

# THE ECONOMY OF MANATEE AND SARASOTA COUNTIES

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## *Abstract*

This report is intended to characterize the economies of Manatee and Sarasota Counties as part of a larger project assessing the economic impacts of Red Tide events in the two-county region. The overall size and seasonal variations in the economies of Manatee and Sarasota Counties were evaluated in order to provide baseline information necessary to gauge the importance of possible changes resulting from Red Tide events in these areas. This report reveals that the Manatee and Sarasota County region is a tourist-dependent economy subject to seasonal variations. Both counties experienced declines in recreational and commercial fishing, although commercial and recreational vessel registrations did rise. Additionally, the two-county region exhibited a 65.6% growth in population and a 147% increase in personal income between 1980 and 1995.

**Key Words:** Employment, Fisheries, Income, Manatee County, Population, Retail Sales, Sarasota County, Tourism, Unemployment.

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## **INTRODUCTION**

The Red Tide phenomenon is a naturally occurring, harmful algal bloom that takes place in coastal waterways. Although Red Tide events have been recorded in areas remote from human influence, the incidence of Red Tide events has risen following the growth of human populations. Red Tide events are recorded on a near-annual basis in Florida. Although the exact cause of Red Tide is unknown, one theory suggests that Red Tide is associated with human activities involving pollutant leaching into coastal waterways from agricultural waste runoff, phosphate detergents, human waste, organic wastes and toxic metal effluent associated with industry, which may provide for disruption of natural estuarine circulation (Steidinger et al., 1999). The impacts of Red Tide events are detrimental as they contribute to human respiratory irritation, as well as fish, bird and animal mortality. Economic losses are suggested to result (Boesch et al., 1997). These economic losses may include reduced tourism revenues, commercial fisheries losses, clean-up expenses and health costs.

This report is intended to characterize the economies of Manatee and Sarasota Counties as part of a larger project assessing the economic impacts of Red Tide events in the two-county region. This report will emphasize the economic attributes of Manatee and Sarasota Counties pertinent to an economic impact analysis of Red Tide events in the region. Special attention is given to related statistics on general demographics, retail sales, and the tourism and fisheries industries in Manatee and Sarasota Counties because these latter



sectors of the local economy may be particularly vulnerable to Red Tide events. The analysis is intended to evaluate the overall size and seasonal variations in the local economy in order to provide baseline information necessary to gauge the importance of possible changes resulting from Red Tide events.

This report will be divided into five primary sections. The first section considers population and income trends in the Manatee and Sarasota County region. Section 2 offers employment and unemployment statistics for the region, and section 3 provides information on retail sales and tourism development tax proceeds. Section 4 describes the commercial and recreational fisheries industries in the region, and lastly, the appendix section contains more detailed information on population and income, employment and unemployment, retail sales and tourism development tax proceeds, and commercial and recreational fisheries for the interested reader. The appendix section is subdivided according to the four major data categories of this report.

**TOTAL POPULATION**

The populations of Manatee and Sarasota Counties have consistently risen between 1980 and 2000 (Figure 1-1). Throughout this twenty-year period, the population of Sarasota County was greater than that of Manatee County. In 1980, 202,251 individuals inhabited Sarasota County and 148,442 individuals resided in Manatee County. In 1995, population figures grew to 301,528 for Sarasota County and 233,160 for Manatee County. Population projections for the year 2000, estimated at 325,889 for Sarasota County and 254,990 for Manatee County, indicate a continuance of this upward movement. Both counties exhibited comparable rates of growth in their populations between 1980 and 2000 (61% for Sarasota County and 71% for Manatee County). These county population growth rates are stronger than growth rates evident in both Florida (56%) and the United States (21%) over the same twenty-year period. Recently, the rate of growth in population for both counties has declined. Between 1990 and 1995, Sarasota County grew by 8.6% and between 1995 and 2000 this rate is expected to drop to 8.1%. Manatee County experienced a 10.1% growth rate between 1990 and 1995, and a 9.4% anticipated growth rate between 1995 and 2000.

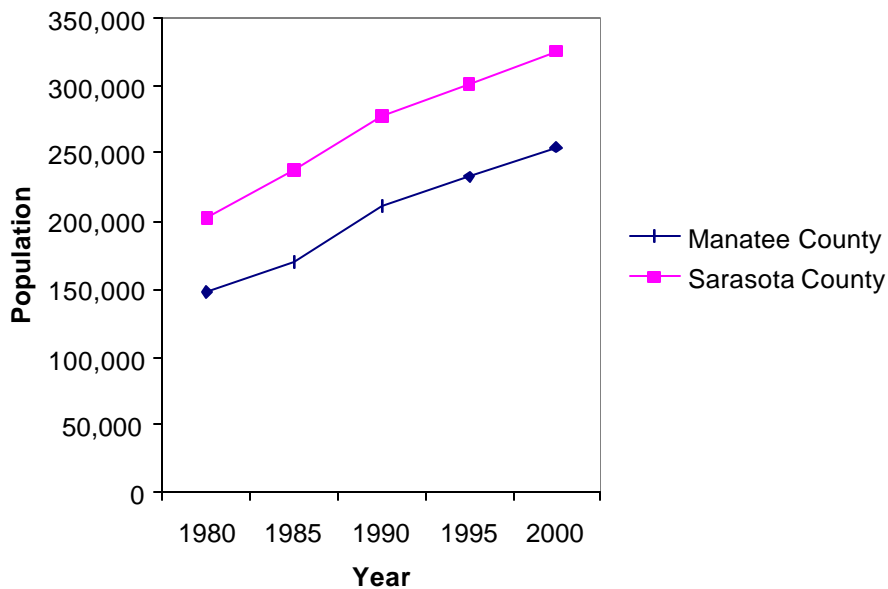


Figure 1-1. Population of Manatee and Sarasota Counties, 1980-2000. (Florida Statistical Abstract).

### SENIOR POPULATION

The senior population in Manatee and Sarasota Counties has been steadily rising between 1980 and 1995 (Figure 1-2). Clearly Sarasota County supports a greater number of senior-aged individuals. The number of seniors in 1980 was estimated at 40,156 for Manatee County and 60,609 for Sarasota County. In 1995, 64,763 seniors resided in Manatee County and 98,994 seniors inhabited Sarasota County. Population projections for the year 2000 further support this rising trend. During the year 2000, 68,287 individuals aged 65 and over are expected to live in Manatee County and 105,560 are projected to reside in Sarasota County. Furthermore, the rate of growth in the senior populations of Manatee and Sarasota Counties has surpassed senior population growth rates in both Florida and the United States between 1980 and 2000. The United States population growth rate during the twenty-year period is 35%, in Florida it is 62%, in Manatee County it is 70% and in Sarasota County it is 74%. This trend confirms that senior-aged individuals are comprising a greater portion of the total population of Manatee and Sarasota Counties over time.

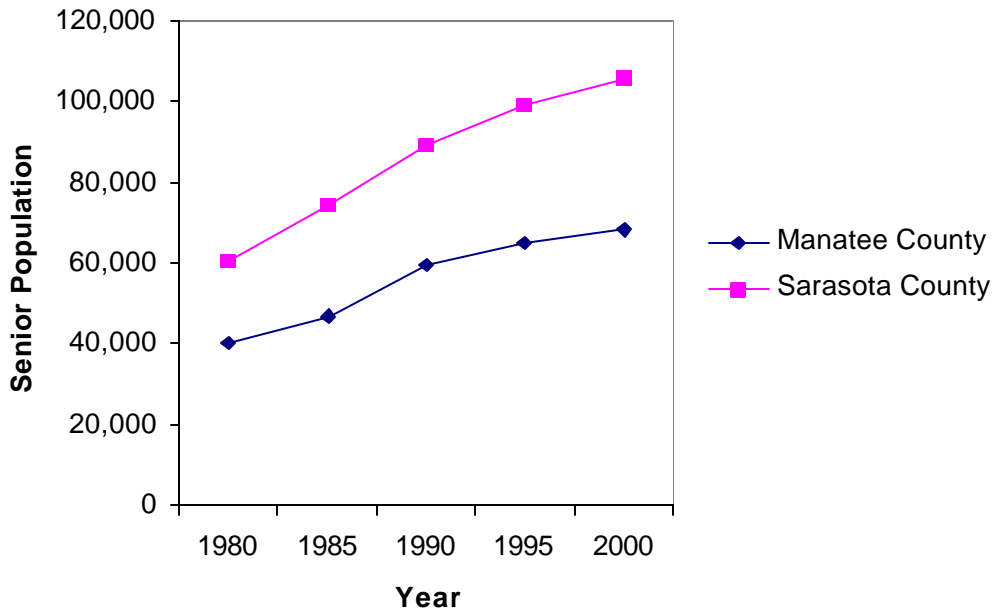


Figure 1-2. Population of Persons Aged 65 and Over in Manatee and Sarasota Counties (1980-2000. *(Florida Statistical Abstract)*).

**PER-CAPITA PERSONAL INCOME**

Per-capita personal income in Manatee and Sarasota Counties has risen consistently between 1980 and 1997 (Figure 1-3). Of the two counties, Sarasota County exhibited the greatest level of per-capita income. In 1997 per-capita personal income averaged approximately \$36,000 in Sarasota County and \$27,000 in Manatee County. Between 1980 and 1997, per-capita personal income levels in both counties exceeded levels in Florida and the United States. Furthermore, per-capita income growth rates in both counties have risen over time, surpassing per-capita personal income growth rates in both the United States and Florida. Overall, per-capita personal income growth between 1980 and 1997 was 160% in Manatee County, 181% in Sarasota County, 149% in Florida and 151% in the United States.

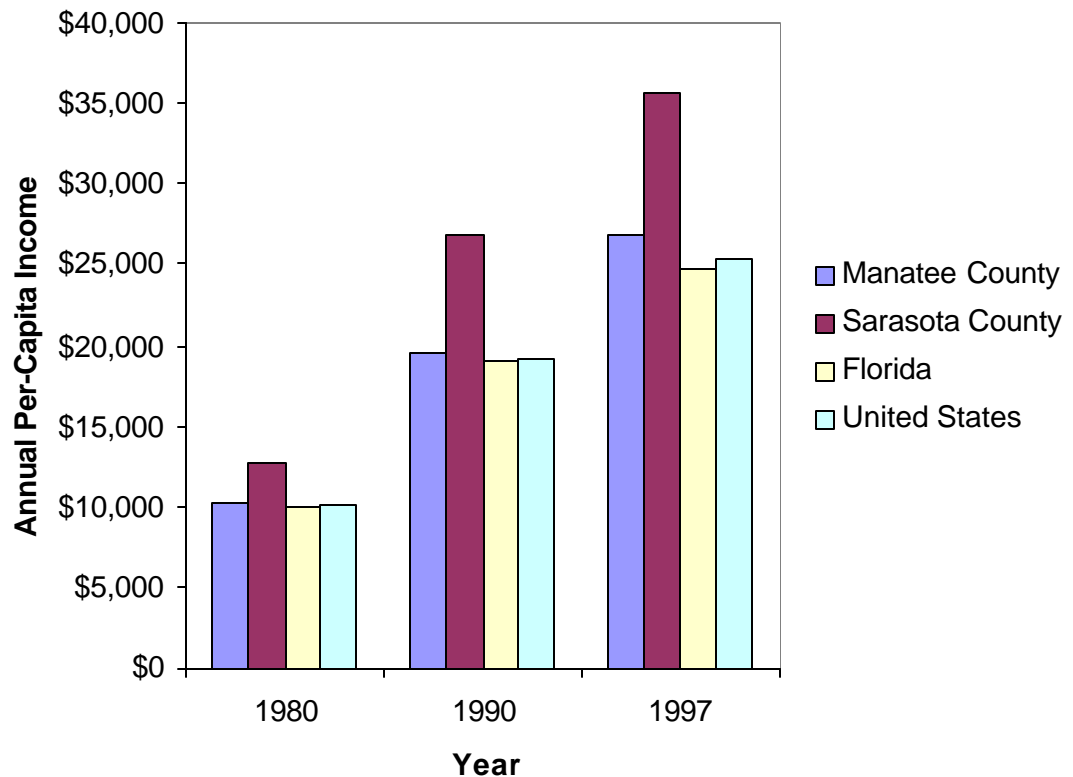


Figure 1-3. Per-Capita Personal Income in Manatee and Sarasota Counties, Florida and the United States, 1980-97. (*Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce*).

### **TOTAL PERSONAL INCOME-MANATEE COUNTY**

Although total personal income in Manatee County has grown considerably between 1980 and 1997, the relative importance of the total personal income (TPI) components across industries and institutions has varied slightly over this same time period (Figures 1-4 and 1-5). The relative contribution of the personal income components 'dividends, interest, rent' and 'transfer payments' has declined over the 17- year period. Transfer payments accounted for 21% of total personal income in 1980 and 19% of TPI in 1997. In 1980, 34% of total personal income was comprised of dividends, interest and rent. In 1997 this figure dropped to 29%. The dominance of the personal income categories 'transfer payments' and 'dividends, interest and rent' in the Manatee County economy is consistent with the growing migration of individuals aged 65 and over in the Manatee County region, as this demographic segment is expected to hold considerable wealth in the form of investment income and transfer payments.

Regarding industrial income sources, the services sector has the greatest earnings in Manatee County in both 1980 and 1997. Additionally, the relative importance of the services sector has increased considerably between both years. In 1980, income accruing to the services sector represented 10% of TPI in Manatee County and 23% of total personal income in 1997. The relative importance of income in the remaining economic sectors has changed slightly between 1980 and 1997. The relative contribution of income in the retail trade and manufacturing sectors varied by one percentage point over the 17-year period. Collectively the income category 'other' has declined in importance. In 1980 the 'other' category accounted for 20% of total personal income and 15% of TPI in 1997. This five-percentage point reduction is attributed to the slightly declining importance of the 'construction,' 'mining,' 'finance, insurance, real estate' and 'transportation/public utilities' sectors. The accumulation of these events clearly indicates that the economy of Manatee County is adopting a stronger services orientation.

**TOTAL PERSONAL INCOME**

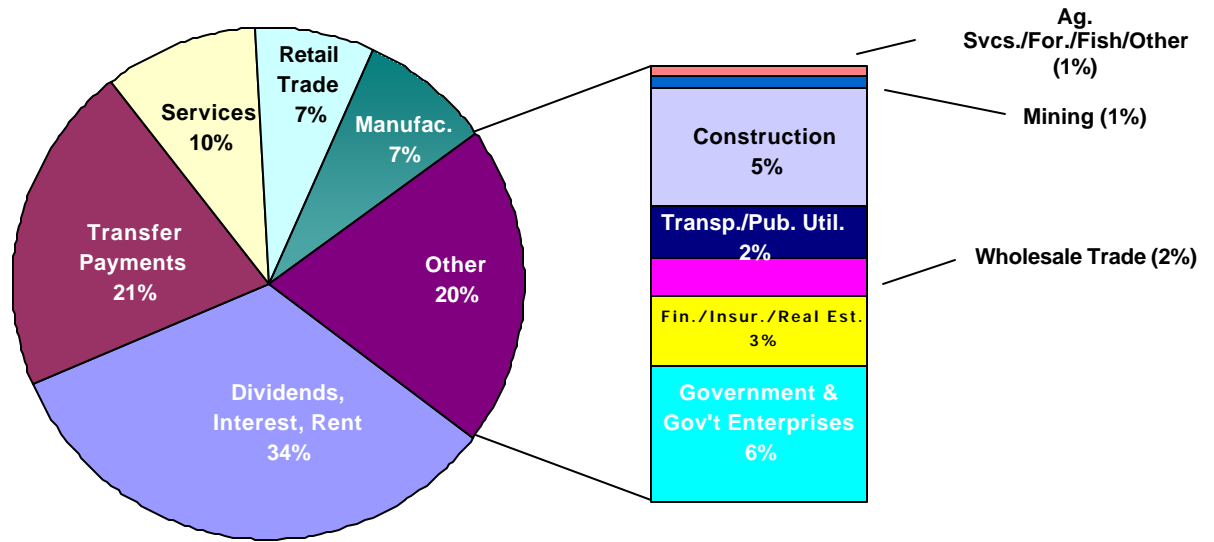


Figure 1-4. Total Personal Income by Industry and Institution in Manatee County, 1980. (Regional Economic Information System, Bureau of Economic Analysis, Department of Commerce).

