



The Economic Impact of Nude Tourism & Recreation in Florida



i

“Florida has a competitive advantage over all national and international destinations to be the niche-tourism mecca for nude recreation which in turn creates excellent opportunities for broad-based economic growth.”

American Association for Nude Recreation
Florida Region

February 7, 2017

EXECUTIVE SUMMARY – NUDE TOURISM CONTRIBUTES BILLIONS TO FLORIDA

Tourism is a mainstay of Florida's economy with 107 million visitors in 2015 spending an average of \$244 million per day employing over 1.2 million people. Visitors choose Florida for many reasons, but from theme parks to beaches, Florida's temperate year-round climate facilitates a wide spectrum of activities and experiences that makes the state a global tourism leader.

Those investing and promoting Florida tourism continue to cultivate new attractions to broaden the tourism market and to remain competitive. By focusing on niche markets, or Special Interest Tourism [SIT], destinations throughout Florida can realize the economic benefits of tourism, not just mass-market heavyweights such as Orlando, Miami and Tampa. Ft Lauderdale provides a great example as one of the only destinations to begin marketing to the LGBT travel segment some 20 years ago. Now that niche market accounts for over \$1.5 billion in local spending annuallyⁱⁱ and other destinations throughout the country are rushing to catch up with this lucrative SIT market.

Nude tourism is another niche SIT market that holds billion-dollar potential for the Florida economy, particularly in rural destinations. As revealed in this study, today the state boasts an estimated:

34	NUDIST RESORTS
5,100	TOTAL ROOMS AT NUDIST RESORTS
1.2 million	ANNUAL ROOMS SOLD IN 2016
2.2 million	ANNUAL NUDIST VISITORS
22 million	ANNUAL NUDIST VISITOR NIGHTS
\$4.3 billion	ANNUAL NUDIST VISITOR DIRECT EXPENDITURE
\$7.4 billion	ANNUAL TOTAL ECONOMIC IMPACT

Regarding the potential economic impact of public nude recreation, Florida's first officially-sanctioned nude beach - **Haulover Beach in Miami** - receives some 500,000 nudist sunbathers per year earning the city \$980,000 alone just in parking fees. If just half of the sunbathers are non-residents, their total economic impact could be well over \$720 million (using Miami's average expenditure and tourism multiplier). Moreover, in a recent Zogby poll, some 28% of American adults surveyed indicated that they would consider going to a nude beach, revealing a possible untapped market for nude recreation of some **70 million Americans**.

However, **without formal recognition and support** from state, regional and local tourism and government entities, Florida may lose the economic momentum of nude tourism due to the ageing of the baby boomer generation, the current primary market. Additionally, Florida's slow acceptance of new nudist recreational destinations limits the state's attractiveness to nudists, particularly the millennial and international markets. To address these concerns, this report concludes with three recommendations to improve Florida's nudist tourism economic opportunities:

1. **RECOGNITION & EXPANSION:** VisitFlorida, local visitors bureaus and business communities need to embrace the nude tourism concept as an important niche SIT market and become advocates for promotion and expansion of clothing-optional recreation at applicable public sites.
2. **MARKETING:** Similar to recent campaigns addressing the alternative lifestyle market, VisitFlorida needs to create a focused and broad-based marketing campaign highlighting Florida's many clothing-optional opportunities.
3. **RESEARCH:** As revealed in this initial study, there is very little tourism research regarding the composition and potential of Florida's nudist market. Specific questions should be added to VisitFlorida's visitor surveys to determine demographic profile, attitudes, participation, satisfaction and expenditure.

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PREFACE

IS NUDISM IS LEGAL IN FLORIDA?

YES!

Florida's courts have drawn a clear distinction between mere nudity and lewd or lascivious behavior and have granted nudists throughout the State the right to participate in nude recreation without fear of arrest or prosecution; **mere nudity is not lewd activity, nor a crime.** In order for there to be a violation of the indecent exposure statute (§800.03, *Fla. Stat.*), there must be a "*lascivious*" exhibition of sexual organs; mere nudity alone is not a violation. *Goodmakers v. State*, 450 So. 2d 888 (Fla. 2d DCA 1984); *Hoffman v. Carson*, 250 So.2d 891 (Fla. 1971). Further, Florida law specifically provides for the establishment of public areas for the purpose of nude recreation, recognizing the legality of public nudity "in any place provided or set apart for that purpose." §800.03, *Fla. Stat.* Public lands have been set aside for clothing-optional recreation in places like North Haulover Beach (Miami), Blind Creek Beach (Ft. Pierce) and portions of Cape Canaveral National Seashore at Playalinda and Apollo Beaches.ⁱⁱⁱ

ABOUT THE SPONSORS

THE AMERICAN ASSOCIATION FOR NUDE RECREATION

The American Association for Nude Recreation [AANR] is the largest and oldest nudist-advocacy organization of its kind in North America. With roots dating to 1931, AANR has served over 200 clubs and 213,000 people throughout the United States, Canada, and Mexico. For over 80 years AANR has espoused the benefits of wholesome nude family recreation. Since the association's inception it has remained the primary mission to protect the rights of nudists in appropriate settings regardless of age, gender, marital status, religious beliefs, ethnic origin or sexual orientation.^{iv} The AANR national headquarters is located in Kissimmee, FL, near Orlando.

THE AMERICAN ASSOCIATION FOR NUDE RECREATION FLORIDA REGION

The AANR-Florida Region is a regional organization of clubs and individuals that promote the concept of social family nudism. This includes the belief in the essential wholesomeness of the human body, and the naturalness of social family nudism. Areas covered include Florida, Mexico and the Caribbean. AANR-Florida endeavors to establish, maintain and foster the establishment of public and private resorts, camps, parks, beaches and other areas for the enjoyment of nude recreation. AANR Florida boasts the largest AANR regional membership representing 16 Resort Clubs (with physical facilities like a RV park, resort, etc.) and 12 Social Clubs (local groups, some with special interests like scuba diving, biking and running).^v

LIMITATIONS OF THIS STUDY

While nude travel, leisure and recreation have been around since the dawn of mankind in all continents of the world, there are very few studies that explore the dynamics of this tourism special interest travel market. With the exception of the NEF Zogby poll, no professional studies of Florida's nudist tourism exist. With a limited budget, this report searches to uncover the broad parameters of nude tourism's contribution to local and state economies in an effort to stimulate interest in expanding the market and also conducting scientific research. This report is NOT a quantitative input-output economic analysis, but an anecdotal study reliant upon expert opinion.



I. INTRODUCTION, CAPTURING THE RISING TIDE OF TOURISM

Study Objectives

This study was contracted by the American Association for Nude Recreation Florida Region as a foundational document for economic partnership discussions with government, community and business. Through the aggregation of existing research and public information, inventorying of nudist attractions, and qualitative surveying of AANR Florida resort members, this study's goal is to paint a descriptive picture of nude tourism's structure and contribution to the Florida economy.

