Okaloosa County Tourist Development Dept.

Marketing, Advertising and PR Services RFP TDD 53-18

July 5, 2018

RFP Questions

1. Considering the launch of your most recent effort in 2016-2017, what is the reason for releasing an RFP at this time? The initial term of the current agency contract expires in February 2019. With a new Director, involved Tourist Development Council, and revised scope of agency services, the County is performing due diligence to ensure the right agency fit.

2. Has the incumbent agency been invited to submit a proposal? Yes, they are welcome to submit.

3. What is the breakdown of the current budget? Media breakdown? Advertising vs. PR? Paid $4.25M, Owned $750K, Earned $100K, Shared $350K

4. How well has your recent advertising performed?
   Pacing above KPI's for destination mktg industry standard:
   Social Media 2% vs .1% CTR
   Google display/retarget .41% vs .1% CTR
   Google search 2.54% vs 2% CTR
   Reached over 93% over primary target, adults 25-54, HHI $150K+

5. What amount has been budgeted for agency services? The current contract amount is $772K. However, social media and PPC/SEM are being transitioned to County staff so a corresponding decrease in agency hours and cost is anticipated.

6. What is the media mix? Traditional $1.95M, Digital $2.25M

7. Do you have a library of visual assets to use or would you expect agency to develop new visuals? The agency will be expected to perform a branding exercise and develop new creative assets for a new campaign.

8. What are you specifically requiring for financial records for the past two years and is this portion to be excluded from public records? Financial statements audited by an independent firm are required if typically prepared and available. If not, financial statements prepared by an independent CPA or accounting firm are acceptable.

Florida's Public Records Law, Ch. 119 F.S., provides a right of access to the records of local governments as well as to private entities acting on their behalf. In the absence of statutory exception, this right of access applies to all materials made or received in connection with the transaction of official business. It would be the agency's responsibility to assert the basis upon which certain records are statutorily exempt/confidential. We cannot advise in this regard.

9. We do not offer traditional PR services such as media relations, however, we collaborate with a partner PR firm. Are we able to provide separate proposals/RFP responses or are you expecting a joint proposal? A joint proposal is required.

10. Does the 35-page proposal limit exclude title pages, table of content and required forms? 35 pages max for items noted in Section III. Response Format. Excludes required forms.

11. To clarify, is the selected firm not expected to bill markups on media and production services? Correct – media, production, and any third-party expenses will be reimbursed at net cost only.

12. Are the $4m for paid media and the $350K for shared media net budgets? Yes

13. On the pricing sheet, if the only third-party pass-through expenses expected to be media, are we to just list the annual cost at $4m? What are your expectations for this section? No need to list media. An example would be any third-party vendor expense associated with ongoing research.

14. What is the expected campaign launch time once contract has been awarded? The new agency would be expected to begin branding immediately, with new creative rolled out to market in Oct/Nov timeframe

15. With regards to the in-person requirement (8 days/month + 1 weekend/month), can you further define the expectations of the County with regards to which Agency personnel would be required to be present for those days? For example, will these be Account Management functions? PR functions? Creative functions? The purpose of requiring in-market personnel is to understand the destination's characteristics year-round to market appropriately based on seasonality and other local factors. PR, social, creative, branding, etc are most successfully accomplished by continually experiencing the uniqueness of the destination and working collaboratively with the CVB team. All staff assigned to the

County's account are expected to spend some time in-market. The specific agency personnel in market will vary by month based on need and mutual agreement.

16. What are your current efforts in your marketing program that you feel are working strongly. Transitioning from focus on print media to greater spend on digital and other non-traditional advertising approaches. Tremendous strides in social media.

17. Where do you feel you are the weakest in your efforts and where improvement is needed? "Emerald Coast" is a ubiquitous term used throughout the NW Florida gulf coast region. Branding and messaging unique to Destin-Fort Walton Beach-Okaloosa Island is needed to set the destination apart. Research is lacking; establishing a comprehensive, ongoing research program will be critical to the correct messaging and target audience.

18. Do you have Google analytics and quantitative and/or qualitative research and data information for 2017 or YTD 2018 (1st quarter) you can share that shows KPI's and results garnered for your earned, paid, shared or owned media efforts currently in place? KPI's for the first six months of this fiscal year (Oct 17 – Mar 18) attached. Media spend will be tracked via paid, owned, earned, and shared beginning in Oct 2018.

19. Do you have quantitative and/or qualitative research and data information for 2017 or YTD 2018 (1st quarter) indicating your strongest and your weakest current domestic and international markets and indication as to why they are traveling to Okaloosa county, their current length of stay, their spending habits, etc? Began quarterly quantitative research in July 2017. Results attached. Conducted one qualitative focus group in August 2017. Results attached.

20. In terms of the ability to take on billing, we currently have a similar Miami-Dade county client who does not pay until services are rendered and media runs as well. Tear sheets and back up is sent by the publications with the invoices and the media bills net direct. If we can make arrangements on your behalf for the same, would this be an acceptable measure? Although we CAN take on billing, we prefer net direct to the client instead following run dates if that is an option. This option would need to be explored with the Okaloosa County Clerk's Office; could be viable if all proof of performance is received prior to payment.

21. Under goals/objectives can you provide the baseline of where you are starting? Or a specific indication of just how aggressive the desired increase for each item. The goals and objectives stated are a baseline based on past experience of the Director. They were developed to start the process of accountability and will be collaboratively tweaked with the selected agency.

22. In paid media there is a desire to concentrate efforts against new and emerging markets. There is an outline of the current visitor profile but not the markets. Can you define (ideally by importance to overnight visitation?) Have any new or emerging markets been identified? Research is lacking, but the most recent visitor profile surveys are attached that include primary and secondary feeder markets. New and emerging

markets would include our new Allegiant routes, as well as those identified during the branding exercise. Research program will confirm whether our existing markets are emerging markets as well. https://www.flyvps.com/route-map-3/

23. Increase awareness of the Emerald Coast as a year-round destination—what level is it at now? How measured? 60% of our tourist development taxes are collected May thru August. This metric measures how well we are able to increase collections, occupancy, ADR, & RevPAR during the non-peak season from September to April. "Emerald Coast" is a ubiquitous term and branding may veer us aware from this destination name.

24. Focus and increase brand awareness against primary markets—what is the level now by market? How measured? Research is lacking. We look forward to implementing comprehensive, state of the art research that will help us measure our brand awareness.

25. How were the media profiles outlined developed/selected---what is the rationale? And how does that link to the goals on page 4 INTRODUCTION—Do you have any research/data to indicate that those media profiles would, in fact, be the ones of people most likely to visit? To stay in paid accommodations? The media profiles are a baseline based on past experience of the Director. They were developed to start the process of accountability and will be collaboratively tweaked with the selected agency.

26. For shared media, the goal is to increase the destination's engagement by 30% YOY—where is it at now and how is that being measured currently? The goals and objectives stated are a baseline based on past experience of the Director. Again, they were developed to start the process of accountability and will be collaboratively tweaked with the selected agency.

27. Of comparable destination marketing organizations, which destination is executing a marketing and communications program that you aspire to have? Pure Michigan campaign – content, delivery, tone, authenticity… everything is spot on for that destination.

28. Who do you view as your top competitors? We monitor our neighbors from Biloxi to Panama City as well as Myrtle Beach, Hilton Head, Savannah, Orlando, & Tampa/St Pete. This competitive needs to be revisited based on research.

29. What do you feel like you have been doing well? What needs improvement?
Doing well transitioning from print media focus to greater spend on digital and other non-traditional advertising approaches. Tremendous strides in social media. Research is lacking; establishing a comprehensive, ongoing research program will be critical to the correct messaging and target audience. "Emerald Coast" is a ubiquitous term used throughout the NW Florida gulf coast region. Branding and messaging unique to Destin-Fort Walton Beach-Okaloosa Island is needed to set the destination apart.

30. Please confirm submittal format – one hard copy and one USB drive. Yes

31. If two agencies are partnering to respond to the RFP are the five references required in total or five for each agency? Five for each agency

32. If selected as a top-ranked vendor and the agency's 2017 audited financial statements are not yet completed, will a letter from the agency's accountant suffice? Yes, along with a copy of 2015 & 2016 financials

33. If one of the partnering entity's LLC does not produce audited financial statements, will tax returns be acceptable? The purpose of this requirement is to demonstrate the firm's capacity to pay media and production bills timely. Tax returns do not identify cash, receivables, & payables information. If audits aren't available, financial statements prepared by an independent CPA or accounting firm are acceptable.

34. The RFP states "if a joint venture of multiple specialized agencies is proposed, pricing information must be provided for all agencies." If there is a partnership governed by the lead agency's pricing information can we provide one set of pricing for the partnership? Yes. The purpose of this statement is to ensure proposed pricing is inclusive of all agencies. The County will remit monthly payment to the lead firm only.

35. May we secure temporary "read only" access to the www.emeraldcoastfl.com Google Analytics for a limited period to assess site? Provide an email address to dmason@myokaloosa.com and we will set up access to emeraldcoastfl.com and emeraldcoastconventioncenter.com through August 1. Please note: our current websites are very antiquated, underperforming, not user-friendly, and have tremendous issues. They are not functioning as an integral part of our marketing program as they should be. We are currently building new websites based on best practices that will launch January 1.

36. Will the proposal form referenced in the RFP be provided following the submission of these questions? Or, is the response intended to be put together by the vendors in their own formatting? Vendors may use their own formatting within the requirements in the RFP: The response to this RFP must not exceed 35 electronic pages and shall be delivered via thumb drive with all creative assets embedded. 35 pages max for items noted in Section III Response Format. Excludes required forms.

37. Are vendors allowed to redline terms prior to signature and submission? Terms may be redlined, but please note that redlining may remove the vendor from further consideration in the view of the selection committee.

38. Following the RFP opening date of August 1, when will the top-ranked vendors be notified and when will the presentation be? The selection committee will meet August 22 to review responses and short-list the top-ranked vendors. The top-ranked vendors will be notified of the presentation topic and date, which is expected to be the week of September 1.

39. When do you envision a final vendor will be selected following the presentation and when do you believe contract execution will occur? The selection committee will identify the final vendor on or about the week of September 17 and negotiations will begin thereafter. Contract execution is anticipated in early November.

40. What will the discovery period entail and what are the time requirements from the selected agency prior to the February start date? Each agency has its own approach to discovery. The purpose of this requirement is to ensure the new agency's ability to effectively service the account on the start date.

41. How do you see the breakdown between paid media and shared media? Paid media includes print, broadcast, outdoor, etc. along with digital PPC, Google display, YouTube. Shared media includes boosted organic posts and influencers across social media networks.