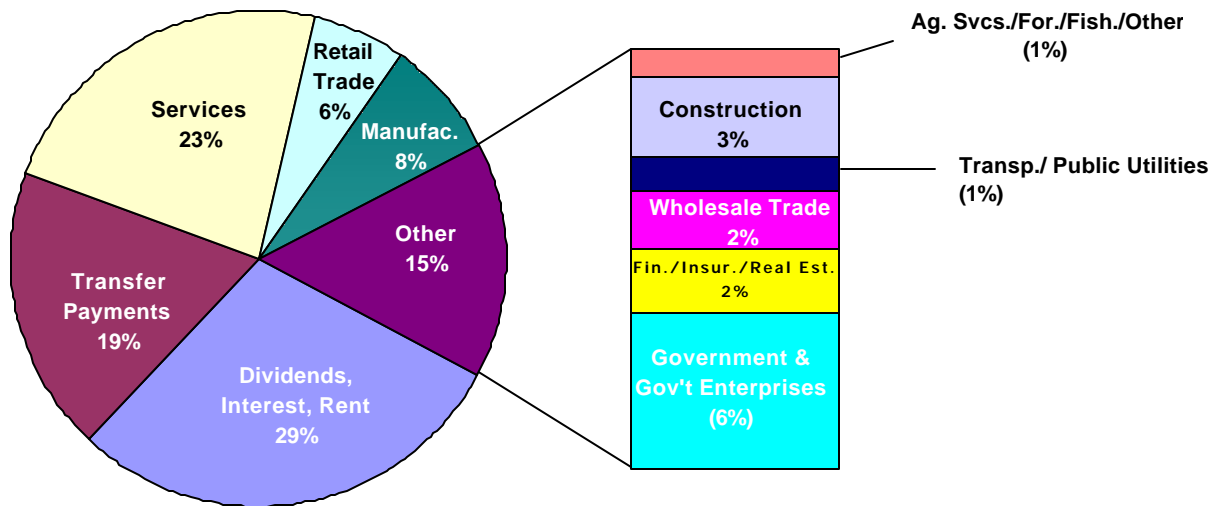


Figure 1-5. Total Personal Income by Industry and Institution in Manatee County, 1997. (Regional Economic Information System, Bureau of Economic Analysis, Department of Commerce).

**TOTAL PERSONAL INCOME-SARASOTA COUNTY**

The relative importance of total personal income components in Sarasota County experienced minor changes between 1980 and 1997 despite a dramatic increase in total personal income during the same time frame (Figures 1-6 and 1-7). Unlike Manatee County, the relative importance of the income categories 'dividends, interest and rent' and 'transfer payments' increased in 1997 as compared to 1980. In 1980 dividends, interest and rent accounted for 39% of total income and in 1997 they accounted for 42% of TPI in Sarasota County. Transfer payments increased by one percentage point from 18% in 1980 to 19% in 1997. These findings are consistent with the stronger growth rates in the senior population of Sarasota County relative to Manatee County (See Figure 1-2).

The services sector represented the most important industry in Sarasota County both in 1980 and 1997. In 1980 income accruing to the services sector accounted for 11% of TPI and 16% of TPI in 1997. This rising trend indicates that Sarasota County is becoming an increasingly services-oriented economy. Retail trade between 1980 and 1997 dropped one percentage point from 7% in 1980 to 6% in 1997. The 'manufacturing' and 'other' sectors also declined in economic importance. In 1980 income accruing to the manufacturing and 'other' sectors categories constituted 4% and 20% of total personal income, respectively. In 1997 these figures dropped to 6% for the manufacturing sector and 15% in the 'other' sector category. The five-percentage point decrease in the 'other' category is mainly attributed to declines in the construction, mining, transportation/public utilities and government/government enterprise sectors. The strongest decline in the 'other' income category was experienced by the construction sector, which decreased from 6% in 1980 to 3% in 1997.

**TOTAL PERSONAL INCOME**

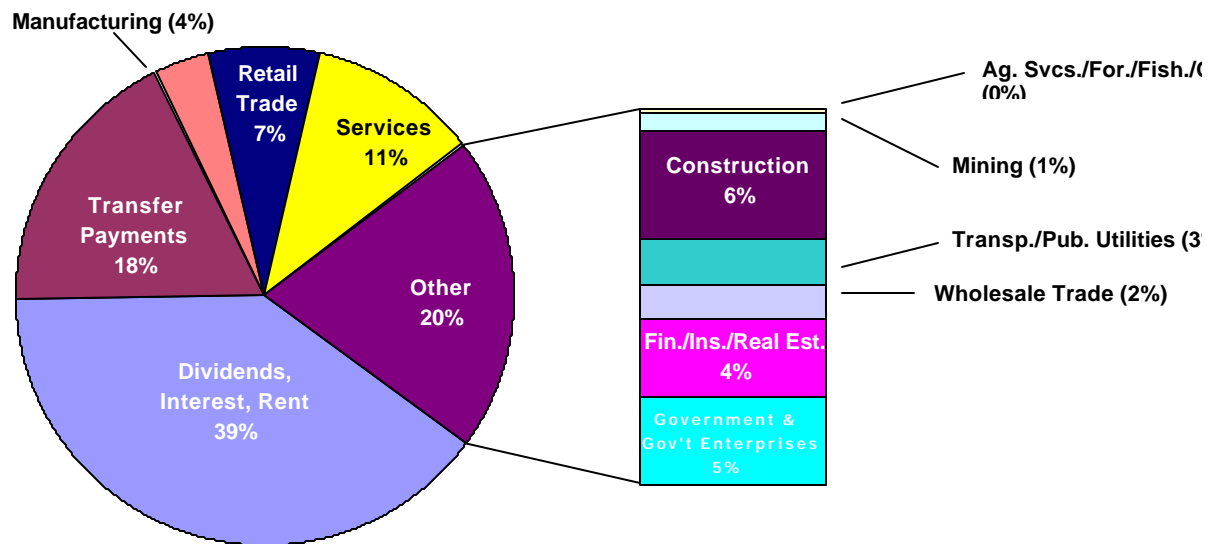


Figure 1-6. Total Personal Income by Industry and Institution in Sarasota County, 1980. (Regional Economic Information System, Bureau of Economic Analysis, Department of Commerce).

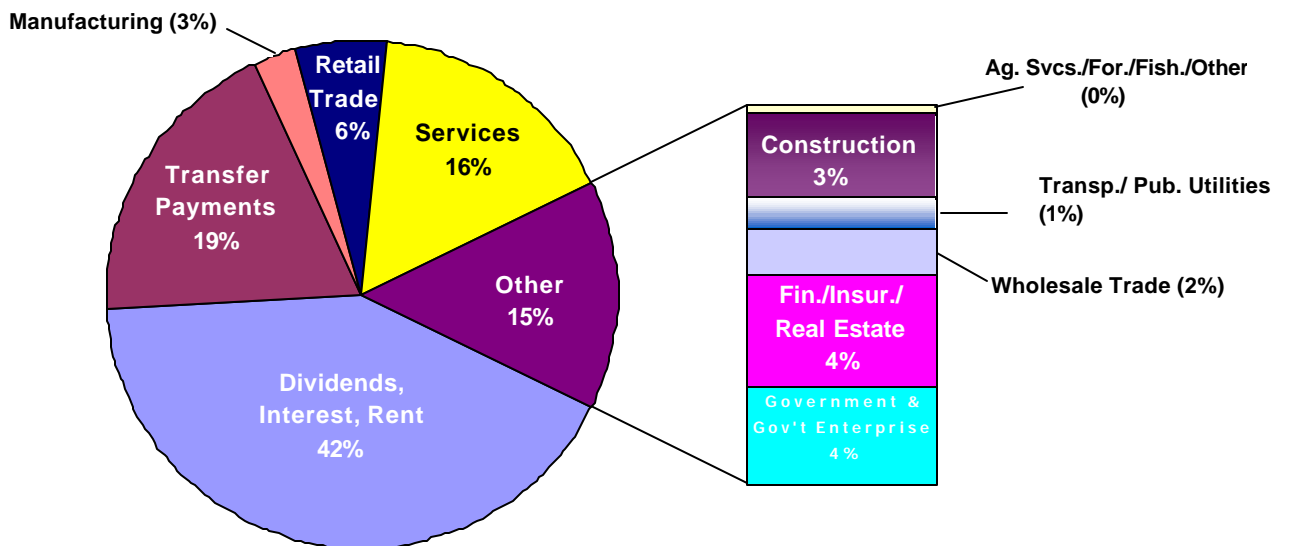


Figure 1-7. Total Personal Income by Industry and Institution in Sarasota County, 1997. (Regional Economic Information System, Bureau of Economic Analysis, Department of Commerce).



**TOTAL EMPLOYMENT**

Total employment in Manatee and Sarasota Counties generally increased between 1990 and 1998 (Figure 2-1). An exception to this trend involves a 1993 downward shift in bi-county employment, most likely the product of a national recession in the early 1990s. Employment between 1992 and 1993 dropped by 3.7% in Manatee County and 4.3% in Sarasota County. In 1994 employment increased, re-initiating an upward trend that persisted into 1998. Overall, employment grew by 23% in Manatee County and by 19% in Sarasota County between the years 1990 and 1998.

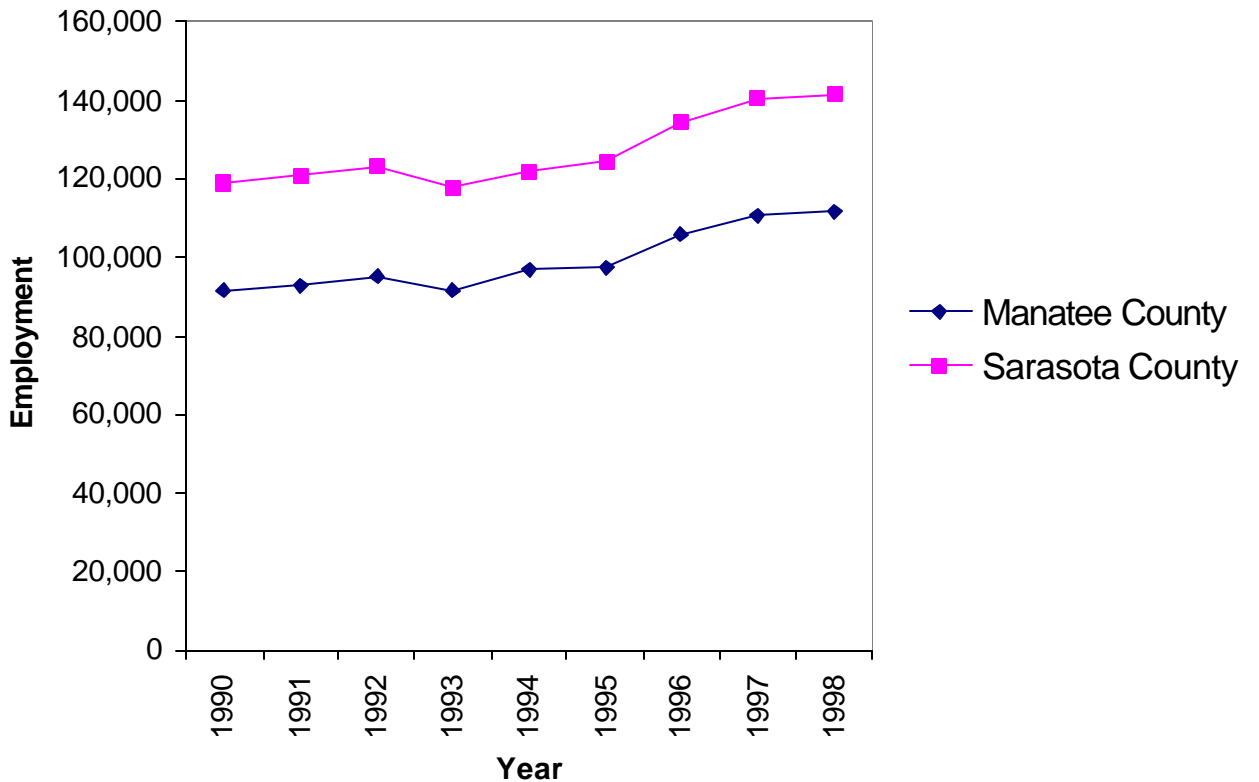


Figure 2-1. Employment in Manatee and Sarasota Counties, 1990-98. (*Bureau of Labor Statistics, Florida Department of Employment and Labor Security*).

### AVERAGE MONTHLY EMPLOYMENT

Average monthly employment in Manatee and Sarasota Counties was not subject to wild fluctuations between 1996 and 1998 (Figure 2-2). Consistent with figure 2-1, employment in Sarasota County was greater than employment in Manatee County across all twelve months. Monthly employment figures ranged from 106,000 to 112,000 in Manatee County and 133,000 to 142,000 in Sarasota County. The low and high ranges of both counties occurred during January and December, respectively. Fluctuations in average monthly employment were similar in both Manatee and Sarasota Counties. These fluctuations reflected a mild seasonal pattern where rising employment trends were evident during the late autumn, winter and early spring seasons and stable trends during the rest of the year.

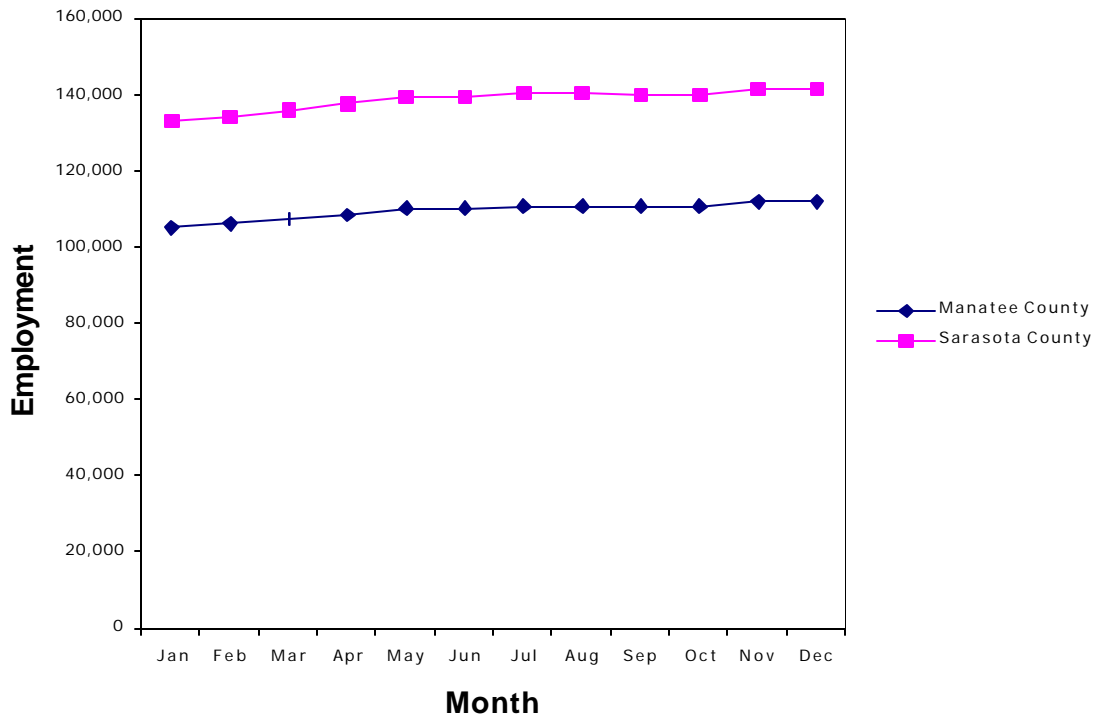


Figure 2-2. Average Monthly Employment in Manatee and Sarasota Counties, 1996-98. (Bureau of Labor Statistics, Florida Department of Labor and Employment Security).

