



Analysis of the 2009 Hillsborough County Visitor Key Findings

- Overall, total number of visitors decreased 6.2% and accounted for an estimated 15.05 million visitors to Tampa/Hillsborough County in 2009.
- Visitor spending increased by 6.3% in 2009, totaling \$2.9 billion.
- Direct impact from visitors on wages and employment in 2009 was over \$1.1 billion dollars in wages and 46,222 jobs.
- Overnight visitors staying in commercial lodging facilities (i.e. hotels, motels, condominiums, and campgrounds) decreased 4.4% from 4.56 million in 2008 to 4.36 million people in 2009. Commercial overnight visitors stayed an average of 3.88 nights in our community and contributed \$1.66 billion to the local economy.
- Commercial lodging visitors accounted for 29% of our total visitors to Hillsborough County; and accounted for 57% of total expenditures.
- Bed Tax Revenues reached \$17.9 million during 2009, representing a 13.4% decrease over 2008 collected bed taxes.
- Average Occupancy for 2009 decreased 5.2% over 2008 to end at 53%, and the Average Daily Rate (ADR) decreased 10.8% from 2008 to end the year at \$92.69.
- Domestic inbound passengers at Tampa International Airport decreased 7.6% to 8.25 million, and International inbound passengers increased by 6.05% to 200,125 airline passengers.
- Total cruise passengers at the Port of Tampa reached 793,884 cruise passengers for calendar year 2009, which represented a 1.1% increase over 2008 figures.
- Domestic United States markets continue to make up the majority of our visitors accounting for 57.4% of the market. In-State visitors represented 31.5% of the market and International markets were 11.1% of the total market.
- Canada, England and Germany are the top three international markets for visitors to Tampa/Hillsborough County, with Canada accounting for 33.6% of the international market, England accounting for 23.2% of the international market, and Germany accounting for 9.1% of the international market.

TRIP CHARACTERISTICS OF THE TAMPA TRAVELER

CATEGORY	2002	2003	2004	2005	2006	2007	2008	2009
Total Visitors (in millions)	15.52	16.57	16.98	17.88	16.91	16.76	16.05	15.05
Total Spending (in billions)	\$2.5	\$2.5	\$2.8	\$3.0	\$3.2	\$3.1	\$2.7	\$2.9
Total Overnight Visitors (in millions)	4.6	4.8	5.0	5.2	4.7	4.4	4.6	4.3
Average Number of Nights: (Commercial Lodging Guests)	3.7	3.3	3.9	3.7	3.8	4.2	3.6	3.8
Stayed Overnight in Tampa:	48.6%	49.4%	55.1%	58.6%	55.9%	53.8%	52.6%	51.8%
Average Party Size:	2.91	3.01	3.44	3.39	3.33	3.25	3.35	2.67
Travel Mode to Tampa:								
• Air:	41.0%	38.2%	39.9%	41.4%	41.2%	41.6%	41.6%	46.3%
• Auto:	59.0%	61.8%	60.1%	58.6%	58.8%	58.4%	58.4%	53.7%
Avg. Expenditures (per party/per day):	\$219.57	\$224.51	\$248.40	\$265.06	\$263.25	\$263.46	\$236.50	\$241.45
Percent Likely To Return:	83.1%	83.6%	83.4%	84.5%	83.5%	84%	84.4%	98.6%
Visitor Origins:								
• In-State:	37.2%	39.2%	36.2%	35.8%	36.8%	35.6%	36.5%	31.5%
• Domestic:	51.0%	51.8%	53.2%	53.1%	52.3%	53.7%	56%	57.4%
• International:	11.8%	9.0%	10.6%	11.1%	10.8%	10.7%	7.5%	11.1%

VISITOR ORIGIN MARKETS

IN-STATE Visitors represented 36.5% of total visitors. The top 10 cities were:

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| <ol style="list-style-type: none"> 1. St. Petersburg 2. Clearwater 3. Orlando 4. Lakeland 5. Sarasota | <ol style="list-style-type: none"> 6. Miami 7. Bradenton 8. New Port Richey 9. Wesley Chapel 10. Jacksonville |
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DOMESTIC Visitors represented 56% of the total visitors. The top 10 cities were:

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| <ol style="list-style-type: none"> 1. New York, NY 2. Washington, DC 3. Chicago, IL 4. Atlanta, GA 5. Boston, MA | <ol style="list-style-type: none"> 6. Philadelphia, PA 7. Detroit, MI 8. Denver, CO 9. Dallas-Fort Worth, TX 10. Minneapolis-St. Paul, MN |
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INTERNATIONAL Visitors represented 7.5% of the total visitors. The top 5 countries were:

1. Canada
2. England
3. Germany
4. Brazil
5. Scotland

Accommodation Information

Number of Hotel/Motels in Hillsborough County: 190 (21,000+ rooms)

Bed Tax Percentage: 5.00% **Sales Tax:** 7.00% **Total Tax for Accommodation:** 12.00%

<u>CATEGORY</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Average Daily Rate	\$79.23	\$81.57	\$87.87	\$96.54	\$102.25	\$103.88	\$92.69
Occupancy	62.5%	67.9%	68.6%	67.8%	63.7%	58.2%	53.0%

(Source: Smith Travel Research)

Bed Tax Collections (<i>millions</i>)	\$15.4	\$17.9	\$19.8	\$21.5	\$21.5	\$21.5	\$17.9
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(Source: Hillsborough County TDC)

Airport and Cruise Information

<u>Tampa International Airport</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Total Inbound Passengers (<i>millions</i>)	7.8	8.4	9.5	9.4	9.6	9.1	8.5

(Source: Tampa International Airport)

<u>Tampa Port Authority</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Total Cruise Passengers (<i>thousands</i>)	821.2	780.6	812.1	913.8	735.7	785.8	793.9

(Source: Port of Tampa)