42. Does only the core team or the full extended team need to be in market 8 days each month? The purpose of requiring in-market personnel is to understand the destinations characteristics year-round to market appropriately based on seasonality and other local factors. PR, social, creative, branding, etc are most successfully accomplished by continually experiencing the uniqueness of the destination and working collaboratively with the CVB team. All staff assigned to the County's account are expected to spend some time in market. The specific agency personnel in market will vary by month based on need and mutual agreement.

43. Who is the incumbent agency? Aqua Marketing & Communications

44. Do the financial statements need to be audited or certified? Financial statements audited by an independent firm are required if typically prepared and available. If not, financial statements reviewed/certified by an independent CPA or accounting is acceptable. A compilation is not acceptable, as the purpose of this requirement is too independently demonstrate and provide assurance of the firm's capacity to pay media and production bills timely.

45. Is the $4MM paid and $350k shared budget allocated annually or is this total for the three year contract? Annual budget for 10/1/18-9/30/19; subject to change each year as the marketing plan evolves

46. Does the $4MM and $350K budgets for paid and owned/shared (respectively) include fees and/or OOPs/production costs or is this media spend only? Media spend only

47. When will top-ranked vendors be notified? The selection committee will meet August 22 to review responses and short-list the top-ranked vendors. The top-ranked vendors will be notified of the presentation topic and date, which is expected to be the week of September 17.

48. Who is on the review committee? Six industry-related members of the Tourist Development Council and the Fort Walton Beach Chamber President/CEO. *Please note contact between prospective vendors and committee members is prohibited*

49. How will the RFPs be evaluated, and can the evaluation criteria be shared in advance? The selection criteria is provided on pages 13 & 38 of the RFP.

50. How many agencies will be selected/short listed for round 2? To be determined by the selection committee, but staff anticipates 3-4

51. Crisis communications planning and execution' appears under a list of scope of services that may or may not be used. Can you clarify how you envision using crisis services as part of this mandate?
   - (a) Is CVB looking for the development of a crisis plan as part of the budget? or
   - (b) Are crisis communications planning/execution services ones that CVB may use if/when a need is determined?
     Implementation of crisis-specific messaging and media plan are required services under Public Relations & Publicity. The current crisis communications plan will need to be reviewed and updated as needed by the agency and executed by the agency in the event of a storm or other emergency.

Consumer

52. Can you provide additional detail or relevant research on your current consumer targets and who you consider to be emerging? Research is lacking, but the most recent visitor profile surveys are attached that include primary and secondary feeder markets. New and emerging markets would include our new Allegiant routes (https://www.flyvps.com/route-map-3/), as well as those identified during the branding exercise. Research program will confirm whether our existing markets are emerging markets as well.

53. Are consumer profiles the same for paid and earned? Yes

General

54. Who do you feel is your current competitive set, other Florida destinations? Other beach/island travel? Stay-cations? We monitor our neighbors from Biloxi to Panama City as well as Myrtle Beach, Hilton Head, Savannah, Orlando, & Tampa/St Pete. This competitive needs to be revisited based on research program.

55. Who do you feel is doing a great job in the travel/tourism space? Pure Michigan campaign – content, delivery, tone, authenticity… everything is spot on for that destination

56. Do you define Shared channels as social engagement/word-of-mouth or as industry partnerships to leverage each other's reach and relevance? Social engagement (e.g. boosted organic posts, influencers)

57. Is strategic integrated communications planning and execution for each Emerald Coast CVB entity collaborative or managed independently? Collaborative

58. How much interaction and collaboration will the agency have with the Okaloosa County Tourist Development Department vs. the Emerald Coast Convention and Visitors Bureau (CVB), and each entity within the CVB? The Tourist Development Department is the CVB. The agency will primarily interact with the CVB marketing team, but will also work the convention center staff and the film commissioner.

59. Are there areas of communications support that take priority over others due to the need for additional resources, or influence from strategic initiatives (paid media strategy, owned media tactical support, earned media, shared media strategy, etc.)? No.

60. Technical Approach is listed twice within the scoring matrix, but with different maximum point allocations. Please provide more clarity around scoring for Technical Approach. The correct selection criteria are listed on page 13:

Selection Criteria

The following selection criteria will be used to evaluate responses to this RFP:

45%	Creative & Strategic Approach
25%	Destination Marketing Organization Experience
15%	Technical Approach
10%	Financial Information
5%	References

The scoring matrix on page 38 will be updated accordingly.

Research, Data and Analysis

61. Does year-to-year trend analysis for prime season tax revenue exist, and is it accessible to the public? Tax revenue data attached.

62. In regard to Paid Media; what research or information is being used to inform target media profiles outlined within the RFP (Older Millennials, Generation X, DINKS, ZOOMERS, etc.)? The media profiles are a baseline based on past experience of the Director. They were developed to start the process of accountability and will be collaboratively tweaked with the selected agency.

Measurement

63. Referring to Section II. INTRODUCTION; please provide more detail around which metrics or data points are to be aligned with the following goals and objectives; Increase partner exposure by 20% Just launched a partner program; will need to be identified in collaboration with selected agency. Increase social media engagement by 30%
In regard to Earned Media; how is publicity value being determined, as a KPI? Mentions, reach, value.

64. In regard to Shared Media; how is engagement being measured, as a KPI? Impressions, clicks, CTR. The goals and objectives stated are a baseline based on past experience of the Director. They were developed to start the process of accountability and will be collaboratively tweaked along with KPI's with the selected agency.

65. As a transparency measure, would the county be willing to be billed directly for media purchases, as long as the agency implemented processes to review invoices and provide monthly reconciliation? This option would need to be explored with the Okaloosa County Clerk's Office; could be viable if all proof of performance is received prior to payment.

66. Please identify any restrictions on travel reimbursement including state and county regulations.
http://www.leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&Search_String=&URL=0100-0199/0112/Sections/0112.061.html
http://www.co.okaloosa.fl.us/sites/default/files/users/gdugre/Final%20Approved%20Travel%20Policy%20Okaloosa%20County%2010-3-17.pdf

67. Are all participants in a joint venture required to complete Documents A through I under Question 31? Yes

68. Please clarify what type of audited financial statement will be required from top-ranked vendors (audited, reviewed or compilation). Financial statements audited by an independent firm are required if typically prepared and available. If not, financial statements reviewed/certified by an independent CPA or accounting is acceptable. A compilation is not acceptable, as the purpose of this requirement is to independently demonstrate and provide assurance of the firm's capacity to pay media and production bills timely.

69. Will all parties in a joint venture be required to submit audited financial statements if selected as a top-ranked vendor? The County will remit monthly payment to the lead firm only. Audited financial statements are required only from the lead agency assuming responsibility for payment of all media and production bills.

70. How will audited financial statements from top-ranked vendors need to be submitted (i.e. electronically)? Preferably electronically

71. What existing qualitative research is current? And, will it be made available for the creative and strategic scenarios given? Most recent research available is attached.

72. What is the average annual value of a visitor in terms of economic impact? By season? See attached research

73. Is there a particular objective, activity or area of focus for the agency team member during the one weekend required in market? The purpose of requiring in-market personnel is to understand the destination's characteristics year-round to market appropriately based on seasonality and other local factors. PR, social, creative, branding,

etc are most successfully accomplished by continually experiencing the uniqueness of the destination and working collaboratively with the CVB team. All staff assigned to the County's account are expected to spend some time in-market. The specific agency personnel in market will vary by month based on need and mutual agreement. Weekend assignments will frequently be related to special events.

74. Under "Goals & Objectives" what are the current benchmarks that increases will be measured against? The goals and objectives stated are a baseline based on past experience of the Director. They were developed to start the process of accountability and will be collaboratively tweaked with the selected agency.

75. Under KPI's, how is a 'lead' defined, and is there a value associated with them? Leads come through visitor guide requests, reader service listings, lead generation services, etc. They represent potential visitors. No monetary value associated.

76. How has the area grown in the last five years? What are the tax revenue numbers or percentages of change in summer vs. non-summer months from the last five years? TDT collection data attached.

77. How has ADR grown in the past two years? What is the average ADR in summer months vs.non-summer months? What is the ADR in the peak month and in the lowest month? Occupancy, ADR, & RevPAR data attached. The unit mix within the destination is about 53% condos, 31% hotels, 6% single family, and 10% other. Occupancy, ADR, & RevPAR perform differently for each. The attached data is aggregated for the destination.

78. What is the anticipated fiscal year budget for earned media? $100K. Includes press trips, travel journalists, media events, e-newsletter, press releases, etc.

79. What is the anticipated fiscal year budget for the new research system as identified within the scope of service? A specific budget has not yet been identified; pending determination of research program recommended by selected agency.

Paid Ad Media Results

Prime Season

October 2017 – March 2018

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

CPM

$5.40
122% below industry standard ($12.00)

Views

1,097,004 Consumers
viewed :15 second spots

Digital Video

70% completion rate
5% above industry standard

Impressions

416,060,147

Digital CTR

1.25%

Prime Campaign Results

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Cable, Out-of-Home and Print

October 2017 – March 2018

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Spot Paid

$11.44
Average per spot

Commercials

26,378
:15 second spots

Reach

86% Reach
of our Primary Target

Impressions

3,792,815
Chicago, Columbus, Minneapolis/St. Paul, Springfield/Champaign, Atlanta and Orlando

Google Analytics

Chicago, Orlando, Atlanta, Houston, Dallas, Columbus, Cincinnati, etc.

Cable Results
Nov. – Jan.
6 week Flight

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

CPM

$2.91

Industry standard $12.00 CPM

Exposure/Approach

Dundas Square and train in Toronto. All boards showed Real Time Weather for the destination.

Impressions

68,670,652

Spots

1,070,626

Received 45% in added value (contracted amount 740,672)

High Visibility

Locations on high feeder arteries, near airports, etc.

Out-of-Home Results
Nov. – Mar.

CPM

$7.92

Industry standard $12.00 CPM

Titles

Visit Florida Annual Guide, Interfuse and Mid-West Living, Better Homes & Gardens, Coastal Living, etc.

Circulation

137,441,401

Added Value

Included: digital newsletters, banner campaigns, editorial coverage, 1/3 vertical ad space for co-op partners

High Visibility

Southern Living buy garnered over one million dollars in earned media.

Print
Nov. – Mar.