Florida Records a Banner Year in Tourism

In 2015 Florida recorded another banner year in tourism welcoming some 106 million out-of-state and international visitors and over 20 million in-state travelers representing nearly an 8% increase over 2014. Florida commands over 15% of all domestic travel in the US with visitors spending close to \$90 billion creating over 1.2 million jobs. Some 23% of sales tax revenues come from tourism equating to \$5 billion in revenues^{vi}. According to a 2015 interview with Governor Rick Scott:

"I am proud to announce the Sunshine State continued our record breaking success and welcomed the most visitors in Florida's history over the first half of the year. Our growing tourism industry employs over 1.2 million Floridians and is helping us meet our goal of becoming the best place in the world for jobs."^{vii}

While the overall numbers seem encouraging, it should be noted that annually Orlando commands over 60 million visitors, with Miami attracting over 14 million. When considering the top 10 Florida destinations receive 80+% of the state's overall visitation, the tourism industry may be falling short of providing balanced economic growth throughout the state, particularly in rural communities that were once dominated by agriculture.

Niche Tourism Lifts All Boats

Niche tourism refers to how a specific tourism product can be tailored to meet the needs of a particular audience to attract new markets and diversify a destination's tourism offerings. While tourism powerhouses like Orlando, Miami and Clearwater boast international, mass-tourism attractions, niche tourism helps Florida's secondary and rural destinations compete in an increasingly competitive tourism environment. Niche tourism diversifies the tourism economy, attracts visitors to small towns, and is dominated by local entrepreneurs who are more likely to hire and spend locally. Niche tourism products include history, heritage, culture, culinary, ethnic, nature, agritourism, recreation, and special events -- attributes in abundance in Florida's rural communities. Nude tourism and recreation are also excellent examples of niche tourism. Florida's clothing-optional destination resorts, social clubs and beaches attract the "special interest traveler" that is known to be more affluent, better educated, stays longer and spends more leading to an annual infusion of over \$4 billion to the Florida economy.

The Benefits of Public-Private Partnerships:

Tourism is a fragmented industry. Transportation, accommodation, food & beverage and attractions are seldom provided by one provider (except possibly a cruise ship), yet each is essential to the visitor experience at each destination. Coordination and partnership between the private sector with the local, county and state governments is essential in tourism planning, development and promotions.

II. NUDE TOURISM'S CONTRIBUTION TO THE FLORIDA ECONOMY

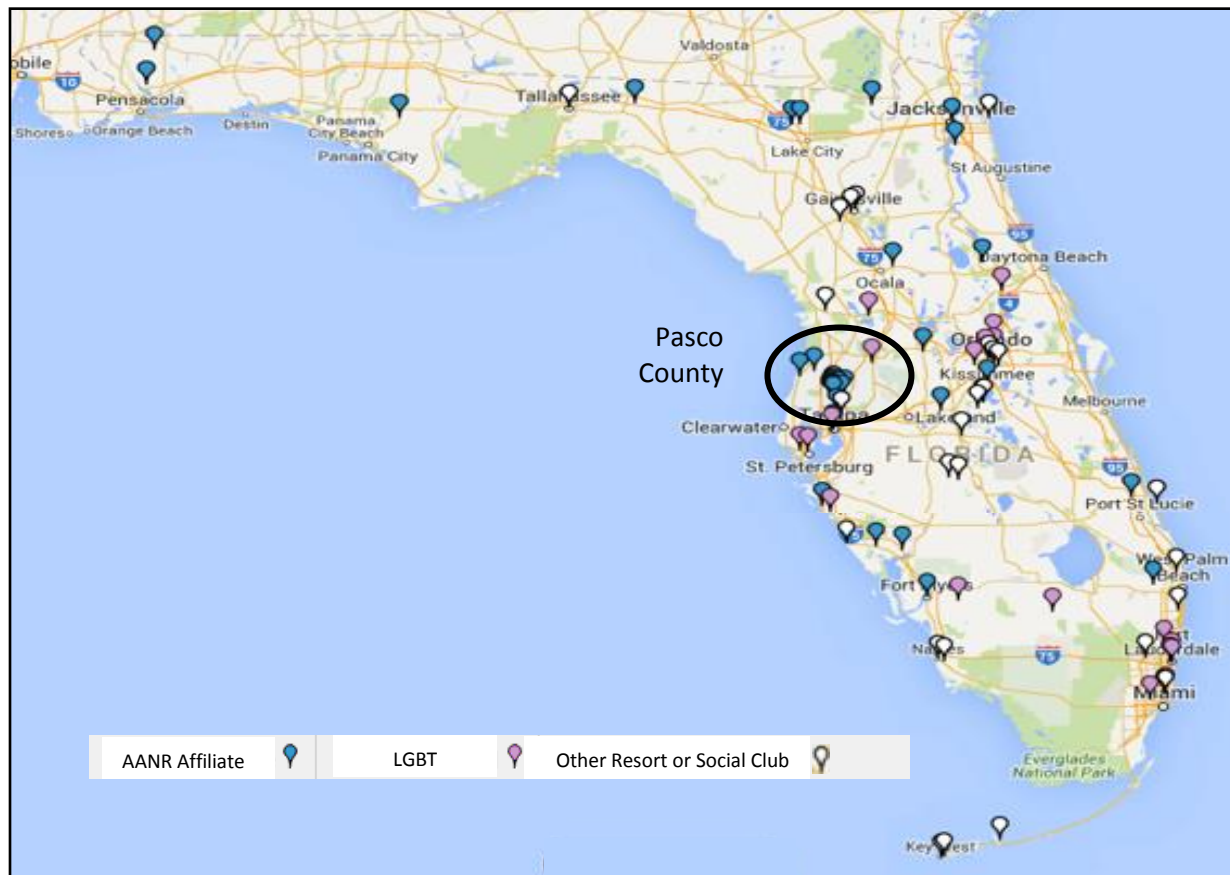
Florida is the Nudist Capital of North America

Florida's temperate climate, world-class beaches, fantastic natural and heritage sites, lively culture, reasonable cost of living, extensive attractions and facilities, and excellent access by surface and air provide important advantages for the growth of domestic and international nude tourism. Nude recreation is enjoyed all over the world, from the clothing-optional beaches of Europe and Brazil to the onsen hot springs of Japan, and is considered an important asset to a diversified tourism product. Historically, nude tourism in Florida has grown organically from beaches to social clubs to campgrounds to resorts to all-inclusive residential communities. Of all AANR regional chapters in the US and Canada, the AANR Florida Region boasts the highest membership, club facilities and tourist visitation. It is the conviction of AANR-Florida that ***"Florida has a competitive advantage over all national and international destinations to be the niche-tourism mecca for nude recreation which in turn creates excellent opportunities for broad-based economic growth."*** ^{viii}

