

Impact of Tourism on Tampa & Hillsborough County 2010



Presentation Outline

- Research as a Marketing Tool
- Review of research process
- 2010 Results
 - Visitor Numbers & Expenditures
 - Visitor Profile
 - Visitor Origin Markets
 - Key Industry Data

Type of Research Available

- Smith Travel Research
 - Hotel/Motel Data on a monthly basis by hotel sub-market
 - Also have past day reports by hotel sub-market
- Visit Florida
- United States Travel Association
- Destination Marketing Assn. International
- Tampa Bay & Company
 - www.visittampabay.com/research

2010 Research Presentation

Bonn Marketing Research Group
Dr. Mark Bonn, PhD



BMRG Data Interpretation

- **Custom Model**

- Visitor market profiles
- Visitor estimates and estimated expenditures
- Length of stay
- Accommodation type
- Bed tax revenues
- Department of Labor statistics
- Lodging occupancy data
- Lodging average daily rate data
- Expenditure data from onsite interviews
- U.S. Department of Commerce customized economic multiplier model

BMRG Results

- **Cross Check**

- State
- Federal
- Industry Associations

- **Reporting Schedule**

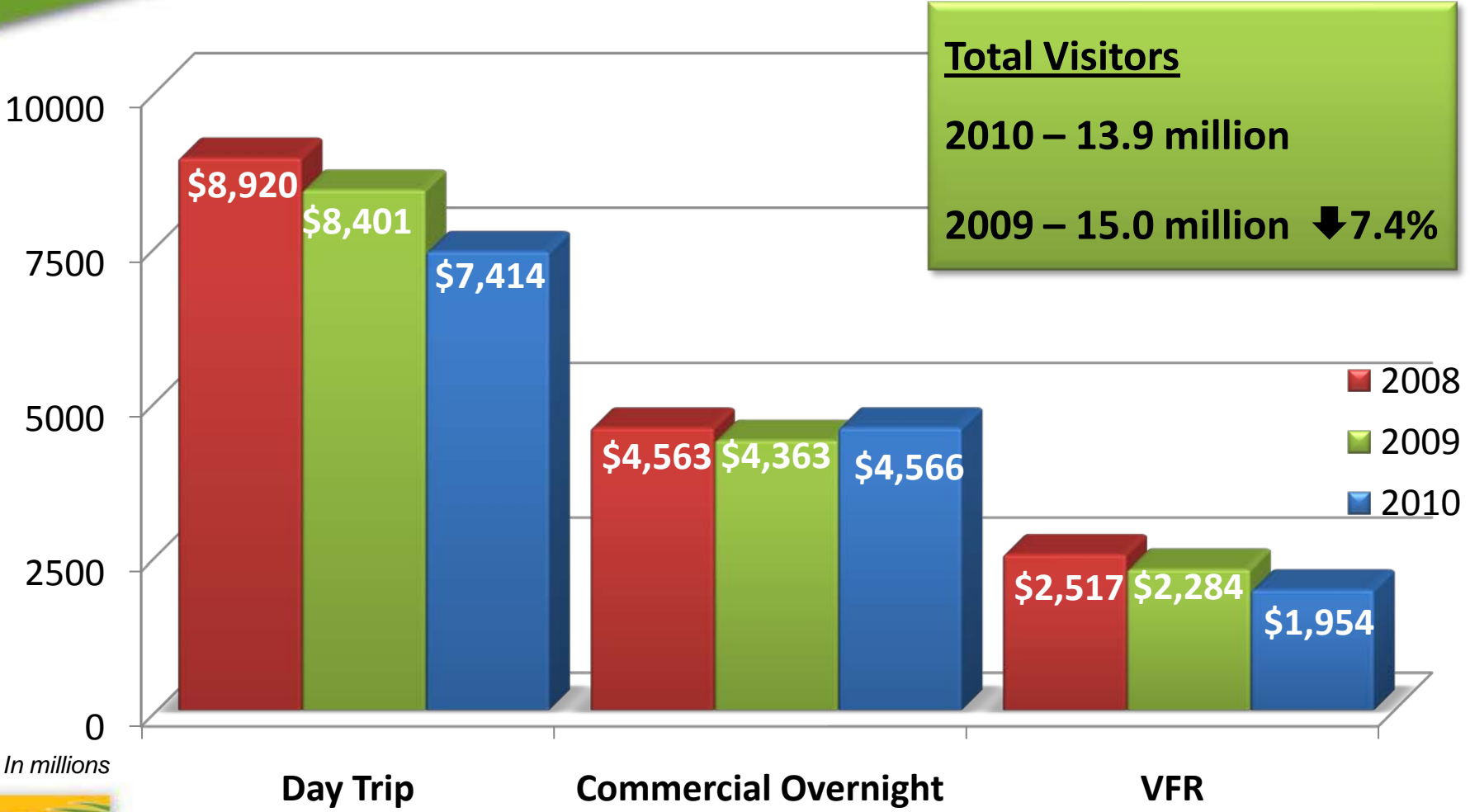
- Monthly visitor statistics
- Quarterly
 - key findings
 - indicated actions
 - on-site strategic interpretation
- Yearly industry application session

BMRG Methodology

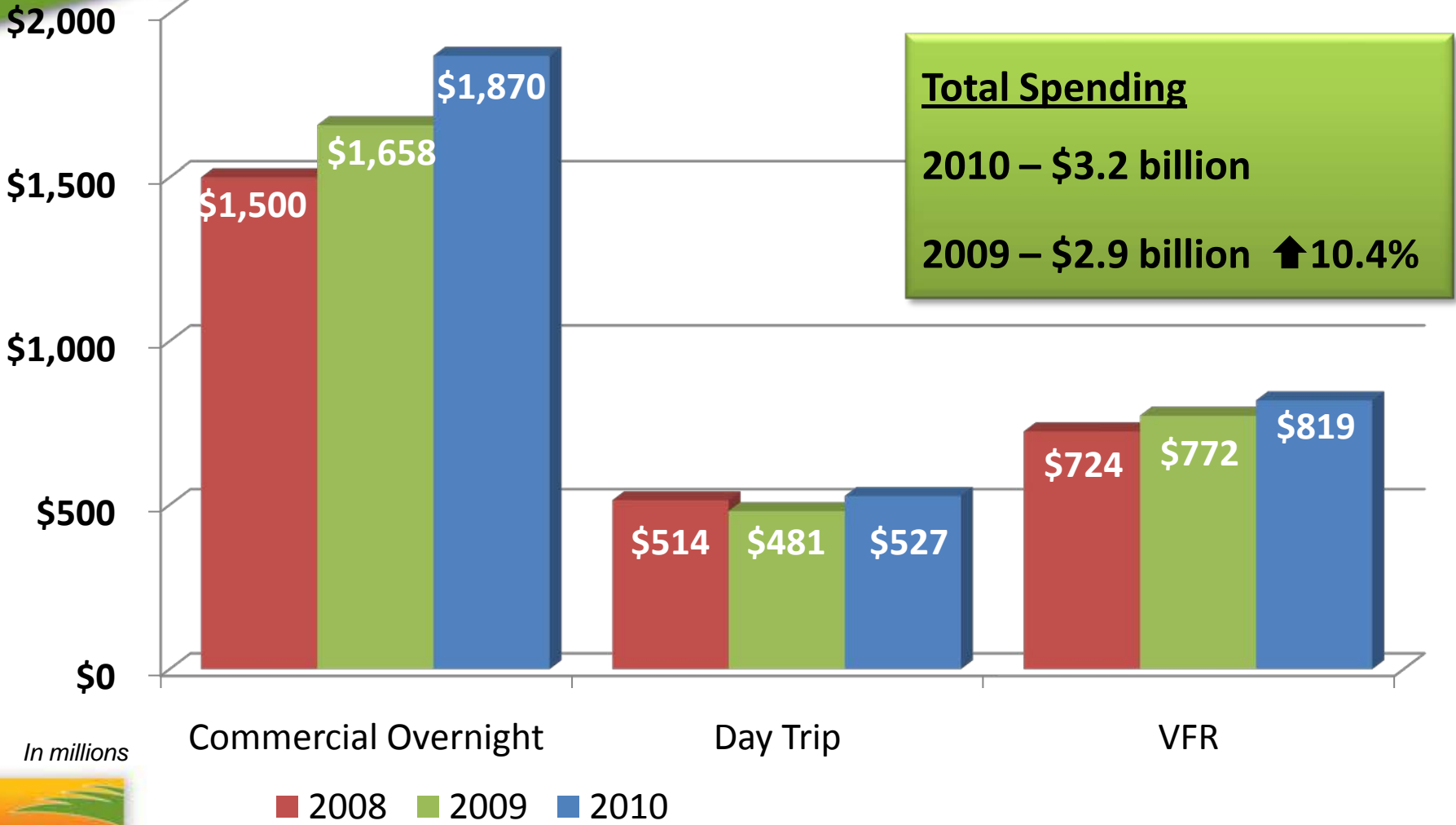
- Monthly interviews with visitors
 - Sample Size: $n=6,990$
- A minimum of 1,600 on-site interviews per quarter
- Random sites
- Random dates
- Proportionate to visitation patterns
- Monthly and quarterly reports