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Media Results

Digital
October 2017 – March 2018

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Campaign

Spend $84,237.50
Generated Revenue
$608,079.29

CPM

$8.62

CTR

.23%
Industry Standard for
Destination Marketing .1%

Adara

Completion

75% completion rate
10% over industry standard

CPM

$11.51

CTR

.16%
Industry Standard for
Destination Marketing .1%

SpotXchange

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Conversation

672 Guides Ordered

CPM

$8.62

Add Value

1,157,845 Impressions

Sojern

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Markets

Florida, Georgia, Alabama, Tennessee and Texas

CPM

$13.09

CTR

.07%
Industry Standard for Destination Marketing
.1%

TripAdvisor

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Top Unit

Mobile ATF – .47% CTR

CPM

$11.09

CTR

.41%
Industry Standard for
Destination Marketing .1%

AccuWeather

Top Units

Pre-roll – 1.55% CTR
300x250 - .44% CTR

CPM

$11.85

Impressions

5,471,077

Weather.com

Impressions

27,034,867

CPM

$3.96

CTR

.14%
Industry Standard for
Destination Marketing .1%

MaxPoint

EMERALD COAST

DESTIN
FT. WALTON BEACH
OKALOOSA ISLAND

Impressions

24,987,687

Clicks

1,018,219

CTR

2%

Industry Standard for Destination Marketing .1%

Social Media (FB/INSTA/PINTEREST/TWITTER/YOUTUBE)

Impressions

209,981,399

Clicks

852,478

CTR

.41%

Industry Standard for Destination Marketing .1%

Google Display/Re-targeting

Impressions

2,147,576

Clicks

45,368

CTR

2.54%

Industry Standard for Destination Marketing 2%

Google Search

Impressions

22,590,262

Clicks

9,793

CTR

.05%

Industry Standard for Destination Marketing .1%

Choozle

Impressions

12,712,525

Clicks

24,786

CTR

.17%

Industry Standard for Destination Marketing

.1%

StackAdapt

Conclusion

- Total Paid Spend of $1,849,129 and Added Value worth 35% equates to a $2,496,829 spend level
- Total Impression delivery of over 416,060,147
- $5.40 CPM
- Reached over 93% of Primary Target, Adults 25-54 with HHI of $150,000+
- Tourist Development Tax – Up 16.46% during Oct. – Feb timeframe
- Pacing above the current KPI to increase TDT by 10% annually
- February up 34.95%

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Destin/Fort Walton Beach
FY Fourth Quarter 2017 *(Jul. – Sept.)*
Visitor Profile

THE HEART OF FLORIDA'S
EMERALD COAST
DESTIN | FT. WALTON BEACH
OKALOOSA ISLAND

Prepared for:
Okaloosa County Tourist Development Council

Prepared by:
Research Data Services, Inc.
Research@ResearchDataLLC.com

January 15, 2018

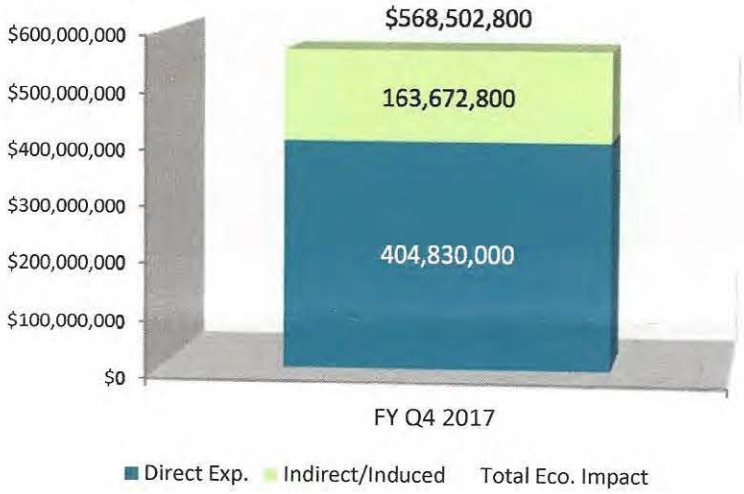
Research Data
market research+

FY Fourth Quarter 2017 *(Jul. – Sept.)*

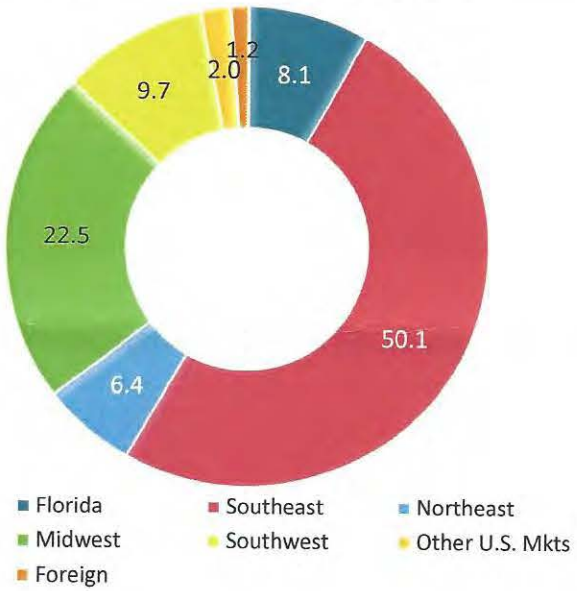
H/M/C/C * Visitor Stats	2017
Visitors (#)	504,700
Direct Exp. ($)	$404,830,000
Total Eco. Impact ($)	**$568,502,800**
Tourist Tax Collections	$7,596,740

** Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)*

FY Q4 2017 Economic Impact



FY Q4 2017 Visitor Origin Distribution *(%)*



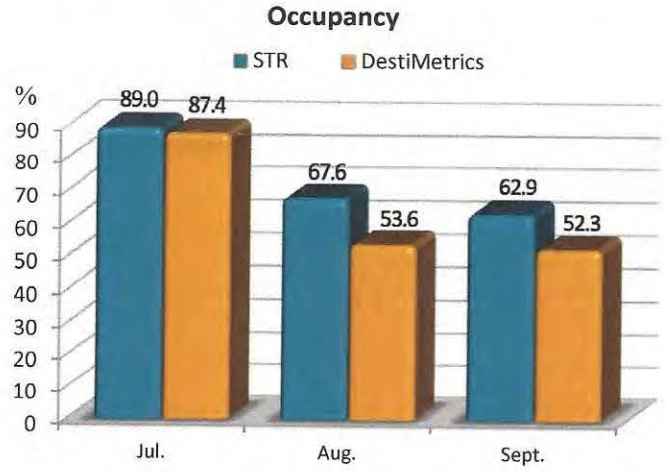
FY Fourth Quarter 2017 *(Jul. – Sept.)*

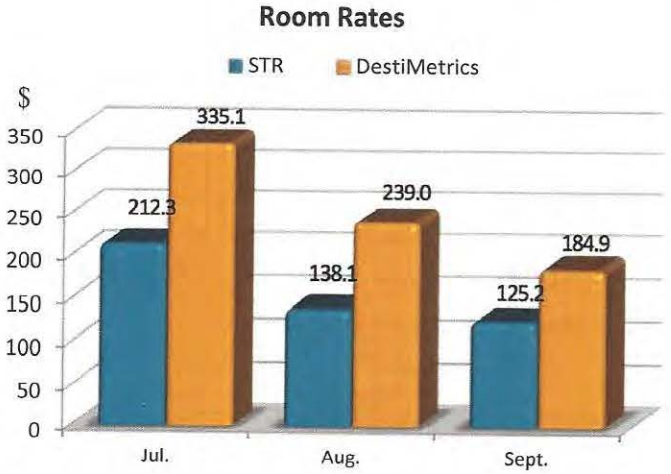
Visitor Origins	Share of Market	2017 # of Visitors
Florida	8.1%	40,880
Southeast	50.1	252,850
Northeast	6.4	32,300
Midwest	22.5	113,560
Southwest	9.7	48,960
Other U.S. Markets	2.0	10,090
Foreign	1.2	6,060
Total	**100.0**	**504,700**

Occupancy and ADR – *Smith Travel Research **	**July 2017**	**August 2017**	**September 2017**
Occupancy	89.0%	67.6%	62.9%
ADR	$212.27	$138.14	$125.15
RevPAR	$188.85	$93.37	$78.68

Occupancy and ADR – *Inntopia/DestiMetrics*	**July 2017**	**August 2017**	**September 2017**
Occupancy	87.4%	53.6%	52.3%
ADR	$335.10	$239.02	$184.93
RevPAR	$292.75	$128.22	$96.32

* *Please Note: Our estimations of the number of Destin/Fort Walton Beach visitors and their economic impact (Page 1) reflect Smith Travel Research's occupancy and average daily rate statistics for properties in the Okaloosa County Tourist Development Tax District (February 2018 report). Additional changes in STR's reporting may result in modifications to these calculations.*





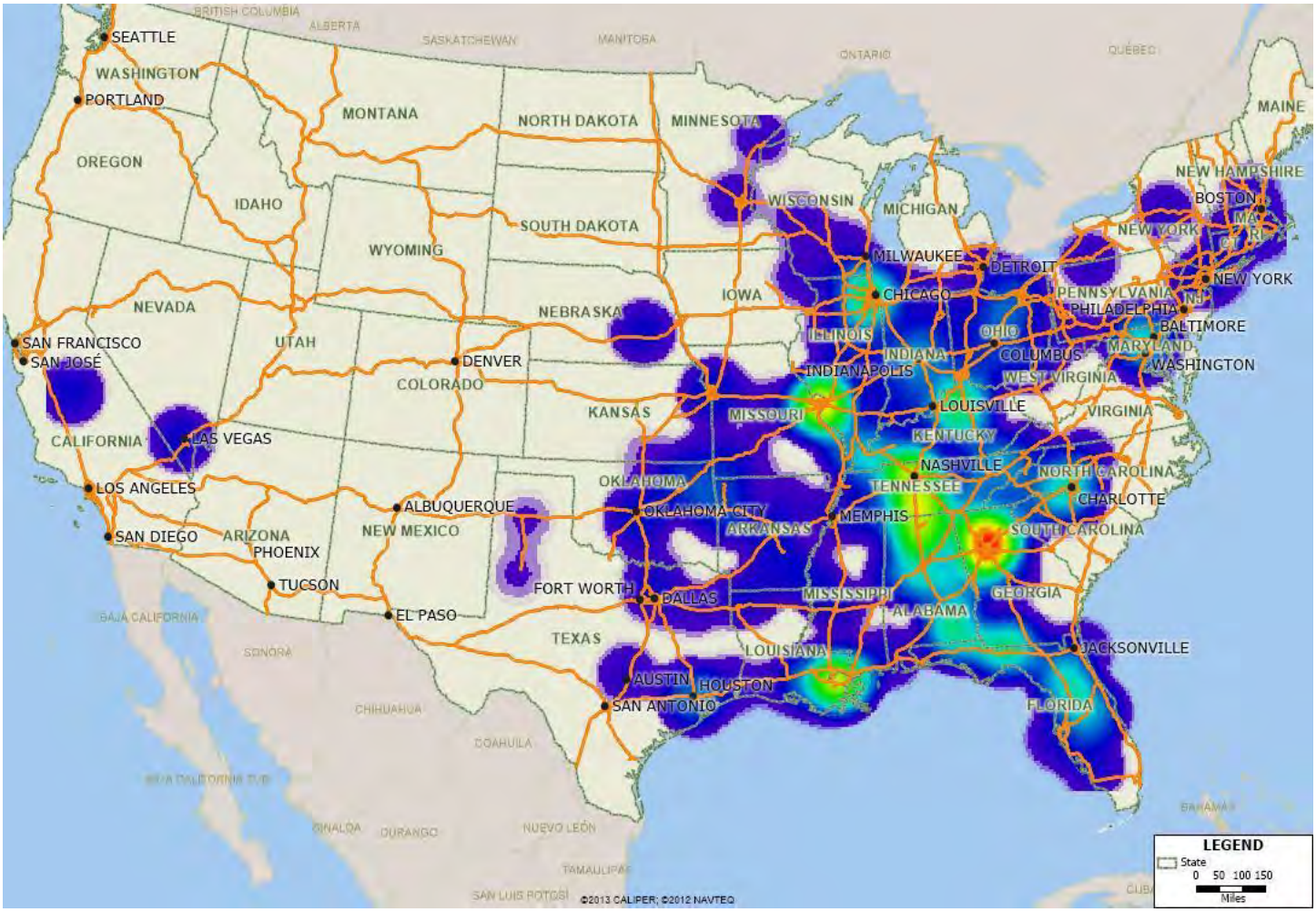
FY Fourth Quarter 2017 Top U.S. Feeder Markets