Significant Investment in Florida Nudist Facilities

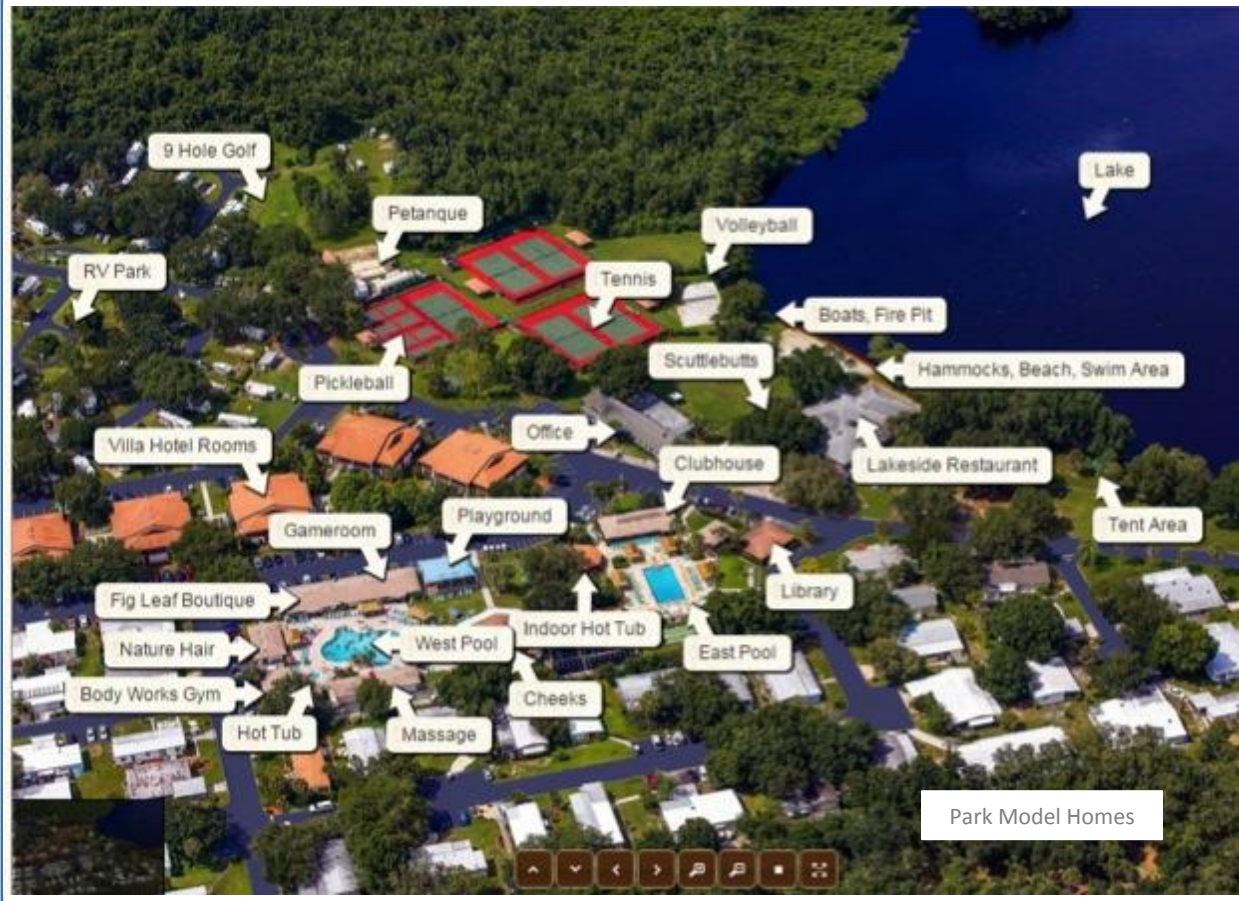
Reflective of the drawing power of Florida nude tourism, it is estimated that Florida has 34 nudist overnight properties, some 16 of which are members of AANR Florida. These properties include significant investments in campgrounds, RV parks, full-amenity resorts and nudist-residential subdivisions. As illustrated in the map below, nudist facilities are located throughout the state with Central Florida (particularly Pasco County 30 minutes north of Tampa) boasting the largest inventory of nudist resorts.

MAP OF FLORIDA NUDIST RESORTS & CLUBS^{ix}



Cypress Cove Nudist Resort & Spa, Kissimmee - A 300-acre Investment

Many misconstrue the nudist market as limited to nude sunbathing at beaches or backyard pools offering limited community economic impact. However, Florida's nudist resort clubs like the Cypress Cove Resort in Kissimmee provide an excellent example of the many sophisticated and integrated investments in Florida. Opening in the 1960s as "basically a lakefront with a windscreen," the 300-acre property offers four types of accommodations: 225 mobile homes, 84 villa hotel rooms, 97 RV spaces, and 100 lakeside tent camping spaces. Recreational facilities include executive golf, tennis, pickleball, pétanque (bocce ball) and boating. Two swimming pools complement the spa, hair, boutique and restaurant facilities. Cypress Cove employs 75 people and recently completed a full renovation of their 84 villa suites.^x



Economic Impact of Resort Members, Day Visitors and Social Clubs

Nudism thrives on social interaction, and providing this environment gives nudist resorts a competitive advantage over the typical hotel. An important component of nudist-resort revenues come from memberships and day visitors. A typical annual membership cost is \$300-\$500, with daily fees ranging from \$10-\$30. According to AANR resort-owner interviews, a significant portion of members are from the local community, with many choosing to live in that community due to its location near the nudist resort. Nudist "social clubs" also offer additional partnership and economic diversification opportunities. Florida boasts over 30 nudist social clubs, with 12 clubs as members of AANR-Florida. Social clubs are a member-based group of nudists with specific interests who often travel together providing an excellent source of group reservations for nudist resorts. AANR membership promotes the interaction between social groups and nudist resorts and extends discounted resort membership and entrance fees to its members.

Nude Public Recreation – A Potential Gold Mine for Florida



North Haulover's once-contested clothing-optional boundaries are now embraced by visitors, government and the local business community. **This year the long-time naturist advocates for N Haulover are celebrating 25 years as a clothing-optional beach proving the success of nudist organizations partnering with the community and government to create a win-win situation for all.** A review of ratings on TripAdvisor.com reveal a very high visitor satisfaction rating of 4.5/5 stars.^{xi}



A key component of N Haulover's success and community acceptance is the B.E.A.C.H.E.S Foundation Institute Beach Ambassador program addressing the three most common concerns of a clothing-optional beach: 1) nudity outside clothing-optional boundaries; 2) inappropriate attention to sunbathers (staring, stalking, photography); 3) lewd / lascivious sexual behavior. Beach Ambassadors are trained to address these concerns and work closely with the beach police and lifeguards, and are often sources of useful safety and community information.^{xii}

N. Haulover Miami - The World's Most Popular & Profitable Nudist Beach?

Statistics below from the Miami – Dade County Parks Department for only the N Haulover parking lot serving the clothing-optional beach reveals an estimated 485,000 annual visitors spending nearly \$1 million on parking fees alone.^{xiii}

Fiscal Year (Oct. - Sept)	North Lot Total Parking Revenue	# of /vehicles	# of average visitors	Parking Fee
FY 15-16	\$977,228	150,989	483,165	\$6 / \$7 wknd
FY 14-15	North Parking Lot Under Refurbishment			
FY 13-14	\$761,416	135,722	434,310	\$6
FY 12-13	\$587,446	104,833	335,466	\$6
FY 11-12	\$581,484	102,978	329,530	\$6

