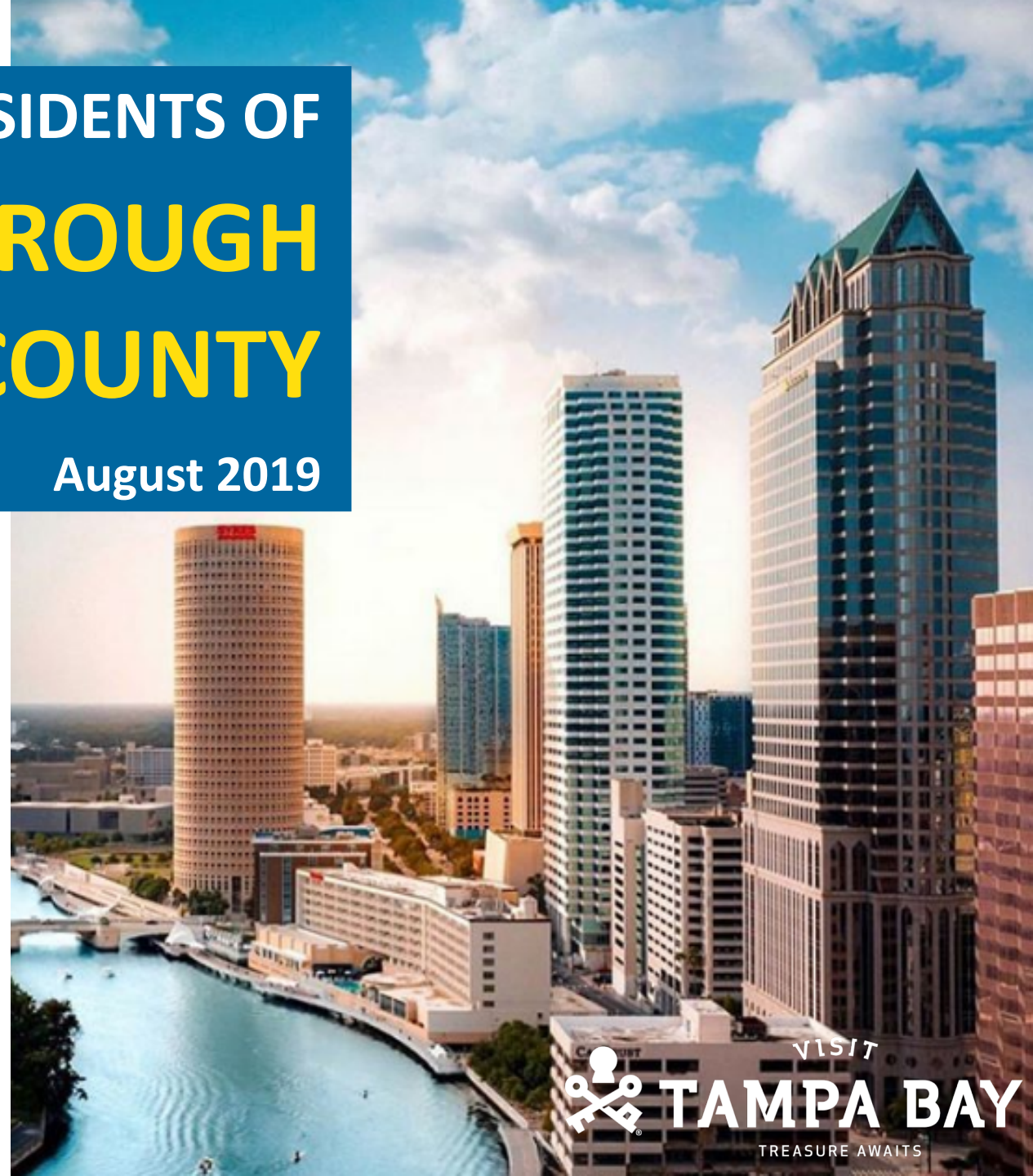


VALUE OF TOURISM TO RESIDENTS OF TAMPA BAY & HILLSBOROUGH COUNTY

August 2019

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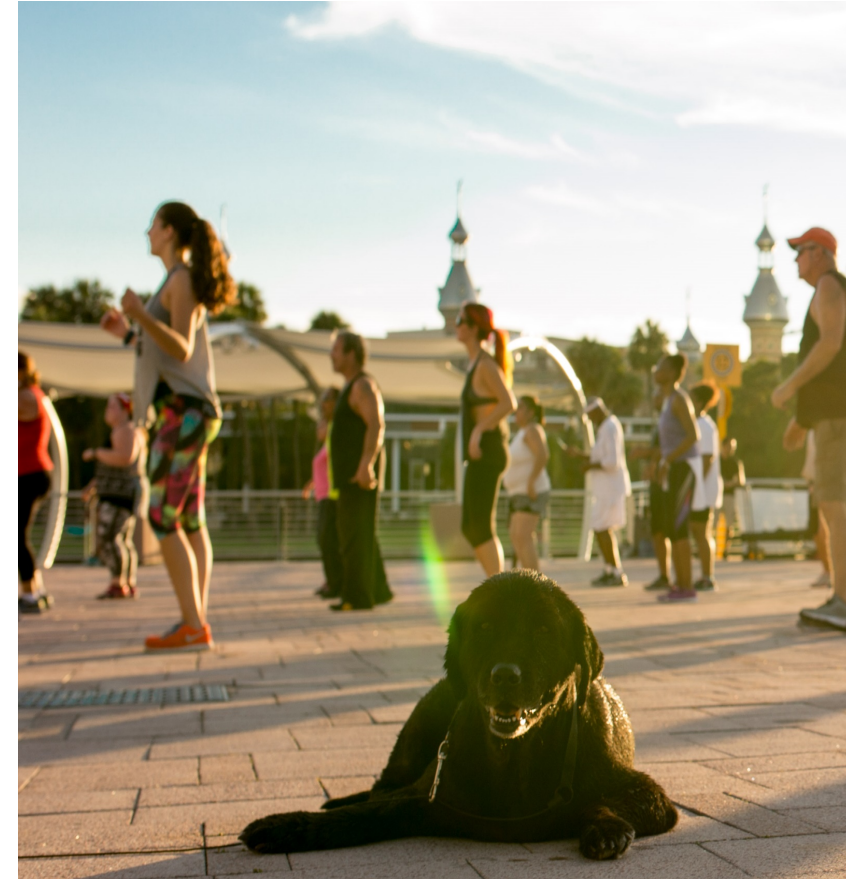
STUDY OBJECTIVES AND METHODOLOGY

Purpose

- » Assess local residents' perceived value of tourism
- » Explore perception of tourism's impact on community
- » Explore perception of tourism's impact on individuals
- » Ascertain positive and negative associations with tourism
- » Examine awareness and evaluation of Visit Tampa Bay

Methodology

- » Email surveys with 400 Hillsborough County residents



VALUE OF TOURISM TO RESIDENTS OF TAMPA BAY & HILLSBOROUGH COUNTY

Executive Summary of Results



IMPACT OF TOURISM IN TAMPA BAY

By an overwhelming **91% to 3%** ratio, residents of Hillsborough County are more likely to say that tourism has positive rather than negative impacts on the community.

- » **91%** of locals believe that tourism has an overall positive impact on Tampa & Hillsborough County, while only **3%** of residents perceive a negative impact from tourism.
- » **59%** of locals believe that tourism in Tampa & Hillsborough County has an overall positive effect on them personally.



POSITIVE IMPACTS OF TOURISM



Supports local economy
79%



Supports arts/culture
70%



Supports small business
69%



Creates more activities
& dining choices **69%**



More jobs for
locals **68%**

Residents' are most likely to believe that tourism has positive impacts on **the local economy, arts & culture, small businesses, and consumer choice.**

POSITIVE ASSOCIATIONS WITH TOURISM

When asked about positive associations with tourism in Tampa Bay & Hillsborough County, locals most frequently reference the **economy, money,** and **community.**



NEGATIVE IMPACTS OF TOURISM



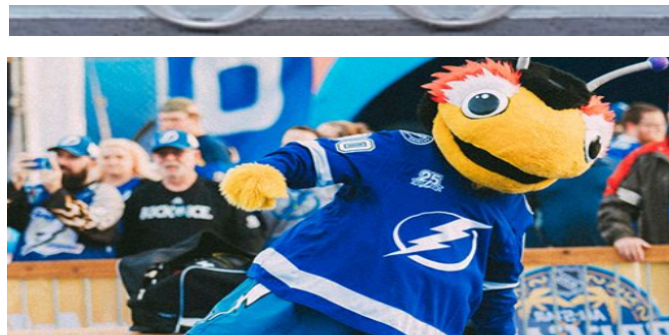
Increased traffic
88%



Parking difficulties
62%



Cost of community upkeep
31%



Tourism jobs are unstable
30%

91% of locals recognize positive impacts, and only **3%** recognize negative impacts, yet locals still cite some negatives associated with tourism.

NEGATIVE ASSOCIATIONS WITH TOURISM

When asked about negative associations with tourism in Tampa Bay & Hillsborough County, locals reference **traffic** more than any other issue.



IMPACT OF TOURISM ON RESTAURANTS

3 in 5 local residents know that tourism enhances their restaurant options.

