matthew and Irma in 2016 and 2017, and more recently Ian and Nicole in 2022 and Milton in 2024. From 2005-2019, the County and the United States Army Corps of Engineers (USACE) mitigated some of the erosion through the placement of sand in the dunes or nearshore area of the beach; however, the volume of the placement events is significantly smaller than the erosion during this period. Notably, the majority of these placement events are for maintenance that is required to meet the goals of the inlet management plan.

The impact of the erosion exceeding the placement volumes is demonstrated by the average decrease in beach width from August 2003 to August/October 2024 of 67.8 ft (Taylor Engineering, 2025a). Some shorelines had greater average erosion, with Daytona Beach and Daytona Beach Shores having shoreline retreat exceeding 100 ft, and Ormond Beach, Wilbur-by-the-Sea, and Ponce Inlet experiencing erosion greater than 90 ft for this period. Taylor Engineering reported that **following Hurricanes Ian and Nicole, the beach in Volusia County receded an average of 100 ft countywide, and it is likely that this impact caused the drop of 460,000 tourists visiting and their associated \$300 million in spending for 2023 versus 2022**, as noted in Section 5.2.1 (Taylor Engineering, 2022). While the volumes will not restore the beach to its historic conditions, Volusia County has embarked on a program to add sand to Volusia County beaches in 2025 (Volusia County, 2024b).

Notably, County residents can see the impact of storms on Volusia County beaches. **The Volusia County (2025) survey of residents found that 46% of them found the current quality of Volusia County beaches worse or much worse than before Hurricanes Ian and Nicole. Moreover, over 90% of them agreed that future storms could deteriorate the quality and conditions of Volusia County beaches.**

4.2 STORM DAMAGE PROTECTION

Decades of research and post-storm assessments have demonstrated that wide beaches are highly effective in reducing storm damage to upland structures. Dean (2001) noted that “a wide beach during storm-induced elevated water levels and high waves provides a very effective energy absorber. Basically, the wave energy is dissipated on and absorbed by the wide beach rather than on upland structures.”

Dean (2001) cited Shows (1978), who quantified the benefit of wide beaches by analyzing the damage caused by Hurricane Eloise to 540 upland structures when it struck the Florida coast in 1975. The National Research Council (1995) noted that “a wide beach is effective in dissipating wave energy,... the destructive force of storm waves thus falls on the beach rather than on upland structures.” These studies show another way that beaches provide economic benefits to Florida: protection of infrastructure during storm events.

*“a wide beach during storm induced elevated water levels and high waves provides a very effective energy absorber. Basically, the wave energy is dissipated on and absorbed by the wide beach rather than on upland structures.”
Dean, 2001*

4.2.1 Infrastructure Protection—Panama City Beach Case Study

Although little funding has been available to document storm damage reduction provided by management of beaches, some documentation is available. For example, the USACE showed that widening beaches in New Jersey and New York prevented \$1.3 billion in damages during Hurricane Sandy (USACE, 2016). Florida Atlantic University studied damage in Florida during the 2004 and 2005 hurricane seasons and showed that wide beaches prevented a loss of \$1.8 billion in property values (Welch and Brockbank, 2016).

Panama City Beach is a good example of how wide beaches protect infrastructure from storm damage. Using historical shoreline measurements, the 18-mile beach at Panama City Beach had eroded an average of 46 feet from 1976 to March 1995 (FDEP, 2023b). Hurricane Opal was categorized as a “marginal”

Category 3 hurricane when it came ashore in October 1995, about 80 miles from Panama City Beach, and its waves and storm surge hit the narrow beaches (Mayfield, 1995; FDEP, 2023b). According to FDEP (2019), Opal caused massive wave and storm surge “damage to 471 buildings and numerous seawalls along Panama City Beach” (Figure 4.2).

