



The Value of Visitors to Escambia County

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Note to Readers



This volume is the first comprehensive “Value of Visitors” report assembled for Escambia County. In the past, individual numbers (such as number of visitors, visitor spending, etc.) have been estimated, based on annual averages from research studies or based on averages and assumptions for the state of Florida and/or the Northwestern region of Florida, rather than specially on Escambia County data.



This more comprehensive view of visitor value is based on Visit Pensacola research studies, conducted in Escambia County by Majority Opinion Research, as well as Escambia County tax data. All data is exclusive to Escambia County. Further, going beyond annual averages used in past calculations, estimates are now calculated monthly, since key metrics (such as occupancy, percent staying in paid accommodations, length of stay, party size, and visitor spending) vary by month and those differences tend to get washed out in simple annual averages. When dealing with large numbers (millions of visitors spending millions of dollars), even subtle differences can have large scale impacts, so calculating in smaller time periods, such as months, produces more accurate results when combined than simply calculating in larger time periods, such as an entire year.



While past reported numbers may have been higher or lower than those presented herein, all data presented in this report is now based on the data from the same sources and calculations that have been made in the same manner, to provide a solid look at trend to date and, importantly, a solid base for trend going forward.

Executive Summary



Visitors bring great value to Escambia County. In 2016, more than 2 million visitors (2,073,381) spent nearly \$800 million dollars (\$787,186,547) in the County. They also paid nearly \$22 million (\$21,864,108) in taxes to the County.



Additionally, the County also collected \$72,474,888 in 2016 property taxes from properties attributed to tourism (hotels, rental condos, bed & breakfasts). Combined with direct payment of taxes by visitors, \$94,338,996 in 2016 taxes (41% of all taxes collected by the county) are directly attributed to tourism.

Further, 22,300 jobs (17% of the jobs in Escambia County) are directly related to tourism (hospitality & leisure).



Based only on the \$787,186,547 direct spending by visitors and reducing that to only those who recall the marketing, Escambia County businesses received \$107 for every one dollar Visit Pensacola invested in marketing the destination.

Based only on the \$21,864,108 in county taxes paid directly by visitors and reducing that to only those who recall the marketing, Escambia County received \$3 in tax revenue for every one dollar Visit Pensacola invested in marketing the destination.

Compared to last year, the number of visitors increased by 30%, visitor spending increased by 16%, visitor paid taxes increased by 10%, the average daily rate paid for accommodations increased 4%, and the average occupancy of lodging in Escambia County increased 5%.

2016 Value of Visitors Dashboard



Measure	Value	Trend
Number of Visitors ¹	2,073,381	30% higher than last year
Visitor Spending ²	\$787,186,547	16% higher than last year
County Taxes Paid by Visitors ³	\$21,864,108	10% higher than last year
Tourist Development Tax ⁴	\$10,175,933	8% higher than last year
Average Daily Rate ⁵	\$123.17	4% higher than last year
Average Occupancy ⁶	67%	5% higher than last year
Returned to Escambia County Businesses (Visitor Spending) for Every \$1 Invested by Visit Pensacola ⁷	\$107	18% higher than last year
Returned to Escambia County Government (Taxes) for Every \$1 Invested by Visit Pensacola ⁷	\$3	\$50% higher than last year

¹ Source: Visit Pensacola Visitor Tracking Study, Visit Pensacola Lodging Stats Study, Majority Opinion Research (calculation presented in appendix)

² Source: Visit Pensacola Visitor Tracking Study, Visit Pensacola Lodging Stats Study, Majority Opinion Research (calculation presented in appendix)

³ Majority Opinion Research (calculation in appendix)

⁴ Source: Escambia County Tax Collector

⁵ Source: Visit Pensacola Visit Pensacola Lodging Stats Study

⁶ Majority Opinion Research (calculation in appendix)

⁷ Majority Opinion Research (calculation in appendix)

Number of Visitors

	2014	2015	2016	Past Year Change
Total Visitors	1,803,568	1,590,000*	2,073,381	+30%
Stayed in Paid Lodging	1,168,332	1,155,097	1,343,895	+16%
Non-Lodging Visitors	635,229	434,903	729,486	+68%



Source: Visit Pensacola Visitor Tracking Study, Visit Pensacola Lodging Stats Study, Majority Opinion Research

Total Visitors	2014	2015	2016	Past Year Change
January	35,741	36,533	46,232	+27%
February	28,042	46,684	57,721	+24%
March	103,974	87,387	100,219	+15%
April	214,495	129,825	91,734	-29%
May	220,064	156,182	204,767	+31%
June	206,991	174,124	268,615	+54%
July	306,893	296,611	350,172	+18%
August	189,184	170,810	242,415	+42%
September	173,711	174,019	206,356	+19%
October	172,744	157,189	218,840	+39%
November	89,238	106,021	176,935	+67%
December	62,482	54,615	109,376	+100%

* Factors resulting in a reduction of the number of unique visitors in 2015, include occupancy being up only 2%, from 2014, while percent staying in paid accommodations was up 8% and length of stay was up 21%. As a result, the number of unique individuals visiting was lower, even while the presence of visitors in the destination was higher.