## **EMPLOYMENT BY INDUSTRY SECTOR**

Following the rise in total employment in Manatee County (Figure 2-1), the relative proportion of industrial employment has changed considerably between 1980 and 1997 (Figures 2-3 and 2-4). The most dramatic change was experienced by the services sector. The services sector accounted for 23% of industrial employment in 1980 and 48% in 1997. Among the remaining industries, only the 'agricultural services, forestry, fishing, other' sector witnessed an increase in its proportion of total employment from 2% in 1980 to 3% in 1997. Employment proportions in the wholesale trade sector remained relatively constant over the same 17-year period. The remaining industrial sectors experienced a decline in their proportions of total employment. The majority of these sectors witnessed a four or five percentage point reduction. Although the dynamics of employment in Manatee County have changed, the services and retail trade sectors dominated industrial employment both in 1980 and 1997. The combined importance of both sectors has risen from 44% in 1980 to 64% in 1997.

The proportion of total industrial employment in Sarasota County changed between the years 1980 and 1997 (Figures 2-5 and 2-6). The services sector witnessed the most dramatic growth in employment proportions, estimated at 27% in 1980 and 47% in 1997. The 'agricultural services, forestry, fishing, other' sector experienced a one percentage point growth to 2% during the same 17-year period. The proportion of employment in the wholesale trade and retail trade sectors did not vary. The remaining industrial sectors experienced declines in their employment proportions ranging from 1% to 5% between 1980 and 1997. The retail trade and services sectors continued to remain the dominant industries in Sarasota County between 1980 and 1997. The proportion of employment for both sectors grew from 49% in 1980 to 63% in 1997.

**INDUSTRY EMPLOYMENT IN MANATEE COUNTY**

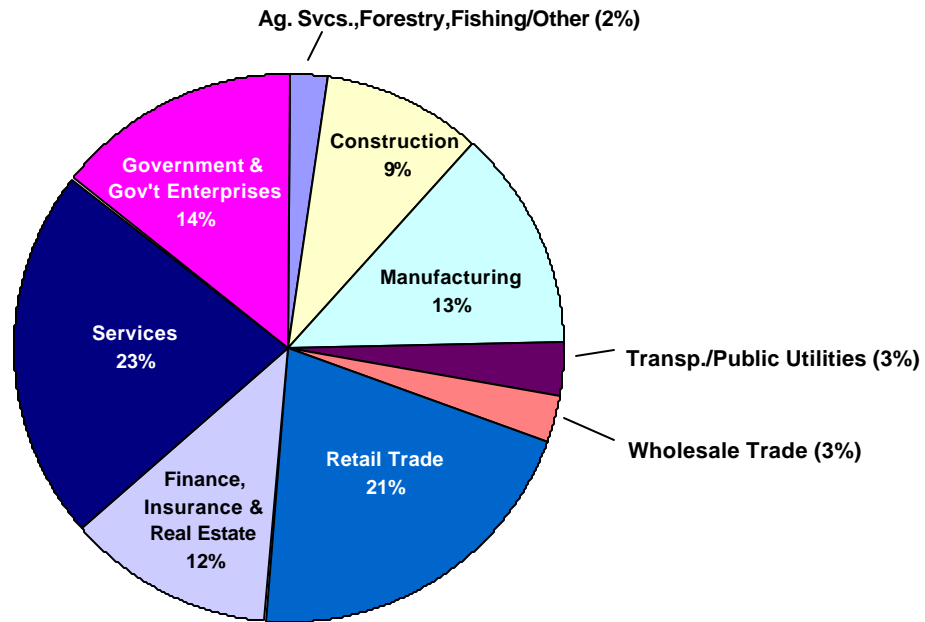


Figure 2-3. Employment by Industry in Manatee County, 1980. (*Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.*)

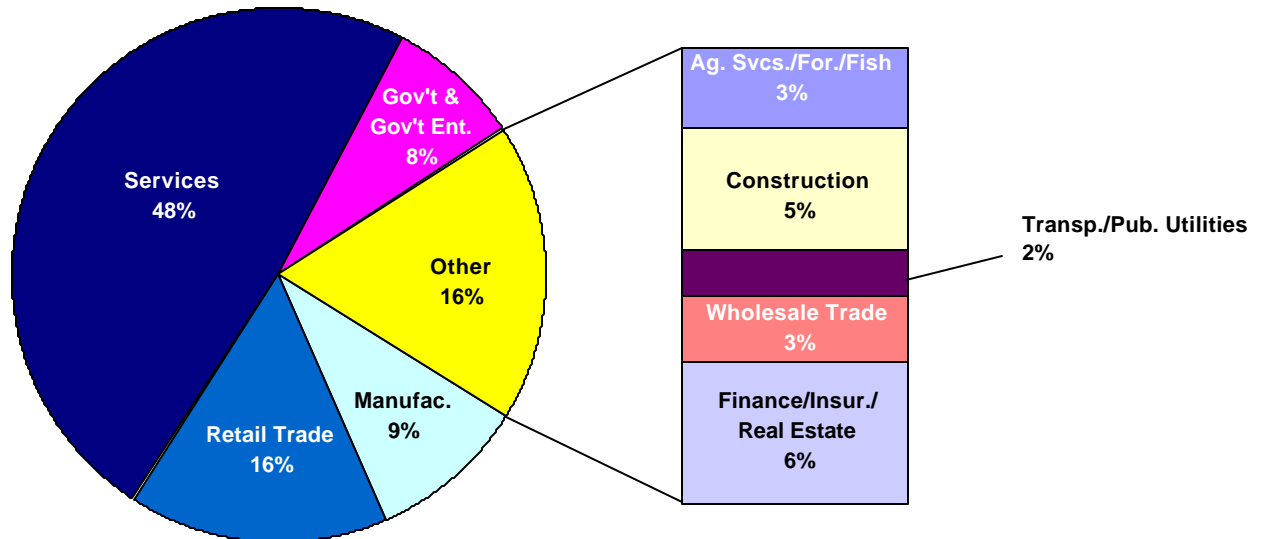


Figure 2-4. Employment by Industry in Manatee County, 1997. (*Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.*)

**INDUSTRY EMPLOYMENT IN SARASOTA COUNTY**

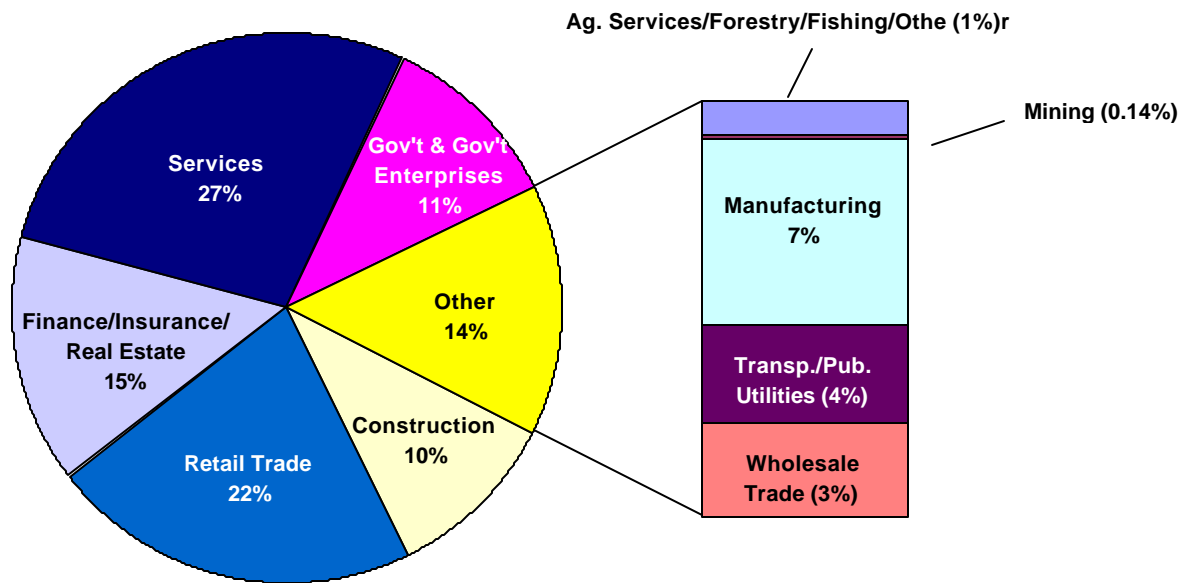


Figure 2-6. Employment by Industry in Sarasota County, 1980. (*Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.*)

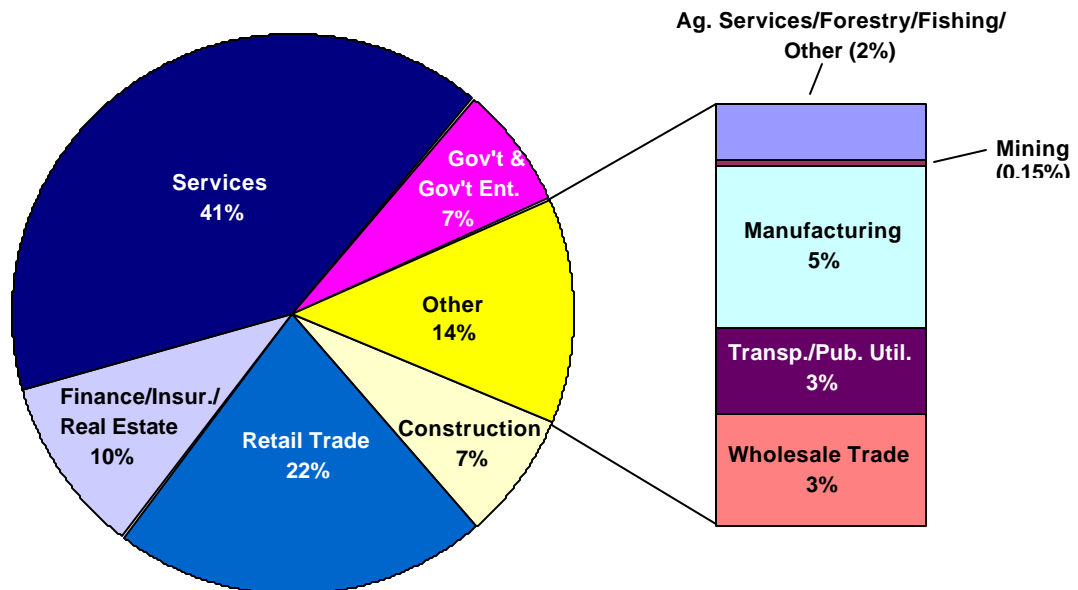


Figure 2-6. Employment by Industry in Sarasota County, 1997. (*Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.*)

### UNEMPLOYMENT

Unemployment rates in Manatee and Sarasota Counties have remained consistently lower than unemployment rates in Florida and the United States between 1980 and 1998 (Figure 2-7). Although the unemployment rates of both counties increased slightly in 1985 relative to 1980, an overall declining trend in unemployment prevails in Manatee and Sarasota Counties. Unemployment rates in Sarasota County have always been lower than rates in Manatee County. However, the gap between both unemployment rates narrowed considerably in 1998. The 1998 unemployment rate was 2.6% in Manatee County and 2.5% in Sarasota County, a .1 percentage point difference. Both Manatee and Sarasota Counties experienced their lowest rates of unemployment in 1998 since 1980.

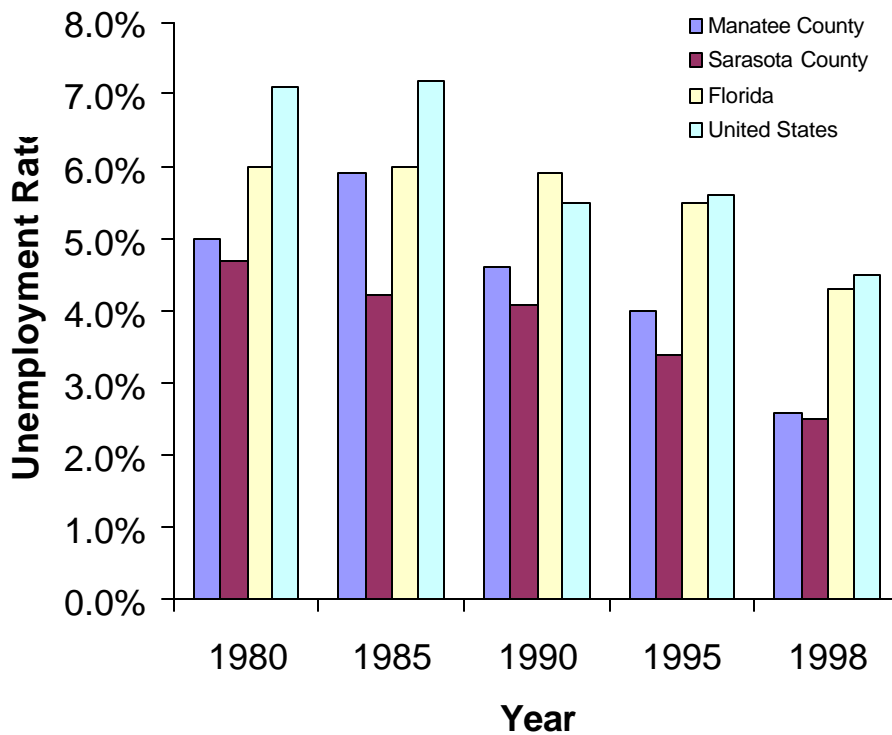


Figure 2-7. Unemployment Rates in the United States, Florida, Manatee and Sarasota Counties, 1980-98. (Bureau of Labor Statistics, Florida Department of Labor and Employment Security).

**GROSS RETAIL SALES**

Gross retail sales consistently increased between 1989 and 1998 (Figure 3-1). Gross retail sales grew by 65.5% in Manatee County and 59.6% in Sarasota County between 1989 and 1998. Between 1993 and 1996, gross retail sales have been increasing at an increasing rate in both counties. During 1997 and 1998, this rate of growth tempered. Revenues generated from gross retail sales were always greater in Sarasota County throughout the entire nine-year period.

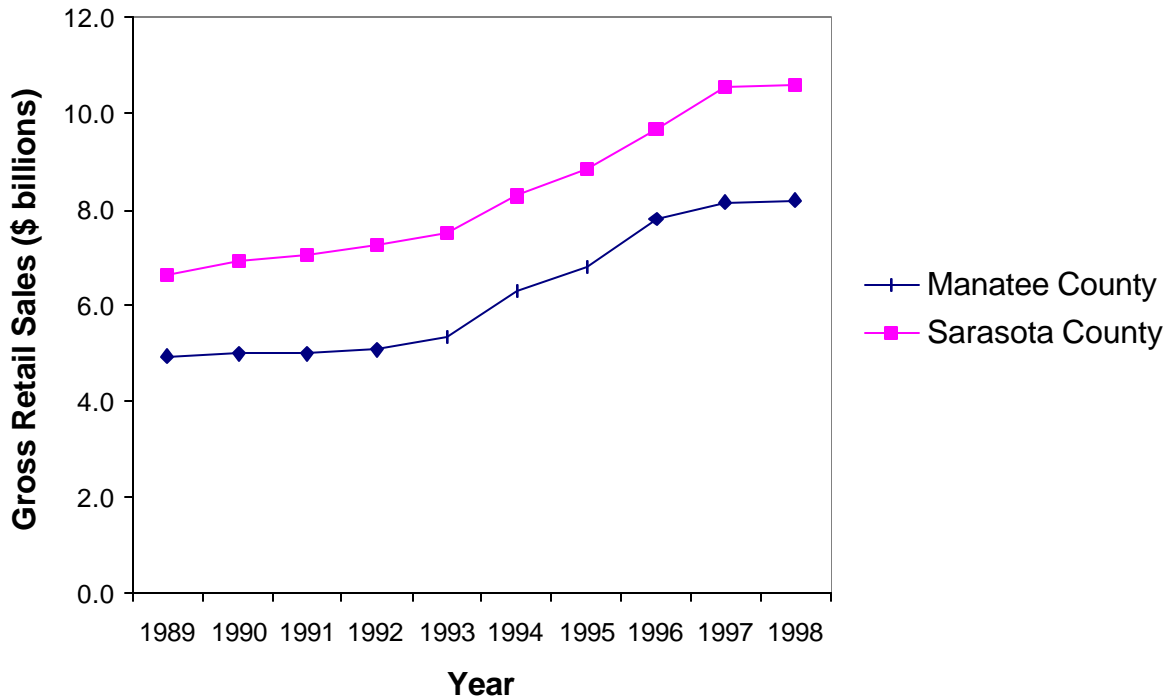


Figure 3-1. Gross (Taxable and Non-Taxable) Retail Sales in Manatee and Sarasota Counties, 1989-98. (Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida).