In 1998-1999, USACE initiated a beach management project using beach nourishment at Panama City Beach, significantly widening its beaches. USACE estimated that had this project been in place before Hurricane Opal, it would have prevented 70% of the damage (Leadon et al., 1998). Additional sand was placed in 2006, 2011, and 2017. About 87% of the nourished sand was still in place after Hurricane Michael, a Category 5 hurricane and the fourth largest to ever hit the U.S., came ashore in 2018, less than 20 miles from Panama City (FDEP, 2019; Houston, 2019; Janssen et al., 2019). FDEP (2019) recorded that the wide beach “protected all beach fronting development and infrastructure along Panama City Beach.” There was wind damage, but no coastal structure damage due to waves and storm surge. Spurgeon (2022) noted that “nourishment that has taken place in the past at Panama City Beach has built it into a robust and resilient system that responds to adverse events better than ever before.”



Figure 4.18 Storm Damage at Panama City Beach Caused by Hurricane Opal (Leadon et al., 1998)

Panama City Beach is also an example of how widening beaches leads to prosperity. Before Opal hit, Panama City Beach had a narrow beach with “mom-and-pop motels” and was called the “Redneck Riviera” (Garman, 2012). Gary Walsingham, chairman of the Bay County Tourist Development Council, said, “The area was a ghost town during the off-season” and “you could fire a cannon down Front Beach Road at 4 p.m. on Labor Day” (Garman, 2012). But the beach widening in 1998 changed everything. Jack Bishop, owner of the Breakers and Captain Jacks restaurants in Panama City Beach, said, “After Opal in 1995, came the biggest evolution from the mom-and-pop resorts to today’s condo resort. From 2000 to 2005, that was the change of Panama City Beach to what it is today” (Garman, 2012; Figure 2.2). Just four months after Hurricane Michael struck, Panama City Beach was named by TripAdvisor in a poll of millions of travelers as the third best beach in America out of 352 beaches (MyPanhandle.com, 2019). In 2021, Panama City Beach tied Huntington Beach, California, as the most popular beach in America in terms of the number of visitors (*Newsweek*, 2021). The number of visitors to Panama City Beach and their spending is up 50% from 2020 to 2023 (MyPanhandle.com, 2024).

5 BEACH-TOURISM COMPETITION

Beach-oriented tourism is very competitive because tourists have many choices. If a beach becomes run down, as Miami Beach did in 1977, tourists can easily go elsewhere. Florida east coast counties have been placing sand on beaches for decades to widen them to protect upland infrastructure from storm events but also to provide recreation and compete for tourists. Houston (2019) analyzed beaches in nine Florida east coast counties (excluding Flagler, Volusia, or Brevard counties) and found that beach widths of nourished beaches increased an average of 120 feet from the start of nourishment (on average in 1981) to 2016-2017. It can be inferred that this growth in beach width increased the appeal of these beaches to tourists.

The nearest beaches that compete with Volusia County beaches for beach-oriented tourists are in adjacent Flagler and Brevard Counties. Flagler County has had erosion problems for many years, limiting its past tourist competition with Volusia County beaches. However, its new federal Coastal Storm Risk Management (CSRM) project has widened the beach at Flagler Beach by 140 feet along 3.5 miles of coast, making this beach a more formidable competitor to beach-oriented tourism (USACE, 2024a). CSRM projects are typically authorized for 50 years and receive funding from the federal government and often the state of Florida. Moreover, as federal projects, CSRM projects are eligible to receive Flood Control and Coastal Emergencies (FCCE) funds, which cover 100% of project repair costs following significant storms.

"The beaches are the number one reason people come to Brevard. We've got to keep sand on the beaches."

Peter Cranis, executive director of the Space Coast Office of Tourism

Brevard County bills itself as the 'Space Coast' and has attractions such as the Kennedy Space Center and a cruise port, which recently surpassed the Port of Miami as the world's busiest (Pallone, 2023a). However, a survey of tourists in Brevard County showed that beaches were the greatest attraction by "a wide margin," with 83% citing beach activities as the number one attraction, almost double the level of any other attraction (Space Coast Office of Tourism, 2018). A recent study noted that "the beach was the #1 visitor activity by a significant margin" (Space Coast Office of Tourism, 2024). Moreover, Peter Cranis, the executive director of the Space Coast Office of Tourism, knows the importance of maintaining the county beaches. He said, "The beaches are the number one reason people come to Brevard. We've got to keep sand on the beaches." (Pallone, 2023b).