While no origin, visitation and expenditure data is available for Haulover, the B.E.A.C.H.E.S Foundation Institute, using Miami- Dade Parks Department estimates for all 4 of Haulover Park parking lots, **estimated that annual visitation to N Haulover at approximately 1.4 million sunbathers (both local and visitor) with an economic impact of over \$1 billion** (avg stay = 5.8 nights / \$265 per day expenditure).^{xiv} The success of the N Haulover Clothing Optional Beach should compel state and local tourism authorities to conduct further research on visitor profile, motivation, duration and expenditure to understand the primary visitor markets and their extended economic impact. **The beach's success should also encourage destinations throughout Florida to assess and promote their potential nudist recreation sites.**

Over \$4 Billion in Direct Nudist Visitor Spending in Florida

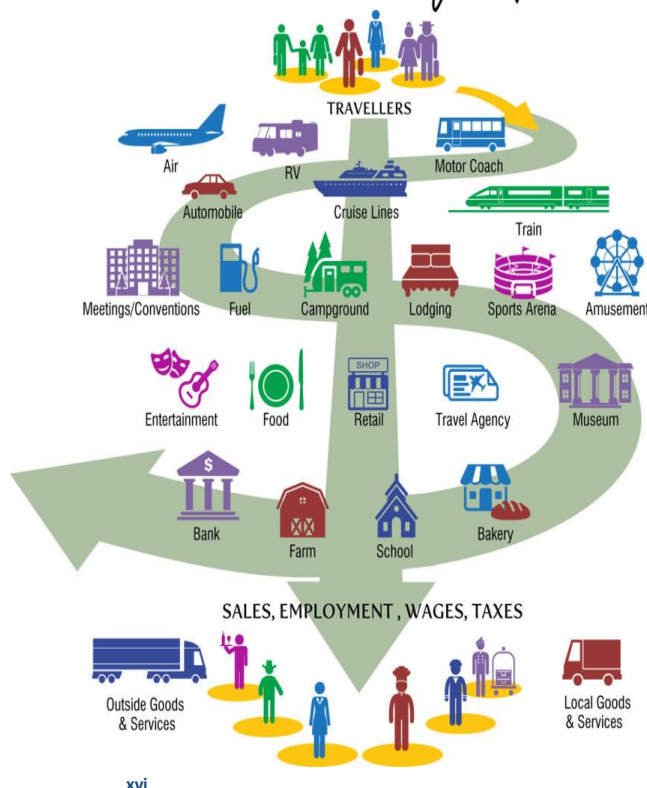
No studies exist quantitatively and longitudinally surveying the demographic profile, motivations, travel habits and expenditures of Florida's nudist visitors and recreationists. The best portrait we can draw at this point is to inventory the state's nudist accommodations then use conservative estimates on occupancy, people per room, nights stay and daily expenditure using expert opinion from nudist resort owners cross checked with existing data about the "average visitor" from Visit Florida. These figures should be viewed as a very conservative starting point to be tested by further study over the course of several years. Within this format, the overall economic impact of nude tourism to Florida is estimated as follows:

34	NUDIST RESORTS inclusive of the wide variety of accommodation types including tent spaces, RV campgrounds, hotel rooms, villas, cabins, condos and housing communities with short-term rentals. Some resorts contain a combination of all the above forms of accommodation, all of which pay local tourism development taxes. Not included are the full inventory of LGBT accommodations that may offer clothing-optional environments.
5,100	NUDIST RESORT ROOMS / CAMP SPACES conservatively estimated at 150 rooms per resort due to the counting challenge of the wide variety of nudist accommodation types (tent, RV, hotel room, cabin, villa, mobile home). As an example, Cypress Cove Resort alone has 225 mobile homes (multiple bedrooms); 84 suite villas; 97 RV spaces and 100 tent spaces which could be counted as well over 500 rooms.
1.2 million	ANNUAL NUDIST RESORT ROOMS OCCUPIED at a 65% occupancy reflective of occupancies at beach (rather than attraction) destinations more dependent upon climate and a strong winter season and a variable summer season.
2.2 million	ANNUAL NUDIST RESORT VISITORS at 1.8 visitors per occupied room reflecting a predominant couples' orientation to nudist resorts.
22 million	ANNUAL NUDIST RESORT VISITOR NIGHTS estimating that visitors stay an average of <u>10 days</u> . This is very conservative considering that AANR resorts estimate that 55% of their visitors are from out of state, Canada and international, and a large percentage of these visitors stay from several weeks to several months.
\$3.3 billion	ANNUAL NUDIST RESORT VISITOR DIRECT EXPENDITURE when multiplying annual visitor nights by a very conservative \$150 total expenditure per day (per daily expenditure in Florida averages \$220-\$260).
\$1.0 billion	ANNUAL NUDIST NON-RESORT VISITOR DIRECT EXPENDITURE of visitors that do not stay at a nudist resort, but whose trip to Florida includes nudist recreation at resorts (day visitors), social clubs and beaches as a primary motivation. Estimated 800,000 non-resort nudist visitors spending 5 days @\$250/day. To note, Miami's Haulover nudist beach alone attracts over 500,000 visitors annually.
\$4.3 billion	ANNUAL DIRECT NUDIST VISITOR ECONOMIC IMPACT when combining both types of nude visitors (those that stay a nudist resorts, those that stay at other accommodations and partake in nude recreation).

Over \$7 Billion in Direct Plus Secondary Nudist Visitor Economic Impact

DYNAMIC CONNECTIONS

Tourism adds value every step of the way!



The true economic impact of tourism is not only measured in the direct revenues received by tourism businesses, but also includes how these businesses then circulate their tourism revenues within the local economy to pay wages, vendors, utilities, etc. This is called the “indirect multiplier,” which can be quite high if the revenues stay within the local economy (such as hiring locals and buying local produce) or quite low if products and services are imported. Additionally, these indirect tourism revenues continue to circulate through the local economy via the “induced multiplier” when those getting paid by tourism businesses then continue to spend tourism revenues in the economy (employees using wages to buy groceries and pay bills).^{xv} Adding the indirect and induced multipliers together forms the tourism secondary expenditure multiplier to be added to direct visitor expenditure to arrive at a total economic impact figure. Using the estimate from the previous page of \$4.3 billion in direct nudist visitor expenditure yields the following estimates:

\$7.4 billion **ANNUAL TOTAL ECONOMIC IMPACT OF NUDIST VISITORS** using the total direct expenditure estimate times a 1.5 secondary expenditure multiplier (indirect plus induced spending).

An Additional Billion Dollar Industry? Visitation Leading to Home Purchases



Like many frequent visitors to Florida, most long-term AANR-Florida members cite their reason for relocating to Florida and buying a house at their club or the nearby community was due to their tourism time spent at a resort club or clothing-optional beach. In fact, nudist residential communities have become so popular in Florida that in 2013 the TLC channel debuted the *Buying Naked* reality show: *Pasco County, Florida is home to one of the world's largest nudist communities and real estate agent Jackie Youngblood has proven to be the authority figure on finding prime real estate for her clothing-optional clientele.*^{xvii}

The Growing Economic Impact of Nude Cruises



Nude cruising from private yachts to luxury liners is also a growing SIT market segment. Carnival Cruiseline has embraced nudist-only cruises heralding another step toward mainstreaming the nudist tourism movement. Florida-based Bare Necessities cruise organizer reports that “the number of nude cruises has increased from one 500-passenger ship in 1992, to 45 cruises and 30,000 people in 2010, with the number of those open to the idea growing each year.”^{xviii}

CARNIVAL VICTORY – BIG NUDE BOAT 2018

Miami-Bahamas-Dominican Republic-Curacao-Aruba. The Carnival Victory hosts just under 2,800 guests and 1,100 crew in a variety of staterooms ranging from simple Interior to spacious Premium Balconies! The Carnival Victory is 893 feet long with a total of 13 decks hosting the staterooms, dining areas, and areas for the endless onboard activities.