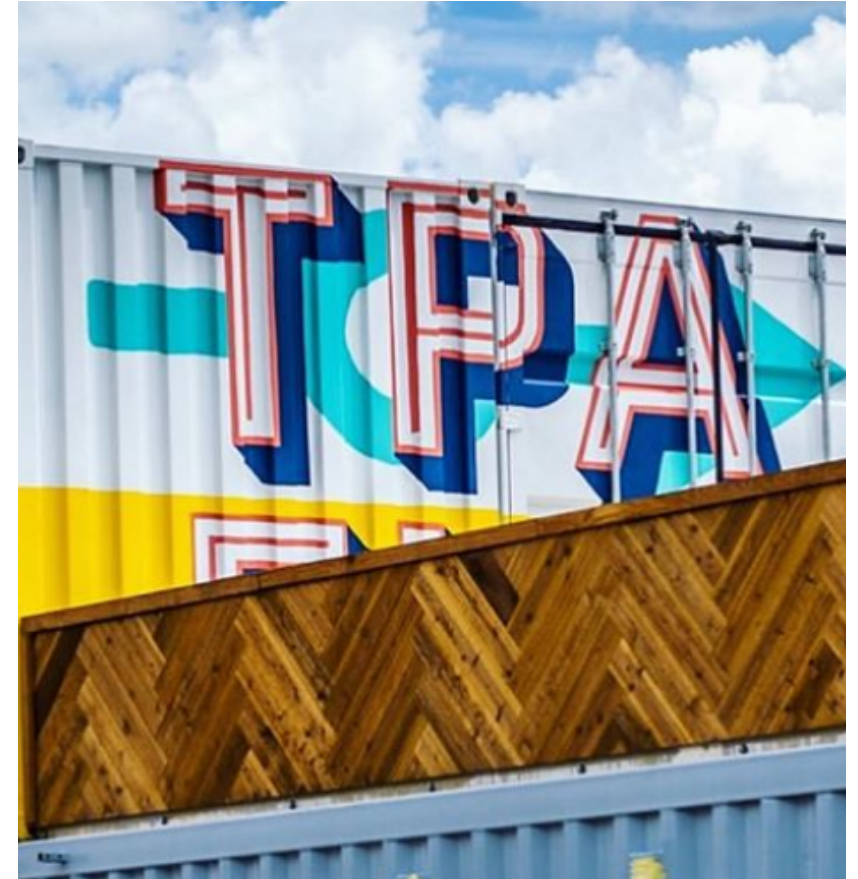
- » **91%** of locals rate the quantity and quality of restaurants in Tampa & Hillsborough County as “good,” “very good,” or “excellent.”
- » **61%** of local residents attribute the quality and quantity of restaurants to tourism.



IMPACT OF TOURISM ON ENTERTAINMENT

3 in 5 local residents know that tourism enhances their entertainment options.

- » **88%** of locals rate the quantity and quality of entertainment options and festivals in Tampa & Hillsborough County as “good,” “very good,” or “excellent.”
- » **62%** of local residents attribute the quality and quantity of entertainment options and festivals to tourism.



IMPACT OF TOURISM ON CULTURE

Over **half** of locals know that tourism enhances Hillsborough County's cultural opportunities.

- » **79%** of locals rate the quantity and quality of cultural opportunities in Tampa & Hillsborough County as “good,” “very good,” or “excellent.”
- » **51%** of local residents attribute the quality and quantity of cultural opportunities to tourism.



OVERNIGHT VISITORS

3 in 4

local residents hosted overnight visitors who live outside of Hillsborough County in their homes in the past year.



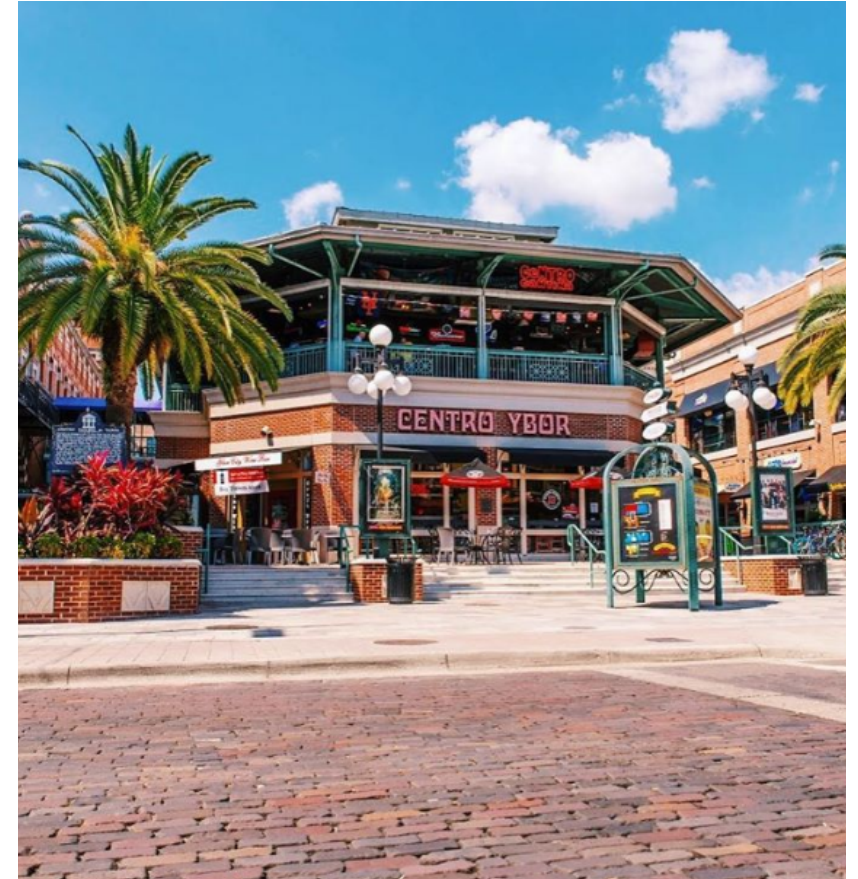
JOBS IN TOURISM INDUSTRY

8%

of locals or their family members work in hotels, vacation rental companies, restaurants, etc., that attribute much of their revenue to visitors.

20%

of locals work for businesses that rely on visitors for at least a significant portion of their revenue – this translates to nearly 120,000 jobs.



AWARENESS ABOUT VISIT TAMPA BAY

Only **1 in 4** locals knows Visit Tampa Bay is funded by hotel user fees.

- » **66%** of locals have heard of Visit Tampa Bay.
- » **27%** of locals are aware that Visit Tampa Bay is funded by hotel user fees rather than by general taxes.



LOCAL SUPPORT FOR VISIT TAMPA BAY

Visit Tampa Bay receives support and favorable ratings from locals.

- » **86%** of locals support Visit Tampa Bay's efforts to increase the number of visitors who come to Tampa & Hillsborough County.
- » **79%** of locals rate Visit Tampa Bay's performance in promoting tourism in Tampa & Hillsborough County as "good," "very good," or "excellent."



PROFILE OF TAMPA BAY LOCALS

Typical local residents in this study¹:

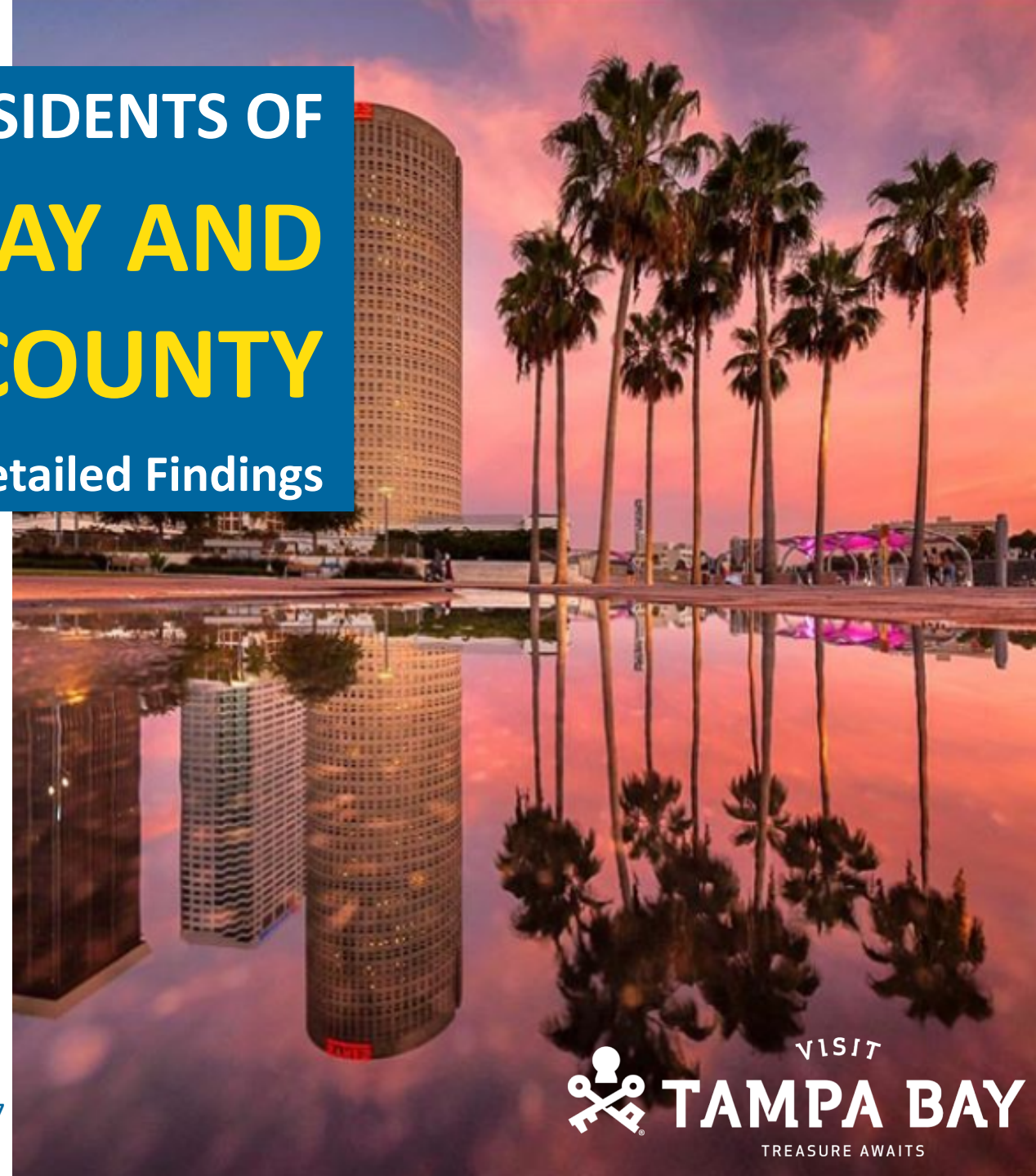
- » Are **47** years old
- » Are male (**51%**)
- » Are White/Caucasian (**49%**)
- » Earn **\$57,400** in household income