	DMA's: *Primary Markets*	**2017**
1.	**Atlanta**	10.9%
2.	**Nashville**	5.7
3.	**New Orleans**	4.6
4.	**Huntsville/Decatur/Florence**	4.4
5.	**Birmingham**	4.0

	DMA's: *Secondary Markets*	**2017**
6.	**Tallahassee/Thomasville**	3.7%
7.	**Chicago**	2.6
8.	**Chattanooga**	2.4
9.	**Baton Rouge**	1.9
10.	**Montgomery/Selma**	1.8

Destin/Fort Walton Beach FY Fourth Quarter 2017 Visitor Origins

Zip Code Density Mapping



Visitor Profile Metrics:

		Core Visitor Origin Markets		
Length of Stay *(Nights)*	**Total** *n = 781*	**Florida/ Southeast** *n = 455*	**Northeast/ Midwest** *n = 226*	**Southwest** *n = 76**
In the Destin/Fort Walton Beach Area	5.6 *nights*	4.9 *nights*	6.1 *nights*	5.9 *nights*
1 - 3 nights	21.5%	32.9%	4.9%	9.3%
4 - 6 nights	39.1	34.6	45.4	46.5
7 - 9 nights	35.1	30.6	47.3	37.2
10 + nights	4.4	1.9	2.4	7.0

Party Size	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Average Number of People	3.8 *people*	3.5 *people*	4.1 *people*	5.0 *people*
1 - 2 people	34.8%	36.6%	28.6%	27.9%
3 - 4 people	38.7	42.2	40.2	25.6
5 - 6 people	13.5	11.6	17.3	18.6
7 + people	13.0	9.6	13.9	27.9

Travel Party Composition *(Multiple Response)*	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Family	62.1%	58.6%	70.2%	72.1%
Couple	27.2	27.9	22.0	20.9
Group of Friends	13.2	15.4	9.3	16.3
Extended Family	10.1	10.6	8.1	16.3
Single	2.6	3.8	1.2	n/a

Have Children or Young Adults In Immediate Travel Party	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
% Yes	53.4%	48.0%	63.9%	65.1%

** Please Note: Due to small sample size, use caution in interpreting.*

Core Visitor Origin Markets

Transportation Mode *(Multiple Response, Percentaged to the Base of All Respondents)*	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Personal Car/RV	79.3%	93.3%	56.0%	76.7%
Plane	16.2	1.0	42.7	14.0
Rental Car	14.9	8.6	20.8	20.9

Airport Deplaned *(Base: Flew)*	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Destin/Ft. Walton Beach	53.8%	n/a	61.2%	n/a
Pensacola	21.1	n/a	21.1	n/a
Panama City Beach	16.6	n/a	12.0	n/a

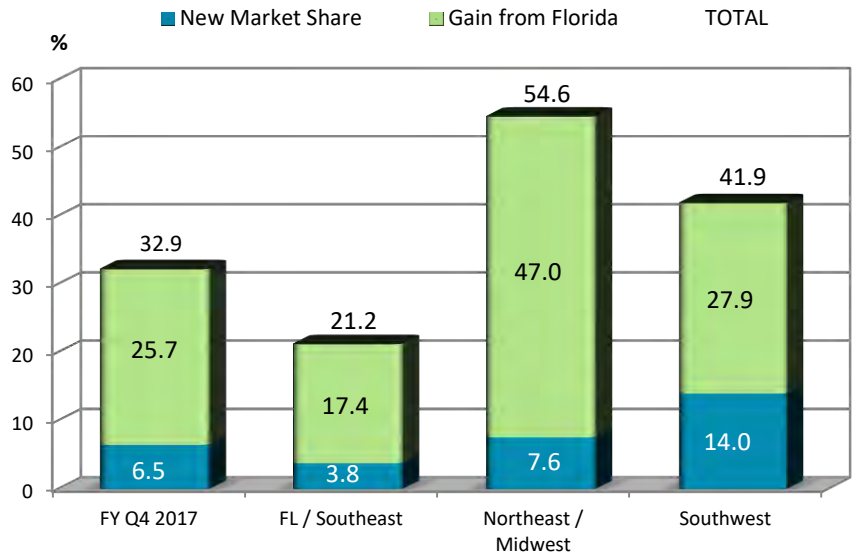
Purpose of Trip *(Multiple Response)*	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Vacation	77.7%	67.1%	91.4%	93.0%
A Getaway	32.1	45.3	11.5	18.6
Visit with Friends/Relatives	16.8	19.3	14.7	7.0
Wedding/Honeymoon	5.0	2.9	8.6	2.3

Type of Lodging *(Multiple Response)*	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Condominium	40.8%	34.5%	52.2%	44.2%
Hotel/Motel/Resort	38.7	52.1	22.7	18.6
Vacation Rental	15.8	9.6	20.2	32.6

First Visit to *(% yes)*	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Destin/Fort Walton Beach	32.9%	21.2%	54.6%	41.9%
Florida	5.8	3.8	7.6	14.0

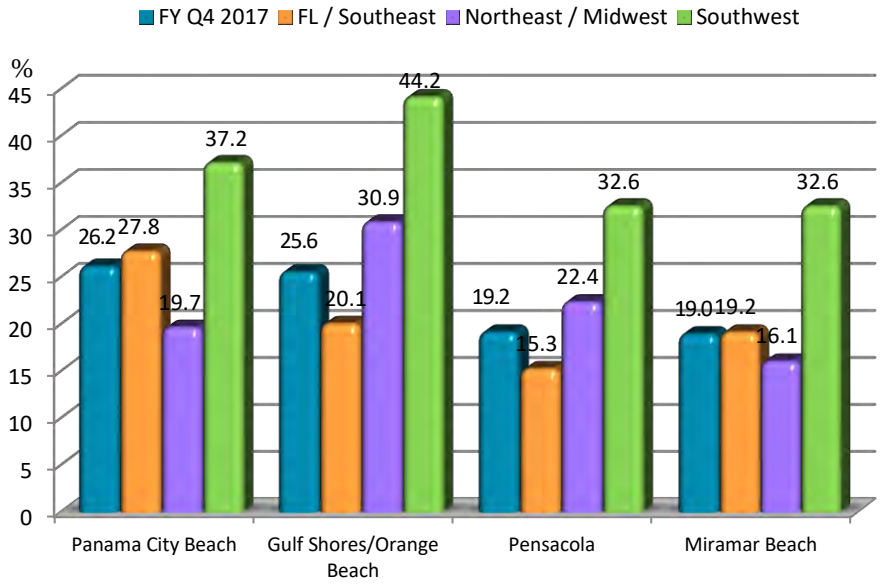
Number of Previous Stays in the Destination *(Base: Repeat Visitors)*	Total	Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
Average Number of Times Previously Stayed in Destin/Fort Walton Beach *(Not including current trip)*	4.8 *times*	5.0 *times*	3.7 *times*	5.5 *times*
1 times	20.0%	19.5%	18.8%	36.0%
2 times	20.2	15.9	36.0	16.0
3 times	18.1	19.6	11.3	8.0
4 times	11.7	14.6	5.4	8.0
5 times	8.6	8.5	14.6	n/a
More than 5 times	21.4	21.9	14.0	32.0

First Visit to Destin/Fort Walton Beach *(% Yes)*



Other Areas Considered for this Trip *(Open Ended Multiple Response)*	**Total**	**Core Visitor Origin Markets** Florida/ Southeast	Northeast/ Midwest	Southwest
Considered Only the Destination	39.3%	44.4%	33.0%	20.9%
Panama City Beach	26.2	27.8	19.7	37.2
Gulf Shores/Orange Beach	25.6	20.1	30.9	44.2
Pensacola	19.2	15.3	22.4	32.6
Miramar Beach	19.0	19.2	16.1	32.6
30A Area	14.8	18.3	9.7	14.0
Navarre Beach	11.7	12.4	3.6	27.9
Santa Rosa Beach	11.4	11.5	10.0	11.6
South Fort Walton	10.8	9.6	10.9	14.0

Other Areas Considered *(Top Four)*



Travel Planning Window	Total	Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
How Far in Advance Book Reservations	35.3 *days*	27.7 *days*	51.0 *days*	33.2 *days*
< 15 days	23.9%	36.6%	5.5%	17.1%
15 - 30 days	40.3	37.7	38.7	39.0
31 - 60 days	26.5	20.4	37.5	36.6
More than 60 days	9.3	5.4	18.3	7.3

Information Most Helpful to Visit *(Multiple Response)*	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
Internet	90.1%	91.3%	87.3%	88.4%
Maps	37.2	34.6	37.1	32.6
Hotel/Accommodations	31.4	38.5	21.7	9.3
Previous Visit	26.8	28.8	22.2	30.2
Recommendation	26.1	30.7	20.0	25.6
Family	18.7	24.1	14.7	4.7
Print Media	14.7	15.3	11.5	11.6
Mobile App	14.3	11.5	16.3	23.3

Internet Information Sources Consulted *(Multiple Response)*	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
Hotel Websites	56.5%	67.3%	41.7%	27.9%
Destination Websites	51.9	52.9	52.1	55.8
Restaurant Websites	45.8	44.1	49.3	46.5
VRBO/Airbnb/HomeAway, etc.	39.7	34.5	46.1	58.1
Booking Sites	36.9	41.4	30.8	20.9
Map Quest/Google Maps, etc.	36.8	36.6	35.9	32.6
Attraction Websites	34.9	30.7	38.8	53.5
Review/Rating Sites	34.1	31.7	43.9	30.2
Weather Sites	33.2	30.7	36.8	27.9
Social Networking Sites	18.2	20.2	15.4	20.9
Daily Deal/Coupon Sites	14.0	11.5	17.6	16.3
Rental Car Websites	13.6	7.7	22.8	7.0
Airline Websites	9.4	n/a	24.7	4.7