Even though the cruises travel outside of Florida, homeport operations and supply functions provide significant economic impact to the state.

Attracting the Affluent LGBT Market

With the legal sanctioning of same-sex marriages by the US Supreme Court, American attitudes toward LGBT lifestyles have changed radically over the last 5 years. Now, nearly all states and major tourism destinations view LGBT visitors as one of the fastest-growing and most-affluent target markets and are investing considerable marketing and investment efforts to attract this market.^{xix} Ft Lauderdale provides a great example as one of the only destinations to begin marketing to the LGBT travel segment some 20 years ago. Now that niche market accounts for over \$1.5 billion in local spending annually^{xx} and other destinations throughout the country are rushing to catch up. According to AANR-Florida, the LGBT market presents excellent potential for the growth of clothing-optional resorts and recreation. While many gays are members of AANR, they also have their own nudist federation, the Gay Naturists International (GNI).^{xxi}

Visit Florida’s Extensive LGBT Website Campaign^{xxii}

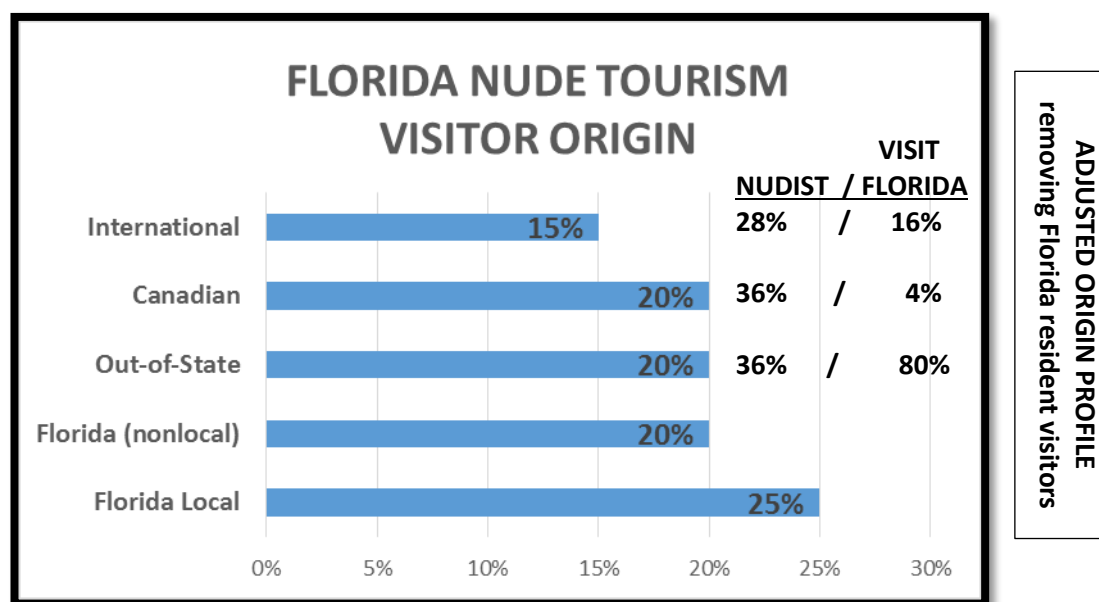


III. UNDERSTANDING FLORIDA’S NUDIST TOURISM VISITOR

Since AANR Florida properties collect very limited demographic data, and many properties were hesitant to share confidential financial information, the following data is anecdotal based on interviews with several leading resorts and campgrounds.

Florida Nudist Tourism Visitor Profile

According to the AANR Florida survey, nearly half of nudist resort visitation is by Florida residents (45%), including community locals (25%) and nonresidents (20%). The resort managers indicate that many of their club’s local members were once seasonal visitors that chose to relocate to Florida near their favorite club. **This is important for several reasons: 1) the economic impact of relocating to Florida is considerable, not only including the purchase of a residence and associated property taxes, but also of year-round spending in the local community; 2) high repeat visitation means not only high satisfaction, but returning year after year keeps tourism expenditure in Florida; and, 3) high local visitation makes good business sense against seasonality and economic downturns, and provides a strong local connection with the community for service and lobbying.**



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Also of considerable interest is the high visitation of international visitation to nudist resorts. Since Visit Florida’s statistics don’t include tourism visitation by Florida residents, the resort managers’ visitor profile has been adjusted above (table on right). This reveals that when only counting nonresident visitors, Florida as a whole receives some 80% of their visitors from the U.S. and 20% internationally. However, according to nudist resort managers, of their nonFlorida market, some 64% are international and only 36% are domestic. The inference that can be drawn here is that there’s significant international interest in nudist tourism, which is confirmed by the resort manager’s opinions that other Western countries are less conservative on their views of public nudity and search for destinations where they feel comfortable with this type of tourism. In fact, Pasco County hosted a German documentary on nudist tourism options in Florida.^{xxiv} Secondly, these figures indicate that there could be a large, untapped US domestic market for nudist tourism.

LENGTH OF STAY: While total visitors entering a destination is the most common metric used to gauge tourism performance, TOTAL VISITOR NIGHTS (visitors * avg nights stayed) is a much more descriptive metric. A good example is a Caribbean destination counting all cruise visitors (day tourists) together with overnight visitors - obviously the overnight visitors stay considerably longer, and spend considerably more. Typical research methodology is to survey the average length of stay at different times of year for a geographic market then multiply it by that market's total visitor arrivals.

FLORIDA NUDIST VISITOR PROFILE		
ORIGIN	% TOTAL	AVG STAY
Local	25%	2-3nts
Florida (nonlocal)	20%	2-7nts
Out-of-State	20%	wk-4mth
Canadian	20%	wk-6mth
International	15%	wk-4mth

All AANR Florida properties surveyed noted similar average stay range across geographical markets, but due to lack of data there were large variances in determining a definitive length of stay for each market. Locals were most often day or weekend visitors with nonlocal Florida residents staying for long weekends or up to a week. Most resorts reported a high-proportion of full-time visitors throughout the winter in their RV campgrounds and park-model mobile home communities. While these long-term visitors may have a much lower average daily expenditure, their total expenditure throughout their stay is rather high. While this component needs much more definitive research, we used a very conservative estimate of 10 days as the average nudist visitor length of stay.



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AGE: In a 2014 article, The Economist quoted Bob Morton of the Naturist Action Committee regarding the average nudist visitor profile: "One reason for the rise in luxury nudist travel is that customers are ageing. Nudists tend to be older, richer and whiter than the national average, and they travel mostly in romantic pairs."^{xxvi} The AANR Florida properties surveyed had similar findings – over 60% of their guests were predominantly retired, Caucasian, and "paired." AANR officials at the national and regional level recognize a challenge in that even though the American population will proportionally move toward retiree age (as depicted above), the main market of Baby Boomers will become less mobile and succeeding generations have less exposure and inclination to public nudity.