¹Sample results were weighted to reflect Hillsborough County demographics.

VALUE OF TOURISM TO RESIDENTS OF TAMPA BAY AND HILLSBOROUGH COUNTY

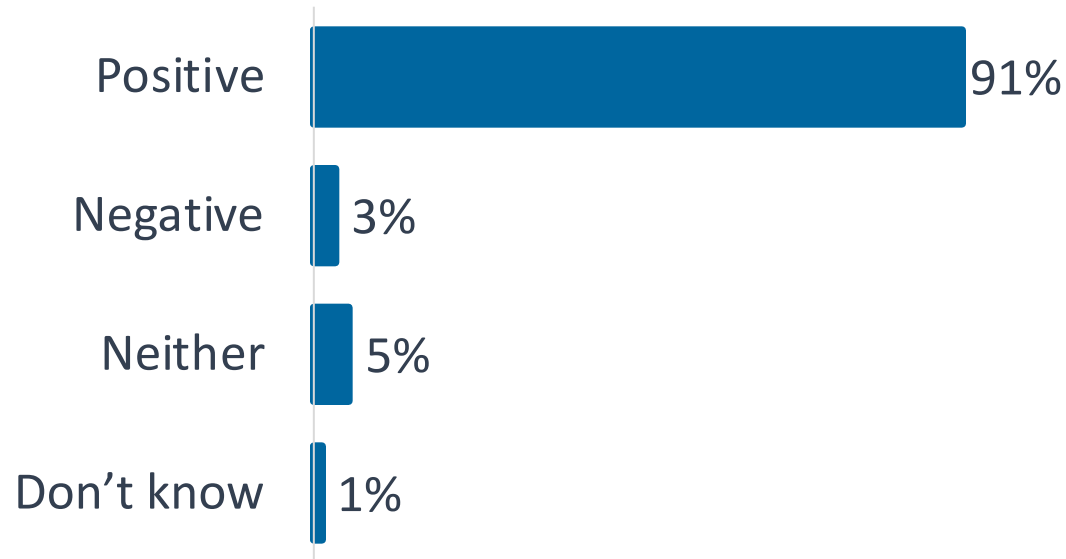
Detailed Findings



IMPACT OF TOURISM ON TAMPA BAY

9 in 10

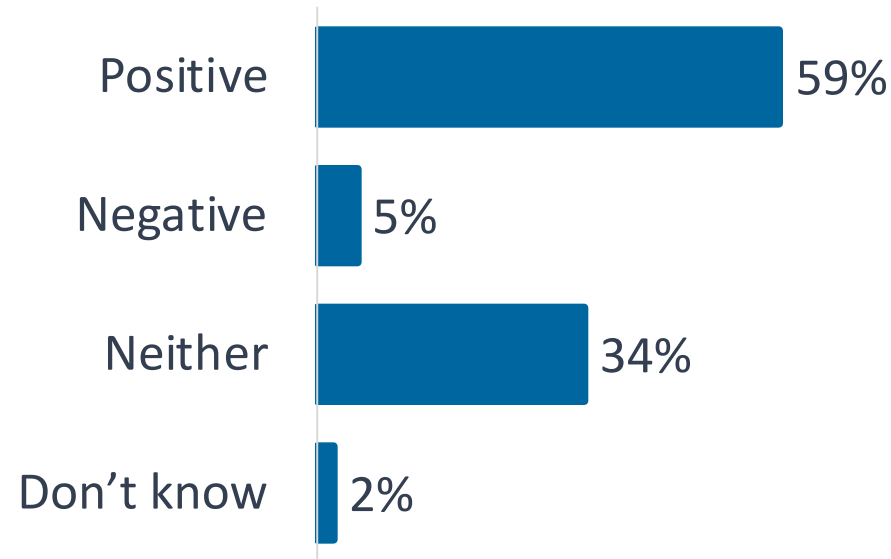
locals believe that tourism has an overall positive impact on Tampa & Hillsborough County.



IMPACT OF TOURISM ON INDIVIDUALS

3 in 5

locals believe that tourism in Tampa & Hillsborough County has an overall positive effect on them as an individual.



POSITIVE IMPACTS OF TOURISM

When given a list of possible positives associated with tourism,

4 in 5

locals check that tourism supports the local economy.

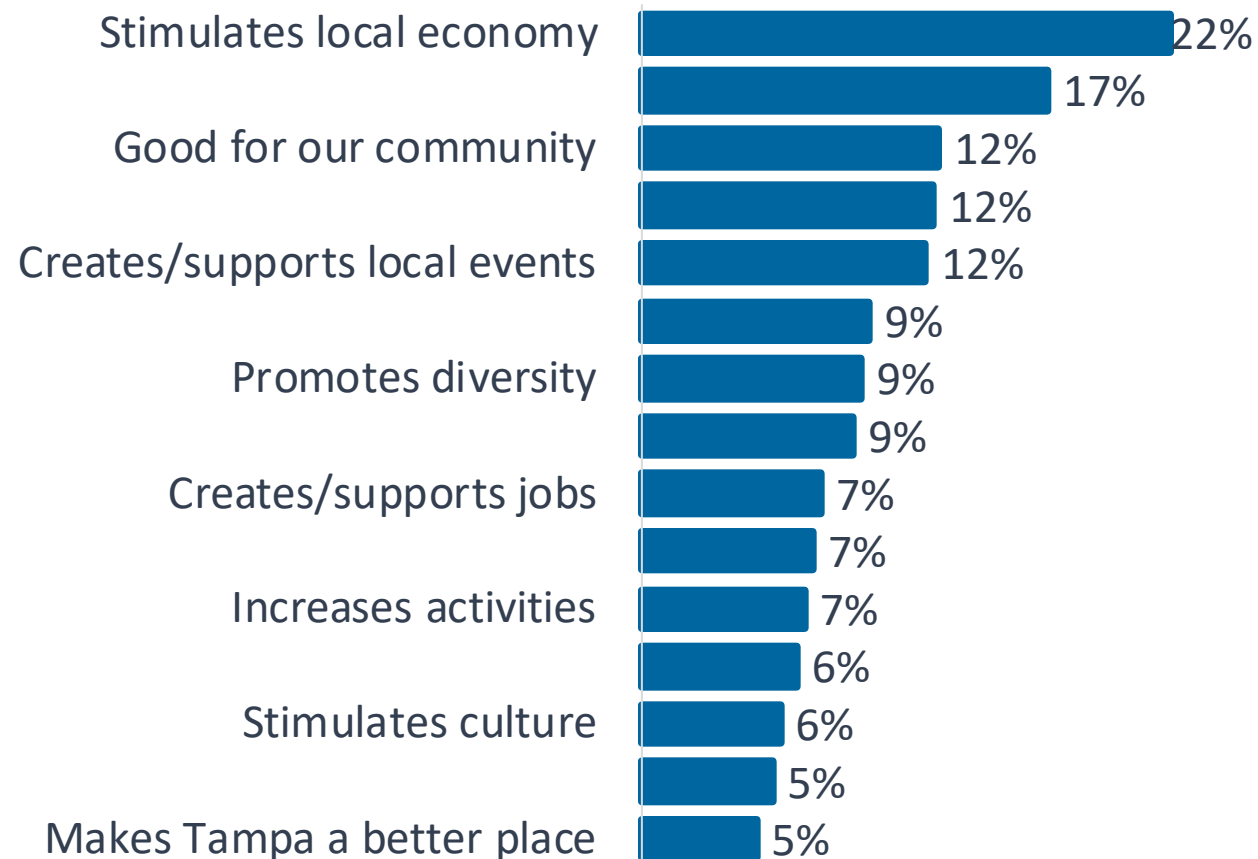


POSITIVE ASSOCIATIONS WITH TOURISM

In an open-ended question where residents could express their own feelings about tourism,

1 in 5

residents mention how tourism stimulates the local economy.