Satisfaction with Destination	Total	Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
Very Satisfied	88.2%	90.4%	86.4%	83.7%
Satisfied	8.0	6.7	8.8	9.3
Satisfaction Level *(Combined)*	**96.2%**	**97.1%**	**95.1%**	**93.0%**

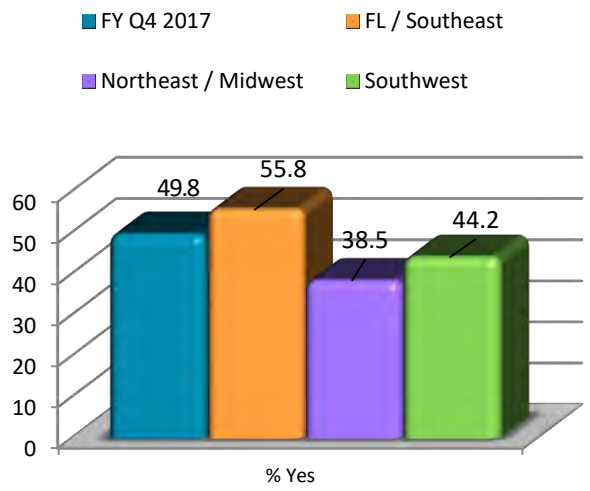
Plan to Return *(% Yes)*	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
To Local Area	86.5%	91.3%	78.5%	83.7%

Demographics	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
Average Age Head of HH *(years)*	46.4 *years*	43.6 *years*	49.9 *years*	47.0 *years*
< 35 years of age	19.6%	27.9%	6.1%	16.3%
35 - 44 years of age	29.7	28.8	33.9	32.6
45 - 54 years of age	18.3	16.4	22.7	16.3
55 - 64 years of age	20.7	17.3	26.8	23.3
65 + years of age	11.1	8.6	10.5	11.6
Median Annual Household Income	$114,886	$106,181	$123,979	$118,055
% Household Income of $100,000+	61.3%	54.2%	71.8%	65.9%

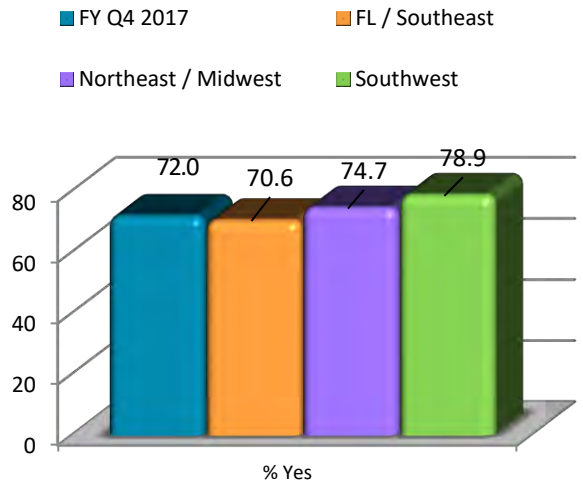
Seen/Read/Heard Destination Information	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
% Yes	49.8%	55.8%	38.5%	44.2%

Influenced by Destination Information	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
(Base: Resp. Reporting Seen/Heard/Read)	72.0%	70.6%	74.7%	78.9%

Seen/Read/Heard Destination Info



Information Influenced



Core Visitor Origin Markets

Base Visitor Party Budget	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
Total	$3,048.04	$2,451.92	$3,476.27	$3,813.95
Per Person/Stay	802.12	700.55	847.87	762.79
Per Person/Night	143.23	142.97	139.00	129.29

Booked Travel for this Trip on the Internet	Total	Florida/ Southeast	Northeast/ Midwest	Southwest
Yes	81.3%	80.7%	86.1%	83.7%

		Core Visitor Origin Markets		
Activities Enjoyed *(Multiple Response)*	**Total**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Beach	94.5%	95.1%	96.1%	90.7%
Dining Out	87.2	86.5	91.5	81.4
Walking on the Beach	75.2	72.9	79.8	74.4
Relaxing	73.9	71.0	79.1	74.4
Shopping	69.5	74.9	58.3	67.4
Swimming	51.1	47.1	62.2	46.5
Pool/Hot Tub	49.5	48.1	59.0	39.5
Local Attractions	43.2	42.3	38.5	58.1
Sight Seeing	38.3	34.5	38.5	46.5
Boating	29.3	28.8	29.3	30.2
Reading	26.3	25.9	27.1	27.9
Bars/Nightlife	20.6	22.1	16.6	23.3
Fishing	18.8	16.3	18.5	20.9
Miniature Golf	15.5	19.2	11.2	11.6
Visiting with Friends/Relatives	14.9	17.3	13.5	9.3
Water Sports *(Jet Skiing, Surfing, Parasailing, Kite Boarding, Water Skiing, etc.)*	14.8	9.6	22.7	27.9
Wildlife/Environment	14.6	15.4	14.2	16.3
Photography	12.0	13.4	9.7	14.0
Golfing	8.4	9.6	2.7	2.3
Paddleboarding/Kayaking/Canoeing	8.1	8.7	7.6	9.3
Special Event/Festival	7.9	7.7	6.6	16.3
Diving/Snorkeling	6.6	3.8	7.3	23.3

What Visitors Are Saying About the Destination:

- *Destin is my favorite place to vacation. I have been to Mexico and both the Atlantic and Gulf sides of Florida and there is* no clearer water *or* whiter sand.
- *The area is* clean, fresh *and* friendly. *Beautiful sites and reasonable prices. Will come back again if I get the chance.*
- *Gulf water was absolutely beautiful, clear, and many* shades of blue.
- *Going to Destin/Ft Walton is a no brainer. The waters are gorgeous, the views are breathtaking, and the beaches are* so clean they squeak *when you walk on them. It's very calming just to take in all the beauty.*
- *Good for* water sports *enthusiasts, boaters, and fisherman.*
- *Extremely* family friendly *beach highlighted by enough attractions to entertain the family without losing any charm.*
- *Things you must see: Beautiful white sand beaches, fun* snorkeling*/dolphin watch cruise, and an interesting Okaloosa Island Turtle Watch Walk.*
- *There are a lot of things to do but we are really enjoying relaxing. When it rains we enjoy sitting on our balcony looking at and listening to the waves. It has been a great time to relax and enjoy* good family togetherness.
- *Can't beat the location. Best of everything - beach,* food*, weather. Not too much rowdiness.*
- *Relaxing and* stress free.
- Great place for a reunion. *Family is renting a huge beach house.*
- *The* fishing *is incredible.* Shopping *is good, too.*
- *Beautiful city. The* golfing *is top notch.* Food is excellent.
- *We heard about it from friends.* Looked beautiful online. *I wanted to see if the sand was really this white. It is!*
- *Rest and relaxation with* no set schedule.
- Safe *location with beautiful beaches, restaurants, shopping and attractions all with in such a short distance from rental.*
- *It was the only way we could experience Florida with the* travel distance *by car and days we had available to travel.*
- *It is beautiful:* less hectic*, more laid back than the other Florida vacation spots, more family oriented, and we are just in love with the Okaloosa strip!*
- *The water is the most beautiful water in the USA, the* golf courses *are great, the* fishing and tackle shops *are first class, the* hotels are 5 star*, the outlets malls are small but fun, the boats ramps are first class and close to the inlet for the ocean, the fish shops will cut up your catch and ice it for you or a restaurant will cook it for you, first class charter boats, the captains really know their stuff, and the ride along 98 is totally beautiful.*
- *It was breathtaking and exactly what you need to* get away from life for a bit *and just relax and enjoy.*
- *This can be an* action packed *vacation* or *a* relaxing *one. We love it here!*
- *Great place to visit.* Easy to get around town. *Great restaurants to choose from and a lot of things for children to do.* Prices good.
- *Not a particularly pet friendly area. We hate leaving our small dogs kenneled back home and it made the trip harder.*
- *Clean,* upscale, *good food.*
- Avoid the toll roads as they are expensive!
- It is hands down better than Panama City Beach.
- You must visit the Gulfarium and the Destin Fishing Museum!

What Visitors Are Saying About the Destination *(All Responses)*:

What Visitors Are Saying About the Destination *Excluding Top 14 Most Common Response Words:*
(Great, Beautiful, Beach, Love, Beaches, Place, Destin, Area, Vacation, Time, Relaxing, Nice, Go, Visit)

What is the main reason that you are staying in this destination on this trip?

- *We loved the blue-green waters and pristine beaches that we got to enjoy on a* previous work trip*, and* wanted our little one to experience it *also.*
- *Clearest water and* less populated*.*
- *Plenty to do.* Highly recommended *by friends*
- The location of our townhouse to the beach, the price of the rental, and the numerous available activities and restaurants.
- Seafood.
- Love the white sand beaches and crystal clear waters and all the activities and dining and shopping opportunities in close proximity.
- Relaxation, parasailing, beach time, checking out local nightlife, restaurants.
- Closest road trip white-sand beach destination for us. Also highly recommended by friends who had been there.
- We have never been to Florida before, and researched on the web. Destin looked like a very pretty place to go.
- Beach and live music.
- Beautiful beaches, great hotels, and legendary golf courses.
- Something different. Looking for more activities.
- Variety of accommodations, shopping, and beautiful beaches.
- Reputation of the beach and gulf as pristine.
- Love the area: the entertainment, restaurants, and the beaches.
- We came for a beach wedding and an offshore fishing charter.
- Just set back and chill looking at the white sand and beautiful blue water and, of course, the Emerald Coast Poker Run.
- This is the only place I can truly relax.
- Looking to go to beach before it gets too cold, but wanted to wait until wasn't busy.
- We are going fishing, heard this was a good place.
- Great area! Beautiful beaches, good food, reasonably priced accommodations, plenty to do.
- We live near Galveston but we wanted the emerald water experience.
- Great beaches, restaurants, shopping, and activities. Destin Harbor.
- We really enjoy the beach, shopping, bike riding & restaurants. People are friendly.
- Our local airport had recently offered cheap, non-stop flights to Fort Walton.
- I come here almost three times a year - it's just beautiful - water is so clear, it sparkles.
- Vacation and we wanted something different than Daytona Beach. We usually go there every year. We just moved to Chattanooga from Detroit and saw the drive time to Destin and decided to give it a try.
- Good reviews.