2010 Visitor Numbers & Expenditures

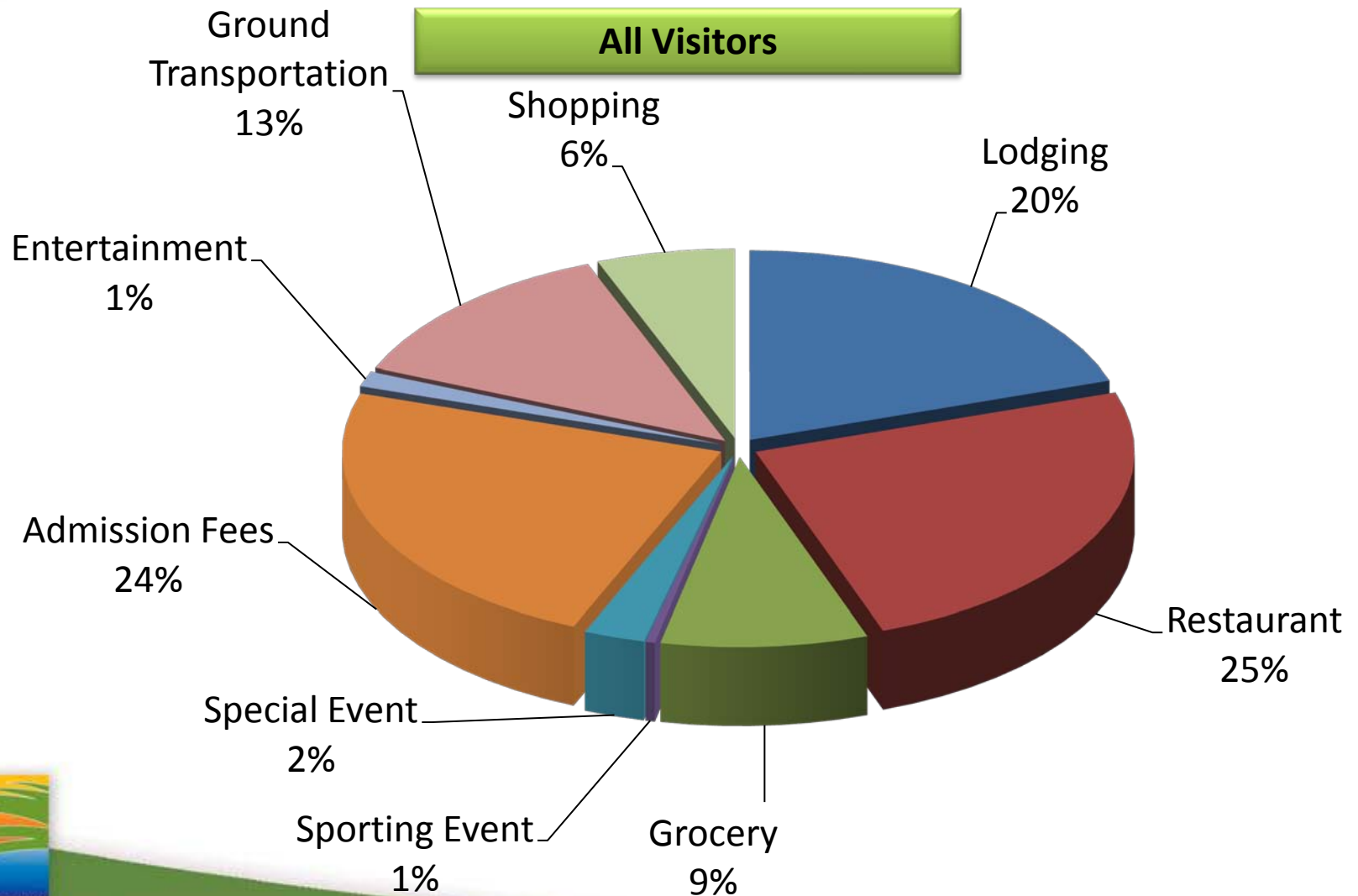
Visitor Estimates



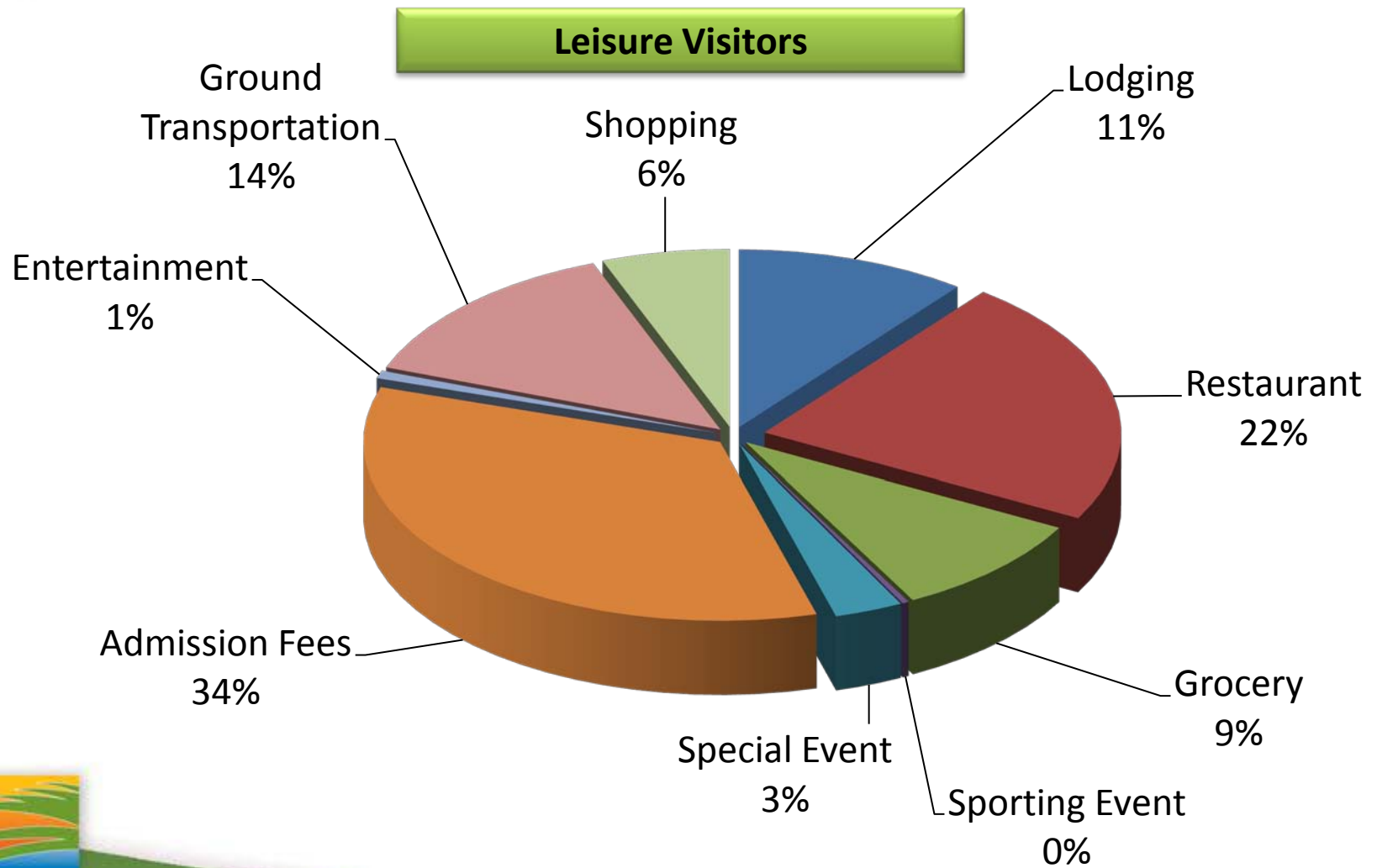
Visitor Spending



Where Visitors Spend Their \$\$

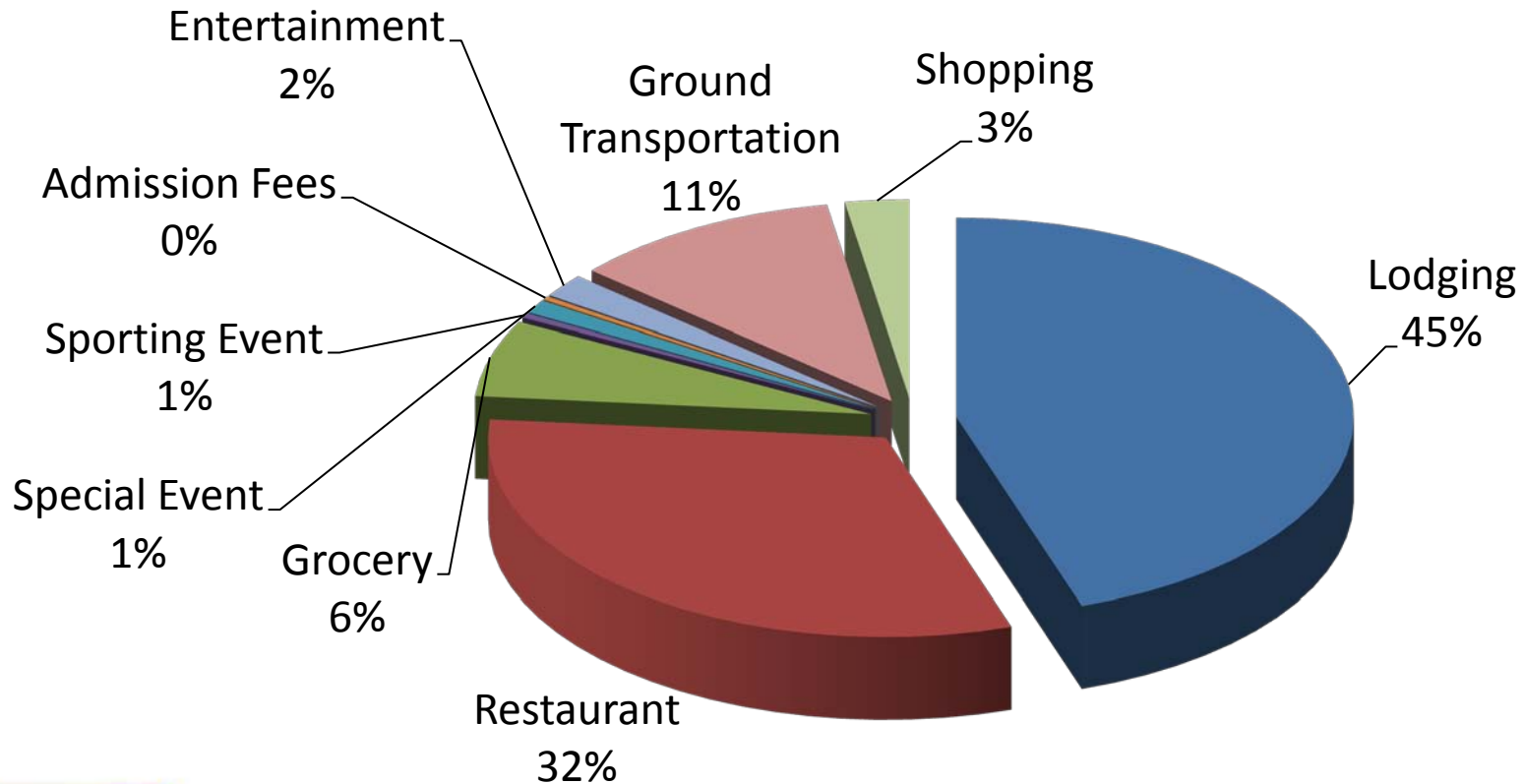


Where Visitors Spend Their \$\$



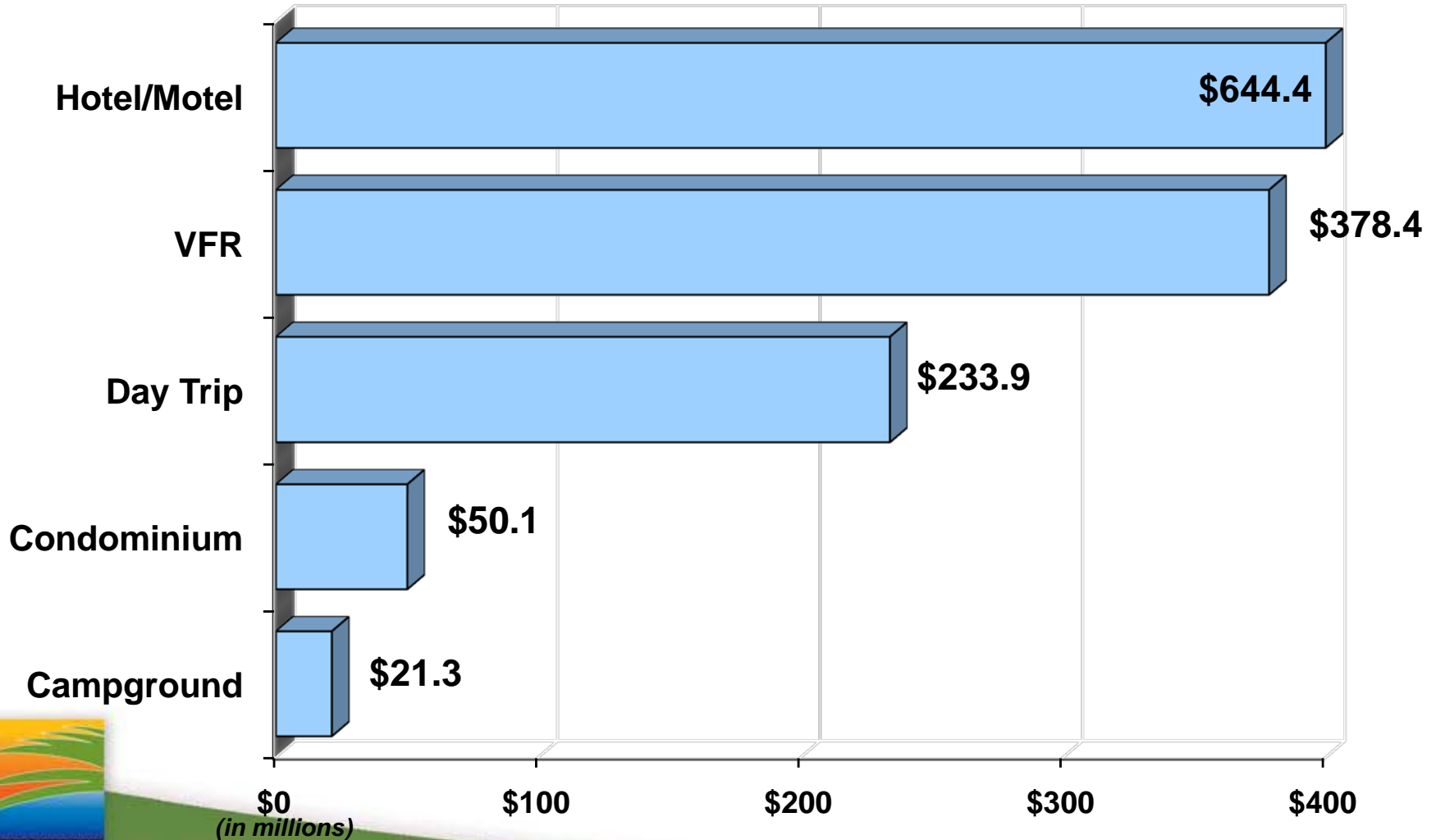
Where Visitors Spend Their \$\$

Convention Visitors



