



## Analysis of the 2008 Hillsborough County Visitor Key Findings

- Overall, total number of visitors decreased 4.2% and accounted for an estimated 16.1 million visitors to Tampa/Hillsborough County in 2008.
- Visitor spending decreased by 14% in 2008, totaling \$2.73 billion.
- Direct impact from visitors on wages and employment in 2008 was over \$1.1 billion dollars in wages and 54,688 jobs.
- Overnight visitors staying in commercial lodging facilities (i.e. hotels, motels, condominiums, and campgrounds) increased 1% from 4.45 million in 2007 to 4.61 million people in 2008. Commercial overnight visitors stayed an average of 3.67 nights in our community and contributed \$1.5 billion to the local economy.
- Commercial lodging visitors accounted for 28% of our total visitors to Hillsborough County; and accounted for 55% of total expenditures.
- Bed Tax Revenues reached \$20.6 million during 2008, representing a 4.32% decrease over 2007 collected bed taxes.
- Average Occupancy for 2008 decreased 8.6% over 2007 to end at 58.2%, and the Average Daily Rate (ADR) increased 1.7% from 2007 to end the year at \$103.88.
- Domestic inbound passengers at Tampa International Airport decrease 4.8% to 8.93million, and International inbound passengers increased by 1.36% to 188,288 airline passengers.
- Total cruise passengers at the Port of Tampa reached 785,827 cruise passengers for calendar year 2008, which represented a 6.2% increase over 2007 figures.
- Domestic United States markets continue to make up the majority of our visitors accounting for 56% of the market. In-State visitors represented 36.5% of the market and International markets were 7.5% of the total market.
- England, Canada and Brazil are the top three international markets for visitors to Tampa/Hillsborough County, with England accounting for 36.2% of the international market, Canada accounting for 29.7% of the international market, and Brazil accounting for 13.1% of the international market.

## TRIP CHARACTERISTICS OF THE TAMPA TRAVELER

CATEGORY	2001	2002	2003	2004	2005	2006	2007	2008
<b>Total Visitors</b> ( <i>in millions</i> )	15.67	15.52	16.57	16.98	17.88	16.91	16.76	16.05
<b>Total Spending</b> ( <i>in billions</i> )	\$2.4	\$2.5	\$2.5	\$2.8	\$3.0	\$3.2	\$3.1	\$2.7
<b>Total Overnight Visitors</b> ( <i>in millions</i> )	4.8	4.6	4.8	5.0	5.2	4.7	4.4	4.6
<b>Average Number of Nights:</b> ( <i>Commercial Lodging Guests</i> )	2.7	3.7	3.3	3.9	3.7	3.8	4.2	3.6
<b>Stayed Overnight in Tampa:</b>	42.7%	48.6%	49.4%	55.1%	58.6%	55.9%	53.8%	52.6%
<b>Average Party Size:</b>	2.92	2.91	3.01	3.44	3.39	3.33	3.25	3.35
<b>Travel Mode to Tampa:</b>								
• <b>Air:</b>	38.6%	41.0%	38.2%	39.9%	41.4%	41.2%	41.6%	41.6%
• <b>Auto:</b>	61.4%	59.0%	61.8%	60.1%	58.6%	58.8%	58.4%	58.4%
<b>Avg. Expenditures</b> ( <i>per party/per day</i> ):	\$189.44	\$219.57	\$224.51	\$248.40	\$265.06	\$263.25	\$263.46	\$236.50
<b>Percent Likely To Return:</b>	82.3%	83.1%	83.6%	83.4%	84.5%	83.5%	84%	84.4%
<b>Visitor Origins:</b>								
• <b>In-State:</b>	37.4%	37.2%	39.2%	36.2%	35.8%	36.8%	35.6%	36.5%
• <b>Domestic:</b>	51.5%	51.0%	51.8%	53.2%	53.1%	52.3%	53.7%	56%
• <b>International:</b>	11.1%	11.8%	9.0%	10.6%	11.1%	10.8%	10.7%	7.5%

## VISITOR ORIGIN MARKETS

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

- |  |   |
|--|---|
| <ol style="list-style-type: none"> <li>1. St. Petersburg</li> <li>2. Sarasota</li> <li>3. Brooksville</li> <li>4. Orlando</li> <li>5. Miami</li> </ol> | <ol style="list-style-type: none"> <li>6. Lakeland</li> <li>7. Ft. Myers</li> <li>8. Jacksonville</li> <li>9. West Palm Beach</li> <li>10. Gainesville</li> </ol> |
|--|---|

### **DOMESTIC Visitors represented 56% of the total visitors. The top 10 cities were:**

- |  |  |
|--|--|
| <ol style="list-style-type: none"> <li>1. New York, NY</li> <li>2. Chicago, IL</li> <li>3. Boston, MA</li> <li>4. Ashville-Greenville, NC</li> <li>5. Baltimore, MD</li> </ol> | <ol style="list-style-type: none"> <li>6. St. Louis, MO</li> <li>7. Detroit, MI</li> <li>8. Manchester, NH</li> <li>9. Dallas-Fort Worth, TX</li> <li>10. Cleveland, OH</li> </ol> |
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### **INTERNATIONAL Visitors represented 7.5% of the total visitors. The top 5 countries were:**

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

## 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>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Average Daily Rate <i>(Source: Smith Travel Research Company)</i>	\$79.70	\$79.23	\$81.57	\$87.87	\$96.54	\$102.25	\$103.88
Occupancy <i>(Source: Smith Travel Research Company)</i>	62.2%	62.5%	67.9%	68.6%	67.8%	63.7%	58.2%
Bed Tax Collections <i>(millions)</i>	\$14.9	\$15.4	\$17.8	\$19.8	\$21.5	\$21.5	\$21.5

## Airport and Cruise Information

<u>Tampa International Airport</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Total Inbound Passengers <i>(millions)</i> <i>(Source: Hillsborough County Aviation Authority)</i>	7.7	7.8	8.4	9.5	9.4	9.6	9.1

<u>Tampa Port Authority</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Total Cruise Passengers <i>(thousands)</i> <i>(Source: Port of Tampa)</i>	632.9	821.2	780.6	812.1	913.8	735.7	785.8

## Convention/Meetings Information

<u>CONVENTIONS/MEETINGS</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Number of Groups:	322	356	435	563	445	489	460
Total Attendance:	273,419	295,710	226,171	303,114	400,712	483,193	430,529
Total Room Nights:	343,201	334,031	318,911	335,662	380,739	402,655	394,134

*(Source: Tampa Bay CVB booking reports)*

**Convention Center Exhibit Space:** 200,000 square feet

**Convention Center Meeting Rooms:** 36,000 sq ft ballroom and 36 breakout rooms

**Committable Hotel Rooms** within 5 blocks of the Center: 1,800 rooms

*(Source: Tampa Bay Convention & Visitors Bureau)*