What is the main reason that you are staying in the destination on this trip?
(All Responses)

What is the main reason that you are staying in the destination on this trip?
Excluding Top 3 Most Common Response Words: (Beach, Beaches, Vacation)

If a friend asked you where you visited, what would you call this area? *

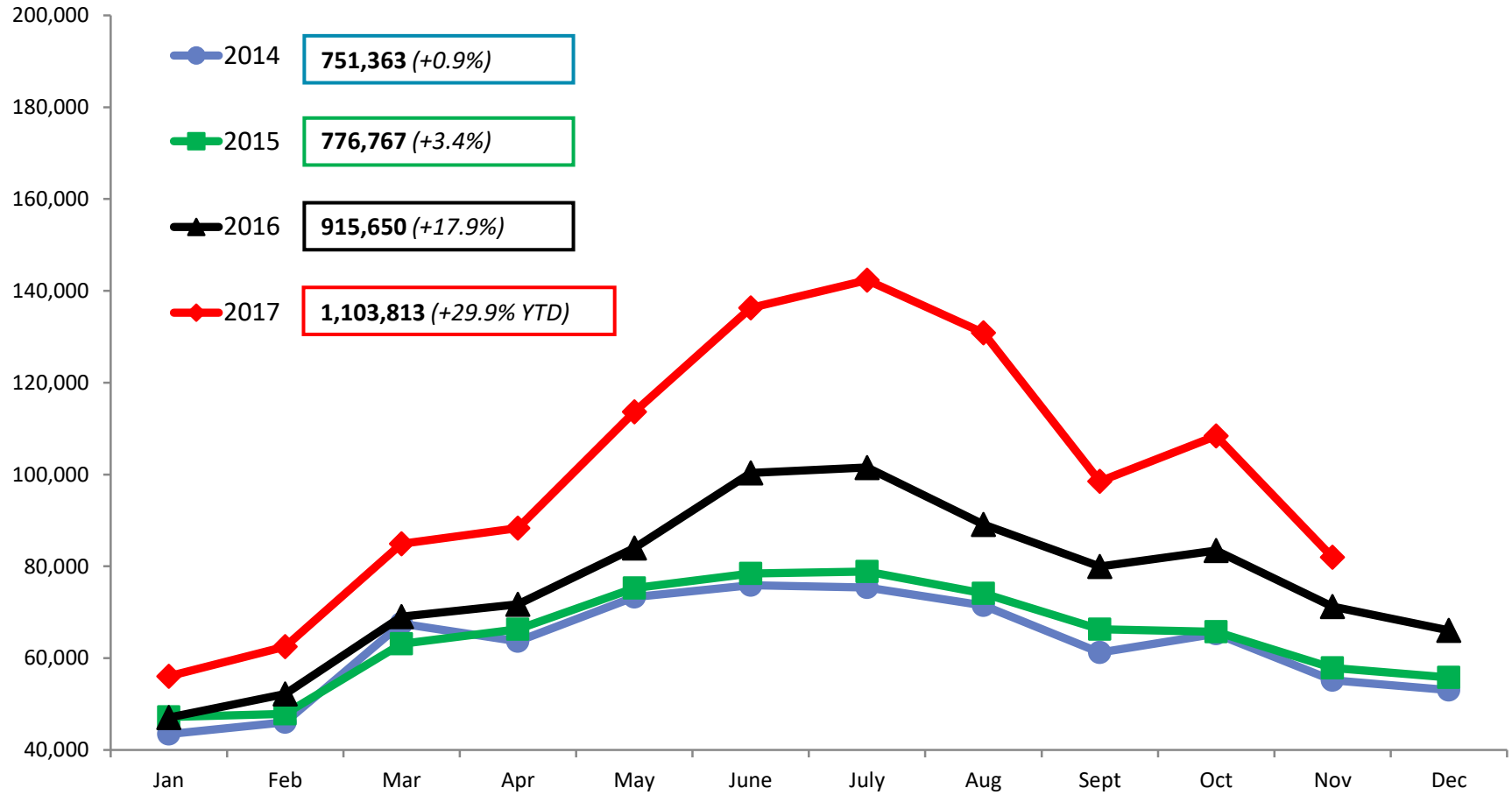
(Open Ended Volunteered Multiple Response)

Destination Identifier	FY Q4 2017
Destin/Destin Beach	59.0%
Fort Walton Beach	23.1
Okaloosa Island	15.4
Emerald Coast	4.1
Panhandle	2.6

** Please note that this query was added to the response matrix after the research for the quarter had commenced and therefore represents a partial dataset.*

APPENDIX

Destin - Fort Walton Beach Airport Total Passenger Traffic



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Destin/Fort Walton Beach Area FY First Quarter 2018 *(Oct. – Dec.)* Visitor Profile

THE HEART OF FLORIDA'S EMERALD COAST
DESTIN | FT. WALTON BEACH
OKALOOSA ISLAND

Prepared for:
Okaloosa County Tourist Development Council

Prepared by:
Research Data Services, Inc.
Research@ResearchDataLLC.com

February 28, 2018

Research Data
market research+

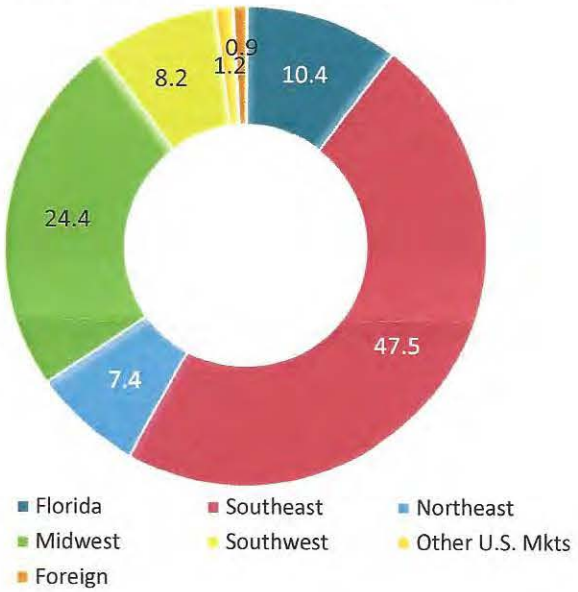
FY First Quarter 2018 *(Oct. – Dec.)*

H/M/C/C * Visitor Stats	FY Q4 2017*	FY Q1 2018*
Visitors (#)	504,700	209,900
Direct Exp. ($)	$404,830,000	$144,535,000
Total Eco. Impact ($)	**$568,502,800**	**$202,970,500**
Tourist Tax Collections	$7,596,740	$2,197,720

** Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)*

Economic Impact

FY Q1 2018 Visitor Origin Distribution *(%)*

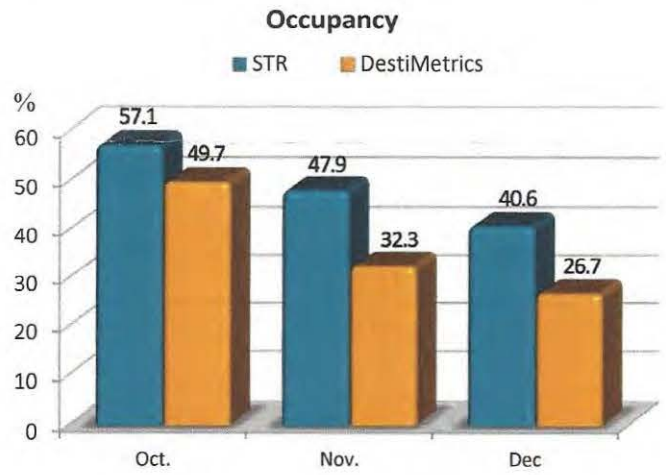


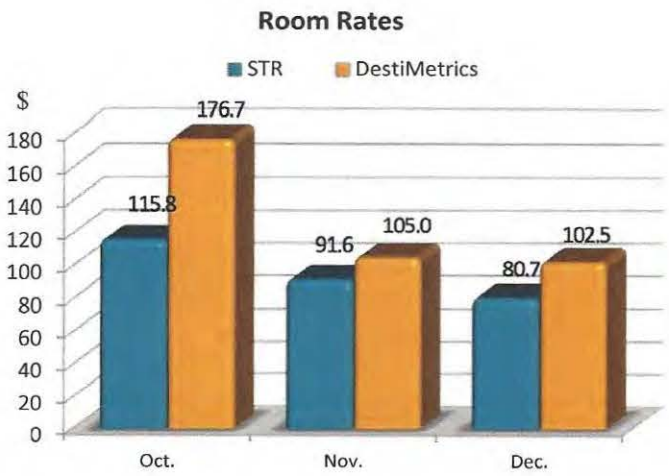
Visitor Origins	FY Q4 2017* *(Jul. – Sep.)* Share of Market	# of Visitors	FY Q1 2018* *(Oct. – Dec.)* Share of Market	# of Visitors
Florida	8.1%	40,880	10.4%	21,830
Southeast	50.1	252,850	47.5	99,700
Northeast	6.4	32,300	7.4	15,530
Midwest	22.5	113,560	24.4	51,220
Southwest	9.7	48,960	8.2	17,210
Other U.S.	2.0	10,090	1.2	2,520
Foreign	1.2	6,060	0.9	1,890
Total	**100.0**	**504,700**	**100.0**	**209,900**

Occupancy and ADR – *Smith Travel Research**	**October 2017**	**November 2017**	**December 2017**
Occupancy	57.1%	47.9%	40.6%
ADR	$115.84	$91.60	$80.74
RevPAR	$66.19	$43.87	$32.81

Occupancy and ADR – *Inntopia/DestiMetrics*	**October 2017**	**November 2017**	**December 2017**
Occupancy	49.7%	32.3%	26.7%
ADR	$176.68	$105.02	$102.47
RevPAR	$86.73	$33.59	$27.25

* *Note: Our visitor and economic impact estimates (Page 1) are based on Smith Travel Research's occupancy and ADR for properties in the Okaloosa County Tourist Development Tax District (February 2018 report). Additional changes in STR's reporting may result in modifications to these calculations.*





