



Analysis of the 2010 Hillsborough County Visitor Key Findings

- An estimated 13.9 million people visited Tampa/Hillsborough County in 2010, a decrease of 7.4% over 2009 visitation.
- Estimated visitor spending increased by 10.5% in 2010, totaling \$3.2 billion.
- Direct impact from visitors on wages and employment in 2010 was over \$1.3 billion dollars in wages and 47,384 jobs.
- Overnight visitors staying in commercial lodging facilities (i.e. hotels, motels, condominiums, and campgrounds) increased 4.4% from 4.36 million in 2009 to 4.56 million people in 2010. They stayed an average of 2.6 nights and contributed \$1.71 billion to the local economy.
- Commercial lodging visitors accounted for 33% of the total visitors to Hillsborough County; and accounted for 58% of total expenditures.
- Bed Tax Revenues reached \$17.7 million during 2010, representing a 0.6% decrease over 2009 collected bed taxes.
- Average Occupancy for 2010 increased 7.8% over 2009 to end at 56.8%, and the Average Daily Rate (ADR) decreased 8.7% from 2009 to end the year at \$85.85.
- Domestic inbound passengers at Tampa International Airport decreased 2% to 8.08 million, and International inbound passengers decreased by 2.1% to 195,875 airline passengers.
- Total cruise passengers at the Port of Tampa reached 845,918 for calendar year 2010, which represented a 6.6% increase over 2009 figures.
- Domestic United States markets continue to make up the majority of our visitors accounting for 61.9% of the market. In-State visitors represented 25.5% of the market and International markets were 12.6% of the total market.
- Canada, England & Germany are the top three international markets for visitors to Tampa/Hillsborough County, with Canada accounting for 32.5% of the visitors, England 20.1% and Germany accounting for 8.9% of the international market.

TRIP CHARACTERISTICS OF THE TAMPA TRAVELER

CATEGORY	2003	2004	2005	2006	2007	2008	2009	2010
Total Visitors (in millions)	16.57	16.98	17.88	16.91	16.76	16.05	15.05	13.93
Total Spending (in billions)	\$2.5	\$2.8	\$3.0	\$3.2	\$3.1	\$2.7	\$2.9	\$3.2
Total Overnight Visitors (in millions)	4.8	5.0	5.2	4.7	4.4	4.6	4.3	4.5
Average Number of Nights: (Commercial Lodging Guests)	3.3	3.9	3.7	3.8	4.2	3.6	3.8	2.6
Stayed Overnight in Tampa:	49.4%	55.1%	58.6%	55.9%	53.8%	52.6%	51.8%	46.2%
Average Party Size:	3.01	3.44	3.39	3.33	3.25	3.35	2.67	2.65
Travel Mode to Tampa:								
• Air:	38.2%	39.9%	41.4%	41.2%	41.6%	41.6%	46.3%	51.5%
• Auto:	61.8%	60.1%	58.6%	58.8%	58.4%	58.4%	53.7%	48.5%
Avg. Expenditures (per party/per day):	\$224.5 1	\$248.4 0	\$265.0 6	\$263.2 5	\$263.4 6	\$236.5 0	\$241.4 5	\$264.9 9
Percent Likely To Return:	83.6%	83.4%	84.5%	83.5%	84%	84.4%	98.6%	99.5%
Visitor Origins:								
• In-State:	39.2%	36.2%	35.8%	36.8%	35.6%	36.5%	31.5%	25.5%
• Domestic:	51.8%	53.2%	53.1%	52.3%	53.7%	56%	57.4%	61.9%
• International:	9.0%	10.6%	11.1%	10.8%	10.7%	7.5%	11.1%	12.6%

VISITOR ORIGIN MARKETS

IN-STATE Visitors represented 25% of total visitors. The top 10 cities were:

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| <ol style="list-style-type: none"> 1. St. Petersburg 2. Clearwater 3. Sarasota 4. Orlando 5. Lakeland | <ol style="list-style-type: none"> 6. New Port Richey 7. Bradenton 8. Miami 9. Wesley Chapel 10. Fort Myers |
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DOMESTIC Visitors represented 62% of the total visitors. The top 10 cities were:

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| <ol style="list-style-type: none"> 1. New York, NY 2. Chicago, IL 3. Boston, MA 4. Atlanta, GA 5. Philadelphia, PA | <ol style="list-style-type: none"> 6. Washington, DC 7. Detroit, MI 8. Cleveland, OH 9. Indianapolis, IN 10. Minneapolis-St. Paul, MN |
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INTERNATIONAL Visitors represented 13% of the total visitors. The top 5 countries were:

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| <ol style="list-style-type: none"> 1. Canada 2. England 3. Germany | <ol style="list-style-type: none"> 4. Brazil 5. Puerto Rico |
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Accommodation Information

Number of Hotel/Motels in Hillsborough County: 170 (21,000+ rooms)

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

<u>CATEGORY</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Average Daily Rate	\$81.57	\$87.87	\$96.54	\$102.25	\$103.88	\$92.69	\$85.85
Occupancy	67.9%	68.6%	67.8%	63.7%	58.2%	53.0%	56.2%

(Source: Smith Travel Research)

<u>CATEGORY</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Bed Tax Collections <i>(millions)</i>	\$17.9	\$19.8	\$21.5	\$21.5	\$21.5	\$17.9	\$17.7

(Source: Hillsborough County TDC)

Airport and Cruise Information

<u>Tampa International Airport</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Total Inbound Passengers <i>(millions)</i>	8.4	9.5	9.4	9.6	9.1	8.5	8.2

(Source: Tampa International Airport)

<u>Tampa Port Authority</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Total Cruise Passengers <i>(thousands)</i>	780.6	812.1	913.8	735.7	785.8	793.9	845.9

(Source: Port of Tampa)