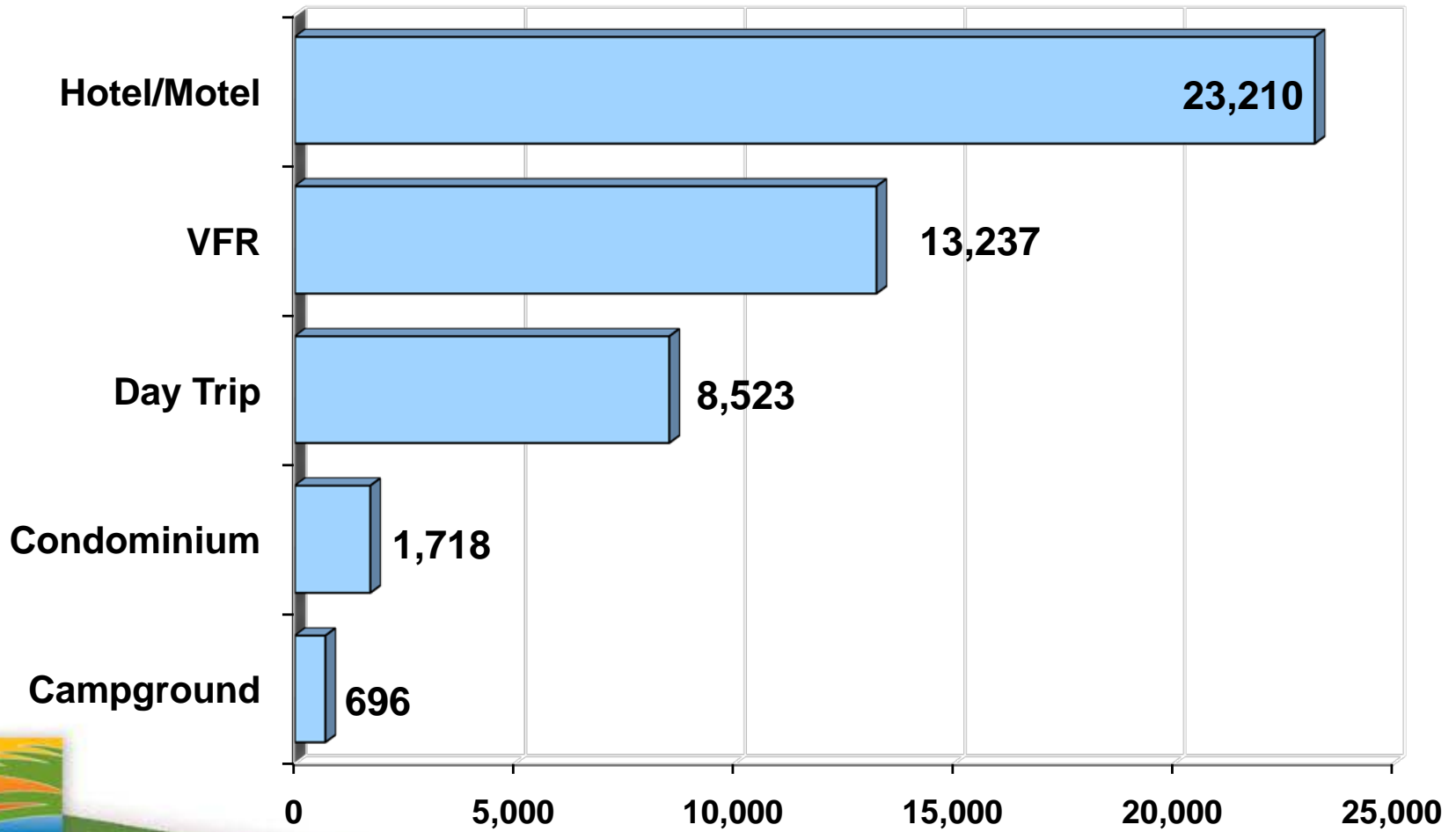
Wages Generated by Tourism

\$1.3 billion for Hillsborough County



Employment Generated by Tourism

47,384 jobs for Hillsborough County



Visitor Profile



Breakdown of Visitor Types

- **Commercial Overnight**

- Hotel/Motel
- Campgrounds
- Condos/Apartments
- Those facilities that collect the “bed tax”