**AVERAGE MONTHLY GROSS RETAIL SALES**

Fluctuations in average monthly gross retail sales between 1994 and 1998 were similar in both Manatee and Sarasota Counties (Figure 3-2). Average monthly gross retail sales demonstrate a consistent pattern of lows during July-October and highs during December and March. The least revenues from gross retail sales were generated in July for both counties (\$392 million in Manatee County and \$528 million in Sarasota County) and the greatest revenues were met in December (\$570 million in Manatee County and \$749 million in Sarasota County).

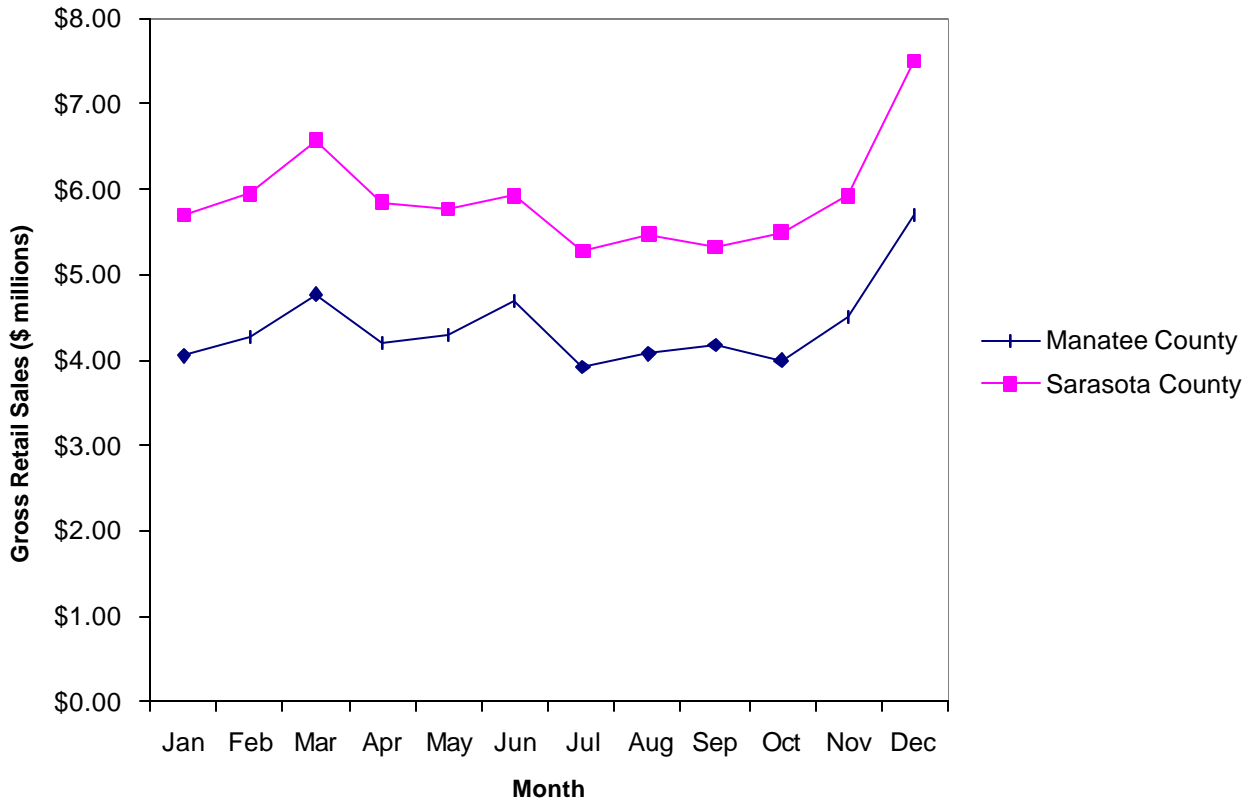


Figure 3-2. Average Monthly Gross Retail Sales in Manatee and Sarasota Counties, 1994-98. (Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida).



### **COMPONENTS OF GROSS RETAIL SALES**

The relative contribution of commercial industrial groupings to 1998 gross retail sales was similar in Manatee and Sarasota Counties (Figures 3-3 and 3-4). The category General Classification occupied the greatest proportion of gross retail sales in both counties (27% in Manatee County and 25% in Sarasota County). The remaining strong contributors of gross retail sales include the Automotive, Commercial and Industrial, Food and Beverage and General Merchandise groupings. These aforementioned groupings retained similar proportions of gross retail sales in Manatee and Sarasota Counties during 1998. The groupings Apparel, Lumber and Building, Consumer Services, Other Services, Specialty Retail and Wholesale Dealers exerted a minimal influence on gross retail sales ( $\leq 6\%$ ) and were subsequently aggregated into the Other category.

**COMPONENTS OF GROSS RETAIL SALES**

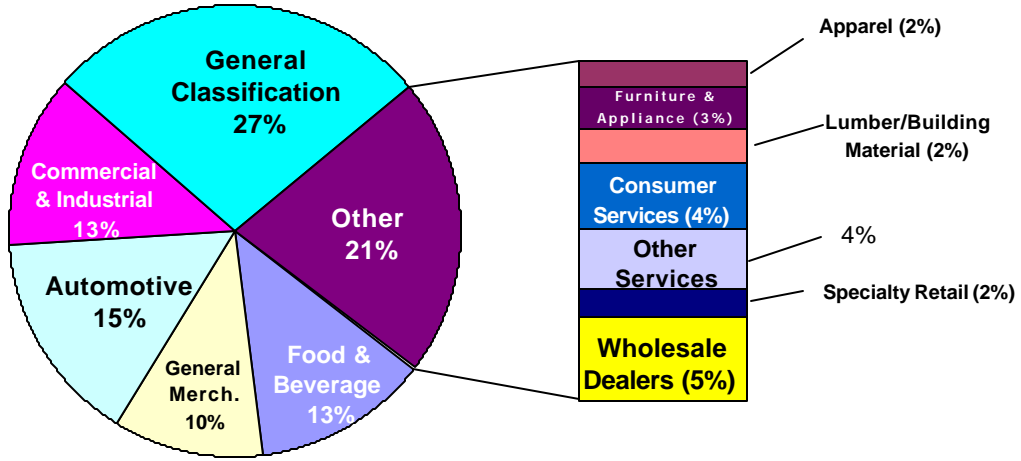


Figure 3-3. Gross (Taxable and Non-Taxable) Retail Sales in Manatee County by Type, 1998 (*Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida.*)

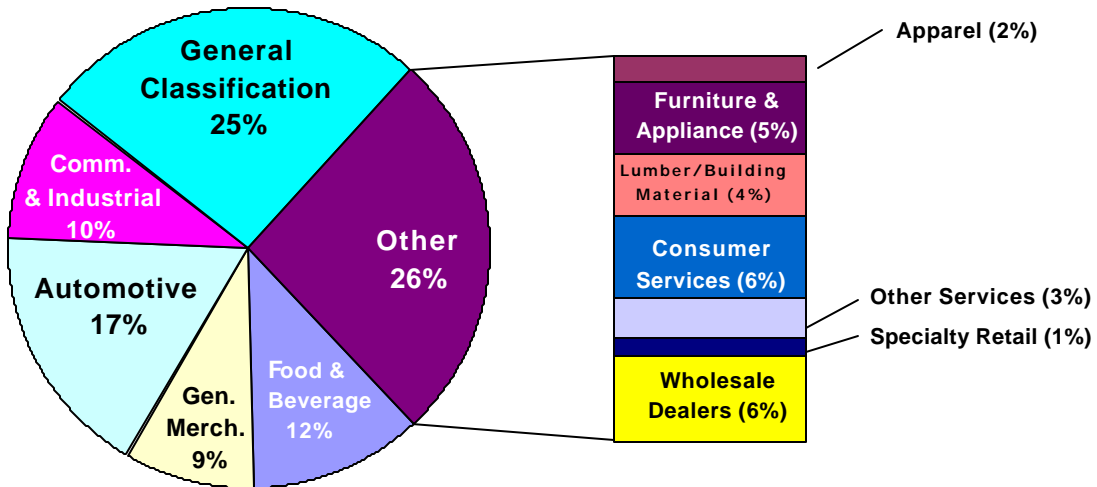


Figure 3-4. Gross (Taxable and Non-Taxable) Retail Sales in Sarasota County by Type, 1998 (*Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida.*)

**TAXABLE RETAIL SALES**

Taxable retail sales grew in Manatee County between 1989 and 1998 (Figure 3-5). Both counties exhibited a steady rate of growth in taxable retail sales during the nine-year period. Taxable retail sales grew by 68.3% in Manatee County and 60.7% in Sarasota County between 1989 and 1998. One exception to this consistent growth pattern occurred in Sarasota County between 1995 and 1996. During this period, retail sales increased sharply but subsequently resumed their normal pattern of growth in 1997. The value of taxable retail sales in Sarasota County superseded that of Manatee County across all nine years.

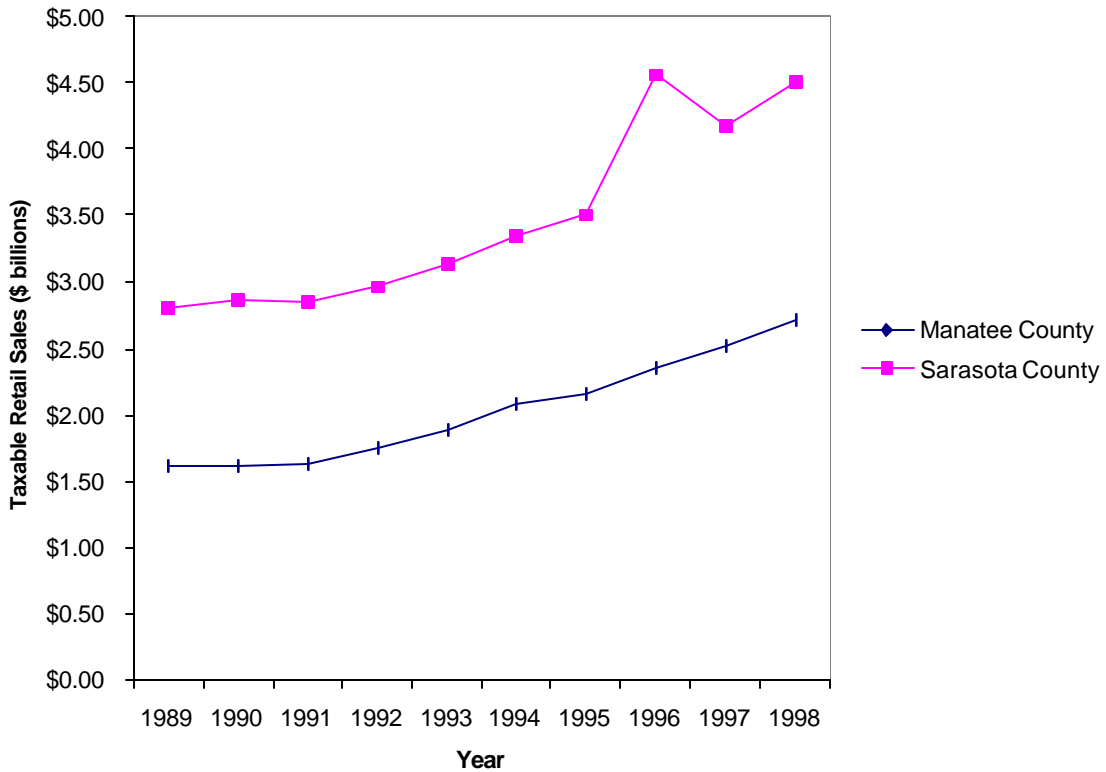


Figure 3-5. Taxable Retail Sales in Manatee and Sarasota Counties, 1989-98. (Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida).

**AVERAGE MONTHLY TAXABLE RETAIL SALES**

Average monthly taxable retail sales oscillated less heavily than average monthly gross retail sales between 1994 and 1998 (Figures 3-6 and 3-2). Monthly taxable retail sales in Manatee and Sarasota Counties exhibited consistent seasonal patterns of lows during the spring and summer seasons and highs during the winter months. The lowest and highest value in taxable retail sales accrued in September and December, respectively. Sarasota County, especially, experienced a sharp up-turn in taxable retail sales during December. Taxable retail sales were always greater in Sarasota County relative to Manatee County across all twelve months.

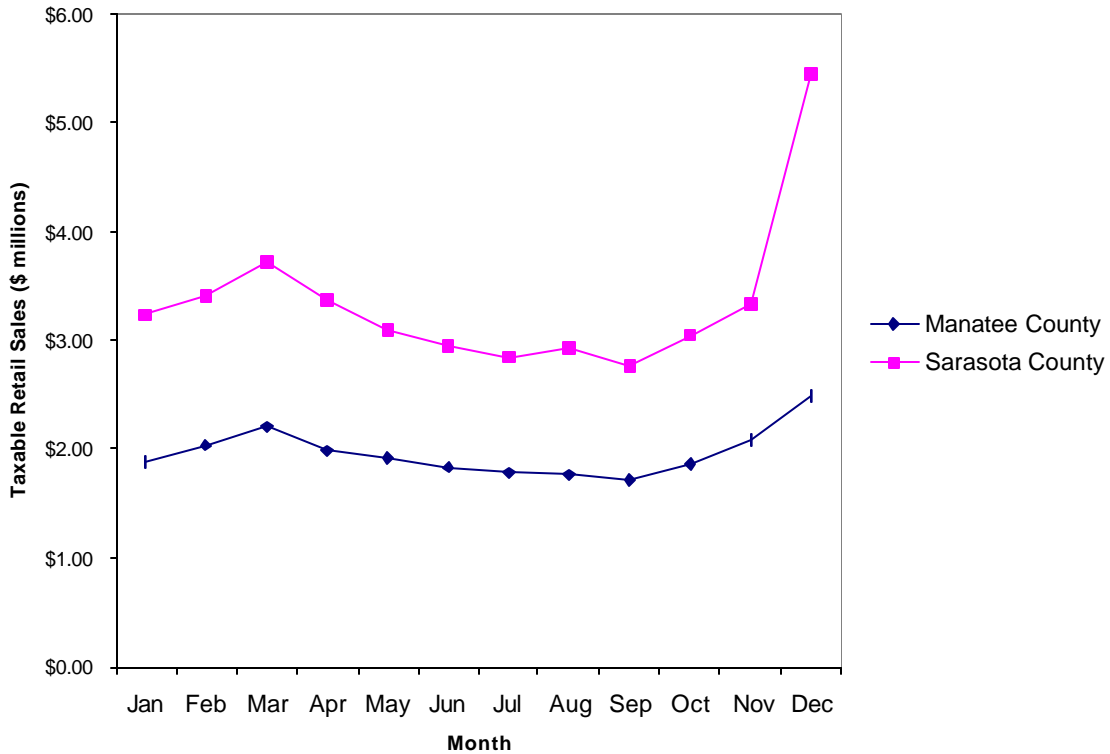


Figure 3-6. Average Monthly Taxable Retail Sales in Manatee and Sarasota Counties, 1994-98. (Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida).

### **COMPONENTS OF TAXABLE RETAIL SALES**

The relative contribution of commercial industrial groupings to 1998 taxable retail sales was comparable in both Manatee and Sarasota Counties (Figures 3-7 and 3-8). Additionally, the proportions of groupings in gross retail sales mirrored proportions of taxable retail sales for both counties of the same period (Figures 3-3 and 3-4). Analogous to the case of gross retail sales, the General Classification grouping retained the largest percentage of taxable retail sales in Manatee and Sarasota Counties. Summarizing across both counties, the Automotive, Food and Beverage, General Merchandise and Commercial and Industry groupings represented prominent contributors of taxable retail sales. The remaining groupings negligibly influenced taxable retail sales individually and were subsequently combined into the Other category.