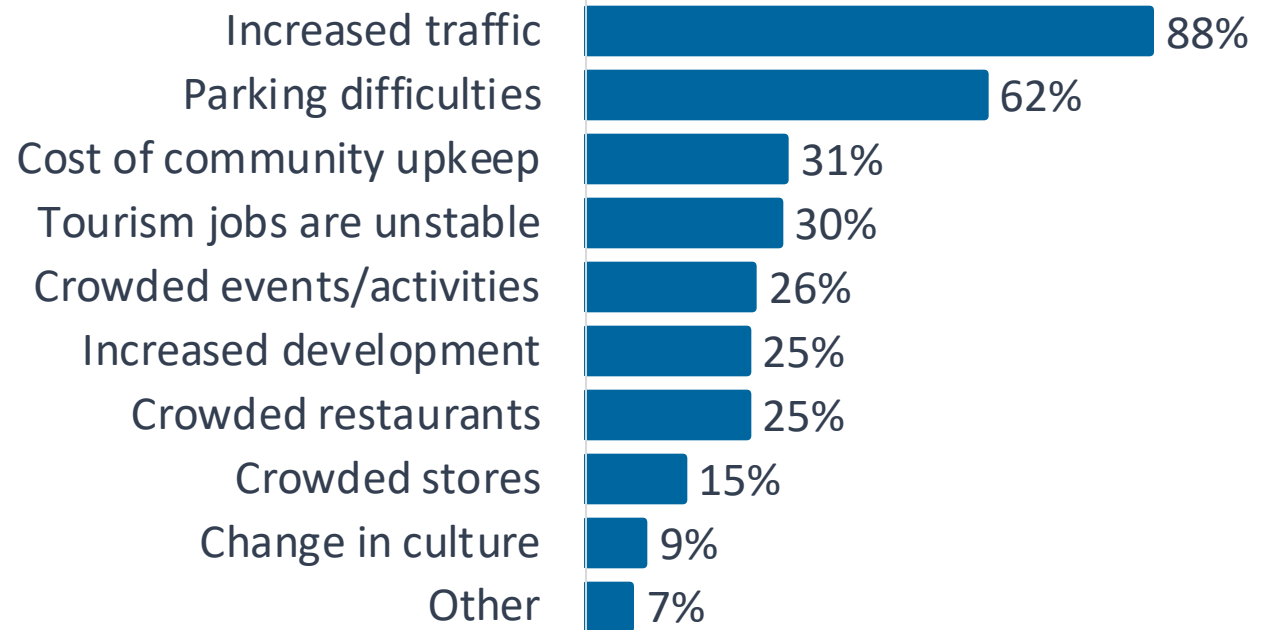


NEGATIVE IMPACTS OF TOURISM

When given a list of possible negatives associated with tourism,

88%

of locals check increased traffic.

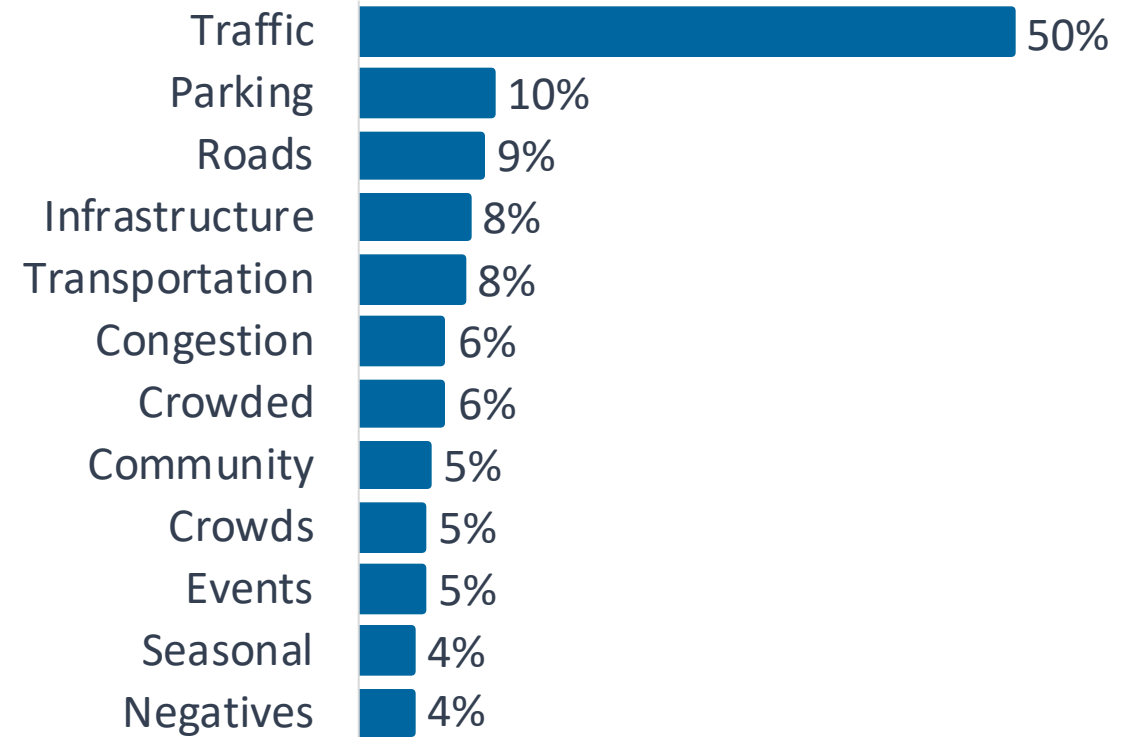


NEGATIVE ASSOCIATIONS WITH TOURISM

In an open-ended question where residents could express their own feelings about tourism,

1 in 2

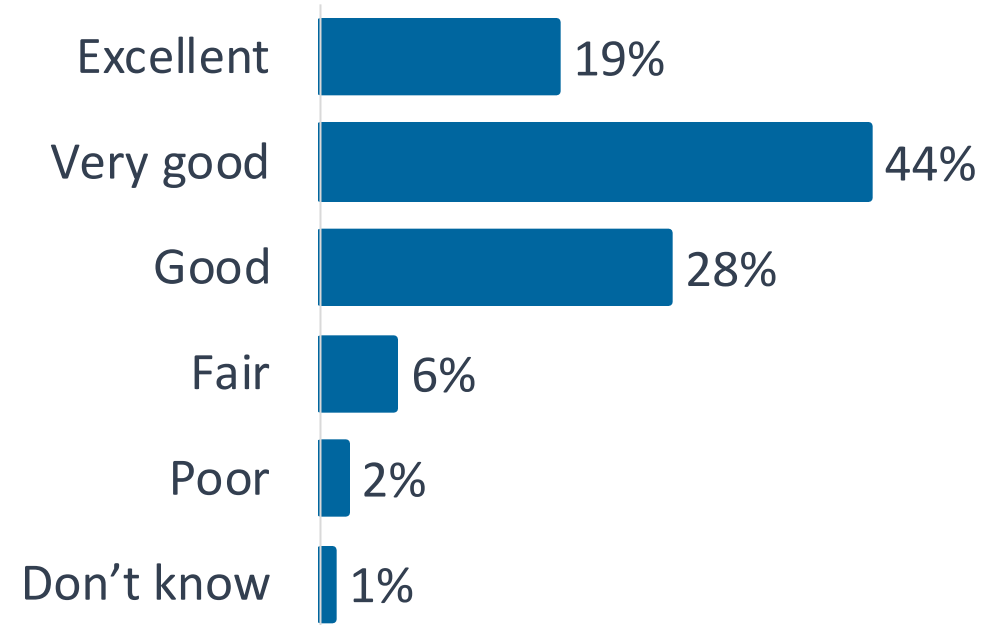
residents mention concerns about traffic.



QUALITY AND QUANTITY OF RESTAURANTS

91%

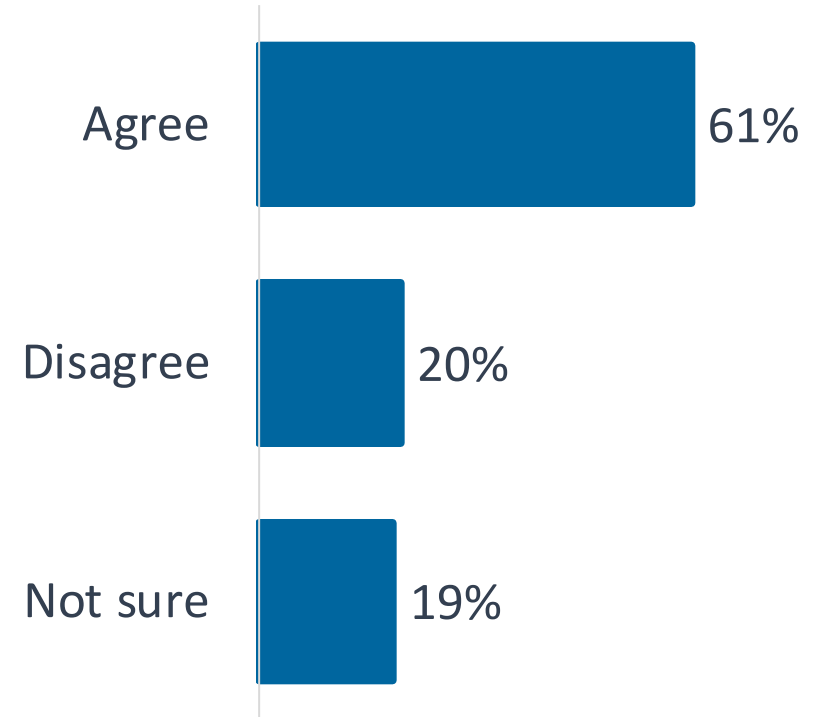
of locals rate the current quantity and quality of restaurants in Tampa & Hillsborough County as “good,” “very good,” or “excellent.”