- **Local Excursionists**

- Individuals who live outside of Hillsborough County & do not spend a night

- **Leisure**

- Here for vacation, non-business

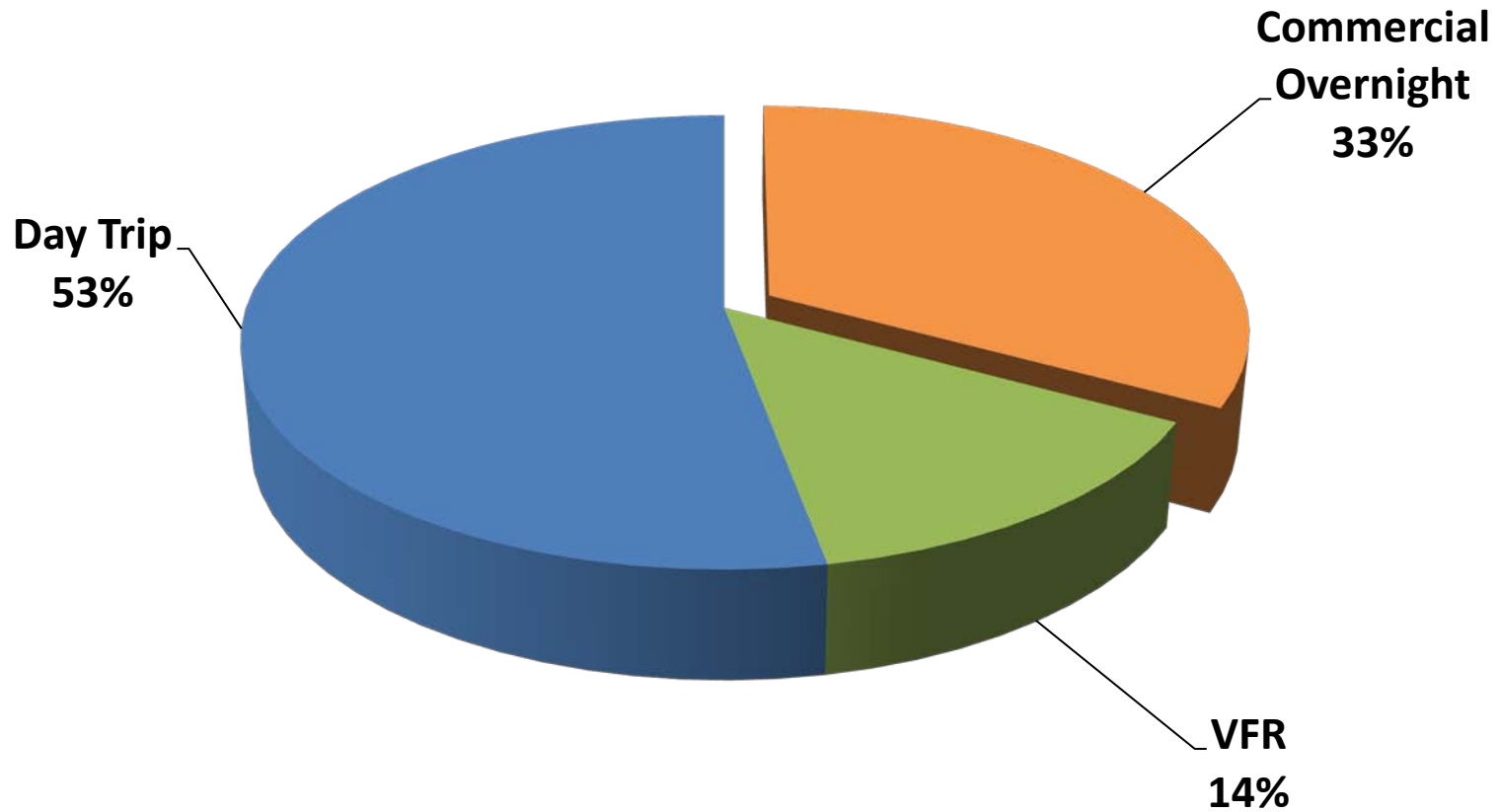
- **Business & Meetings**

- Includes meetings, conferences and conventions

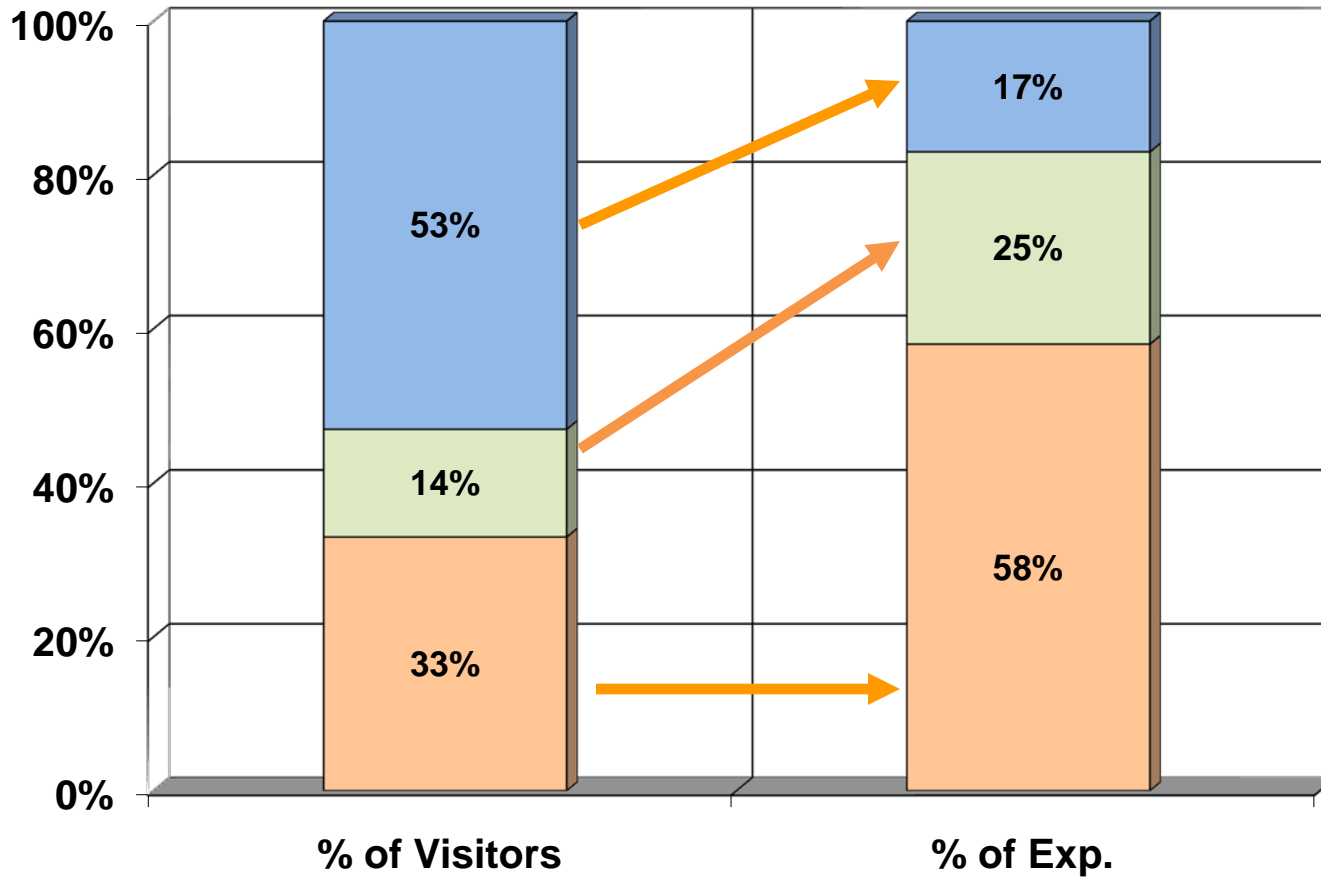
- **Visiting Friends & Relatives**

- Here spending time with family, friends

Visitor Types to Hillsborough County



Comparison of Spending vs. Visitor Type



Commercial Overnight

VFR

Day Trip

Visitor Profile

Visitor Characteristics	All Visitors	Lodging Visitors	Day Visitors
Avg. Exp. Per Party/Per Day	\$264.99	\$370.96	\$207.30
Avg. Nights in Tampa	2.40	2.56	0.0
Avg. Party Size	2.65	2.35	2.83
Travel Mode (Air)	51.5%	74.1%	36.5%
Primary Destination (Yes)	63.0%	77.9%	46.3%
Tampa experience (Excellent)	63.8%	56.3%	65.6%
Income level (\$40K+)	90.6%	94.6%	88.8%
% Likely to Return (in O-2 Years)	99.0%	98.9%	99.8%