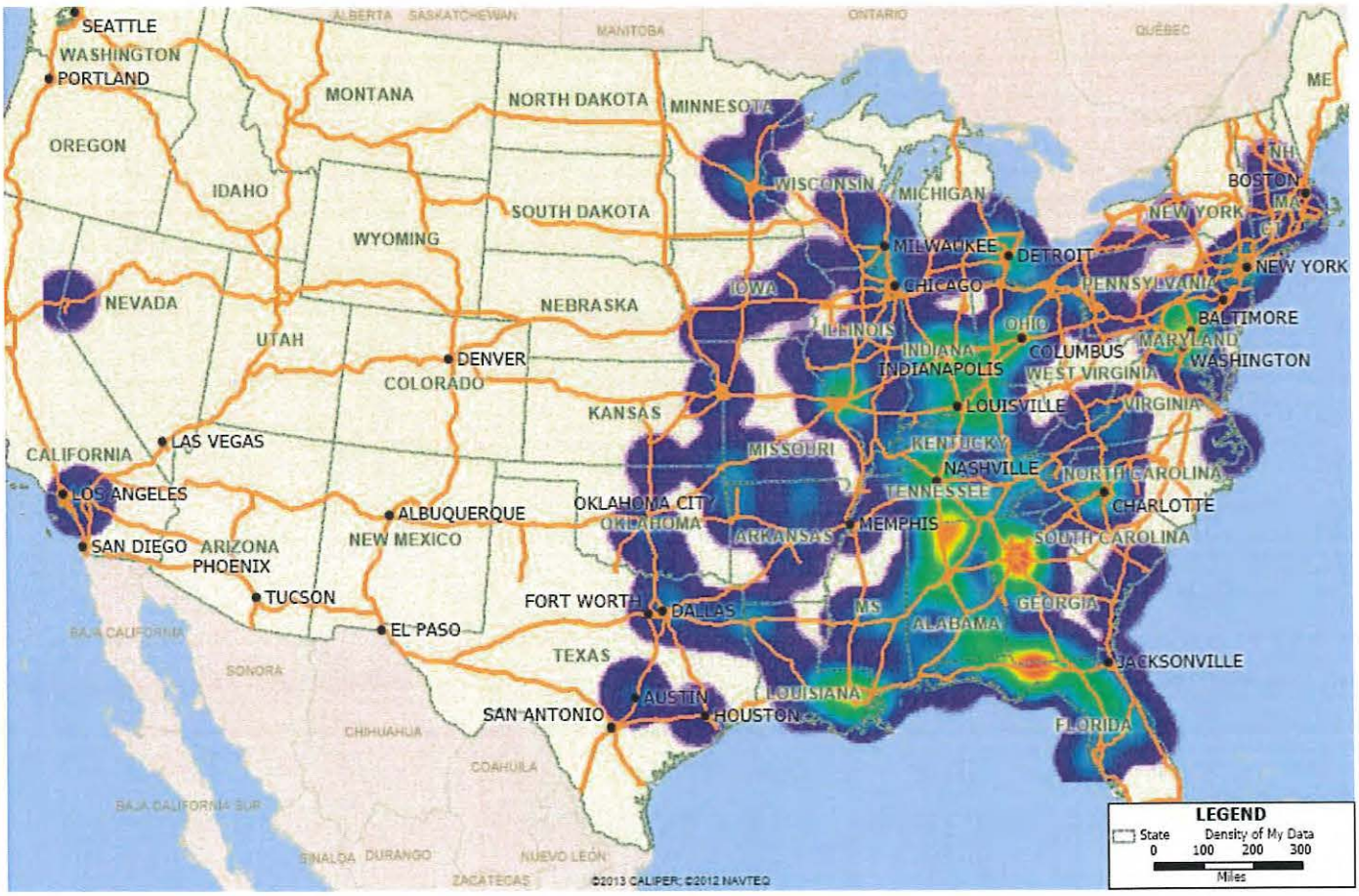
FY First Quarter 2018 Top U.S. Feeder Markets

	DMA's: *Primary Markets*	FY Q1 2018
1.	**Atlanta**	6.0%
2.	**Tallahassee/Thomasville**	5.4
3.	**Nashville**	4.3
4.	**Huntsville/Decatur/Florence**	4.2
5.	**New Orleans**	3.6

	DMA's: *Secondary Markets*	FY Q1 2018
6.	**Indianapolis**	3.4%
7.	**Birmingham**	2.9
8.	**St. Louis**	2.6
9.	**Baton Rouge**	2.1
10.	**Orlando**	2.0

Destin/Fort Walton Beach FY First Quarter 2018 Visitor Origins

Zip Code Density Mapping



Visitor Profile Metrics:

Length of Stay *(Nights)*	FY Q4 2017 *n = 781*	FY Q1 2018 *n = 760*	Core Visitor Origin Markets: Florida/ Southeast *n = 440*	Northeast/ Midwest *n = 242*	Southwest *n = 62**
In the Destin/Fort Walton Beach Area	5.6 *nights*	5.9 *nights*	4.8 *nights*	7.4 *nights*	6.1 *nights*
1 - 3 nights	21.5%	25.8%	41.4%	3.3%	9.5%
4 - 6 nights	39.1	33.7	31.4	37.8	42.9
7 - 9 nights	35.1	31.6	23.2	43.6	42.9
10 + nights	4.4	8.9	4.1	15.3	4.8

Party Size	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Average Number of People	3.8 *people*	2.9 *people*	2.9 *people*	3.0 *people*	3.0 *people*
1 - 2 people	34.8%	53.7%	50.4%	56.0%	61.9%
3 - 4 people	38.7	35.6	41.4	29.0	23.8
5 - 6 people	13.5	8.0	6.1	11.6	9.5
7 + people	13.0	2.7	2.1	3.4	4.8

Travel Party Composition *(Multiple Response)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Couple	27.2%	44.3%	38.1%	53.4%	42.9%
Family	62.1	36.1	35.4	39.2	33.3
Group of Friends	13.2	15.4	21.0	5.2	19.0
Extended Family	10.1	5.8	6.8	4.8	4.8
Single	2.6	1.8	2.0	1.9	n/a

Have Children or Young Adults In Immediate Travel Party	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
% Yes	53.4%	30.7%	32.0%	31.0%	23.8%

** Please Note: Due to small sample size, use caution in interpreting.*

FY Q1 2018 Core Visitor Origin Markets

Transportation Mode *(Multiple Response, Percentaged to the Base of All Respondents)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Personal Car/RV	79.3%	74.5%	89.3%	52.7%	61.9%
Plane	16.2	20.0	3.4	46.1	23.8
Rental Car	14.9	19.3	10.2	30.5	33.3

Airport Deplaned *(Base: Flew)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Destin/Ft. Walton Beach	53.8%	45.9%	n/a	41.1%	n/a
Panama City Beach	16.6	32.4	n/a	34.6	n/a
Pensacola	21.1	12.6	n/a	14.5	n/a

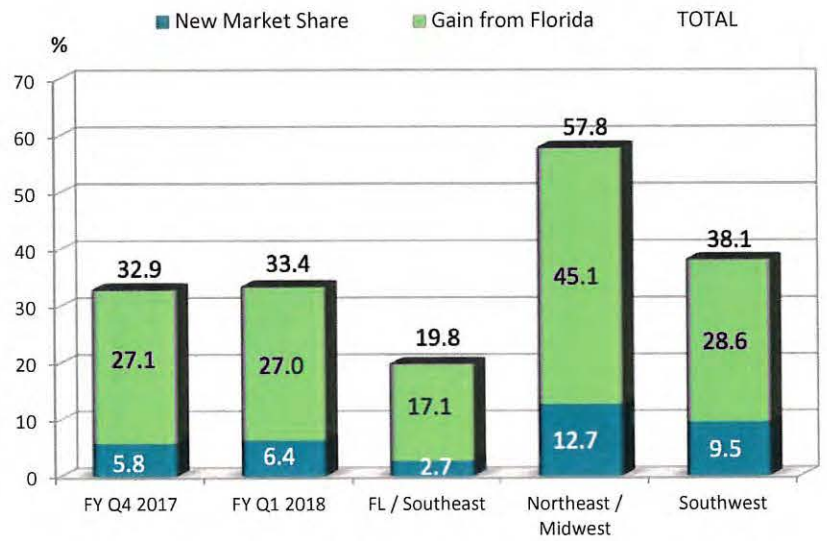
Purpose of Trip *(Multiple Response)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Vacation	77.7%	66.5%	50.5%	88.5%	85.7%
A Getaway	32.1	31.8	42.8	17.2	19.0
Visit with Friends/Relatives	16.8	17.3	17.0	19.3	9.5
Fishing Trip	4.2	5.7	7.5	3.0	4.8
Wedding/Honeymoon	5.0	5.4	5.4	5.9	4.8

Type of Lodging *(Multiple Response)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Condominium	40.8%	42.4%	34.1%	53.4%	47.6%
Hotel/Motel/Resort	38.7	43.7	58.4	24.9	23.8
Vacation Rental	15.8	13.3	7.5	19.8	28.6

First Visit to *(% yes)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Destin/Fort Walton Beach	32.9%	33.4%	19.8%	57.8%	38.1%
Florida	5.8	6.4	2.7	12.7	9.5

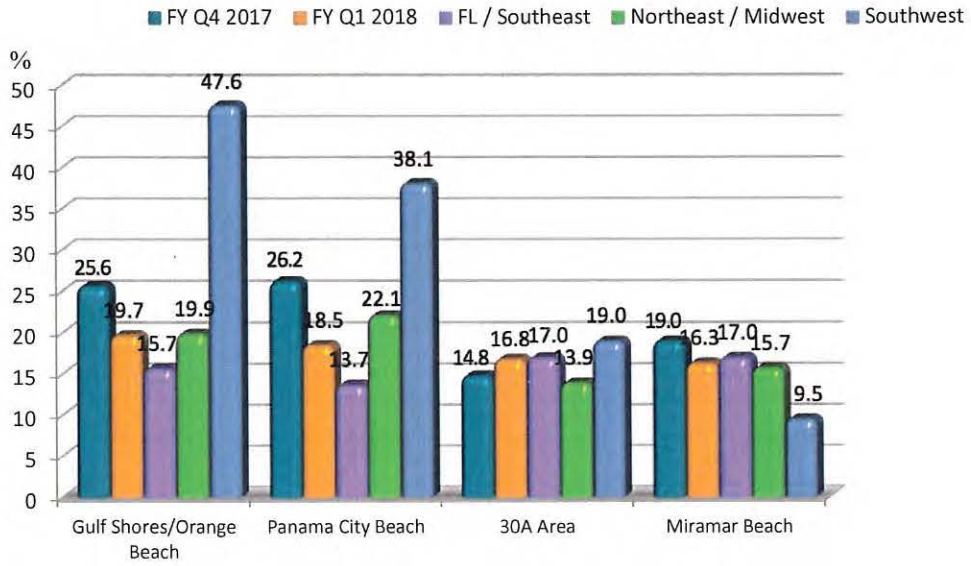
Number of Previous Stays in the Destination *(Base: Repeat Visitors)*	FY Q4 2017	FY Q1 2018	FY Q1 2018 Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
Average Number of Times Previously Stayed in Destin/Fort Walton Beach *(Not including current trip)*	4.8 *times*	4.2 *times*	4.3 *times*	3.6 *times*	5.1 *times*
1 times	20.0%	20.1%	17.9%	20.3%	n/a
2 times	20.2	23.6	24.6	29.3	n/a
3 times	18.1	16.6	16.1	19.5	n/a
4 times	11.7	11.3	13.5	4.4	n/a
5 times	8.6	9.0	8.5	12.4	n/a
More than 5 times	21.4	19.4	19.5	14.1	n/a