**COMPONENTS OF TAXABLE RETAIL SALES**

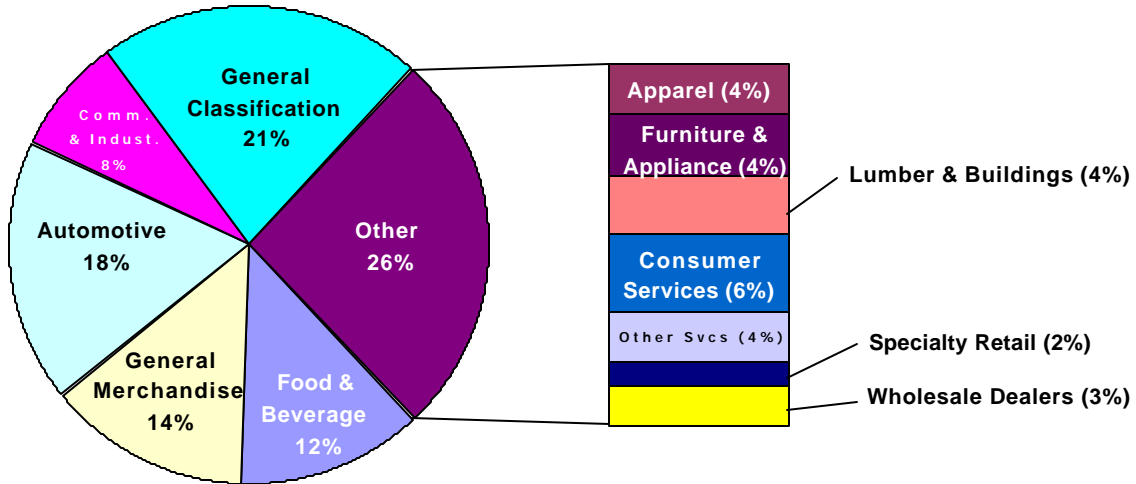


Figure 3-7. Taxable Retail Sales in Manatee County by Type, 1998.  
 (Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida).

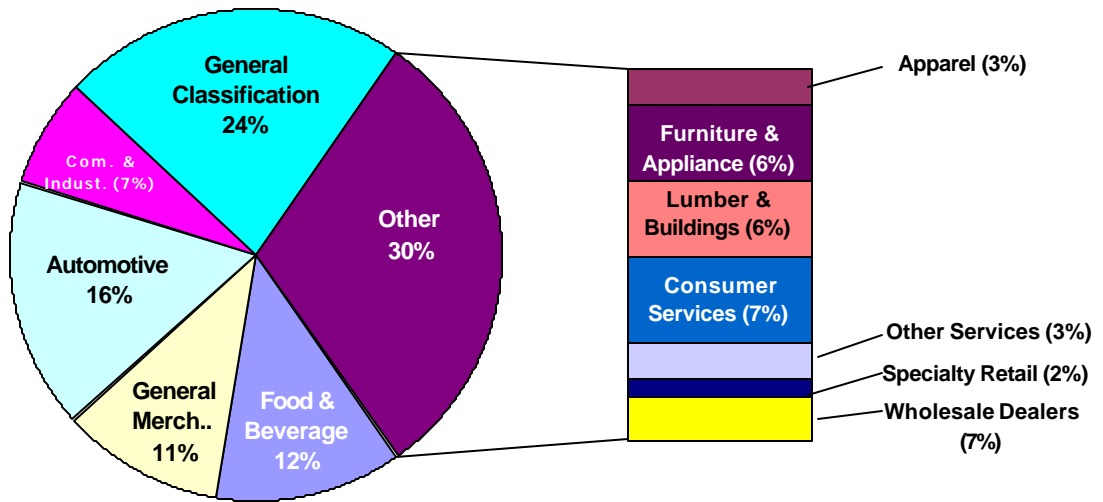


Figure 3-8. Taxable Retail Sales in Sarasota County by Type, 1998.  
 (Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida).

### TOURISM DEVELOPMENT TAX PROCEEDS

Tourism development tax proceeds increased between 1992 and 1997 in Manatee and Sarasota Counties (Figure 3-9). Sarasota County experienced both greater levels of revenues and growth rates in tourism development tax proceeds during this five-year period. Between 1992 and 1997, tourism tax proceeds grew by 23% in Manatee County and 52% in Sarasota County. Additionally, the growth rate in Sarasota County tax proceeds took an upswing during the 1996-97 period. Growth rates in Manatee County have remained relatively steady throughout the entire five years.

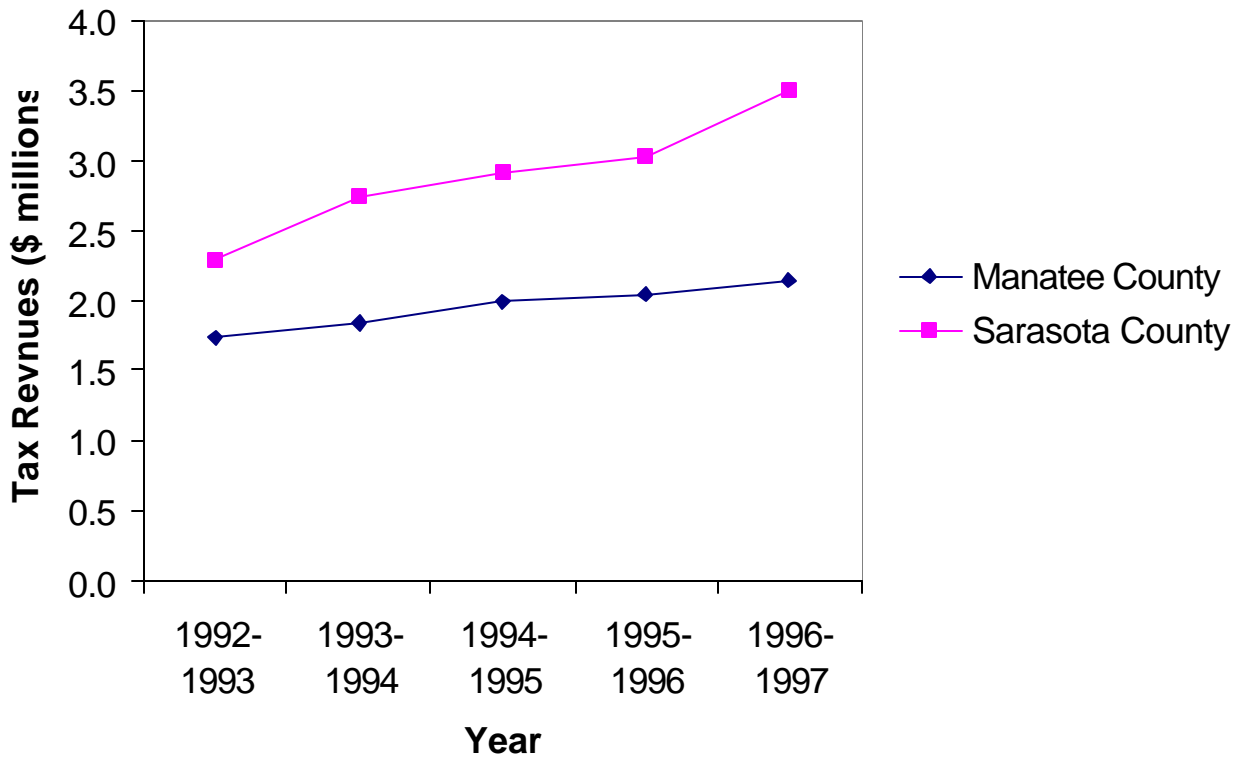


Figure 3-9. Tourism Development Tax Proceeds in Manatee and Sarasota Counties, 1992-97. (*Florida Statistical Abstract*).

**VOLUME OF COMMERCIAL FISHERIES LANDINGS**

Movements in the volume of commercial fisheries landings mirrored variations in commercial landings value between 1985 and 1998 (Figures 4-1 and 4-2). The variation in the volume of commercial fisheries landings was more tumultuous for Manatee County, even though Sarasota County experienced a greater percentage-wise decline in volume between 1985 and 1998. The decline in landings volume was 62.8% in Manatee County and 85% in Sarasota County during this period. Between 1985 and 1998, the volume of commercial fisheries landings overtook that of Sarasota County, although by the late 1990s, the gap between both volumes was narrowing considerably.

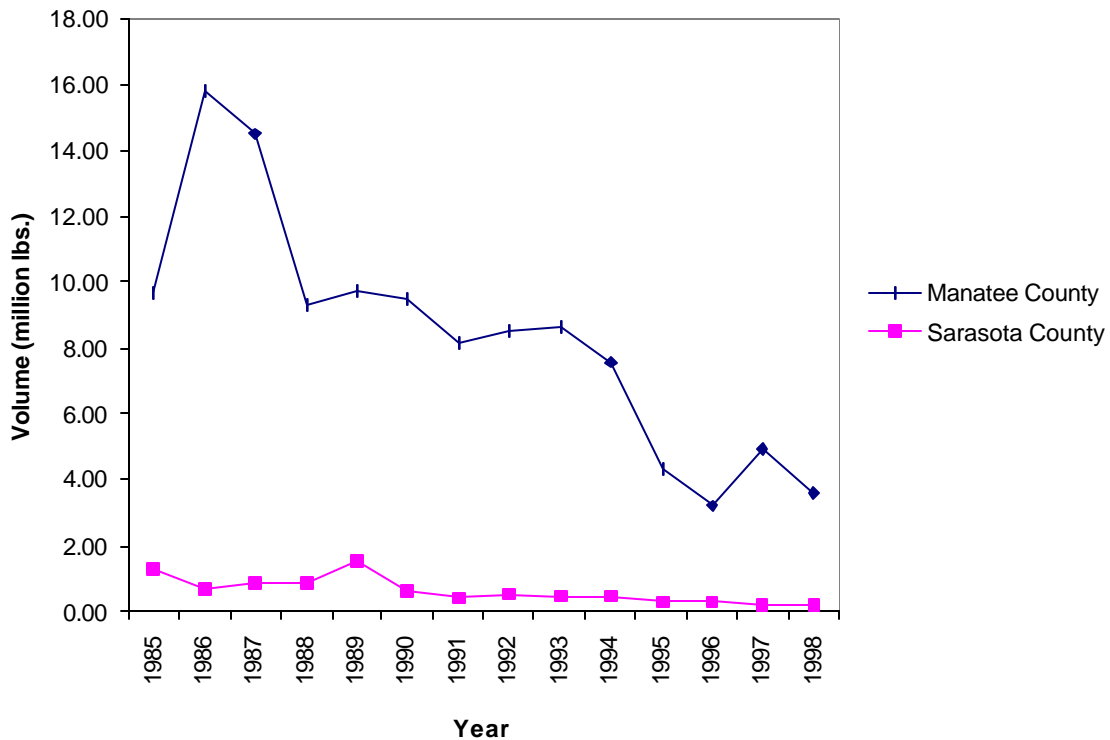


Figure 4-1. Volume of Commercial Fisheries Landings in Manatee and Sarasota Counties, 1985-98. (Florida Department of Environmental Protection, Marine Research Institute).



**VALUE OF COMMERCIAL FISHERIES LANDINGS**

The value of commercial fisheries landings varied considerably among Manatee and Sarasota Counties between 1985 and 1998 (Figure 4-2). Manatee County remained the more fisheries-oriented economy, as evidenced by the markedly higher value of commercial fisheries landings relative to Sarasota County. Manatee County witnessed volatile movements in the value of landings throughout the thirteen-year period. Overall, the value of commercial fisheries landings declined in Manatee County. Between 1985 and 1998, the value of commercial landings dropped by 34.5%. The decline in commercial fisheries landings value was less volatile in Sarasota County, which experienced a 32% decline over the same thirteen-year period.

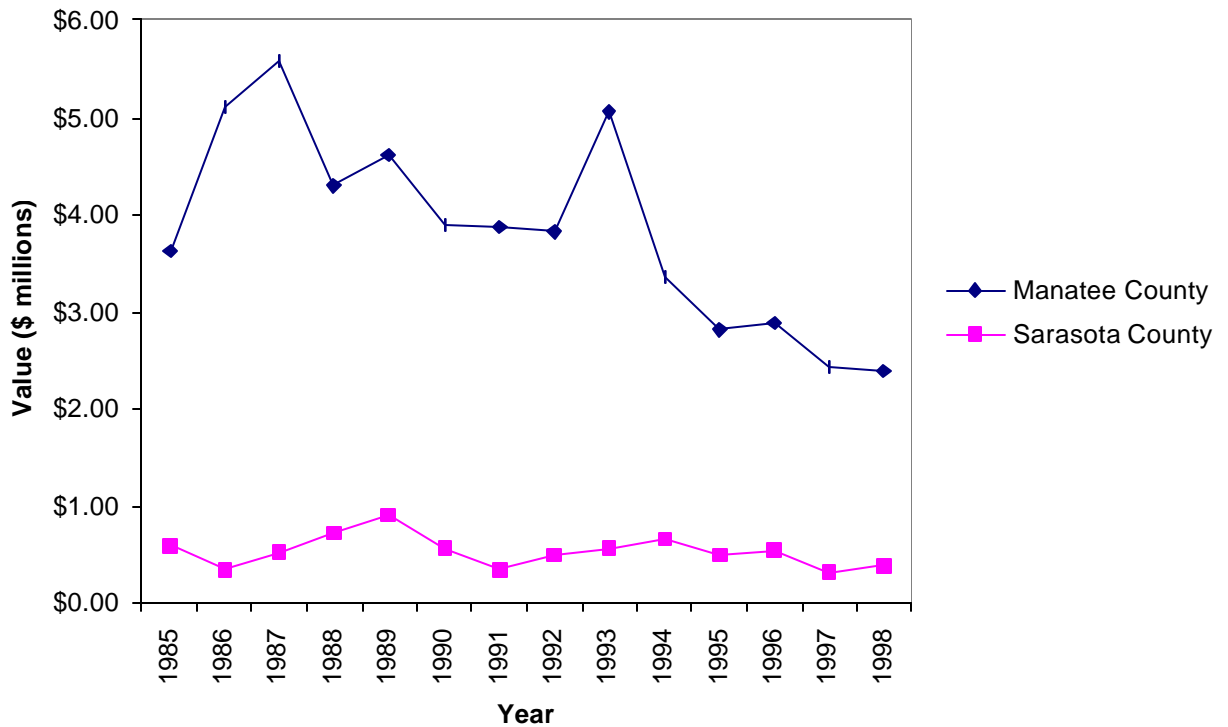


Figure 4-2. Value of Commercial Fisheries Landings in Manatee and Sarasota Counties, 1985-98. (Florida Department of Environmental Protection, Marine Research Institute).

### COMMERCIAL BOAT REGISTRATIONS

The number of commercial boat registrations in Manatee and Sarasota Counties did not vary much between 1989 and 1999 (Figure 4-3). Although movements in annual vessel registrations were sometimes turbulent, the number of boats registered for commercial purposes grew by 13% in Manatee County and 9.5% in Sarasota County over the ten-year period. Between 1992 and 1996, more commercial vessels were registered in Sarasota County. During the remaining years, vessel registration was greater in Manatee County. Additionally, commercial boat registrations in both counties appear to be negatively related.