Visitor Profile

Visitor Type	Avg. Nights Spent	Party Size	Avg. Expenditures	Income Level (\$75K+)
All Visitors	2.4	2.6	\$264	27%
Leisure Visitors	2.1	2.9	\$254	23%
Business Visitors	2.5	1.8	\$331	40%
Overnight Visitors	2.5	2.3	\$370	36%
Day Visitors	0.0	2.8	\$207	24%
Cruise Visitors	1.1	2.9	\$170	24%
Arts/Cultural Visitors	2.5	2.4	\$271	28%
Attraction Visitors	2.0	3.0	\$207	20%

Visitor Profile

Visitor Origin	Avg. Nights Spent	Party Size	Avg. Expenditures	Income Level (\$75K+)
All Visitors	2.4	2.6	\$264	27%
In-State	1.2	2.8	\$208	21%
Domestic	2.9	2.5	\$285	33%
International	5.2	2.9	\$306	14%

Top Activities in the Destination

Visitor Type/Activity	All Visitors	Lodging Visitors	Day Visitors
Area Attractions	59.4	33.7	59.8
Dining/Entertainment	65.7	100	35.8
Shopping	33.0	32.0	29.0
Historical/Cultural	26.4	35.3	16.5
Pro/College Sports	13.5	14.7	9.6
Special Events	5.7	8.1	4.0
Took a Cruise	10.6	13.7	10.5
Recreation	8.3	6.4	12.4
Fine/Performing Arts	1.4	0.2	2.1

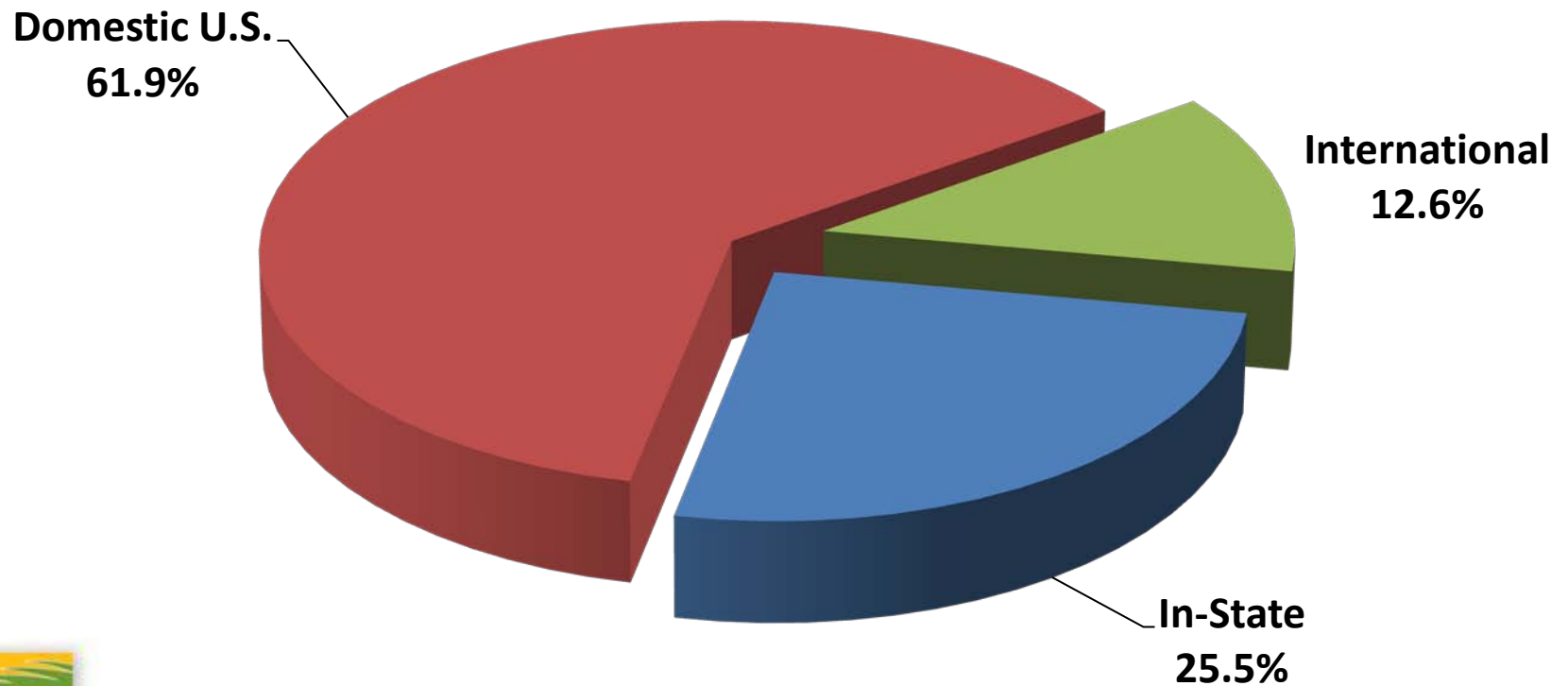
Primary Florida Destination

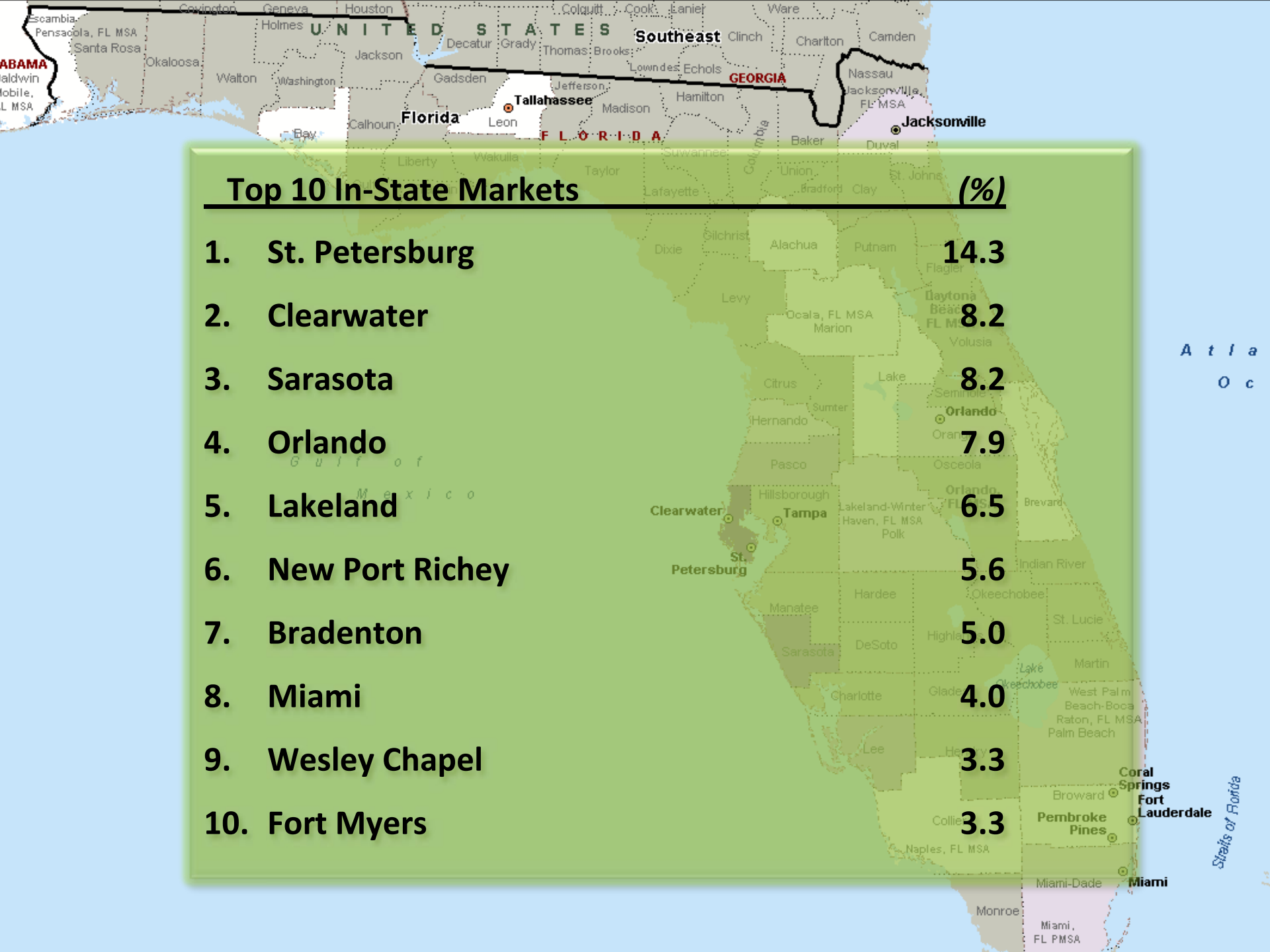
Visitor Type	All Visitors	Lodging Visitors
Tampa	63.0%	77.9%