IMPACT OF TOURISM ON RESTAURANTS

3 in 5

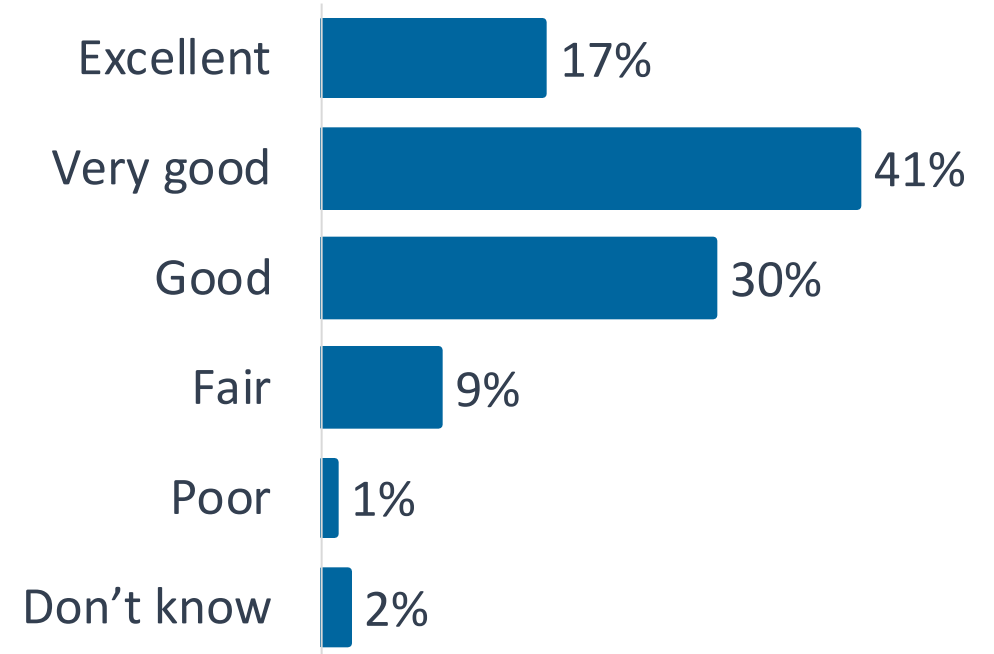
locals agree that without the support and financial assistance of tourists, Tampa & Hillsborough County would not have the same quality and quantity of restaurants.



QUALITY AND QUANTITY OF ENTERTAINMENT

88%

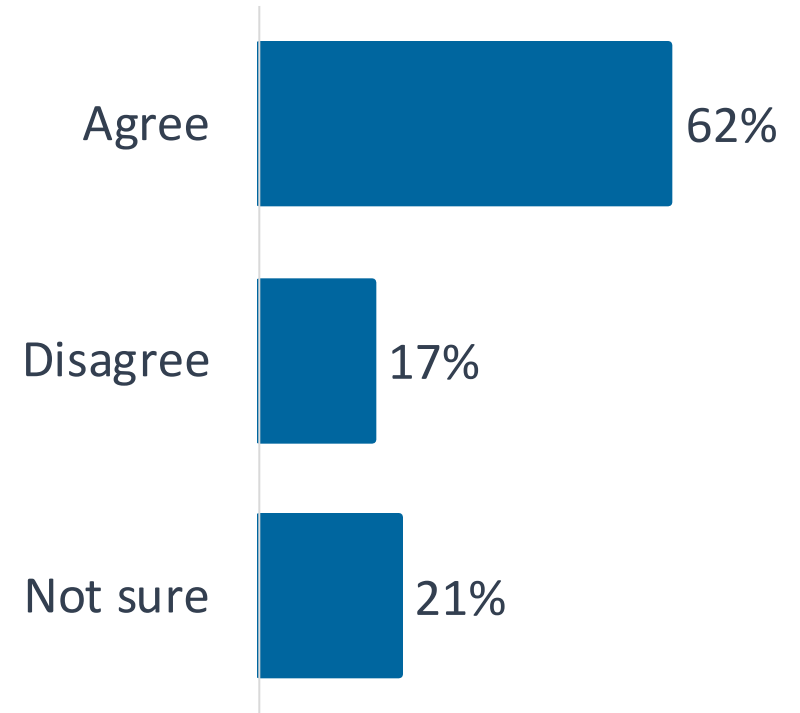
of locals rate the current quantity and quality of entertainment options in Tampa Bay and Hillsborough County as “good,” “very good,” or “excellent.”



IMPACT OF TOURISM ON ENTERTAINMENT

62%

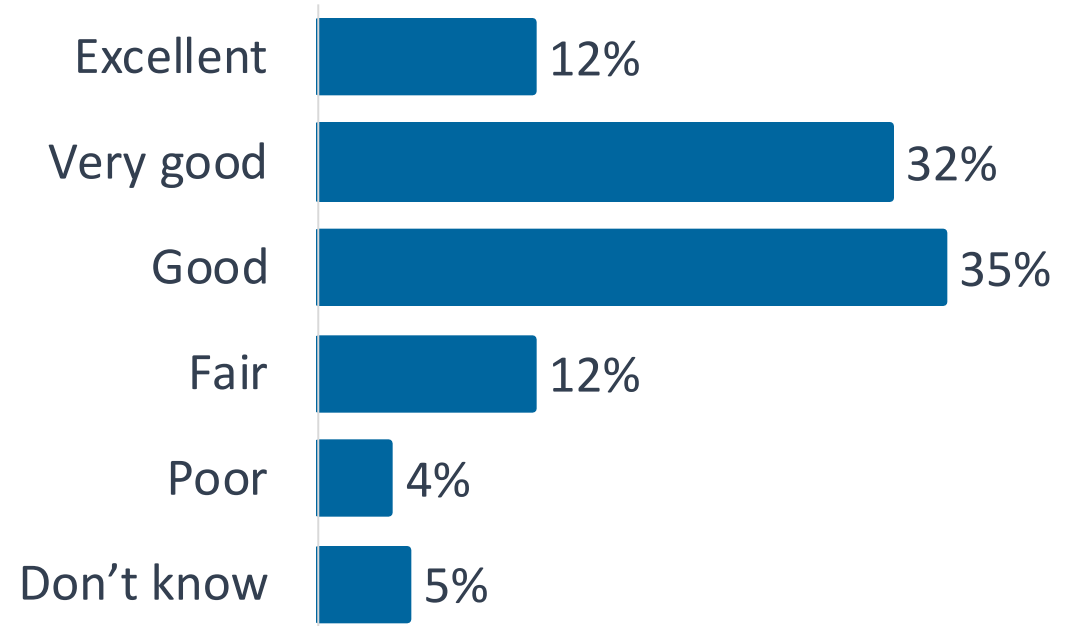
of locals agree that without the support and financial assistance of tourists, Tampa Bay and Hillsborough County would not have the same quality and quantity of entertainment.



QUALITY AND QUANTITY OF CULTURE

8 in 10

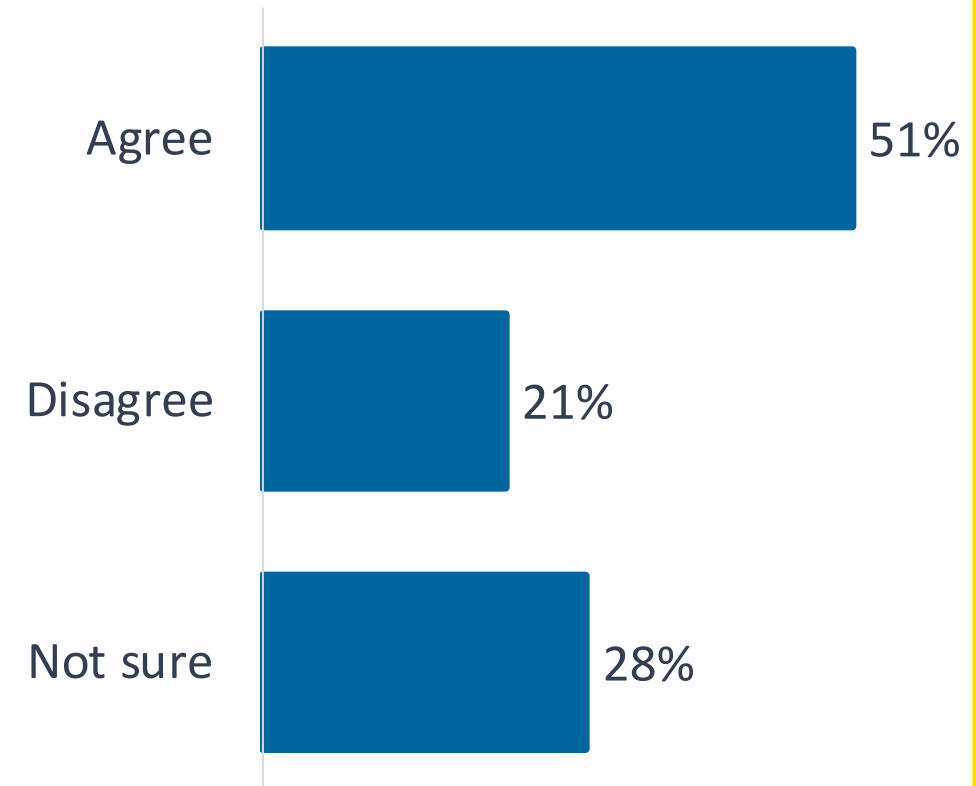
locals rate the current quantity and quality of cultural activities in Tampa Bay and Hillsborough County as “good,” “very good,” or “excellent.”