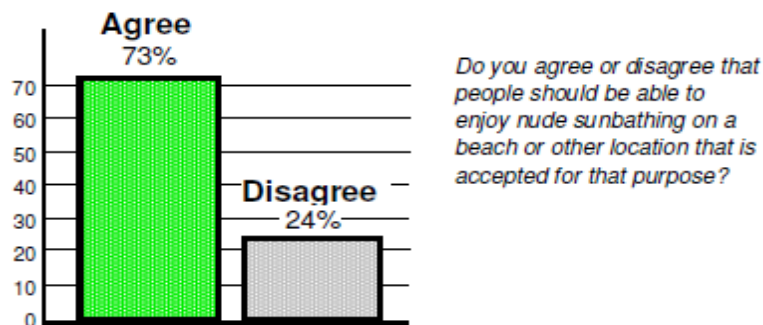
SEASONALITY: One of the biggest problems facing the Florida tourism industry (outside of Orlando) is the highly season nature of their out-of-state visitors, particularly the Canadian market. The peak season from New Year's to mid-April can comprise up to 70% of visitation to some AANR-FLORIDA properties as winter visitors head back to the cooler northern climes. Fortunately, Florida's nudist resorts can attract some 40% of their visitation from within the state to make up for this loss, however much of that revenue is solely weekend traffic.

IV. EXPANDING FLORIDA'S NUDIST TOURISM OPPORTUNITIES

Capitalize on Floridians' Support of Nudist Recreation

Two primary reasons cited by community leaders against expanding and promoting nudist tourism in Florida include: 1) it's not legal, and 2) it won't be accepted by residents. Addressing these concerns this report highlighted in the Preface that public nudism is legal and protected by law absent "lewd and lascivious" behavior. Regarding resident acceptance, a 2015 poll of over 800 Florida adult respondents by Zogby Analytics for the Naturist Education Foundation [NEF] revealed the following positive attitudes of Florida and US residents toward nude recreation:^{xxvii}

Strong Support for Nude Sunbathing

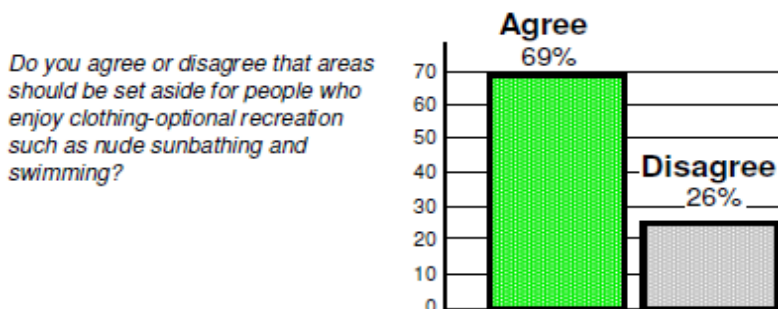


NEF-ZOGBY NATIONAL POLL (2015)

Support Nude Sunbathing

AGREE:	65%
DISAGREE:	29%

Public to Government: Set Aside Clothing-Optional Areas

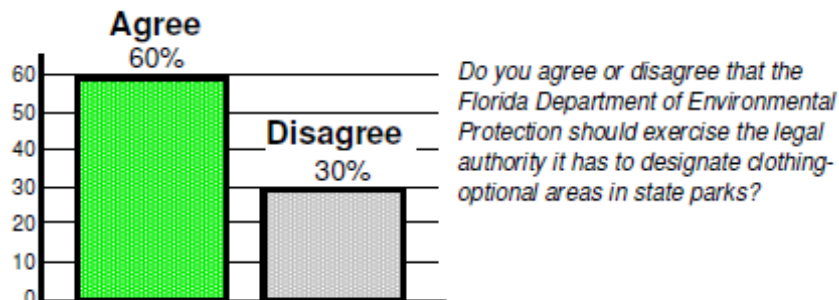


NEF-ZOGBY NATIONAL POLL (2015)

Set Aside Clothing-Optional Areas

AGREE:	57%
DISAGREE:	34%

State Parks Should Have Clothing-Optional Areas



NEF-ZOGBY NATIONAL POLL (2015)

State Park Clothing Optional Areas

AGREE:	69%
DISAGREE:	19%

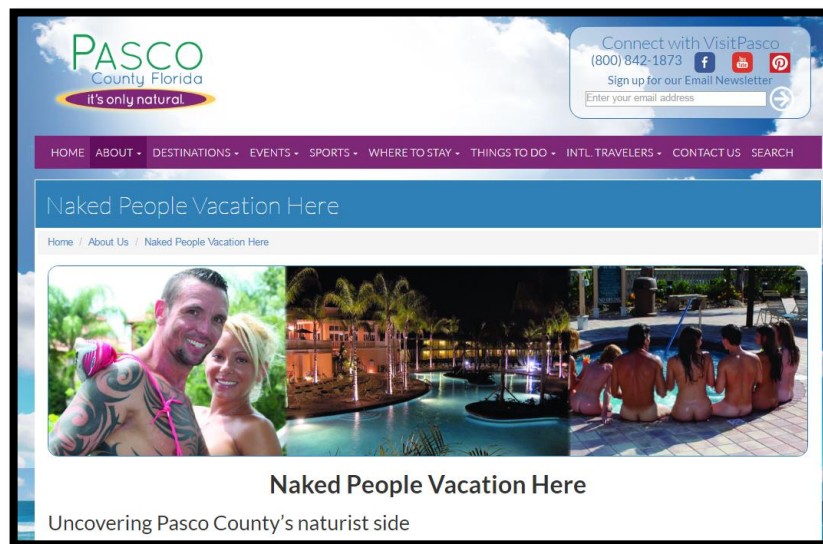
Unmet Demand: 5 Million Potential Florida Naturists / 70 Million National

The NEF/Zogby polls also reported that some 31% of the Floridians (5 million) and 28% of Americans (70 million) would consider going to a nude beach if it was safe and legal, revealing a significant unmet demand for nude recreation at appropriate public sites.

Of particular interest, the Zogby national poll indicated the **18-29 year-old segment reported a 43% likelihood of considering a nude beach.**^{xxviii} When considering that the millennials are the future of Florida tourism, this is an important finding warranting further research, marketing, and product development throughout the state.