Other Destination	37.0%	22.1%
<i>Orlando</i>	6.0%	4.1%
<i>St. Petersburg</i>	6.4%	1.0%
<i>Cruise</i>	10.4%	13.6%

Visitor Origin Markets

Visitor Origin Breakdown





Top 10 Domestic Markets (%)

1. **New York City, NY** 10.2
2. **Chicago, IL** 5.2
3. **Boston, MA** 4.9
4. **Atlanta, GA** 4.8
5. **Philadelphia, PA** 4.0
6. **Washington, DC** 3.6
7. **Detroit, MI** 3.4
8. **Cleveland, OH** 2.6
9. **Indianapolis, IN** 2.3
10. **Minneapolis-St. Paul, MN** 2.1

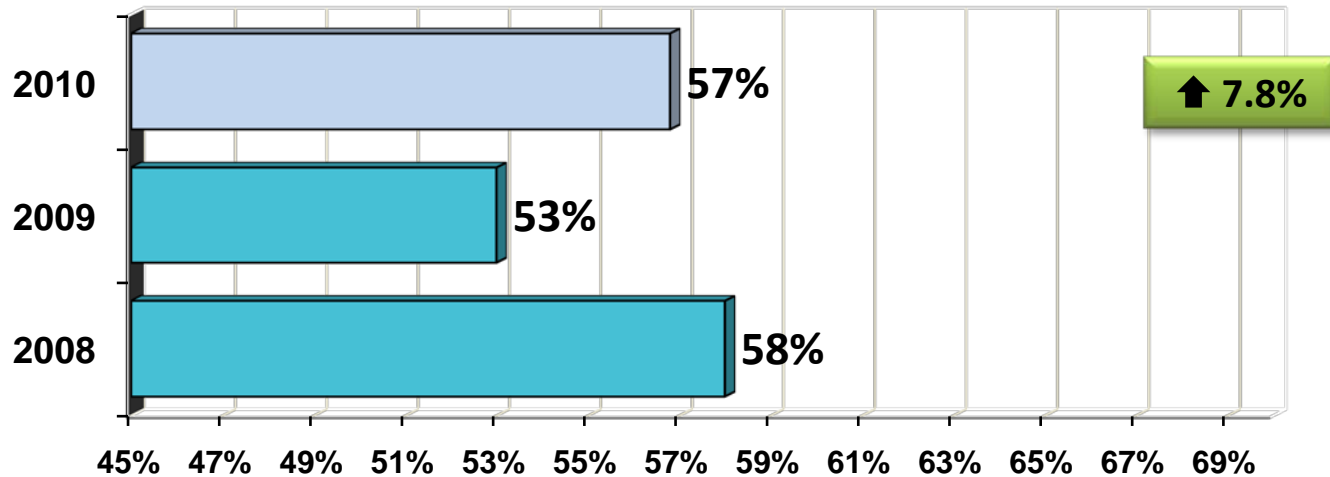
Top 10 International Markets (%)

1. Canada 32.5
2. England 20.1
3. Germany 8.9
4. Brazil 7.5
5. Puerto Rico 3.2
6. Scotland 3.0
7. Ireland 2.6
8. Venezuela 1.7
9. Colombia 1.6
10. Netherlands 1.5