IMPACT OF TOURISM ON CULTURE

51%

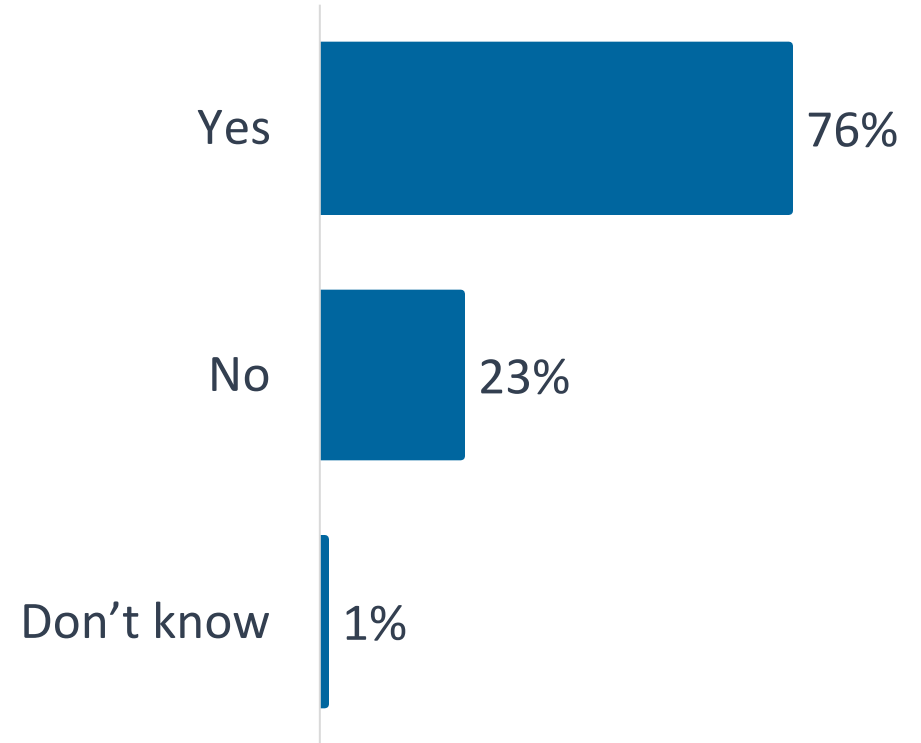
of locals agree that without the support and financial assistance of tourists, Tampa Bay and Hillsborough County would not have the same quality and quantity of cultural opportunities.



OVERNIGHT VISITORS

3 in 4

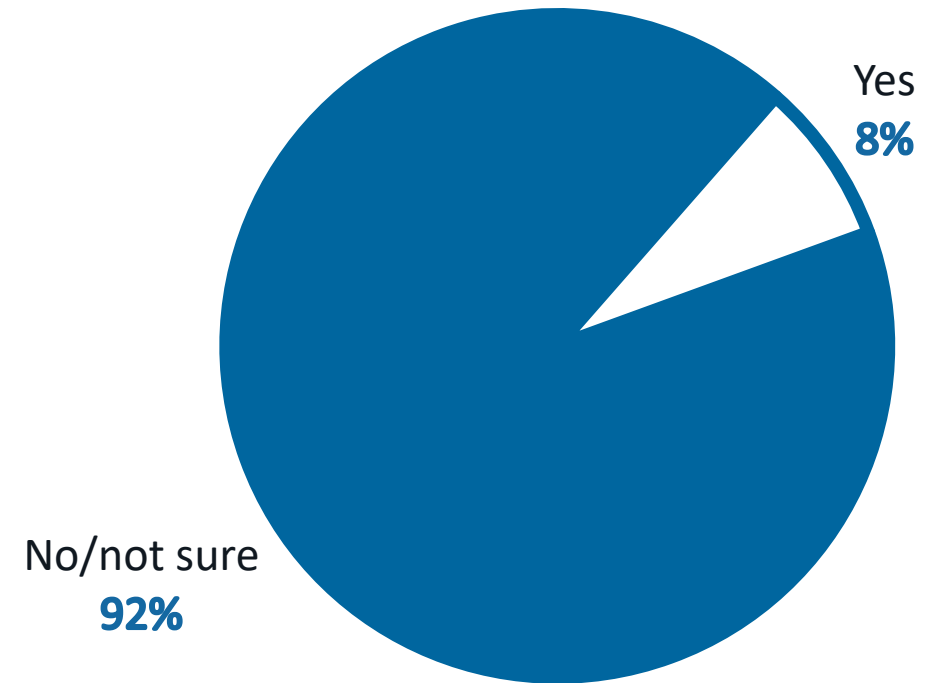
locals hosted overnight visitors who live outside of the Tampa & Hillsborough County area in their homes in the past year.



JOBS IN TOURISM INDUSTRY

8%

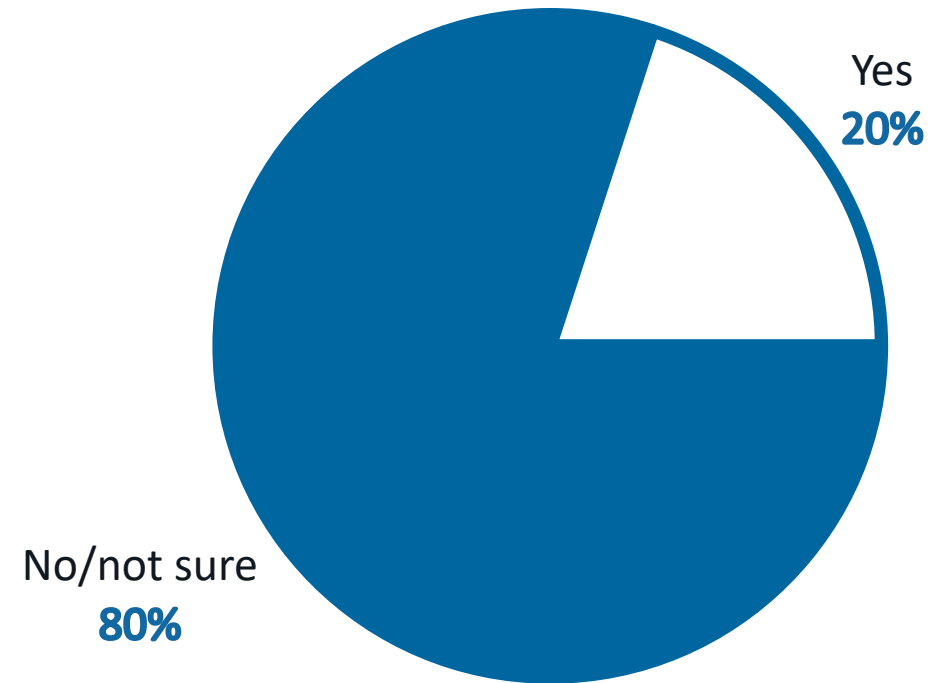
of Tampa & Hillsborough County locals or their family members work in a business that derives most of its revenue from visitors.



JOBS IN SUPPORTING INDUSTRIES

1 in 5

local residents or their family members work for other businesses that derive a significant portion of their revenue from visitors.

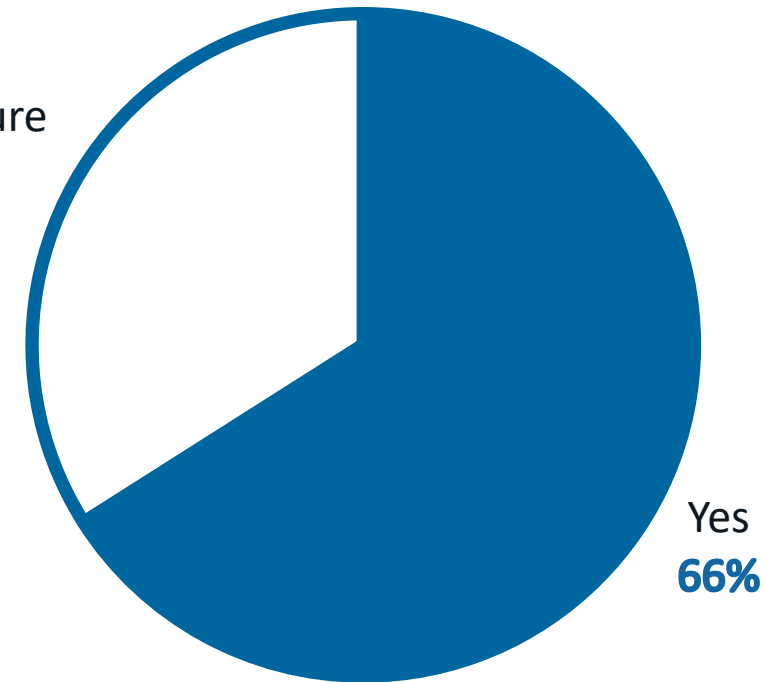


AWARENESS ABOUT VISIT TAMPA BAY

2 in 3

local residents have heard of
Visit Tampa Bay.