CONCLUSION / RECOMMENDATION: While there was some hesitancy toward addressing the alternative-lifestyle segment a decade ago, these special interest tourism markets are now accepted, mainstream, economically lucrative and an important component of a diversified and open community. **Community leaders should keep an open mind when approached with nudist business and recreational opportunities.**

Partnerships Begin at the Local Level – Pasco County as the State’s Role Model

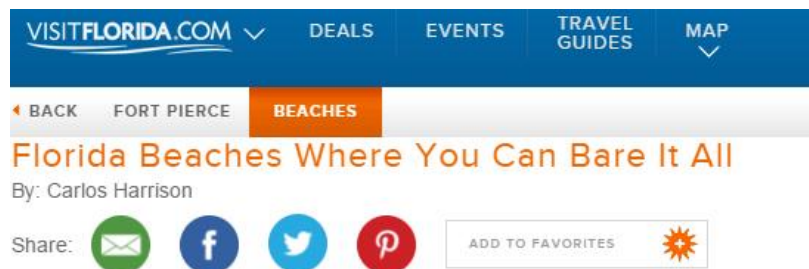


Pasco County just north of Tampa, Florida’s leader in nudist tourism, provides several excellent examples of how counties can support nudist tourism. According to Mr. Ed Caum, Pasco County tourism manager, the 7 clothing-optional tourism / residential communities are the county’s most unique selling points: “We don’t have the brilliant beaches like Clearwater or built attractions like Orlando. The county’s nudist resorts help fill my tourism marketing coffers and are also great industry and community participants.” Mr. Caum recommends the following strategies for destinations and promoters of nudist tourism:^{xxix}

HOW DESTINATIONS & RESORTS CAN SUPPORT NUDIST TOURISM

- Work closely with county civic, business and community leaders to understand that nudist tourism and recreation is not lewd or lascivious and is in fact family oriented
- Ensure naturist offerings are prominently promoted on the destination website and promotional materials
- Encourage a leader of the nudist resort community to become an active member on the county’s tourism development council
- Identify potential public sites for nudist recreation and facilitate feasibility studies for parks’ department consideration
- Encourage nudist resorts to apply for event-sponsorship funding to market nudist special events like the 5k runs, concerts, craft fairs, etc.
- Cross-pollinate with the Chamber of Commerce, the community’s business nexus, by participating on committees, hosting events, volunteering, etc.

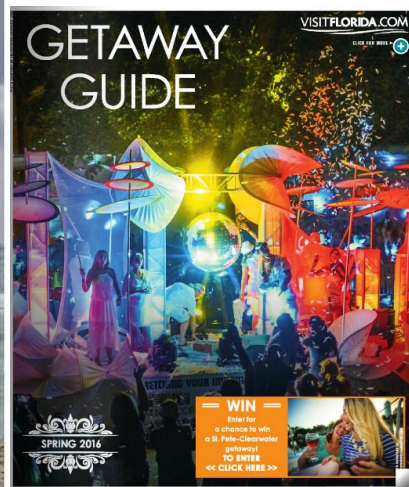
Statewide – Representation & Support from Visit Florida is Essential



It seems fitting that the Sunshine State would be a magnet for sun worshipers from around the world. But it's more than just a place for naturists to gather, says Ralph Collinson, president of the American Association for Nude Recreation, Florida Region. It's *the* place.



A New Jersey couple relaxes on this clothing-optional portion of Haulover Beach. -



VISIT FLORIDA
LGBT
ELECTRONIC
TRAVEL GUIDE

AANR needs to
produce a
similar guide
for Visit
Florida

RECOMMENDATIONS

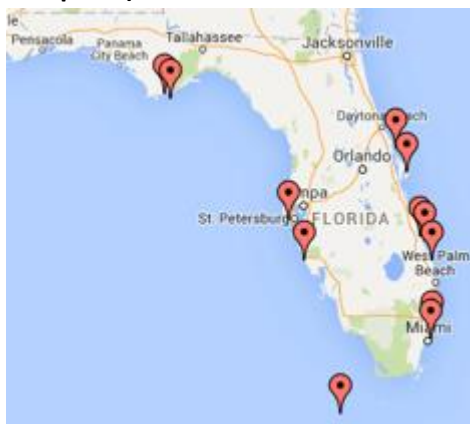
- Distribute this report widely among the Visit Florida board, employees and committees to begin strategic-planning discussions focused on Florida becoming the nudist capital of the world.
- Immediately create a nudist "Getaway Guide" on www.visitflorida.com similar to the above that provides a comprehensive narrative and linkages to the state's nudist tourism and recreation attractions.
- Immediately include relevant nudist tourism questions to the state's visitor research surveys. Two key questions would be similar to the following:
 - 1) Did you participate in any nudist lodging or recreation while in Florida?
 - 2) If not, would you consider going to a clothing-optional beach or resort if it was safe and legal?
- Conduct a comprehensive visitor profile study at North Haulover clothing-optional beach.
- Support the membership of AANR-Florida leaders on relevant Visit Florida committees.
- Add a "Becoming the Nudist Tourism Capital of the World" session at the next Florida Governor's Conference on Tourism.
- Approve of collaborative marketing grants from AANR-Florida to improve their website and other marketing programs.
- Encourage nudist travel documentary film production throughout Florida.

APPENDIX I: INVENTORY OF FLORIDA'S CLOTHING-OPTIONAL BEACHES

"The popularity of clothing-optional beaches in Florida and around the world is growing at a dramatic rate, and there is nowhere near enough supply to satisfy the demand," says John Schlinz, Free Casperan Beach.



Following is a list of Florida beaches (by popularity) where clothing optional is officially or unofficially accepted (weekend visitation estimates are from AANR-FLORIDA^{xxx}):



N Haulover Beach (N Miami Beach)

Status: Officially recognized by the Miami-Dade County.

Advocate group: B.E.A.C.H.E.S. ^{xxxi}. Celebrating 25 years as clothing optional. Rated one of the best clothing-optional beaches in the world. Weekend visitation estimate: 5,000.

Playalinda Beach (Canaveral National Seashore)

Status: Unofficial, but recommended to use the north end of the park outside of Brevard County. Advocate Group: Central Florida Naturists^{xxxii}. Weekend visitation estimate: 1,200.

Blind Creek Beach (Hutchinson Island in Fort Pierce)

Status: Official. Advocate group: Treasure Coast Naturists - Friends of Blind Creek Beach^{xxxiii} still working on official recognition. Weekend visitation estimate: 600.

Apollo Beach (Canaveral National Seashore)

Status: Formal agreement with CNS in yr2000, southernmost end. ^{xxxiv} Advocate group: Naturist Action Committee. Groundbreaking agreement in 2000 with the Canaveral National Seashore. Weekend visitation estimate: 600.



Caspersen Beach (Venice / Sarasota)

Status: Unofficial, yet under petition to local government. Advocate group: Free Casperan Beach^{xxxv}.

Hobe Sound Beach (Jupiter Island)

Status: Unofficial.

Hickory Preserve (Lee County)

Status: Unofficial.

Passage Key (Island off the entrance to Tampa Bay)

Status: Unofficial, need boat to get there.



Clothing Optional Beaches Rated Highly

Consumer-generated travel reviews on TripAdvisor are an excellent measure of tourist satisfaction, and are also an essential element in attracting customers. The high ratings and supporting comments lend great credibility to the clothing-optional beach as a primary regional tourism asset.^{xxxvi}

“Fabulous clothing optional beach and awesome food truck”

NEW



Reviewed 2 days ago



via mobile

I have visited this beach many times. It is in 2 sections. One is a regular beach and the other is clothing optional (look for the pink lifeguard hits). I hadn't been to a clothing optional beach before my first visit, so was a little apprehensive. Once I arrived I found it to be friendly and there was no pressure to shed any clothing you weren't comfortable removing. People here are friendly and no one judges you. It's a great freeing experience and is a wonderful feeling. Take a sun shade as it can get very hot and you won't want to get sun burnt. There is umbrella, sun canopy (sun tents) and sun lounge rental.