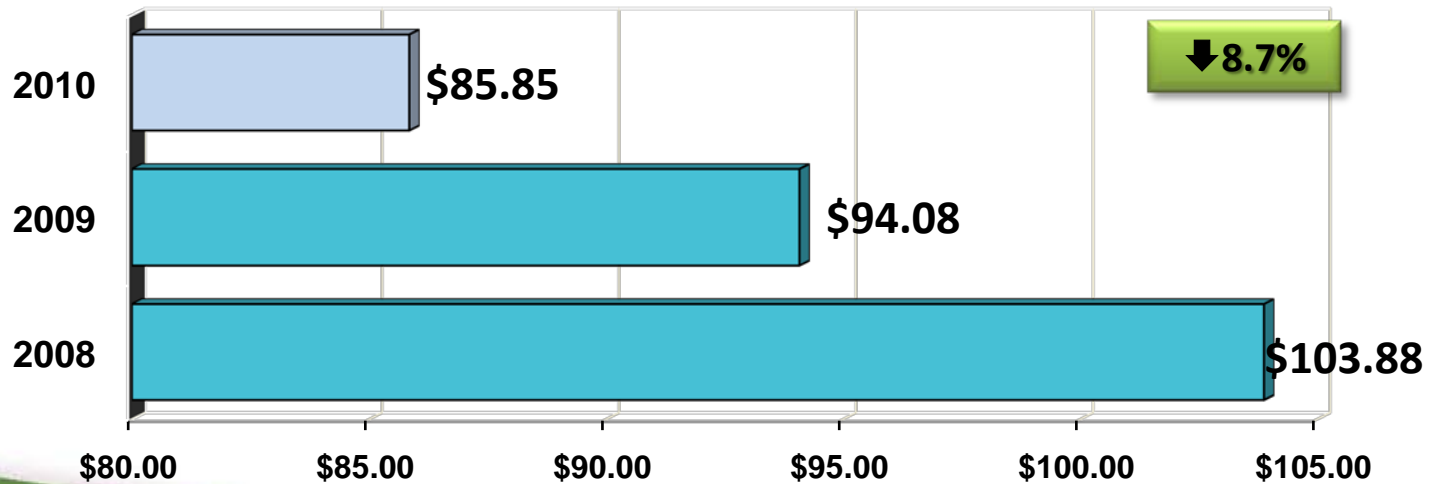
Key Travel Industry Data

Lodging Data

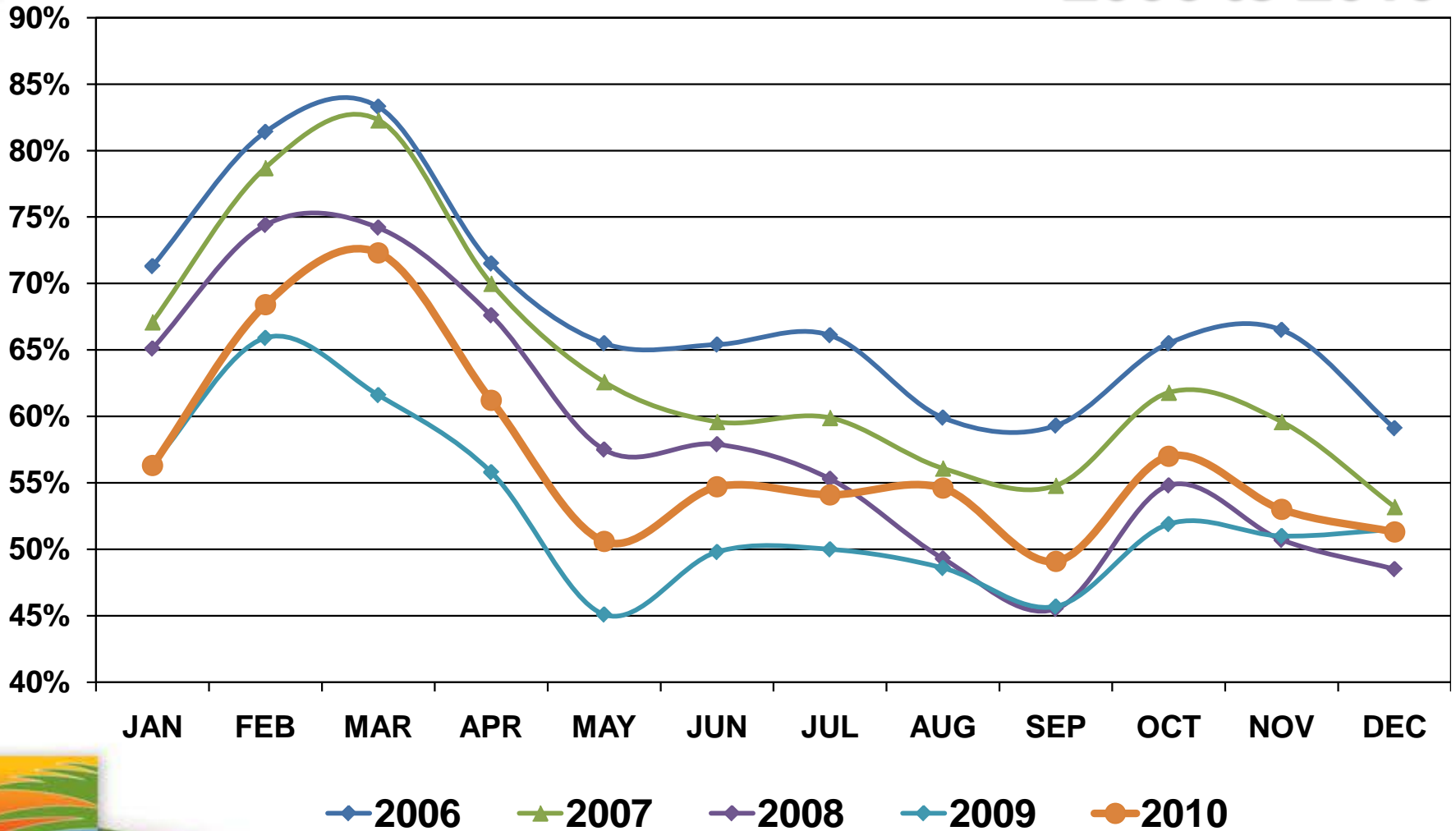
Occupancy



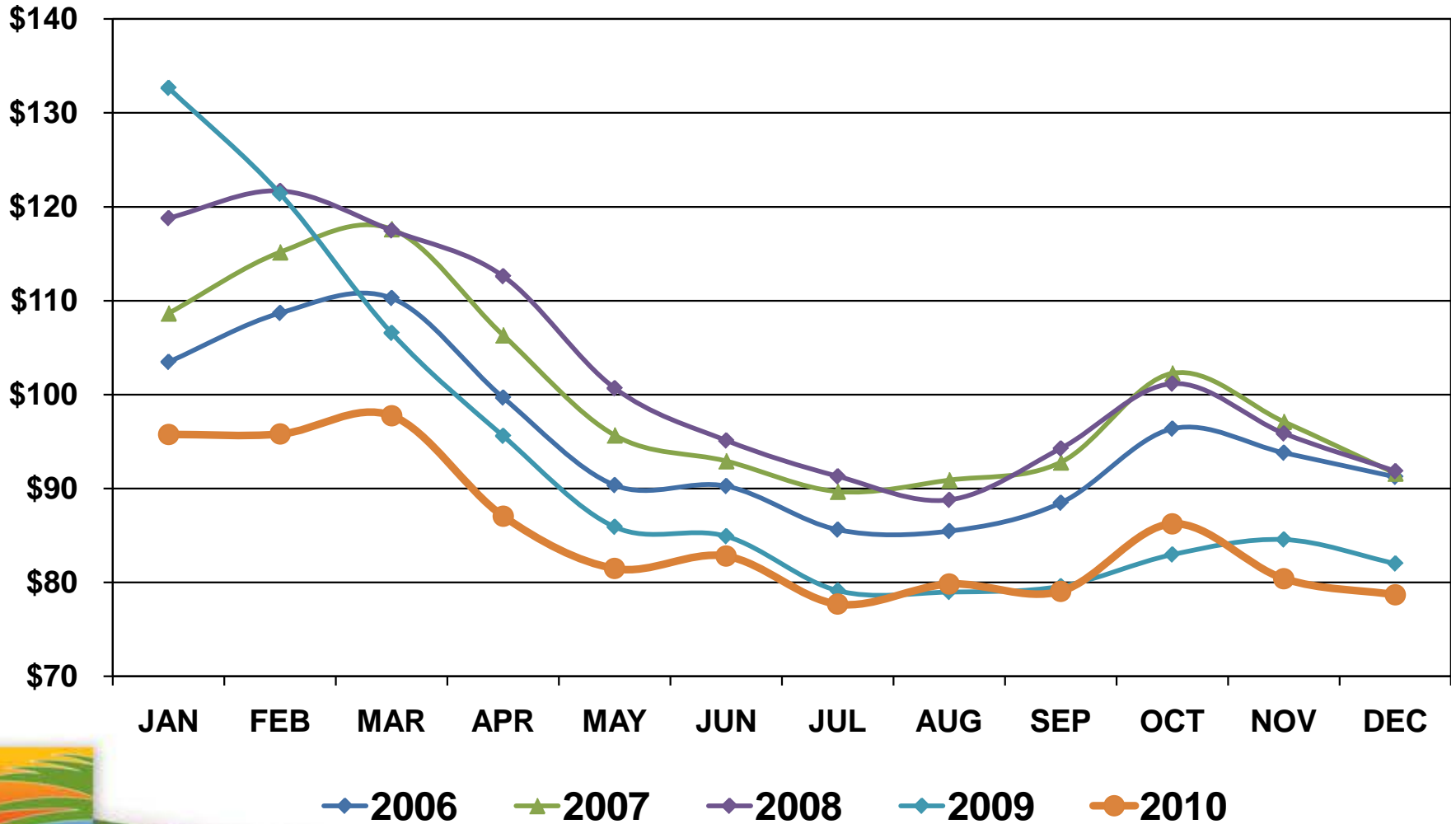
ADR



Tampa Occupancy Levels 2006 to 2010



Tampa ADR Levels 2006 to 2010

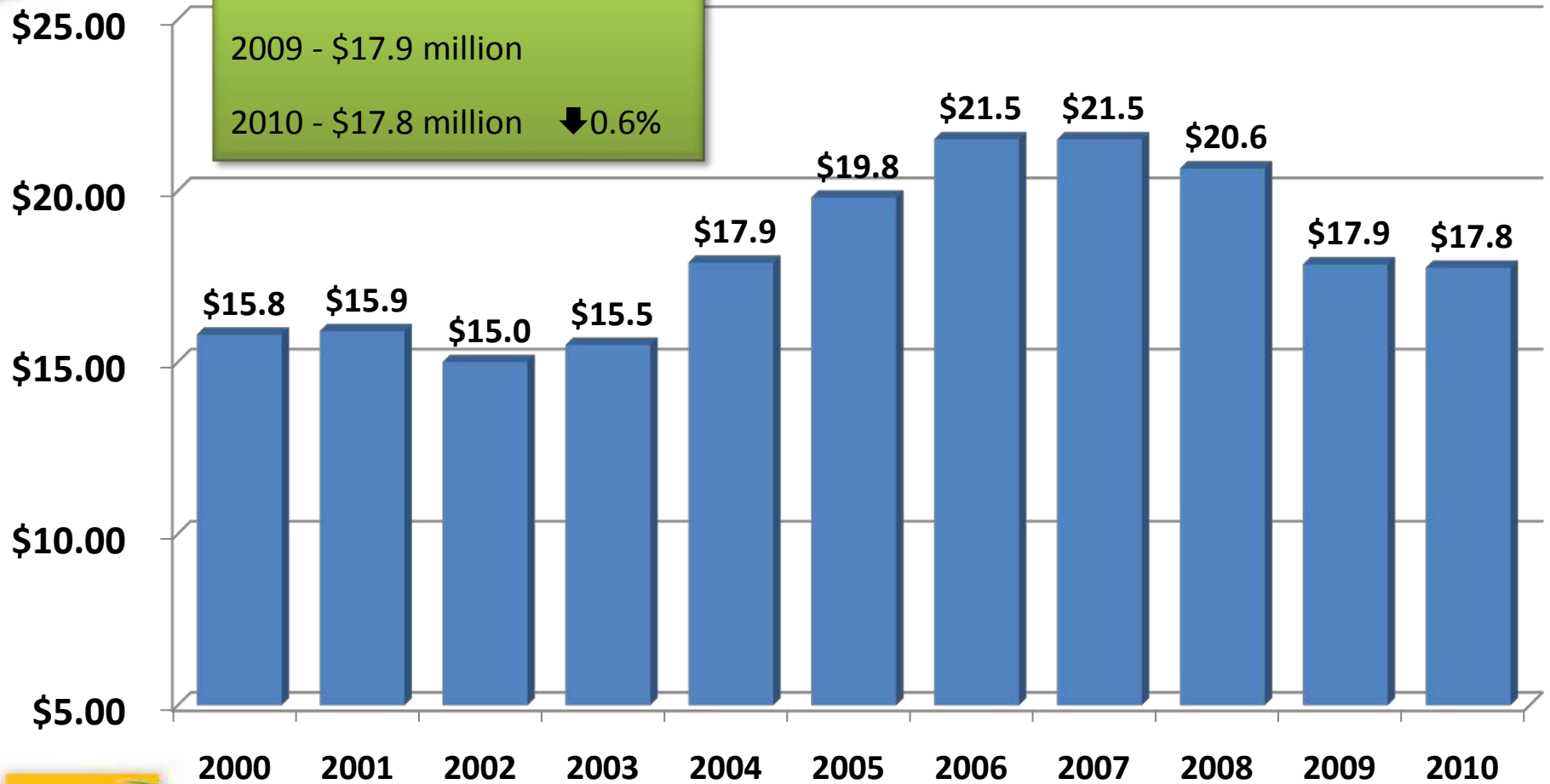


Bed Tax Collections

Bed Tax Collections

2009 - \$17.9 million

2010 - \$17.8 million ↓0.6%



Travel Modes – All Visitors

Arriving in Tampa by Auto:

48.5%

Interstate Used

- I-75 49.3%
- I-275 19.5%
- I-4 19.8%
- I-95 9.3%

Arriving in Tampa by Air:

51.5%

Arrival Airport

- Tampa Int'l: 91.5%
- Orlando Int'l: 5.5%
- Miami Int'l: 3.0

Travel Modes – Overnight Guests

Arriving in Tampa by Auto:

25.9%

Interstate Used

- I-75 64.1%
- I-95 18.9%
- I-4 10.6%
- I-275 6.0%

Arriving in Tampa by Air:

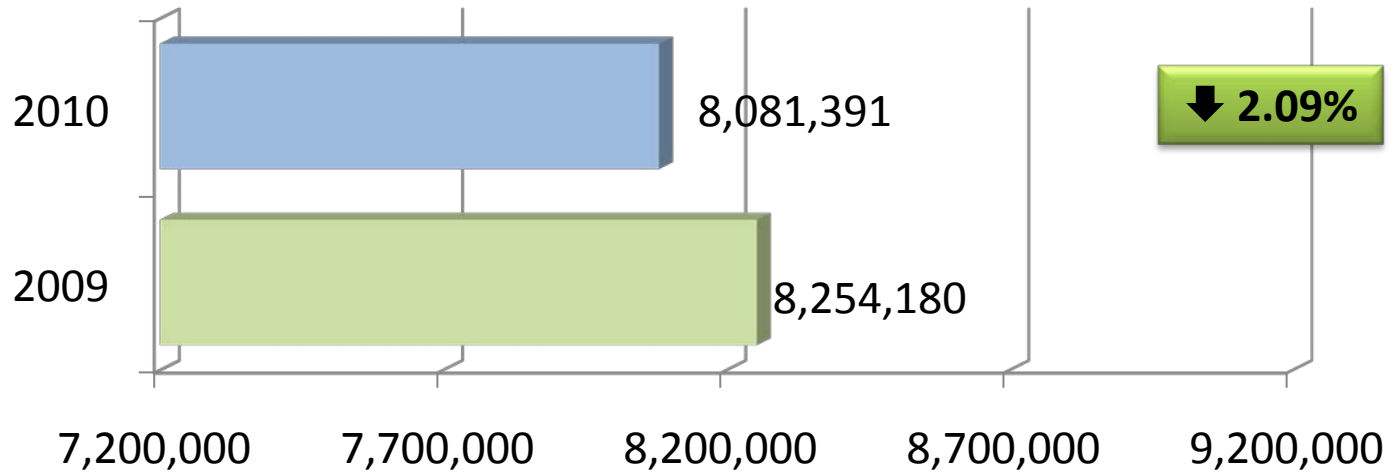
74.1%

Arrival Airport

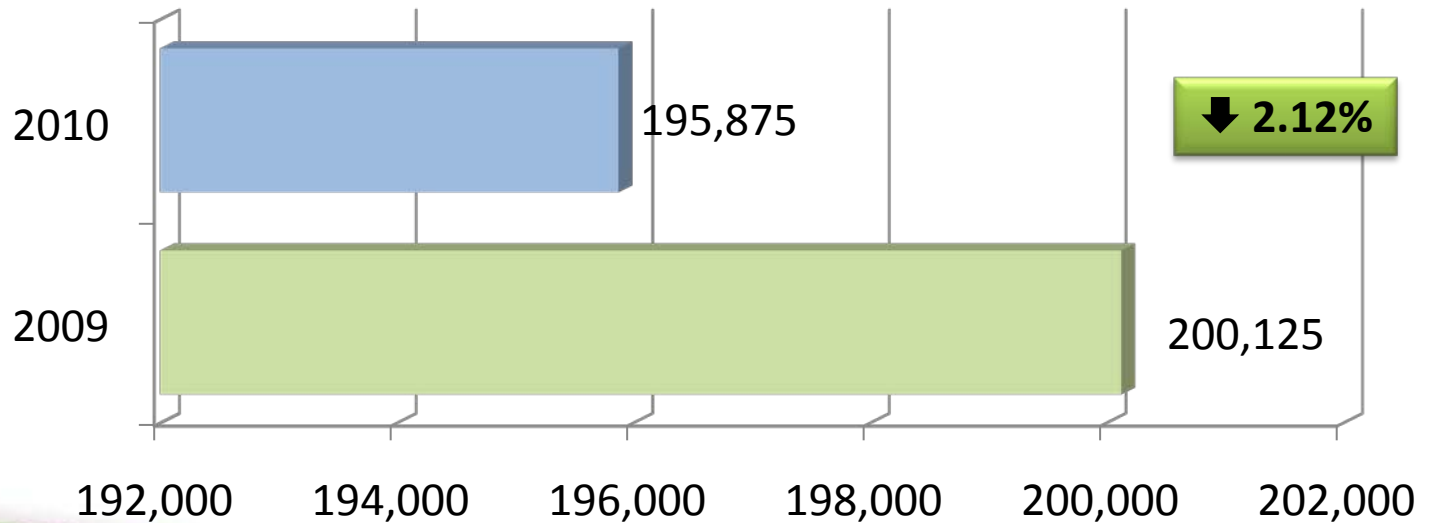
- Tampa Int'l: 94.7%
- Orlando Int'l: 0.6%
- Miami Int'l: 2.0%

TIA Passenger Traffic

Domestic
Deplaned
Passengers

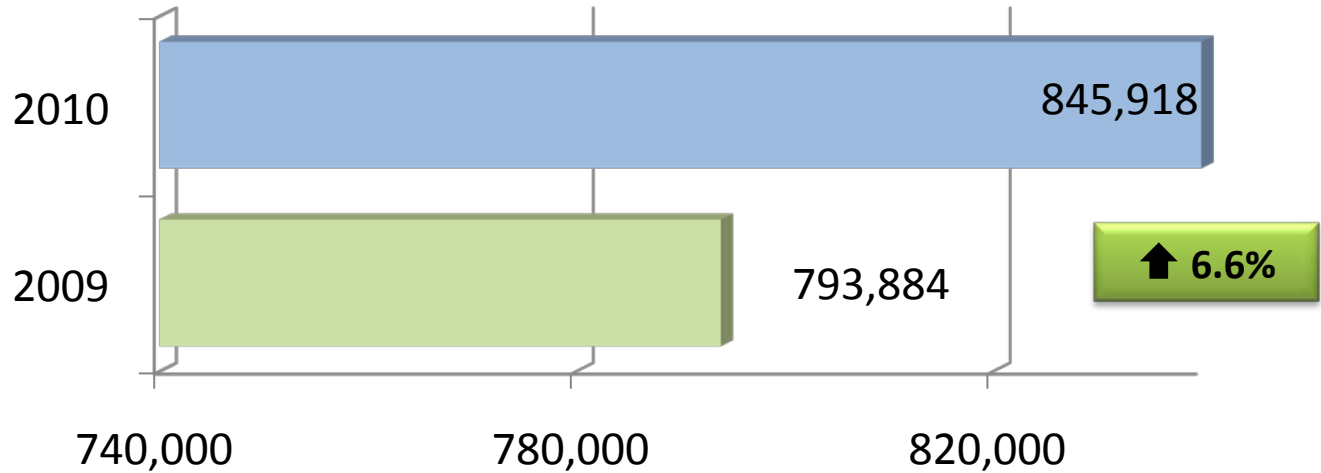


International
Deplaned
Passengers

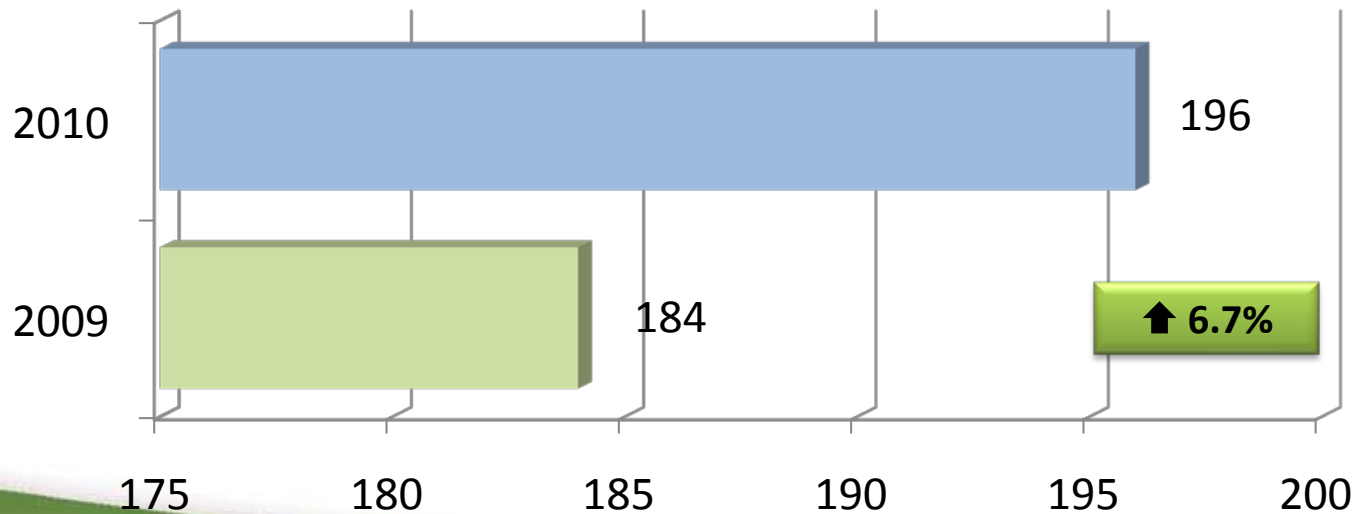


Cruise Passenger Traffic

**Total
Passengers**



**Total
Sailings**



Recap of 2010 Tourism Results



2010 Recap of Tourism Data

<u>Measurement Area</u>	<u>Value</u>
Number of Visitors	13.9 million
Commercial Lodging Visitors	4.5 million
Visitor Spending (direct)	\$3.2 billion
Tourism Employment	47,384
Wages Generated	\$1.3 billion
Length of Stay (nights)	2.6
Average Party Size	2.65
Average Expenditures	\$264.99

2010 Recap of Tourism Data

<u>Measurement Area</u>	<u>Value</u>
Hotel Occupancy	56.8%
Hotel Average Daily Rate	\$85.85
Cruise Passengers	845,918
# of Cruise Sailings	196
Deplaned Air Passengers	8.27 million
Bed Tax Collections	\$17.7 million

THANK YOU FOR COMING TO OUR PRESENTATION

For more information visit
www.VisitTampaBay.com/Research