Visitor Spending

	2014	2015	2016	Past Year Change
Total Visitor Spending	\$599,573,718	\$677,075,644	\$787,186,547	+16%
Overnight Visitor Spending	\$477,268,807	\$588,695,835	\$659,523,794	+12%
Day Visitor Spending	\$122,304,911	\$88,379,828	\$127,662,753	+44%



Source: Visit Pensacola Visitor Tracking Study, Visit Pensacola Lodging Stats Study, Majority Opinion Research

Total Visitor Spending	2014	2015	2016	Past Year Change
January	\$19,310,112	\$28,074,015	\$27,332,764	-3%
February	\$16,690,365	\$29,316,856	\$39,691,358	+35%
March	\$41,587,066	\$47,418,301	\$48,660,641	+3%
April	\$60,575,911	\$49,191,733	\$46,861,724	-5%
May	\$73,971,085	\$74,959,555	\$88,513,151	+18%
June	\$80,530,778	\$78,268,963	\$97,879,209	+25%
July	\$97,673,172	\$104,205,681	\$129,042,502	+24%
August	\$64,049,616	\$77,175,364	\$98,103,186	+27%
September	\$42,986,296	\$52,318,425	\$61,503,111	+18%
October	\$42,607,497	\$64,167,932	\$67,369,942	+5%
November	\$32,678,808	\$37,209,007	\$49,157,056	+32%
December	\$26,913,012	\$34,769,832	\$33,071,904	-5%

Note: 2014 and 2015 numbers are different than those reported in the past as a result of a more accurate means of calculated estimates.

Visitor Spending by Category

	2014	2015	2016	Past Year Change
Lodging	\$216,501,650	\$236,210,450	\$254,399,825	+8%
Dining	\$153,473,999	\$188,856,377	\$208,824,460	+11%
Shopping	\$74,288,829	\$76,461,865	\$84,124,337	+10%
Activities	\$32,600,612	\$58,845,603	\$101,984,247	+73%
Groceries	\$51,496,644	\$56,152,717	\$65,510,246	+17%
Gasoline	\$50,617,698	\$50,228,141	\$43,182,186	-14%
Anything else	\$20,594,285	\$10,320,511	\$29,161,245	+183%



Source: Visit Pensacola
Visitor Tracking Study

County Taxes Paid By Visitors

	2014	2015	2016	Past Year Change
Total County Taxes Paid by Visitors	\$17,236,993	\$19,905,821	\$21,864,108	+10%
Tourist Development Tax	\$8,660,066	\$9,448,418	\$10,175,933	+8%
County Sales Tax	\$7,461,891	\$8,560,422	\$10,177,412	+19%
County Gasoline Tax	\$1,115,037	\$1,896,981	\$1,510,704	-20%



Return on Marketing Investment

	2014	2015	2016	Past Year Change
Investment in Marketing	\$3,177,000	\$3,968,000	\$3,714,000	- 6%
Visitor Spending	\$599,573,718	\$677,075,644	\$787,186,547	+16%
County Taxes Paid by Visitors	\$17,236,993	\$19,905,821	\$21,864,108	+10%
Marketing Communications Recall	42%	52%	53%	+2%
Visitor Spending Attributed to Marketing	\$259,673,627	\$360,206,277	\$396,996,731	+10%
County Taxes Paid by Visitors Attributed to Marketing	\$7,703,635	\$9,761,235	\$11,650,290	+19%
Returned to Escambia County Businesses (Visitor Spending) for Every \$1 Invested by Visit Pensacola	\$82	\$91	\$107	+18%
Returned to Escambia County Government (Taxes) for Every \$1 Invested by Visit Pensacola	\$2	\$2	\$3	+50%

Source: Visit Pensacola Visitor Tracking Study, Visit Pensacola Lodging Stats Study, Visit Pensacola, Majority Opinion Research

Additional Value of Tourism

	Value	Notes
Hospitality & Leisure Jobs in Escambia County	22,300 ¹	17% of those employed in the county
Property Taxes Paid by Tourism Properties	\$72,474,888 ²	46% of all property tax collected
Total Tourism Related Taxes Collected by County	\$94,338,996 ³	41% of all taxes collected



¹ Bureau of Labor Statistics

² Escambia County Tax Collector

³ Escambia County Tax Collector

Note: These additional points of value NOT included in ROI calculations.