No/not sure
34%



AWARENESS ABOUT VTB FUNDING

27%

of **all** local residents know that Visit Tampa Bay is funded by hotel user fees.

Aware of Visit Tampa Bay funding

27%

Not aware of Visit Tampa Bay funding

39%

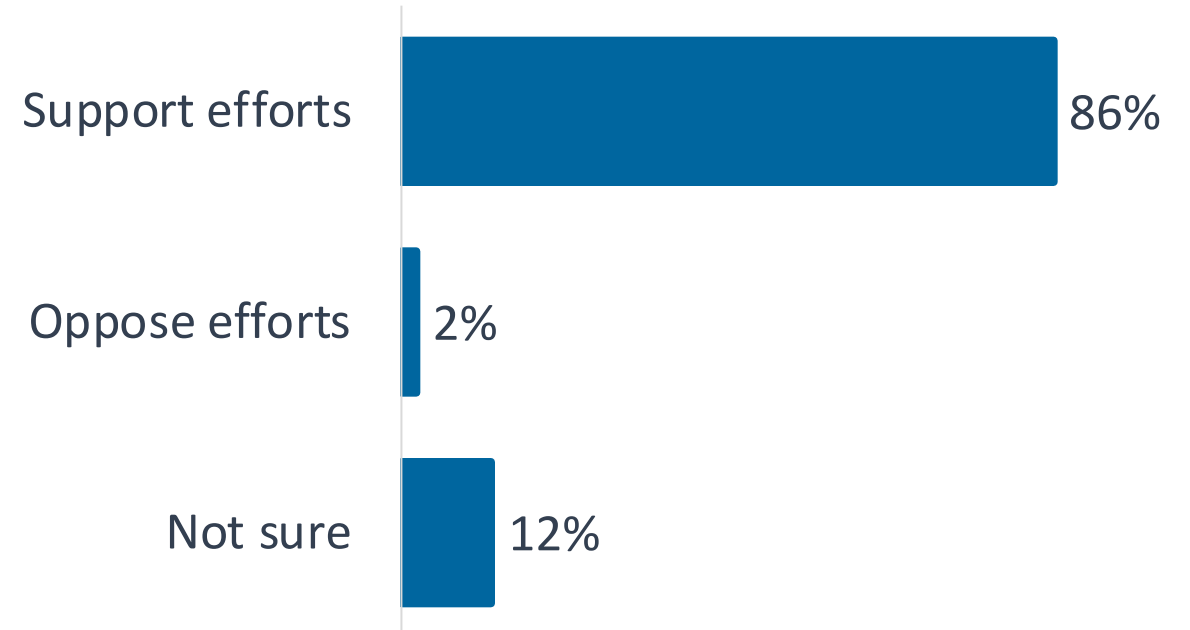
Not aware of Visit Tampa Bay

34%

LOCAL SUPPORT FOR VISIT TAMPA BAY

86%

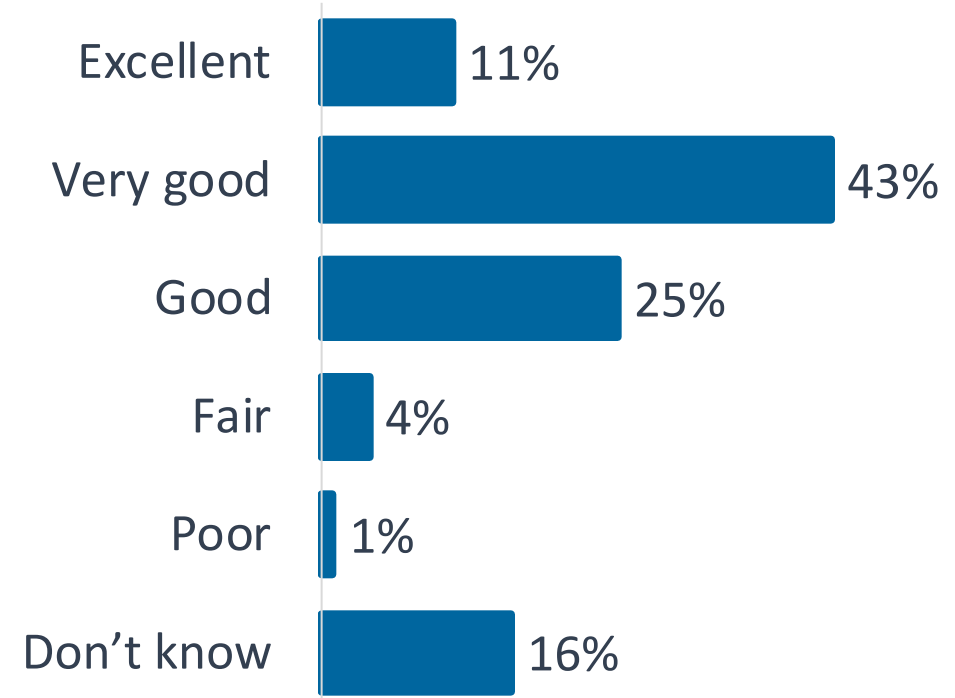
of locals support Visit Tampa Bay's efforts to increase the number of visitors who come to Tampa & Hillsborough County.



RATING OF TOURISM EFFORTS

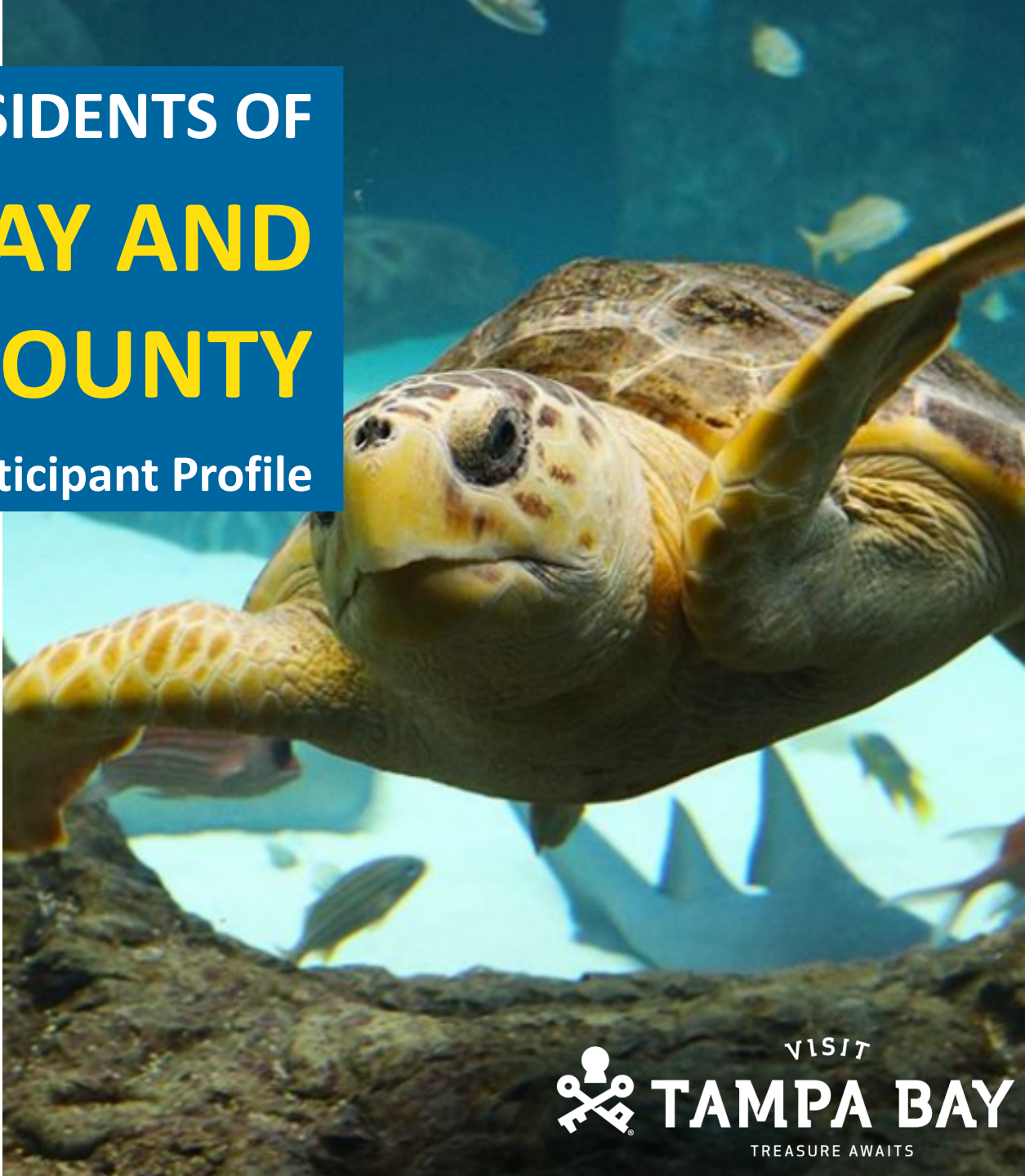
4 in 5

locals rate Visit Tampa Bay's performance in promoting tourism in Tampa & Hillsborough County as "good," "very good," or "excellent."



