



The Value of Visitors to Escambia County



More than 2.6 million visited Escambia County in 2017

29% more than last year
49% increase since 2014

	2014	2015	2016	2017	Past Year Change
Total Visitors	1,803,568	1,590,000	2,073,381	2,683,221	+29%
Stayed in Paid Lodging	1,168,332	1,155,097	1,343,895	1,703,274	+27%
Non-Lodging Visitors	635,229	434,903	729,486	979,947	+34%



2017 visitors spent more than \$800 million in Escambia County

2% more than last year
34% increase since 2014

	2014	2015	2016	2017	Past Year Change
Total Visitor Spending	\$599,573,718	\$677,075,644	\$787,186,547	\$802,582,211	+2%
Overnight Visitor Spending	\$477,268,807	\$588,695,835	\$659,523,794	\$672,445,710	+2%
Day Visitor Spending	\$122,304,911	\$88,379,828	\$127,662,753	\$130,136,501	+2%



2017 visitors paid more than \$22 million in taxes to Escambia County



2% more than last year
30% increase since 2014

	2014	2015	2016	2017	Past Year Change
Total County Taxes Paid by Visitors	\$17,208,103	\$19,857,456	\$21,857,908	\$22,361,153	+2%
Tourist Development Tax	\$8,631,175	\$9,400,053	\$10,169,792	\$10,673,622	+5%
County Sales Tax	\$7,461,891	\$8,560,422	\$10,177,412	\$10,349,176	+2%
County Gasoline Tax	\$1,115,037	\$1,896,981	\$1,510,704	\$1,338,355	-11%



More than 24,000 jobs in Escambia County are directly attributed to tourism



8% more than last year

	2016	2017	Notes
Hospitality & Leisure Jobs in Escambia County	22,300 ¹	24,081 ¹	8% increase over last year 18% of those employed in the county
Average Annual Wages Paid for Hospitality & Leisure Jobs in Escambia County	\$17,052 ¹	\$17,732 ¹	4% increase over last year
Total Estimated Hospitality & Leisure Wages Paid to Escambia County Residents	\$380,259,600	\$427,004,292	12% increase over last year

Lodging properties also pay property taxes to the County, which helps lower the tax burden on residents.

¹ Bureau of Labor Statistics



In 2017, more than \$427 million was paid in wages to tourism employees in Escambia County

12% more than last year

	2016	2017	Notes
Hospitality & Leisure Jobs in Escambia County	22,300 ¹	24,081 ¹	8% increase over last year 18% of those employed in the county
Average Annual Wages Paid for Hospitality & Leisure Jobs in Escambia County	\$17,052 ¹	\$17,732 ¹	4% increase over last year
Total Estimated Hospitality & Leisure Wages Paid to Escambia County Residents	\$380,259,600	\$427,004,292	12% increase over last year

Lodging properties also pay property taxes to the County, which helps lower the tax burden on residents.

¹ Bureau of Labor Statistics



For every \$1 invested in marketing by Visit Pensacola, businesses receive \$96 and the County receives \$3 in taxes

	2014	2015	2016	2017	Past Year Change
Investment in Marketing	\$3,177,000	\$3,968,000	\$3,714,000	\$4,207,901	+13%
Visitor Spending	\$599,573,718	\$677,075,644	\$787,186,547	\$802,582,21	+2%
County Taxes Paid by Visitors	\$17,236,993	\$19,905,821	\$21,864,108	\$22,361,153	+2%
Marketing Communications Recall	42%	52%	53%	51%	-4%
Visitor Spending Attributed to Marketing	\$259,673,627	\$360,206,277	\$396,996,731	\$404,250,932	+2%
County Taxes Paid by Visitors Attributed to Marketing	\$7,703,635	\$9,761,235	\$11,650,290	\$11,253,344	-3%
Returned to Escambia County Businesses (Visitor Spending) for Every \$1 Invested by Visit Pensacola	\$82	\$91	\$107	\$96	-10%
Returned to Escambia County Government (Taxes) for Every \$1 Invested by Visit Pensacola	\$2	\$2	\$3	\$3	0%



Overview of Visitor Trends

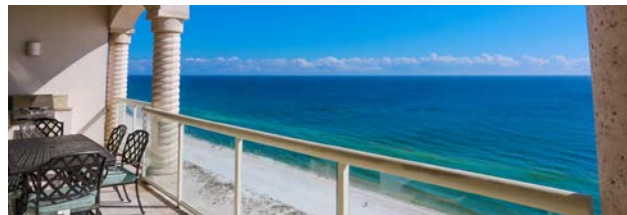


The 2017 average daily rate in Escambia County was \$123



3% more than last year
11% increase since 2014

	2014	2015	2016	2017	Past Year Change
Annual Average	\$112.04	\$118.95	\$119.63	\$123.18	+3%