Additional Value of Tourism Specific to SRIA

The Santa Rosa Island Authority also collects fees on Pensacola Beach.

These are largely, although not entirely, tourism related.

These are not included in any calculations of benefit to Escambia County in this document, although they are both collected and utilized within the County.

	2014	2015	2016	Past Year Change
Santa Rosa Island Fees Collected	\$7,771,191	\$8,494,192	\$4,450,920*	- 48%*

* In 2016, the lease fee reduction policy went into effect.

¹ Santa Rosa Island Authority

² Majority Opinion Research (calculation in appendix)

Top Visitor Origins

2014	2015	2016
Mobile, AL	Mobile, AL	Mobile, AL
Atlanta, GA	Atlanta, GA	Atlanta, GA
New Orleans, LA	Detroit, MI	Ft. Walton Beach-Destin, FL
Birmingham, AL	New Orleans, LA	New Orleans, LA
Dallas-Ft. Worth, TX	Birmingham, AL	Houston, TX
Nashville, TN	Nashville, TN	Washington-Balt.
Baton Rouge, LA	Dallas, TX	Nashville, TN
Houston, TX	Gulfport-Biloxi, MS	Birmingham, AL
Tallahassee, FL	Baton Rouge, LA	Dallas, TX
Gulfport-Biloxi, MS	St. Louis, MO	Gulfport-Biloxi, MS
Washington-Balt.	Jackson, MS	Baton Rouge, LA
Chicago, IL	Ft. Walton Beach-Destin, FL	Montgomery, AL
Lafayette, LA	Memphis, TN	New York, NY
Phoenix, AZ	Washington-Balt.	Chicago, IL
Montgomery, AL	Houston, TX	St. Louis, MO
St. Louis, MO	Indianapolis, IN	Panama City, FL
Miami, FL	Chicago, IL	Jackson, MS
New York, NY	New York, NY	Indianapolis, IN
Memphis, TN	Miami, FL	Jacksonville, FL
Indianapolis, IN	Tuscaloosa, AL	Miami, FL
Louisville, KY	Little Rock, AR	Denver, CO
Cincinnati, OH	Lafayette, LA	Tampa-St. Pete, FL
Tampa-St. Pete, FL	Montgomery, AL	Memphis, TN
Ft. Walton Beach/Destin, FL	Tallahassee, FL	Huntsville, AL
Charlotte, NC	Eau Claire, WI	Detroit, MI



Average Daily Rate

	2014	2015	2016	Past Year Change
Annual Average	\$112.04	\$118.95	\$123.17	+4%
January	\$77.73	\$72.24	\$83.88	+16%
February	\$77.38	\$80.90	\$84.44	+4%
March	\$108.70	\$116.69	\$118.46	+2%
April	\$118.89	\$126.28	\$129.46	+3%
May	\$132.98	\$141.63	\$144.27	+2%
June	\$154.52	\$168.55	\$173.92	+3%
July	\$165.67	\$183.50	\$197.77	+8%
August	\$129.32	\$133.74	\$133.18	-
September	\$106.11	\$115.01	\$119.08	+4%
October	\$99.79	\$104.80	\$110.16	+5%
November	\$87.47	\$88.33	\$92.89	+5%
December	\$85.86	\$90.96	\$90.54	-



Average Occupancy

	2014	2015	2016	Past Year Change
Annual Average	63%	64%	67%	+5%
January	46%	49%	52%	+6%
February	57%	60%	64%	+7%
March	69%	70%	72%	+3%
April	66%	67%	70%	+4%
May	75%	71%	73%	+3%
June	83%	80%	82%	+3%
July	87%	88%	89%	+1%
August	70%	65%	65%	-
September	57%	62%	64%	+3%
October	58%	62%	66%	+6%
November	48%	52%	57%	+10%
December	45%	48%	49%	+2%



Visitor Profile

	2014	2015	2016	Past Year Change
Average Age of Decision Maker	46	46	43	- 6%
Average Household Income	\$81,768	\$77,482	\$80,474	+4%
Average Party Size	2.7	2.7	3.0	+11%
Traveled with Children	24%	22%	25%	+14%
Stayed in Paid Accommodations	66%	71%	66%	- 7%
Length of Overnight Stay (nights)	7.3	8.8	7.8	- 11%
Average Spend Per Overnight Party	\$1,457	\$2,035	\$1,933	- 5%
Average Spend Among Day Visitors	\$419	\$505	\$482	- 4%
First Time Visitor	40%	40%	45%	+14%