Since 1995, USACE and Brevard County have placed over 20 million cubic yards of sand on Brevard County beaches (FDEP, 2023d). In 2014, a \$39-million CSRM project widened beaches at Cocoa Beach by 160 feet (Space Coast Office of Tourism, 2014). After beach erosion following Hurricanes Nicole and Ian, USACE and Brevard County initiated a CSRM project, and because the project is federally authorized, it is eligible for FCCE recovery funds. Project cost should be "100% covered under FCCE" (FDEP, 2022). This did occur, and USACE completed construction in 2024 (USACE, 2024b). In contrast, FDEP (2022) noted that Volusia County beaches were not eligible for the more beneficial "FEMA Category G recovery" monies for managed projects, and "it is unclear if any reaches of shoreline will be eligible for FEMA Category B emergency sand placement." After hard work, Volusia County fortunately received \$77 million of the \$200 million available in Florida's FDEP grants (Springer, 2023). **However, in our opinion, Volusia County will be at an increasing disadvantage in competing for tourism with other Florida beaches because it does not have a large-scale CSRM project.**

Tourism is expanding rapidly in Brevard County, with 10,000 hotel rooms and 2,000 additional ones slated to be completed by October 2025, bringing them in line with the 12,000 in Volusia County (DaytonaBeach.com, 2024; Heidler, 2024). **In addition, Brevard County collected \$25.5 million of TDT funds during its fiscal year 2022-2023 versus \$16.2 million in TDT funds collected in 2023 by Volusia County** (Space Coast Office of Tourism, 2023). This greater TDT income gives Brevard County a competitive advantage in attracting tourists.

Notably, Volusia County and Indian River County are the only counties on the Florida east coast that do not have federal CSRM projects (FDEP, 2023a,c,d). The USACE authorized a federal feasibility study in 2006 for the Volusia County Shore Protection Project, although it has yet to be funded.

6 SUMMARY

The “World’s Most Famous Beach” is the crown jewel of beach tourism in Florida. Volusia County beaches are a remarkable recreational resource and the key driver of the county’s economy. However, the county has had problems growing the number of tourist visitors and their spending. Working to achieve a healthy, resilient beach could provide Volusia County with the benefits of a wide beach that attracts tourists and protects coastal infrastructure from damage during coastal storms. **Wider beaches will bolster Volusia County’s competition for tourists and add resilience to its beachfront infrastructure that is threatened by inevitable coastal storms and increasing sea levels.** Creating a balance between special events, beach driving, and a family-friendly atmosphere is critical for the future of Volusia County. To sustain and grow beach tourism, it is recommended that Volusia County take a unified approach to marketing its coast and ensure that this critical resource is maintained for decades to come.

7 ADDENDUM

This report is based on seven years of data from economic analyses and customer surveys collected by Mid-Florida Marketing and Research Inc (MFMR) from 2017 through 2023. Following its completion, the Daytona Beach Area Convention & Visitors Bureau changed contractors performing this work from MFMR to Downs and St. Germain Research (DSGR).

Results reported by DSGR for the period from April 2024 to March 2025 are quite inconsistent with those reported by MFMR for the period from 2017 through 2023. For example, DSGR, using a different approach from DSGR, reported that only 4.5 million tourists visited Volusia County in 2024. MFMR reported that 10.1 million tourists visited Volusia County in 2023. Since at least 1996, Volusia County has publicly reported each year that the number of tourists visiting the county annually has exceeded 8 million (e.g., Orlando Sentinel, 1997). DSGR reported 2024 tourist spending of \$3.3 billion, whereas MFMR reported spending in 2023 of \$5.4 billion. Volusia County and other organizations have reported for several years that tourist spending exceeds \$5 billion annually. For example, the Lodging and Hospitality Association of Volusia County (2016) reported tourist spending in the county of \$5.4 billion in 2015.

Detailed visitor profile information in the two contractor reports also differs significantly. The reports are so different that it is not statistically valid to combine them.

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