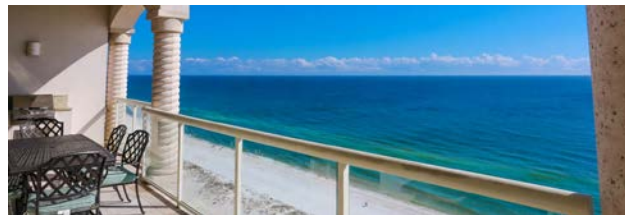




The 2017 average occupancy rate in 2017 was 66%

Same as last year
5% increase since 2014

	2014	2015	2016	2017	Past Year Change
Annual Average	63%	64%	66%	66%	-





Visitor Characteristics

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Average Age of Decision Maker	46	46	43	44
Average Income	\$81,768	← \$77,482	→ \$80,474	→ \$86,472
Traveled with Children	24%	22%	→ 25%	→ 30%
Average Party Size	2.7	2.7	→ 3.0	→ 3.5



Visit Profile

	<u>2014</u>		<u>2015</u>		<u>2016</u>		<u>2017</u>
Advance Planning (days)	46	→	53	←	43	→	51
Advance Booking (days)	42	→	50	←	39	→	47
Stayed in Paid Accommodations	66%	→	71%	←	66%		63%
Average Length of Stay (lodging)	7.3	→	8.8	←	7.8	←	6.3



Visit Profile

	<u>2014</u>		<u>2015</u>		<u>2016</u>		<u>2017</u>
Advance Planning (days)	46	→	53	←	43	→	51
Advance Booking (days)	42	→	50	←	39	→	47
Stayed in Paid Accommodations	66%	→	71%	←	66%		63%
Average Length of Stay (lodging)	7.3	→	8.8	←	7.8	←	6.3

	2014	2015	2016	2017	Past Year Change
Total Visitors	1,803,568	1,590,000	2,073,381	2,683,221	+29%
Stayed in Paid Lodging	1,168,332	1,155,097	1,343,895	1,703,274	+27%
Non-Lodging Visitors	635,229	434,903	729,486	979,947	+34%

Visitor Activities



	<u>2014</u>		<u>2015</u>		<u>2016</u>		<u>2017</u>
	<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>
Went to the beach	89		90	←	80		79
Shopped	29	→	34		32	→	36
Visited museums	34	→	46	←	34	←	27
Went to a fine dining restaurant	11	→	32	→	38	←	25
Went fishing	10		13		11		14
Participated in water sports	4	→	13	←	6	→	12
Played golf	5		6		6		9
Non-ticketed/free performance/event	2	→	14	←	8		9
Visited art galleries	9	→	13		13	←	8
Attended a ticketed performance	3		4		5		6
Ecotourism	NA		NA		NA		6
Attended a professional sporting event	3		2		2		4
Attended non-professional spectator sports	3		1		3		4



Visitor Experience Ratings

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
<u>Positive opinion of:</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
A place you feel comfortable	96	98	97	95
A place to relax	95	98	96	94
Having scenic beauty	96	98	96	94
A place to have fun	93	96	96	93
Customer service you've received	NA	98	96	← 91
Clean, well maintained beaches	94	96	96	← 90
Good place to visit as a couple	93	96	93	← 89
Offering value for the travel dollar	88	→ 92	93	← 86
Dining options you want	84	→ 93	93	← 86
Good place to visit with children	89	86	88	86
Activities other than the beach	78	→ 88	87	← 76
Historical offerings/attractions	81	→ 88	86	← 75
Shopping options you want	75	→ 83	84	← 73
Nightlife options you want	NA	NA	NA	73



Visitor Experience Ratings

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
<u>Positive opinion of:</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
A place you feel comfortable	96	98	97	95
A place to relax	95	98	96	94
Having scenic beauty	96	98	96	94
A place to have fun	93	96	96	93
Customer service you've received	NA	98	96	← 91
Clean, well maintained beaches	94	96	96	← 90
Good place to visit as a couple	93	96	93	← 89
Offering value for the travel dollar	88	→ 92	93	← 86
Dining options you want	84	→ 93	93	← 86
Good place to visit with children	89	86	88	86
Activities other than the beach	78	→ 88	87	← 76
Historical offerings/attractions	81	→ 88	86	← 75
Shopping options you want	75	→ 83	84	← 73
Nightlife options you want	NA	NA	NA	73



Recommendations & Returns

	<u>2014</u>		<u>2015</u>		<u>2016</u>		<u>2017</u>
Will Recommend	98%		99%		99%		99%
<u>Will Return</u>	<u>93%</u>		<u>93%</u>		<u>96%</u>		<u>94%</u>
Within 1 year	72%	→	78%		76%	→	82%
Within 6 months	25%		26%	→	31%		31%

For Additional Information:



Steve Hayes
President
Visit Pensacola
shayes@visitpensacola.com



Jeff Shusterman
President
Majority Opinion Research
jeff@majorityopinionresearch.com