Source: Visit Pensacola Visitor Tracking Study



Visitor Activities

	2014	2015	2016	Past Year Change
Went to the beach	89%	90%	80%	-10%
Went to a fine dining restaurant	11%	32%	38%	+17%
Visited museums	34%	46%	34%	-27%
Shopped	29%	34%	32%	-5%
Visited art galleries	9%	13%	13%	+1%
Went fishing	10%	13%	11%	-13%
Attended a free performance/event	2%	14%	8%	-38%
Participated in water sports	4%	13%	6%	-52%
Played golf	5%	6%	6%	+5%
Attended a ticketed performance	3%	4%	5%	+43%
Attended non-professional spectator sports	2%	1%	3%	+174%
Attended a professional sporting event	3%	2%	2%	+6%

Source: Visit Pensacola
Visitor Tracking Study



Visitor Experience

	2014	2015	2016	Past Year Change
A place you feel comfortable	96%	98%	97%	- 1%
A place to relax	95%	98%	96%	- 2%
Having scenic beauty	96%	98%	96%	- 2%
A place to have fun	93%	96%	96%	-
Having clean, well maintained beaches	94%	96%	96%	-
Customer service you've received	NA	98%	96%	- 2%
Being a good place to visit as a couple	93%	96%	93%	- 2%
Having the dining options you want	84%	93%	93%	-
Offering value for the travel dollar	88%	92%	93%	+ 1%
Being a good place to visit with children	89%	86%	88%	+ 3%
Having activities other than the beach	78%	88%	87%	- 1%
Historical offerings/attractions	81%	88%	86%	- 3%
Having the shopping options you want	75%	83%	84%	+ 1%

Source: Visit Pensacola
Visitor Tracking Study



Appendix

Research Methodologies
Definitions and Calculations
Contact for Additional Information



Research Methodologies

Visitor Tracking

Interviewers intercept visitors throughout Escambia County and administer a survey via iPads to profile visitors and their visitation stats through the year and to assess the experience that visitors are having in the Pensacola area. Additionally, this research tracks visitor origin, demographics, marketing communications recall, planning/booking cycles and visitor spending by category. The research also measures the awareness and use of specific in market product to further aid in the management of the destination. 3,600 interviews are conducted each year (300 per month).

Lodging Stats

Non-hotel properties that are not included in the STR report are surveyed on a monthly basis to collect their average daily rate and average occupancy for the month. This data is combined with STR data on the area's hotels to provide monthly, seasonal and annual calculations of ADR and occupancy. Additionally, the data is combined with Visitor Tracking data to estimate the number of overnight visitors monthly, seasonally and annually.

Definitions and Calculations

Number of Overnight Visitors: Sum of calculation for each month in time period: (((# of rental units x days in month) x occupancy) x party size))/length of stay)

Number of Day Tripper Visitors: (Overnight visitors/% overnight visitors in visitor mix) x % day visitors in visitor mix

Overnight Paid Accommodations Parties: Sum of calculation for each month in time period: ((# of rental units x days in month) x occupancy)/length of stay)

Day Tripper (Non-Paid Accommodations Parties: (Overnight parties/% overnight parties in visitor mix) x % day tripper parties in visitor mix)

Visitor Spending: ((Sum of spending by overnight parties x # of overnight parties) + (Spending by day tripper parties x # of day tripper parties))

Visitor Spending Attributed to Marketing: Overnight visitor spending x % overnight visitors recalling marketing (net one or more recall advertising, recall public relations, visited website, visited Facebook page, read tweets))

Day Tripper Spending Attributed to Marketing: Day tripper visitor spending x % day tripper visitors recalling marketing (net one or more recall advertising, recall public relations, visited website, visited Facebook page, read tweets)

Definitions and Calculations

ROI to Businesses: Visitor spending attributed marketing/marketing budget

ROI in Taxes to the County: Sum all visitor paid taxes below/marketing budget

- County TDT: 4%
 - County Sales Tax: 1.5%
 - County Gas Tax: 11 cents/gallon
 - Groceries are tax exempt
-
- Accommodations: Spending x (4% TDT & 1.5% Sales Tax)
 - Food and drink in restaurants: Spending x (1.5% Sales Tax)
 - Entertainment: Spending x (1.5% Sales Tax)
 - Gasoline: (Spending/cost per gal, excluding tax during time period)* 11 cents per gal
 - Groceries: All spending excluded from tax calculations
 - Anything else: Spending x (1.5% Sales Tax)

For Additional Information



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