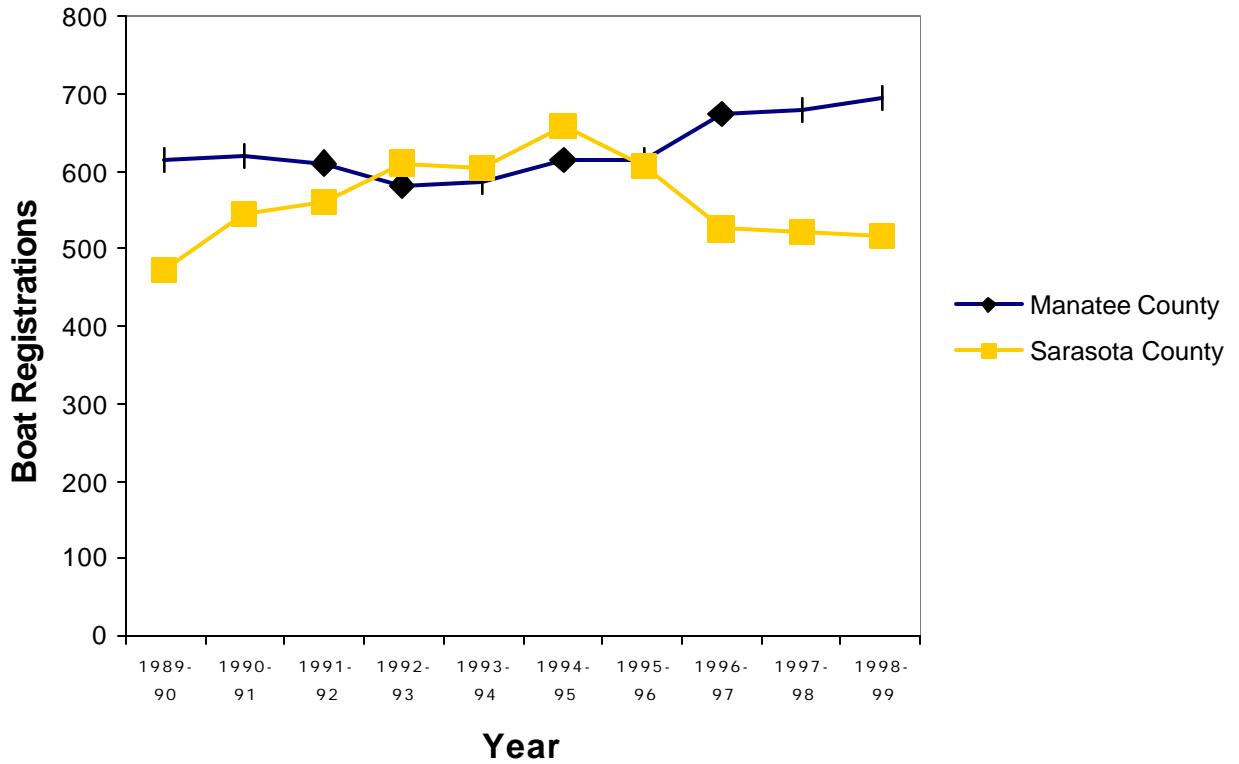


Figure 4-3. Number of Commercial Boat Registrations in Manatee and Sarasota Counties, 1990-99. (Florida Department of Highway Safety and Motor Vehicles, Bureau of Vessel Titles and Registrations)

### RECREATIONAL BOAT REGISTRATIONS

The number of recreational boat registrations in Manatee and Sarasota Counties increased between 1989 and 1999 (Figure 4-4). During this ten-year period, recreational vessel registrations rose by 28.9% in Manatee County and 11.9% in Sarasota County. This upward trend was fairly consistent with few exceptions (1989-91 in Manatee County, 1990-92 in Sarasota County and 1991-93 in Manatee and Sarasota Counties). Both counties exhibited stronger growth rates in recreational boat registrations during the latter half of the decade.

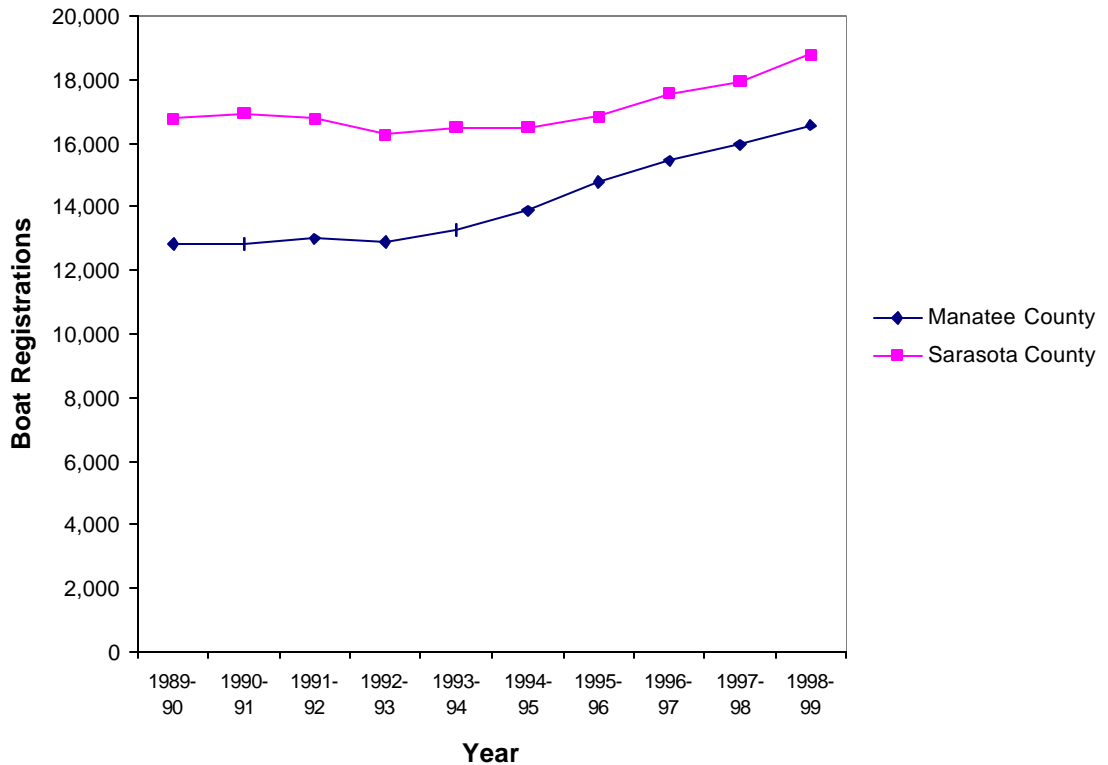


Figure 4-4. Number of Recreational Boat Registrations in Manatee and Sarasota Counties, 1990-99. (Florida Department of Highway Safety and Motor Vehicles, Bureau of Vessel Titles and Registrations)

**RECREATIONAL FISHING LICENSES**

The number of recreational freshwater fishing licenses distributed in Manatee and Sarasota Counties were closely aligned between 1990 and 1996 (Figure 4-4). Overall, the number of licenses declined for both counties during this period (13.3% in Manatee County and 21% in Sarasota County). Drops in licenses reached an all-time low between 1993-94 for both counties. Freshwater license sales in Sarasota County were greater than distributions in Manatee County throughout all years except the final year (1995-96).

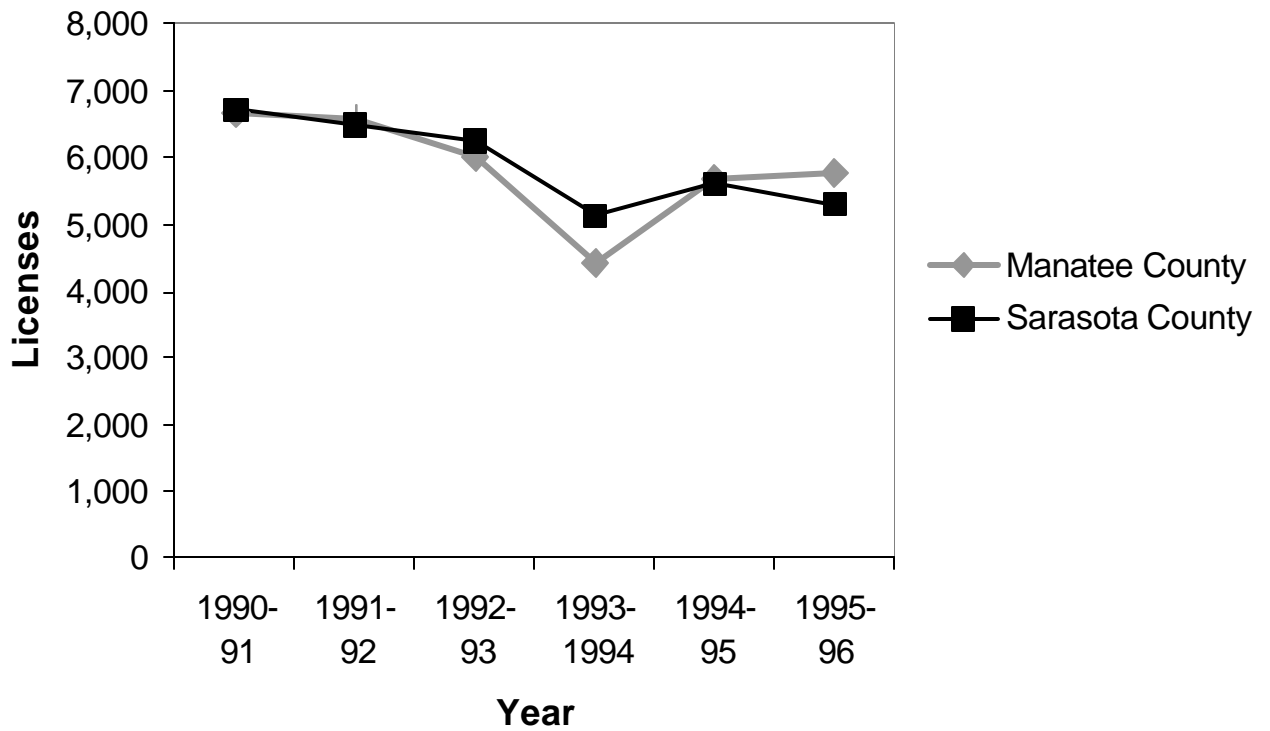


Figure 4-5. Number of Freshwater Fishing Licenses Distributed in Manatee and Sarasota Counties, 1990-96. (*Florida Fish and Wildlife Conservation Commission, Bureau of Licensing and Permitting*).

### RECREATIONAL FISHING LICENSES

Saltwater recreational fishing remained more popular than freshwater recreational fishing in Manatee and Sarasota Counties, as evidenced by the amount of recreational fishing license sales in both counties (Figure 4-5). Although information on the number of freshwater licenses distributed between 1998-99 was lacking, the declining trend in freshwater license allocations coupled with a markedly greater distribution of saltwater licenses relative to freshwater permits indicates that saltwater fishing is a more popular recreational activity than freshwater fishing. Additionally, the number of saltwater recreational licenses distributed in Sarasota County is greater than distributions in Manatee County. The reverse is true for freshwater permit allocations between 1995 and 1996.

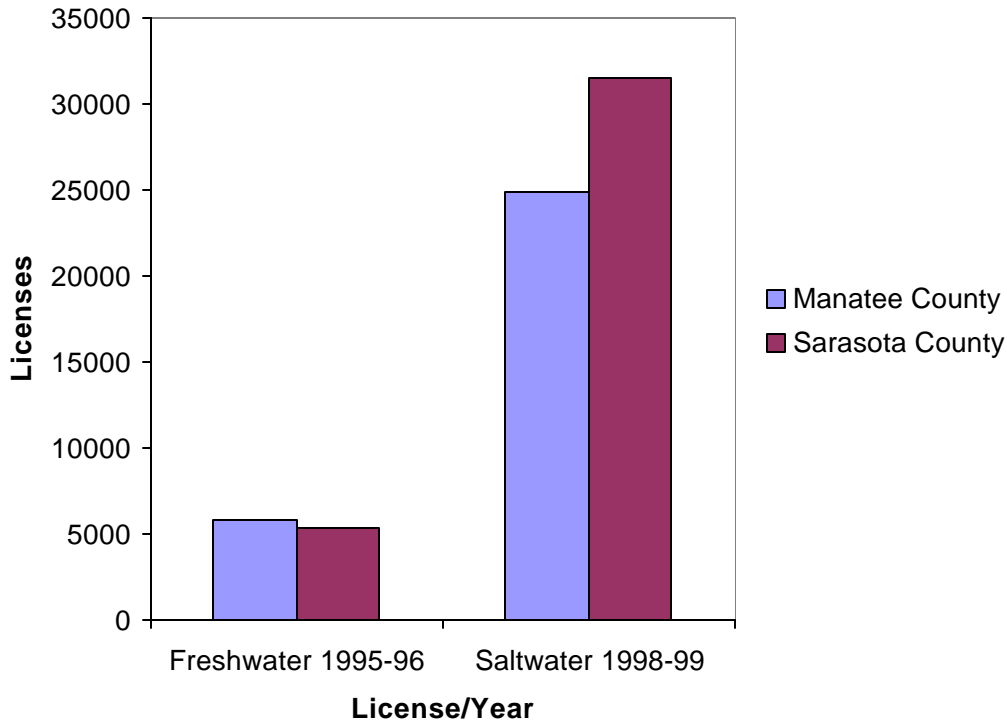


Figure 4-6. Number of Freshwater Recreational Licenses Distributed in Manatee and Sarasota Counties During 1995-96 and Number of Recreational Saltwater Licenses Distributed in Manatee and Sarasota Counties during 1998-99. (Florida Fish and Wildlife Conservation Commission, Bureau of Licensing and Permitting).

**SALTWATER PRODUCTS LICENSES**

The distribution of Saltwater Products Licenses (SPLs) declined between 1985 and 1998 in Manatee and Sarasota Counties (Figure 4-6). Commercial fishermen are required to obtain an SPL in order to sell their catch. Both Manatee and Sarasota Counties experienced similar fluctuations in SPL allocations throughout the thirteen-year period. In absolute terms, Manatee County distributed more SPLs during these years. Despite strong annual variations in SPL distributions, Manatee and Sarasota County witnessed surprisingly minimal declines in SPL allocations between 1985 and 1998 (14% in Manatee County and 34% in Sarasota County).

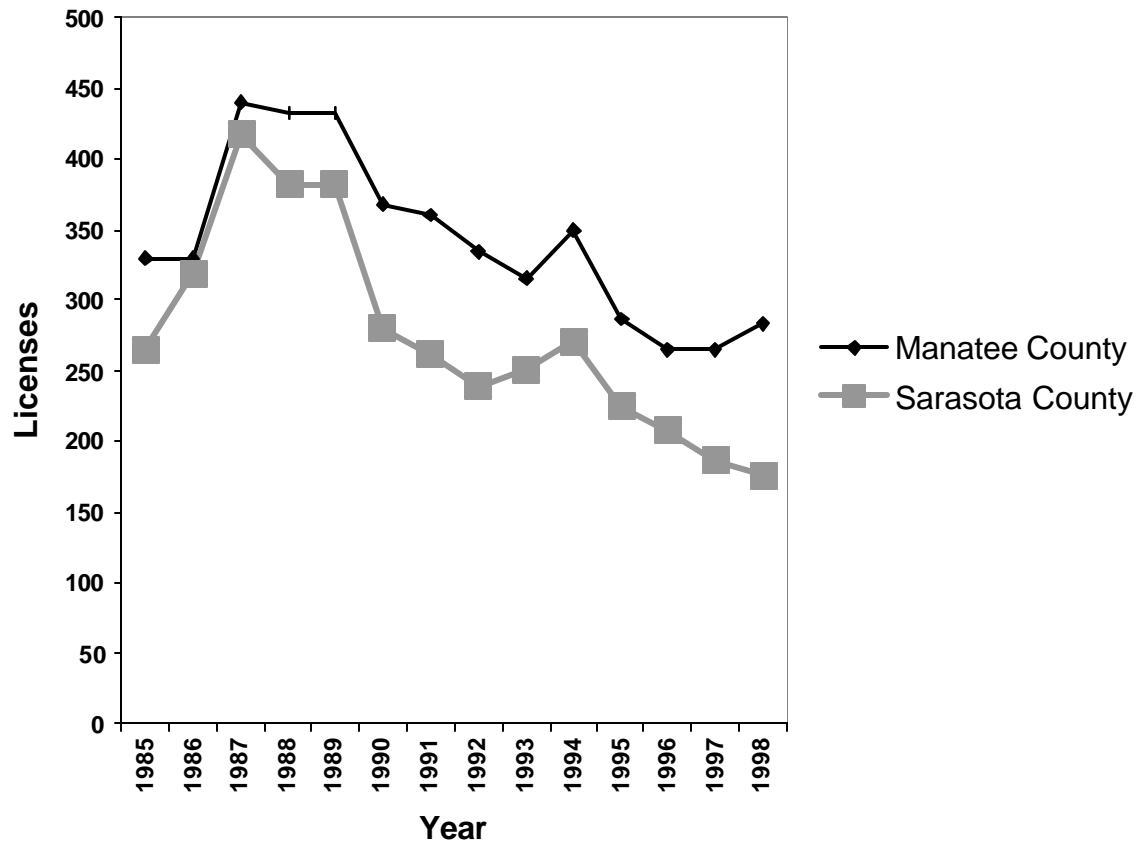


Figure 4-7. Saltwater Products License Distributions in Manatee and Sarasota Counties, 1985-98. (Florida Fish and Wildlife Conservation Commission, Bureau of Licensing and Permitting).