Don't miss the awesome food truck. Food and drinks as reasonably priced for the location and I've never had a bad meal from them.

There's bathrooms and showers nearby and it's in a great location. If you're going to be a regular visitor I'd advise to download the pay by phone app as the lines to pay for parking can be crazy when it's busy.

Take your coolers and spend the day. There's everything you need nearby and the water is clean and inviting.

Visited January 2017

APPENDIX II: ENDNOTES

- ⁱ Photo credit to Cypress Cove Resort, see <http://www.cypresscoveresort.com/activities/swimming/>
- ⁱⁱ Fort Lauderdale LGBT Marketing. See <https://skift.com/2015/07/01/how-to-improve-lgbt-tourism-marketing-efforts-according-to-a-city-that-knows/>
- ⁱⁱⁱ Legal language provided by Jim Wulchak, president of AANR-Florida
- ^{iv} About AANR. See <https://www.aanr.com> for extensive background and membership information.
- ^v About AANR Florida Region. See <http://www.aanr-florida.org/>
- ^{vi} Visit Florida statistics. See <http://www.visitflorida.org/resources/research/>
- ^{vii} Governor Rick Scott interview. See <http://www.visitfloridablog.org/?p=13626#more-13626>
- ^{viii} Interview with Ralph Collinson, AANR-FLORIDA president, 10 June 2015
- ^{ix} Florida Nudist Resort Map. See <http://www.zeemaps.com/view?group=792980&x=-83.5&y=28.4&z=10>
- ^x Cypress Cove Nudist Resort, interview with CCNR general manager. See <http://www.cypresscoveresort.com/>
- ^{xi} Trip Advisor customer reviews, retrieved 24 Jan 2017 from https://www.tripadvisor.com/Attraction_Review-g34067-d274006-Reviews-Haulover_Beach_Park-Bal_Harbour_Florida.html
- ^{xii} B.E.A.C.H.E.S. Foundation Ambassador Program. See <http://www.beachesfoundation.org/ambassadors.html>
- ^{xiii} Haulover Parking Statistics. Email from Hernandez, Christopher (MDPR) hern00@miamidade.gov Sent: Monday, June 29, 2015 4:56 PM
- ^{xiv} B.E.A.C.H.E.S. Foundation Stats. See: <http://sffb.com/pdfs/hauloverstats.pdf>
- ^{xv} The Michigan Study reflects the different approaches to tourism multipliers; see <https://msu.edu/course/pr/840/econimpact/multipliers.htm>
- ^{xvi} Tourism Economic Impact Graphic. Source: <http://valueoftourism.ca/economics-of-tourism/real-numbers-real-impact/>
- ^{xvii} Buying Naked TLC Channel. See: <http://www.tlc.com/tv-shows/buying-naked/>
- ^{xviii} Clothing Optional Holidays. See: http://www.dailymail.co.uk/travel/travel_news/article-3087772/Towels-chair-CEO-passengers-surprising-dress-code-dinner-bare-truth-growing-trend-naked-cruising.html
- ^{xix} Visit Florida LGBT Travel. See: <http://www.visitflorida.com/en-us/articles/2007/november/738-gay-and-lesbian-florida-travel.html>
- ^{xx} Ft Lauderdale LGBT Campaign. See <https://skift.com/2015/07/01/how-to-improve-lgbt-tourism-marketing-efforts-according-to-a-city-that-knows/>
- ^{xxi} Gay Naturists International website. See: <http://gaynaturists.org/>
- ^{xxii} Visit Florida LGBT Website Campaign. See: <http://www.visitflorida.com/en-us/topiclanding.gridview.html?t=lgbt>
- ^{xxiii} Visit Florida Tourism Fact Sheet.
- ^{xxiv} German Nudist Travel Documentary. See: <http://www.tampabay.com/news/humaninterest/film-crew-following-german-couple-on-nudist-vacation/2182830#>
- ^{xxv} 70 is the New 60. See: <http://www.nationalparksonline.org/wp-content/uploads/2011/01/Y-Partnership-Portrait-of-American-Travelers-Highlights.pdf>
- ^{xxvi} Economist article on nude travel. See: <http://www.economist.com/news/united-states/21606292-right-bare-arms-legs-and-other-body-parts-nudists-cruises>
- ^{xxvii} The Naturist Education Foundation [NEF] commissioned Zogby Analytics poll of 804 Florida adults in November 2014. The margin of error is ± 3.5 percentage points with a 95% confidence interval. See http://naturisteducation.org/nef.2015.us.poll/NEF_2015_FL_Poll_rev_A.pdf
- ^{xxviii} NEF Zogby National Poll, p 27. See: http://naturisteducation.org/nef.2015.us.poll/NEF_2015_US_Poll_in_N_magazine_34.4.pdf
- ^{xxix} Interview with Mr Ed Caum, Tourism Manager – Visit Pasco, 23 March 2016
- ^{xxx} Interview with Ralph Collinson, AANR Florida.
- ^{xxxi} N Haulover Advocate, B.E.A.C.H.E.S. Foundation. See: <http://www.beachesfoundation.org/main.html>
- ^{xxxii} Playalinda Beach advocate, Central Florida Naturists. See <http://playalinda.blogspot.com/2012/01/cfn-playalinda-blog-re-activated.html>
- ^{xxxiii} Blind Creek Beach advocate, Treasure Coast Naturists. See <http://www.treasurecoastnaturists.org/>
- ^{xxxiv} Apollo Beach Advocate, Naturist Action Committee. See: http://naturistaction.org/Success_Stories/Apollo_Beach_2000/apollo_beach_2000.html
- ^{xxxv} Casperan Beach advocate, Free Casperan Beach. See: <https://www.change.org/p/stop-the-unnecessary-harassment-of-skinny-dippers-on-caspersen-beach-because-of-invalid-and-unsupported-complaints>

^{xxxvi} N. Haulover Beach Tripadvisor.com review. See:

https://www.tripadvisor.com/Search?geo=28930&pid=3826&typeaheadRedirect=true&redirect=&startTime=&uiOrigin=&q=nude+beach&returnTo=_2F_&searchSessionId=D3E7880FB4D22D6C5C370C9996ADEA961479924141191sid

ABOUT THE REPORT AUTHOR

John Heather, MIM, currently teaches international tourism and hospitality management at Saint Leo University near Tampa, FL and is a member of the Pasco County Tourism Development Council. He spent 14 years on Guam, America's Gateway to Asia, expanding the DFS duty-free retail empire, managing the Guam Visitors Bureau market research department, and chairing the International Tourism Department at the University of Guam. John also taught international tourism and community development at Arizona State University where he worked closely with Native American communities to collectively program and market their cultural and natural attractions. Over the last decade John's USAID / UN assignments in destination development, private-sector engagement and economic growth have taken him to Mongolia, Sri Lanka, Indonesia, Iraq and Afghanistan. John earned a master of international management degree majoring in Japanese business from the Thunderbird School of Global Management in Glendale, AZ, and a BA in economics from the University of Colorado, Boulder. He was born and raised in Newport Beach, CA.

Ms. Raisa Alstodt, Saint Leo University graduate assistant, assisted in the compilation of Florida's nudist tourism resort inventory.