VALUE OF TOURISM TO RESIDENTS OF TAMPA BAY AND HILLSBOROUGH COUNTY

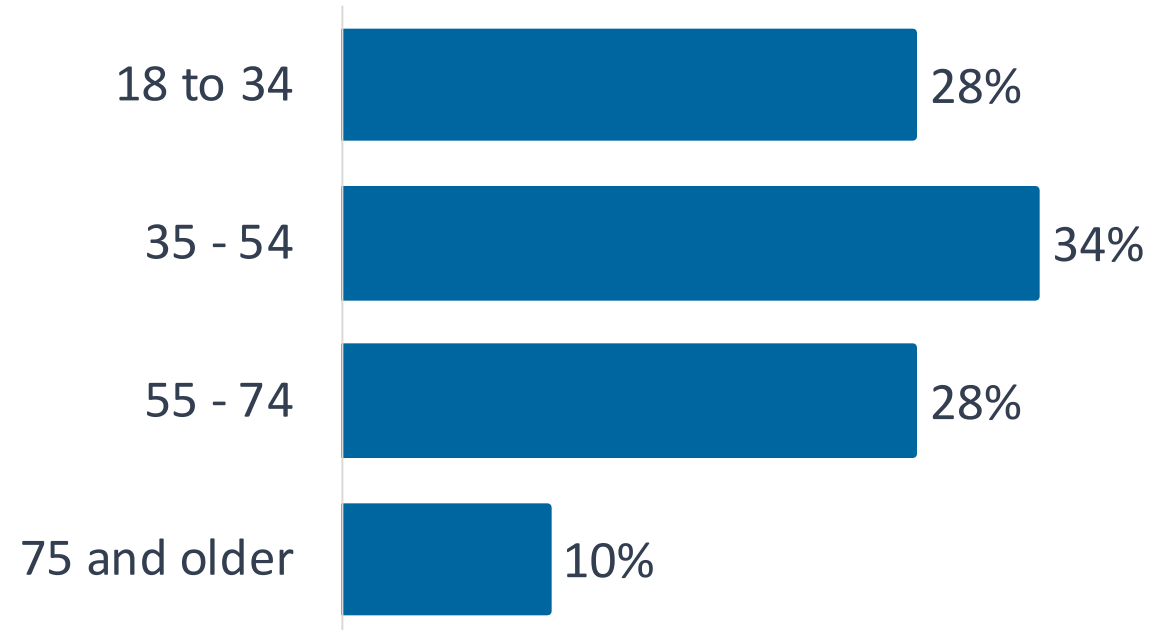
Participant Profile



AGE OF PARTICIPANTS

The typical resident of
Tampa & Hillsborough
County who participated in
this study was

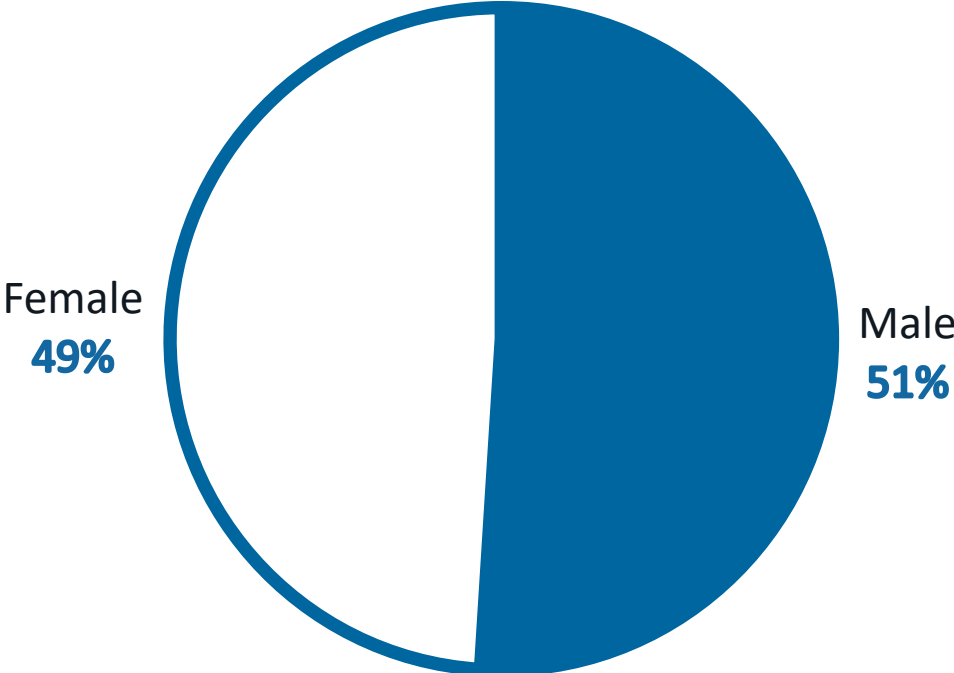
47
years old.



GENDER OF PARTICIPANTS

51%

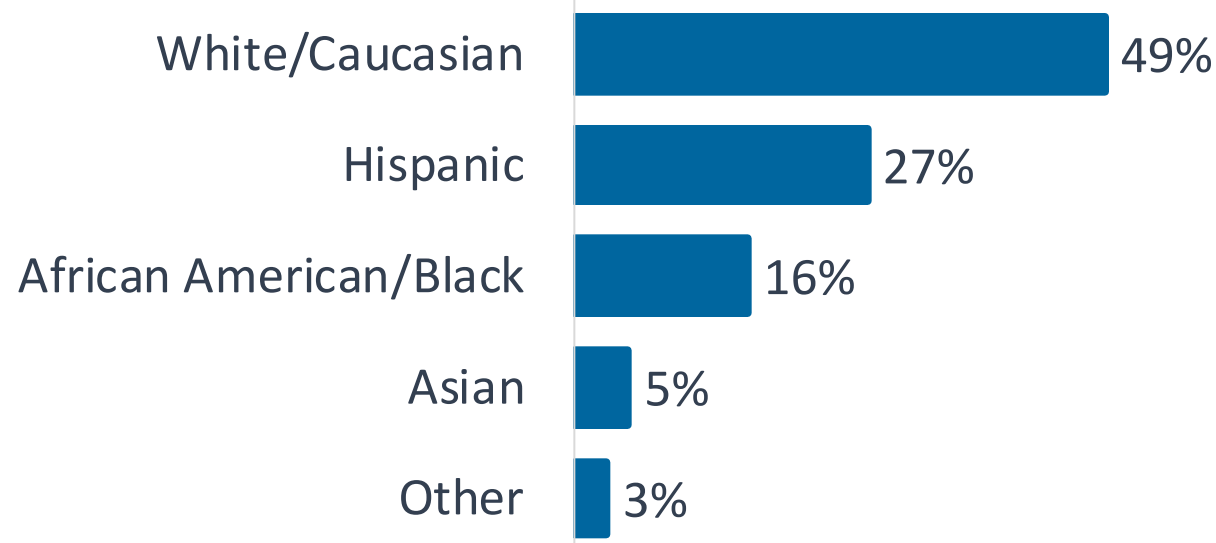
of residents in this study
are male.



RACE & ETHNICITY OF PARTICIPANTS

Half

of Tampa & Hillsborough County locals in this study identified as White/Caucasian.

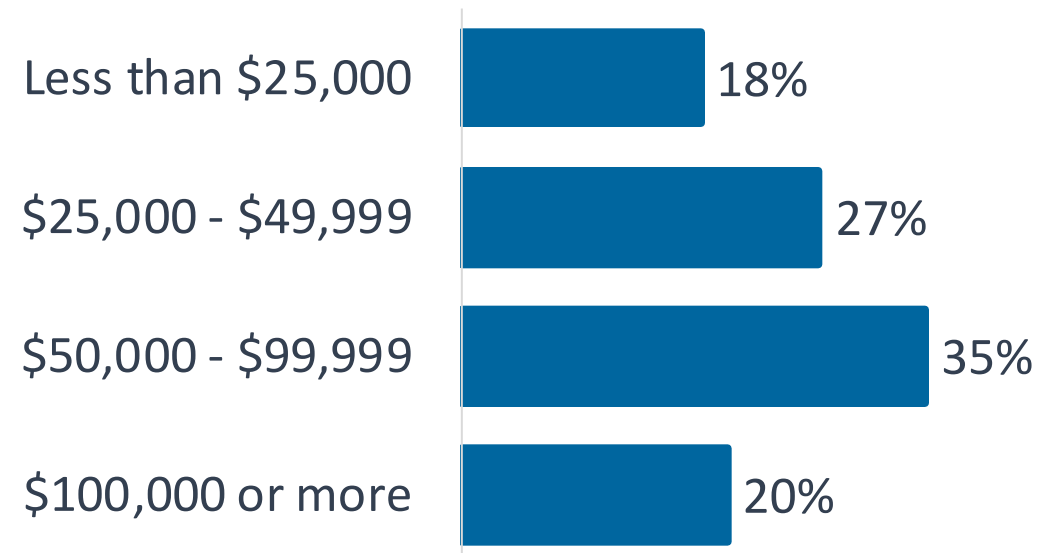


HOUSEHOLD INCOME OF PARTICIPANTS

The typical Tampa & Hillsborough County household in this study earned

\$57,400

last year.



VALUE OF TOURISM TO RESIDENTS OF TAMPA BAY AND HILLSBOROUGH COUNTY

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