## **CONCLUSION**

This report contains information on population and income, employment and unemployment, retail trade and tourism development tax proceeds, vessel registration, and commercial and recreational fisheries in the Manatee and Sarasota County region of Florida. These economic characteristics were selected following the presumption that Red Tide events may disproportionately impact the tourism and fishing industries of the Manatee and Sarasota County region. Given the near-annual frequency of Red Tide events in the state of Florida, any resulting economic losses among these industries could prove severe.

Information in this report indicates that the Manatee and Sarasota County region is a tourist-dependent economy. Tourism development tax proceeds have increased over time. Additionally, both gross and taxable retail sales have increased as has employment in the retail trade and services sectors. This finding is noteworthy as both the services and retail trade sectors are traditionally dependent on tourists. Furthermore, employment and retail sales in Manatee and Sarasota Counties exhibit seasonal patterns of highs during the warm winter and fall months and lows during the hot summer and spring months. Although employment in the retail trade and services sectors increased, increases in income accruing to these sectors were not as pronounced. This fact probably owes to the predominance of investment income and transfer payments in the region. This is consistent with the growing migration of seniors into the area as this demographic segment relies heavily on both income sources.

The economy of Manatee and Sarasota Counties is characterized by high rates of growth in both population and per-capita personal income. This occurrence coupled with a rise in the area's senior population suggests that citizens of the region may have both the time and disposable financial resources to engage in recreational activities within their immediate vicinities. Furthermore tourist visitors in Manatee and Sarasota Counties will likely seek recreational opportunities in the region. Recreational boat registrations have risen over time. However, recreational fishing license sales in the Manatee and Sarasota County region have declined. Information in this report reveals that recreational saltwater fishing remains more popular than recreational freshwater fishing. However recreational activities associated with freshwater fishing have declined in the region, as evidenced by reduced numbers of freshwater fishing license sales. Although commercial boat registrations increased slightly in both Manatee and Sarasota Counties, commercial fishing in the Manatee and Sarasota County region declined. Both the value and volume of commercial fisheries landings has dropped, coinciding with reduced sales of Saltwater Products Licenses. Changes in such license sales may be more directly linked with regulatory change, rather than environmental factors.

As mentioned in the introduction, one of the possible triggering factors of Red Tide events may be human-induced nutrient leaching into coastal waterways. The population of Manatee and Sarasota Counties is growing, albeit at a decreasing rate. This population trend, and the resulting impact on water quality, may exacerbate the incidence of Red Tide in the region. If Red Tide



events in the Manatee and Sarasota County region negatively impact area businesses, the continuance of these incidents could detract from the regional economy in the long term.

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- Steidinger, K.A., Landsberg, J.H., Tomas, C.R. and Burns, J.W. 1999. Harmful Algal Blooms in Florida. Harmful Algal Bloom Task Force Technical Advisory Group.

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Florida Fish and Wildlife Conservation Commission, Bureau of Licensing and Permitting, Tallahassee, FL.

Florida Statistical Abstract, Bureau of Economic and Business Research, University of Florida, Gainesville, FL.

Regional Economic Information System, Bureau of Economic Analysis, United States Department of Commerce, Washington, DC.

Statistical Abstract of the United States, Bureau of Statistics, Department of Census, Washington, DC.

Table A-1. Population Characteristics of Florida, Manatee and Sarasota Counties, 1980-2000.

	Manatee County	% Change	Sarasota County	% Change
1980	148,442		202,251	
1985	170,565	14.9%	238,013	17.7%
1990	211,707	24.1%	277,776	16.7%
1995	233,160	10.1%	301,528	8.6%
2000 *	254,990	9.4%	325,889	8.1%

\*Estimate

Source: Florida Statistical Abstract

Table A-2. Population of Persons Aged 65 and Over in Manatee and Sarasota Counties and Percentage Change in Population, 1980-2000.

	Manatee County	% Change	Sarasota County	% Change
1980	40,156		60,609	
1985	46,974	17.0%	74,296	23.6%
1990	59,408	26.5%	89,408	20.3%
1995	64,763	9.0%	98,994	11.7%
2000 *	68,287	5.4%	105,560	7.6%

\*Estimate

Source: Florida Statistical Abstract.

Table A-3. Population of Municipalities and Metropolitan Statistical Area of Manatee and Sarasota Counties, 1980-95.

	1980	1985	1990	1995
<b>Manatee County</b>	<b>148,445</b>	<b>170,565</b>	<b>211,707</b>	<b>233,160</b>
Anna Maria	1,537	1,664	1,744	1,840
Bradenton	30,228	36,374	43,769	47,679
Bradenton Beach	1,595	1,730	1,657	1,673
Holmes Beach	4,023	4,347	4,810	5,025
Longboat Key (part)	2,460	2,648	2,544	2,647
Palmetto	8,637	9,265	9,268	9,747
Unincorporated	99,965	114,537	147,915	164,549
<b>Sarasota County</b>	<b>202,251</b>	<b>238,013</b>	<b>277,716</b>	<b>301,528</b>
Longboat Key (part)	2,383	3,592	3,393	3,806
North Port	6,205	8,331	11,973	15,161
Sarasota	48,868	50,782	50,897	51,143
Venice	12,153	14,218	17,052	18,450
Unincorporated	132,642	161,090	194,461	212,968

Source: Florida Statistical Abstract

Table A-4. Population in Manatee and Sarasota Counties by Sex, Race and Ethnicity, 1980-2000.

**Manatee County**

	Sex		Race				Ethnicity
	Male	Female	White	Black	American Indian, Eskimo or Aleut	Asian or Pacific Islander	Hispanic Origin
1980	69,230	79,212	133,191	13,263	259	405	3,185
1985	80,189	90,376	NA	NA	NA	NA	NA
1990	100,147	111,560	194,606	16,799	528	1,261	9,642
1995	110,932	122,228	206,043	20,093	759	1,846	12,941
2000*	121,348	133,642	234,000	19,000	NA	NA	NA

**Sarasota County**

	Sex		Race				Ethnicity
	Male	Female	White	Black	American Indian, Eskimo or Aleut	Asian or Pacific Islander	Hispanic Origin
1980	93,365	108,616	189,711	10,457	272	704	2,989
1985	110,077	127,936	NA	NA	NA	NA	NA
1990	130,050	147,726	265,091	12,314	483	1,457	6,014
1995	141,823	159,705	277,476	14,428	598	2,106	7,903
2000*	153,047	172,842	310,000	13,000	NA	NA	NA

\* Estimate

Source: Florida Statistical Abstract, Statistical Abstract of the United States.

Table A-5. Per-Capita Personal Income of Manatee and Sarasota Counties, Florida and the United States, 1980-97.

	Manatee County	Sarasota County	Florida	United States
1980	\$10,317	\$12,707	\$9,957	\$10,062
1985	\$14,160	\$18,744	\$14,367	\$14,410
1990	\$19,567	\$26,964	\$19,127	\$19,156
1995	\$24,568	\$32,296	\$22,676	\$23,059
1997	\$26,857	\$35,654	\$24,799	\$25,288

Source: Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.

Appendix A: Population and Income

Table A-6. Total Personal Income by Major Source and Earnings by Major Industry  
(\$ millions) in Manatee County, 1980-1997. 1/

	1980	1985	1990	1995	1997
<b>Total Personal Income 2/</b>	<b>\$1,550.29</b>	<b>\$2,635.33</b>	<b>\$4,171.67</b>	<b>\$5,619.65</b>	<b>\$6,312.97</b>
Dividends, Interest, and Rent /3	\$487.08	\$888.61	\$1,411.00	\$1,581.81	\$1,820.42
Transfer Payments	\$305.25	\$483.11	\$712.61	\$1,065.28	\$1,169.02
<b>Private Industry Earnings 4/</b>	<b>\$581.24</b>	<b>\$938.57</b>	<b>\$1,541.55</b>	<b>\$2,586.64</b>	<b>\$2,904.10</b>
Agricultural Services, Forestry, Fishing and Other /5	\$8.34	\$14.35	\$40.58	\$43.74	\$65.28
Mining	\$8.55	\$12.25	\$2.46	\$1.14	\$1.39
Construction	\$80.51	\$102.47	\$107.48	\$146.60	\$183.16
Manufacturing	\$122.58	\$195.34	\$303.18	\$406.04	\$484.69
Transportation and Public Utilities	\$35.72	\$51.51	\$55.39	\$66.57	\$76.85
Wholesale Trade	\$26.32	\$51.53	\$60.05	\$88.04	\$133.72
Retail Trade	\$109.34	\$192.68	\$246.87	\$315.87	\$372.84
Finance, Insurance, and Real Estate	\$47.96	\$53.05	\$91.67	\$124.28	\$147.00
Services	\$142.11	\$266.40	\$633.89	\$1,394.36	\$1,439.17
Government and Government Enterprises	\$90.86	\$154.33	\$242.70	\$307.52	\$348.78

1/ The estimates for 1975-87 are based on the 1972 Standard Industrial Classification (SIC). The estimates for 1988-97 are based on the 1987 SIC.

2/ Sub-categorical information does not comprise an exhaustive list of 'Total Personal Income' components.

3/ Rental income of persons includes the capital consumption adjustment.

4/ Totals may not add up to the sum of their components due to rounding.

5/ "Other" consists of wage and salary disbursements to U.S. residents employed by international organizations and foreign embassies and consulates in the United States.

Source: Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.



## Appendix A: Population and Income

Table A-7. Total Personal Income by Major Source and Earnings by Major Industry (\$ millions) in Sarasota County, 1980-97. 1/

	1980	1985	1990	1995	1997
<b>Total Personal Income 2/</b>	<b>\$2,598.04</b>	<b>\$4,615.96</b>	<b>\$7,532.20</b>	<b>\$9,514.61</b>	<b>\$10,706.93</b>
Plus: Dividends, Interest, and Rent /3	\$1,087.22	\$2,032.88	\$3,419.36	\$3,948.84	\$4,548.29
Plus: Transfer Payments	\$489.79	\$848.97	\$1,256.54	\$1,833.20	\$2,032.67
<b>Private Industry Earnings 4/</b>	<b>\$1,024.84</b>	<b>\$1,671.23</b>	<b>\$2,601.74</b>	<b>\$3,452.82</b>	<b>\$3,828.49</b>
Agricultural Services, Forestry, Fishing and Other /5	\$7.80	\$14.21	\$26.41	\$35.23	\$46.27
Mining	\$27.39	\$24.60	\$3.05	\$4.79	\$4.91
Construction	\$157.13	\$251.15	\$302.92	\$276.85	\$337.06
Manufacturing	\$98.05	\$163.66	\$241.47	\$299.75	\$292.11
Transportation and Public Utilities	\$68.33	\$102.93	\$120.54	\$142.86	\$146.05
Wholesale Trade	\$50.08	\$75.80	\$128.11	\$157.44	\$185.59
Retail Trade	\$198.07	\$344.11	\$478.24	\$559.69	\$640.78
Finance, Insurance, and Real Estate Services	\$113.58	\$132.15	\$251.31	\$379.68	\$451.43
Government and Government Enterprises	\$126.20	\$217.30	\$362.71	\$438.21	\$402.52

1/ The estimates for 1975-87 are based on the 1972 Standard Industrial Classification (SIC). The estimates for 1988-97 are based on the 1987 SIC.

2/ Sub-categorical information does not comprise an exhaustive list of 'Total Personal Income' components.

3/ Rental income of persons includes the capital consumption adjustment.

4/ Totals may not add up to the sum of their components due to rounding.

5/ "Other" consists of wage and salary disbursements to U.S. residents employed by international organizations and foreign embassies and consulates in the United States.

Source: Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.

Table B-1 . Employment in Manatee and Sarasota Counties, 1990-98\* .

	Manatee County	Sarasota County
1990	91,336	118,967
1991	92,615	120,571
1992	94,966	122,974
1993	91,476	117,740
1994	97,175	121,742
1995	97,353	124,201
1996	105,967	134,179
1997	110,891	140,201
1998	112,049	141,664

\*Employment figures for years preceding 1990 are not offered due to methodological revisions initiated by the Florida Department of Labor Security during 1990 rendering pre-1990 employment figures incomparable with post-1990 employment figures.

Source: Bureau of Labor Statistics, Florida Department of Employment and Labor Security.

Table B-2. Average Monthly Employment in Manatee and Sarasota Counties, 1996-98.

	Manatee County	Sarasota County
January	105,195	133,063
February	106,117	134,230
March	107,548	136,040
April	108,668	137,456
May	110,233	139,435
June	110,163	139,348
July	111,033	140,449
August	111,072	140,500
September	110,880	140,256
October	110,831	140,200
November	111,829	141,457
December	112,059	141,748

## Appendix B: Employment and Unemployment

Table B-3. Unemployment Rates in the United States, Florida and Manatee and Sarasota Counties, 1980-95.

	1980	1985	1990	1995
Manatee County	5.0%	5.9%	4.6%	4.0%
Sarasota County	4.7%	4.2%	4.1%	3.4%
Florida	6.0%	6.0%	5.9%	5.5%
United States	7.1%	7.2%	5.5%	5.6%

Source: Florida Statistical Abstract, Statistical Abstract of the United States.

Table B-4. Employment by Industry Sector in Manatee and Sarasota Counties, 1980-97  
and Percentage of Total for 1997 Industry Employment. 1/ 2/

	1980	1985	1990	1995	1996	1997	1997 % of Total
<b>Manatee County</b>	<b>58,421</b>	<b>72,411</b>	<b>93,004</b>	<b>135,144</b>	<b>125,739</b>	<b>142,660</b>	<b>100%</b>
Agricultural Services, Forestry, Fishing, Other /3	1,333	1,693	3,274	3,472	4,473	4,547	3.19%
Mining	22	205	196	151	120	115	0.08%
Construction	5,447	5,821	4,982	5,783	6,850	6,872	4.82%
Manufacturing	7,577	8,635	10,427	12,254	12,211	13,253	9.29%
Transportation and Public Utilities	1,825	2,182	2,186	2,247	2,491	2,629	1.84%
Wholesale Trade	1,588	2,084	2,425	2,916	3,645	3,681	2.58%
Retail Trade	12,241	16,401	18,571	20,656	22,919	22,531	15.79%
Finance, Insurance, and Real Estate	7,168	7,633	7,145	7,280	7,630	7,866	5.51%
Services	12,784	18,469	33,531	69,580	53,967	69,699	48.86%
Government and Government Enterprises	8,436	9,288	10,267	10,805	11,433	11,467	8.04%
<b>Sarasota County</b>	<b>98,772</b>	<b>129,329</b>	<b>151,083</b>	<b>170,834</b>	<b>166,645</b>	<b>169,324</b>	<b>100%</b>
Agricultural Services, Forestry, and Fishing	1,267	1,825	1,965	2,407	2,855	3,072	1.81%
Mining	139	429	388	328	266	259	0.15%
Construction	10,139	13,691	13,151	10,434	11,717	12,127	7.16%
Manufacturing	6,528	7,910	8,852	8,875	9,308	8,442	4.99%
Transportation and Public Utilities	3,481	4,121	4,411	4,437	4,546	4,519	2.67%
Wholesale Trade	3,225	4,265	4,794	4,967	5,369	5,676	3.35%
Retail Trade	21,440	28,308	33,922	34,551	36,047	36,983	21.84%
Finance, Insurance, and Real Estate	14,510	17,316	15,802	16,417	17,031	17,331	10.24%
Services	27,506	39,259	53,094	74,085	67,206	68,387	40.39%
Government and Government Enterprises	10,537	12,205	14,704	14,333	12,300	12,528	7.40%

1/ Includes full-time and part-time employment.

2/ The estimates for 1975-87 are based on the 1972 Standard Industrial Classification (SIC). The estimates for 1988-97 are based on the 1987 SIC.

3/ "Other" consists of wage and salary disbursements to U.S. residents employed by international organizations and foreign embassies and consulates in the United States.

Source: Regional Economic Information System, Bureau of Economic Analysis, US Department of Commerce.

Appendix C: Retail Sales and Tourism Development Tax Proceeds

Table C-1. Annual Gross (Taxable and Non-Taxable) Retail Sales for Commercial Industrial Groupings (\$ millions)  
in Manatee and Sarasota Counties, 1989-98.

<b>Manatee County</b>										
	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
<b>Total Sales</b>	<b>\$4,959.17</b>	<b>\$4,983.91</b>	<b>\$4,979.72</b>	<b>\$5,089.67</b>	<b>\$5,330.26</b>	<b>\$6,292.74</b>	<b>\$6,823.11</b>	<b>\$7,796.01</b>	<b>\$8,151.63</b>	<b>\$8,209.23</b>
Food and Beverage	\$537.14	\$571.20	\$571.74	\$606.74	\$624.56	\$672.54	\$687.77	\$914.68	\$986.17	\$1,032.34
Apparel	\$39.41	\$39.17	\$44.57	\$76.87	\$100.16	\$119.53	\$111.41	\$119.10	\$129.09	\$137.45
General Merchandise	\$396.65	\$438.59	\$450.00	\$486.88	\$525.10	\$592.31	\$620.74	\$733.18	\$764.64	\$850.33
Automotive	\$654.36	\$599.08	\$595.99	\$638.51	\$719.65	\$866.86	\$907.99	\$959.60	\$1,016.16	\$1,264.87
Furniture and Appliance	\$107.75	\$112.70	\$108.47	\$127.42	\$133.07	\$150.81	\$181.29	\$203.96	\$198.11	\$222.59
Lumber/Building Material	\$206.20	\$302.21	\$301.93	\$204.75	\$124.27	\$140.79	\$143.76	\$165.52	\$185.35	\$176.16
Consumer Services	\$187.34	\$196.99	\$211.68	\$229.88	\$266.27	\$271.11	\$302.35	\$310.31	\$335.75	\$336.91
Other Services	\$230.29	\$220.16	\$247.99	\$265.94	\$248.00	\$285.74	\$337.80	\$367.94	\$421.77	\$313.19
Specialty Retail	\$65.33	\$70.96	\$86.47	\$96.82	\$96.86	\$108.89	\$111.98	\$131.19	\$132.48	\$137.31
Commercial and Industrial	\$758.14	\$698.31	\$641.57	\$579.23	\$564.86	\$670.72	\$809.56	\$1,005.14	\$1,051.94	\$1,034.38
Wholesale Dealers	\$259.33	\$269.84	\$262.45	\$298.20	\$367.24	\$529.77	\$513.56	\$524.59	\$481.56	\$427.45
General Classification	\$1,517.23	\$1,464.71	\$1,456.86	\$1,478.45	\$1,560.24	\$1,883.69	\$2,094.90	\$2,360.81	\$2,448.62	\$2,276.25
<b>Sarasota County</b>										
	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
<b>Total Sales</b>	<b>\$6,649.07</b>	<b>\$6,933.24</b>	<b>\$7,075.14</b>	<b>\$7,258.59</b>	<b>\$7,541.64</b>	<b>\$8,269.88</b>	<b>\$8,816.51</b>	<b>\$9,687.22</b>	<b>\$10,562.57</b>	<b>\$10,588.18</b>
Food and Beverage	\$833.26	\$893.94	\$911.73	\$950.31	\$958.12	\$1,014.09	\$1,041.86	\$1,126.55	\$1,196.08	\$1,238.54
Apparel	\$129.87	\$148.40	\$158.68	\$164.38	\$162.65	\$163.86	\$162.60	\$159.13	\$180.06	\$199.67
General Merchandise	\$510.94	\$548.33	\$544.47	\$556.72	\$589.78	\$626.04	\$665.58	\$780.39	\$851.04	\$917.55
Automotive	\$956.99	\$994.98	\$941.03	\$1,045.34	\$1,224.16	\$1,305.72	\$1,462.53	\$1,590.01	\$1,663.38	\$1,814.53
Furniture and Appliance	\$379.51	\$442.06	\$501.96	\$382.29	\$311.75	\$345.52	\$378.21	\$406.94	\$439.18	\$516.11
Lumber/ Building Material	\$298.45	\$296.75	\$249.41	\$252.64	\$269.68	\$302.11	\$317.04	\$360.18	\$399.58	\$450.06
Consumer Services	\$329.33	\$345.20	\$379.17	\$427.06	\$423.63	\$456.95	\$468.90	\$533.42	\$566.58	\$600.31
Other Services	\$329.00	\$339.54	\$341.00	\$351.58	\$311.72	\$362.89	\$418.98	\$456.39	\$466.18	\$294.13
Specialty Retail	\$75.94	\$73.67	\$72.72	\$74.03	\$80.14	\$82.33	\$85.05	\$107.52	\$105.04	\$112.94
Commercial and Industrial	\$663.01	\$665.05	\$686.90	\$683.00	\$716.16	\$818.38	\$849.82	\$907.61	\$1,045.32	\$1,058.06
Wholesale Dealers	\$346.95	\$366.66	\$390.43	\$400.19	\$447.54	\$502.15	\$533.70	\$598.19	\$695.20	\$614.68
General Classification	\$1,795.81	\$1,818.66	\$1,897.66	\$1,971.04	\$2,046.32	\$2,289.85	\$2,432.24	\$2,660.89	\$2,954.94	\$2,771.61

Source: Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida.

Appendix C: Retail Sales and Tourism Development Tax Proceeds

Table C-2. Annual Taxable Retail Sales for Commercial Industrial Groupings (\$ millions)  
in Manatee and Sarasota Counties, 1989-98.

<b>Manatee County</b>										
	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
<b>Total Sales</b>	<b>\$1,615.28</b>	<b>\$1,614.38</b>	<b>\$1,626.62</b>	<b>\$1,750.35</b>	<b>\$1,882.70</b>	<b>\$2,076.40</b>	<b>\$2,160.67</b>	<b>\$2,346.72</b>	<b>\$2,522.33</b>	<b>\$2,718.38</b>
Food and Beverage	\$296.33	\$313.21	\$312.95	\$328.59	\$340.00	\$364.70	\$364.29	\$409.95	\$428.58	\$431.51
Apparel	\$38.97	\$38.53	\$43.15	\$71.39	\$91.93	\$112.39	\$106.97	\$116.55	\$126.27	\$131.29
General Merchandise	\$276.22	\$309.25	\$312.83	\$337.93	\$359.36	\$375.83	\$381.12	\$446.65	\$421.08	\$469.88
Automotive	\$377.90	\$329.00	\$308.35	\$334.21	\$367.08	\$399.24	\$446.75	\$466.85	\$509.81	\$617.26
Furniture and Appliance	\$77.30	\$77.62	\$82.52	\$91.52	\$94.18	\$116.61	\$125.02	\$131.68	\$139.26	\$153.99
Lumber and Buildings	\$95.65	\$91.83	\$84.62	\$85.20	\$103.89	\$109.18	\$108.70	\$113.74	\$139.55	\$142.12
Consumer Services	\$120.91	\$131.62	\$135.60	\$141.91	\$159.48	\$168.59	\$176.94	\$186.03	\$194.15	\$198.06
Other Services	\$94.88	\$86.36	\$99.77	\$106.47	\$81.79	\$100.20	\$108.09	\$119.12	\$139.09	\$123.02
Specialty Retail	\$33.86	\$33.71	\$36.22	\$37.01	\$38.05	\$41.47	\$48.73	\$47.99	\$49.24	\$56.55
Commercial and Industrial	\$149.53	\$145.48	\$148.02	\$154.72	\$168.07	\$202.12	\$198.80	\$210.91	\$273.15	\$279.54
Wholesale Dealers	\$51.89	\$56.76	\$62.07	\$60.12	\$74.18	\$80.71	\$89.49	\$90.72	\$93.46	\$100.06
General Classification	\$452.92	\$454.95	\$482.20	\$501.52	\$526.27	\$598.46	\$627.82	\$661.30	\$757.78	\$767.18
<b>Sarasota County</b>										
	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
<b>Total Sales</b>	<b>\$2,797.39</b>	<b>\$2,859.55</b>	<b>\$2,839.22</b>	<b>\$2,955.65</b>	<b>\$3,141.29</b>	<b>\$3,336.43</b>	<b>\$3,506.40</b>	<b>\$4,557.36</b>	<b>\$4,180.86</b>	<b>\$4,495.77</b>
Food and Beverage	\$453.60	\$481.61	\$493.20	\$505.51	\$525.14	\$553.88	\$581.65	\$620.88	\$660.33	\$697.39
Apparel	\$118.07	\$133.40	\$143.60	\$148.58	\$148.94	\$146.65	\$145.17	\$139.45	\$158.56	\$173.72
General Merchandise	\$391.41	\$412.91	\$408.38	\$407.23	\$434.49	\$459.38	\$474.76	\$567.49	\$601.36	\$627.32
Automotive	\$537.96	\$518.88	\$485.04	\$525.77	\$605.49	\$626.59	\$691.16	\$762.19	\$837.40	\$930.95
Furniture and Appliance	\$200.24	\$195.11	\$194.17	\$194.64	\$221.71	\$245.05	\$265.42	\$283.41	\$314.73	\$360.16
Lumber and Buildings	\$224.67	\$220.90	\$194.82	\$197.77	\$216.60	\$239.64	\$250.86	\$278.64	\$318.03	\$352.27
Consumer Services	\$250.87	\$264.98	\$280.79	\$296.11	\$299.87	\$318.22	\$328.71	\$357.77	\$383.52	\$411.01
Other Services	\$163.91	\$160.29	\$158.36	\$175.57	\$145.20	\$169.42	\$177.42	\$195.52	\$202.36	\$158.91
Specialty Retail	\$47.40	\$51.68	\$52.64	\$55.82	\$57.92	\$63.40	\$64.03	\$71.72	\$77.85	\$87.04
Commercial and Industrial	\$271.69	\$283.36	\$284.02	\$299.85	\$311.55	\$334.92	\$349.34	\$462.21	\$391.58	\$416.30
Wholesale Dealers	\$132.41	\$132.34	\$140.59	\$139.14	\$150.71	\$157.79	\$156.96	\$169.33	\$204.44	\$200.20
General Classification	\$871.44	\$896.74	\$920.02	\$976.16	\$988.93	\$1,065.23	\$1,097.39	\$1,278.10	\$1,290.45	\$1,308.95

Source: Florida Department of Revenue. Provided by the Bureau of Economic and Business Research, University of Florida.

## Appendix C: Retail Sales and Tourism Development Tax Proceeds

Table C-3 . Average Monthly Gross and Retail Sales in Manatee and Sarasota Counties, 1994-98 (\$1000s).

	Manatee County		Sarasota County	
	Gross Retail Sales	Taxable Retail Sales	Gross Retail Sales	Taxable Retail Sales
January	\$404,584	\$189,042	\$569,698	\$323,168
February	\$427,396	\$204,242	\$595,884	\$341,092
March	\$478,211	\$221,082	\$656,467	\$371,891
April	\$419,094	\$198,587	\$585,449	\$336,703
May	\$430,669	\$192,753	\$576,326	\$310,494
June	\$470,835	\$184,384	\$593,387	\$294,755
July	\$391,582	\$179,244	\$528,116	\$285,256
August	\$407,266	\$177,287	\$548,178	\$292,509
September	\$417,426	\$172,043	\$532,032	\$277,120
October	\$400,136	\$187,864	\$549,678	\$305,710
November	\$450,911	\$208,556	\$592,537	\$333,016
December	\$570,009	\$249,814	\$749,112	\$543,651

Source: Florida Department of Revenue. Provided by Bureau of Economic and Business Research, University of Florida.

Table C-4. Tourist Development Tax Revenues in Manatee and Sarasota Counties, 1992-97 (\$1000's). 1/

	1992-1993	1993-1994	1994-1995	1995-1996	1996-1997
Manatee County	\$1,741	\$1,834	\$1,988	\$2,045	\$2,141
Sarasota County	\$2,300	\$2,747	\$2,904	\$3,024	\$3,500

1/ Data reflect both state and locally administered tourist development tax collections.  
Source: Florida Statistical Abstract.



Appendix D: Commercial and Recreational Fisheries

Table D-1. Value of Commercial Fisheries Landings in Manatee and Sarasota Counties, All Species, 1985-98.

	Manatee County	Sarasota County
1985	\$3,627,461	\$574,234
1986	\$5,108,251	\$346,865
1987	\$5,581,247	\$509,053
1988	\$4,282,008	\$717,453
1989	\$4,613,518	\$908,885
1990	\$3,895,001	\$569,959
1991	\$3,871,446	\$336,901
1992	\$3,812,190	\$485,685
1993	\$5,059,018	\$568,316
1994	\$3,354,368	\$656,995
1995	\$2,809,008	\$505,180
1996	\$2,877,356	\$543,666
1997	\$2,421,441	\$303,872
1998	\$2,374,069	\$390,198

Source: Florida Department of Environmental Protection, Marine Research Institute.

Table D-2. Volume of Commercial Fisheries Landings (Lbs.) in Manatee and Sarasota Counties, All Species, 1985-98.

	Manatee County	Sarasota County
1985	9,682,390	1,263,978
1986	15,763,910	672,285
1987	14,533,652	872,867
1988	9,315,722	879,063
1989	9,736,042	1,542,725
1990	9,504,422	639,915
1991	8,129,422	404,680
1992	8,520,547	522,383
1993	8,640,075	472,558
1994	7,578,246	437,107
1995	4,336,513	282,831
1996	3,219,779	308,172
1997	4,930,435	182,335
1998	3,595,554	188,706

Source: Florida Department of Environmental Protection, Marine Research Institute.

Appendix D: Commercial and Recreational Fisheries

Table D-3. Number of Commercial Boat Registrations in Manatee and Sarasota Counties, 1990-99.

	Manatee County	Sarasota County
1989-90	613	471
1990-91	619	545
1991-92	611	561
1992-93	583	611
1993-94	585	606
1994-95	615	658
1995-96	614	608
1996-97	675	526
1997-98	680	524
1998-99	695	516

Source: Florida Department of Highway Safety and Motor Vehicles, Bureau of Vessel Titles and Registrations.

Table D-4. Number of Recreational Boat Registrations in Manatee and Sarasota Counties, 1990-99.

	Manatee County	Sarasota County
1989-90	12,851	16,756
1990-91	12,840	16,928
1991-92	12,975	16,802
1992-93	12,865	16,272
1993-94	13,278	16,492
1994-95	13,898	16,520
1995-96	14,775	16,812
1996-97	15,425	17,574
1997-98	15,967	17,936
1998-99	16,564	18,756

Source: Florida Department of Highway Safety and Motor Vehicles, Bureau of Vessel Titles and Registrations.

Table D-5. Number of Recreational Freshwater Fishing Licenses Distributed in Manatee and Sarasota Counties, 1990-96.

	1990-91	1991-92	1992-93	1993-1994	1994-95	1995-96
<b>Manatee County</b>	<b>6,642</b>	<b>6,582</b>	<b>6,001</b>	<b>4,415</b>	<b>5,685</b>	<b>5,757</b>
Resident License	5,903	5,862	5,332	3,982	5,076	5,093
Non-Resident License	739	720	669	433	609	664
<b>Sarasota County</b>	<b>6,710</b>	<b>6,478</b>	<b>6,231</b>	<b>5,135</b>	<b>5,611</b>	<b>5,308</b>
Resident License	5,805	5,692	5,351	4,413	4,858	4,561
Non-Resident License	905	786	880	722	753	747

Table D-6. Number of Recreational Saltwater Fishing Licenses Distributed in Manatee and Sarasota Counties, 1998-99. 1/

	1998-99
<b>Manatee County</b>	<b>24,871</b>
Resident	14,200
Non-Resident	10,671
<b>Sarasota County</b>	<b>31,542</b>
Resident	14,824
Non-Resident	16,718

1/ Estimates of saltwater license disbursements prior to the 1998-99 period do not offer reliable estimates and were omitted from this report.

Source: Florida Fish and Wildlife Conservation Commission, Bureau of Licensing and Permitting.

Table D-7. Number of Saltwater Products Fishing Licenses Distributed in Manatee and Sarasota Counties, 1985-98.

	Manatee County	Sarasota County	Manatee/Sarasota
1985	329	265	594
1986	329	318	647
1987	440	417	857
1988	433	381	814
1989	433	381	814
1990	368	280	648
1991	360	262	622
1992	334	239	573
1993	316	251	567
1994	349	271	620
1995	286	224	510
1996	264	208	472
1997	264	186	450
1998	283	175	458

Source: Florida Department of Environmental Protection, Marine Research Institute.