First Visit to Destin/Fort Walton Beach *(% Yes)*



Other Areas Considered for this Trip *(Open Ended Multiple Response)*	FY Q4 2017	FY Q1 2018	FY Q1 2018 Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
Considered Only the Destination	39.3%	44.9%	50.2%	36.4%	38.1%
Gulf Shores/Orange Beach	25.6	19.7	15.7	19.9	47.6
Panama City Beach	26.2	18.5	13.7	22.1	38.1
30A Area	14.8	16.8	17.0	13.9	19.0
Miramar Beach	19.0	16.3	17.0	15.7	9.5
Pensacola	19.2	14.9	13.0	14.6	28.6
Santa Rosa Beach	11.4	10.2	8.2	10.1	19.0
Navarre Beach	11.7	9.9	7.5	7.5	38.1
Perdido Key	7.6	6.2	7.5	2.3	14.3
South Fort Walton	10.8	5.8	4.8	4.5	19.0

Other Areas Considered *(Top Four)*



Travel Planning Window	FY Q4 2017	FY Q1 2018	FY Q1 2018 Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
How Far in Advance Book Reservations	35.3 *days*	44.0 *days*	36.3 *days*	56.4 *days*	44.0 *days*
< 15 days	23.9%	27.9%	40.9%	8.2%	25.0%
15 - 30 days	40.3	32.2	28.8	35.1	40.0
31 - 60 days	26.5	22.2	17.4	32.5	15.0
More than 60 days	9.3	17.7	12.9	24.2	20.0

Information Most Helpful to Visit *(Multiple Response)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Internet	90.1%	86.5%	83.1%	90.7%	90.5%
Hotel/Accommodations	31.4	42.9	48.2	35.7	28.6
Previous Visit	26.8	38.7	44.3	24.6	47.6
Maps	37.2	37.8	33.3	46.5	38.1
Recommendation	26.1	29.7	29.3	27.3	33.3
Family	18.7	23.0	27.8	18.2	4.8
Print Media	14.7	17.9	13.6	26.5	19.0
Mobile App	14.3	9.8	6.2	13.5	23.8

Internet Information Sources Consulted *(Multiple Response)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Hotel Websites	56.5%	63.8%	72.8%	48.1%	52.4%
Destination Websites	51.9	48.5	43.6	53.5	66.7
Weather Sites	33.2	45.9	42.9	49.1	47.6
VRBO/Airbnb/HomeAway, etc.	39.7	45.6	39.5	53.3	47.6
Booking Sites	36.9	36.4	38.1	35.4	19.0
Map Quest/Google Maps, etc.	36.8	36.0	31.3	40.2	47.6
Restaurant Websites	45.8	35.3	30.0	43.0	42.9
Review/Rating Sites	34.1	30.5	24.5	38.9	33.3
Attraction Websites	34.9	24.0	18.4	32.2	33.3
Rental Car Websites	13.6	19.5	8.9	37.1	14.3
Airline Websites	9.4	13.5	2.1	30.5	14.3
Social Networking Sites	18.2	12.9	15.0	8.2	19.0
Daily Deal/Coupon Sites	14.0	7.7	6.1	9.4	14.3

Satisfaction with Destination	FY Q4 2017	FY Q1 2018	FY Q1 2018 Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
Very Satisfied	88.2%	90.9%	93.2%	86.1%	90.5%
Satisfied	8.0	6.0	6.1	6.4	4.8
Satisfaction Level *(Combined)*	**96.2%**	**96.9%**	**99.3%**	**92.5%**	**95.3%**

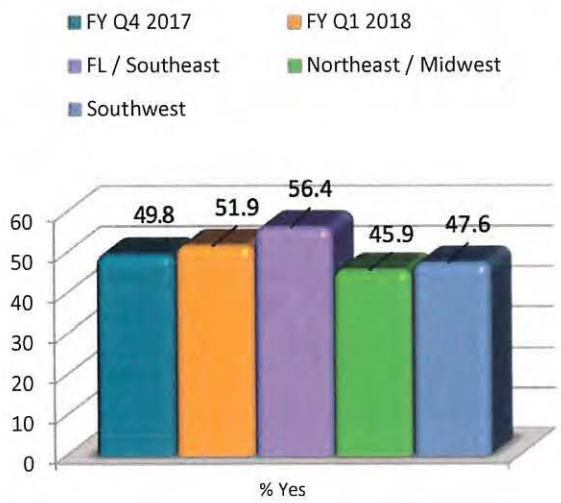
Plan to Return *(% Yes)*	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
To Local Area	86.5%	88.2%	93.2%	79.1%	85.7%

Demographics	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Average Age Head of HH *(years)*	46.4 *years*	48.2 *years*	43.5 *years*	54.1 *years*	54.9 *years*
< 35 years of age	19.6%	24.3%	35.3%	10.8%	4.8%
35 - 44 years of age	29.7	22.4	25.2	17.1	19.0
45 - 54 years of age	18.3	15.8	12.9	21.3	19.0
55 - 64 years of age	20.7	19.3	13.6	28.5	28.6
65 + years of age	11.1	18.2	12.9	22.3	28.6
Median Annual Household Income	$114,886	$103,016	$89,513	$128,627	$137,499
% HH Income < $75,000	19.3%	27.4%	38.9%	13.1%	5.6%
% HH Income $75,000 - $99,999	19.4	21.4	19.1	24.1	27.8
% HH Income $100,000 - $149,999	37.8	20.4	19.1	22.2	22.2
% HH Income $150,000 - $199,999	14.1	20.7	14.7	27.3	33.3
% Household Income of $200,000+	9.3	10.2	8.1	13.1	11.1

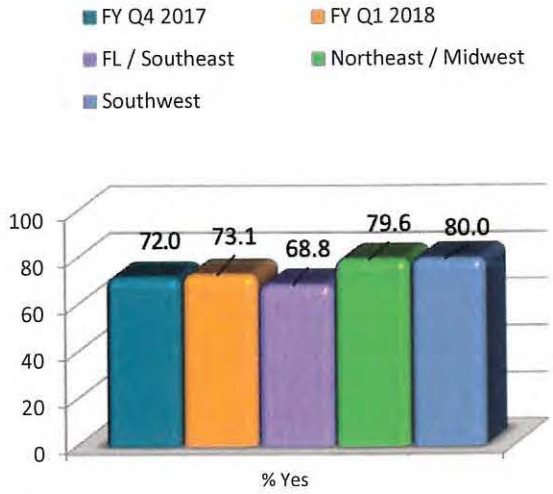
Seen/Read/Heard Destination Information	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
% Yes	49.8%	51.9%	56.4%	45.9%	47.6%

Influenced by Destination Information	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
(Base: Resp. Reporting Seen/Heard/Read)	72.0%	73.1%	68.8%	79.6%	80.0%

Seen/Read/Heard Destination Info



Information Influenced



FY Q1 2018 Core Visitor Origin Markets

Base Visitor Party Budget	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Total	$3,048.04	$1,996.91	$1,571.04	$2,637.45	$2,286.84
Per Person/Stay	802.12	688.59	541.74	879.15	762.28
Per Person/Night	143.23	116.71	112.86	118.80	124.96

Booked Travel for this Trip on the Internet	FY Q4 2017	FY Q1 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Yes	81.3%	85.4%	83.1%	92.2%	76.2%

Activities Enjoyed *(Multiple Response)*	FY Q4 2017	FY Q1 2018	FY Q1 2018 Core Visitor Origin Markets: Florida/ Southeast	Northeast/ Midwest	Southwest
Dining Out	87.2%	88.0%	85.0%	90.6%	95.2%
Beach	94.5	86.1	82.4	90.6	90.5
Shopping	69.5	74.2	74.9	72.0	71.4
Relaxing	73.9	67.9	59.9	79.3	71.4
Walking on the Beach	75.2	63.7	52.5	81.0	71.4
Pool/Hot Tub	49.5	41.5	37.4	47.9	42.9
Local Attractions	43.2	41.2	38.8	39.6	57.1
Sight Seeing	38.3	38.4	29.3	52.4	42.9
Bars/Nightlife	20.6	37.0	42.1	29.8	33.3
Swimming	51.1	34.3	28.6	43.7	38.1
Boating	29.3	32.1	30.6	29.8	38.1
Fishing	18.8	25.1	24.5	23.5	28.6
Reading	26.3	23.2	19.1	31.0	19.0
Visiting with Friends/Relatives	14.9	21.6	21.7	24.1	9.5
Golfing	8.4	15.1	14.3	13.7	14.3
Miniature Golf	15.5	11.5	12.3	12.7	4.8
Wildlife/Environment	14.6	9.7	5.5	15.7	19.0
Paddleboarding/Kayaking/Canoeing	8.1	8.0	6.8	9.0	9.5
Biking	6.6	7.9	6.8	11.2	4.8
Photography	12.0	7.4	6.2	9.8	9.5
Water Sports *(Jet Skiing, Surfing, Parasailing, Kite Boarding, Water Skiing, etc.)*	14.8	7.3	5.5	9.4	14.3
Special Event/Festival	7.9	6.9	4.8	10.5	9.5

What Visitors Are Saying About the Destination:

- *Fun, beautiful beach. Relaxing.* Best time of the year. *Lots of stuff to do. Great food.*
- *Very* family friendly. *Shopping and food are great. Love Destin Commons. Love the beach.*
- *We like the beaches. They are* clean. *Fishing trips are always fun and we always* catch a ton of fish.
- *The* resort *is gorgeous.*
- *The* golfing *is great. We come several times per year, but this is our favorite. Not many tourists and* perfect weather.
- *Gorgeous area,* exactly what it looks like in pictures.
- *Beaches are beautiful. It's too cold to swim but we still had* fun in the sand. *There are* so many other things to do.
- *Great place to relax this time of year. We're having a ball. Great place for family get-together. Can't wait for* seafood Thanksgiving.
- *The condo is beautiful. The beaches are the prettiest in the US. Great seafood.* Lots to do for kids.
- *I was told it was beautiful and they have lots of* events for the holidays. *We thought we would come for Thanksgiving and, if we like it, have some family meet us here for Christmas and New Years.*
- *Great fun. I love the* fishing and boating. *My wife loves shopping and beach.*
- *Good* surfing *when there's waves. None this weekend though. Like going out at night. Needs more dance clubs.*
- *It's so pretty! The wedding was beautiful. Trying to* soak up sun *before we go home. I definitely want to come back when it's warmer. The* locals are so nice.
- *One of the best destinations to be* sailing for a sunset.
- *We come every December for two weeks. We have stayed in South Walton also, but we like Destin better. It's* less expensive *and there is* more to do at night.
- *HarborWalk village is beautiful. Never been here before and we are* really impressed. *Will definitely come back when it's warmer.*
- *Made lots of* memories *here.*
- *It's going to be our* tradition *to party here every New Year's Eve. Destin's a beautiful beach, great food and nightlife.*
- *Never had* fried grouper. *It's amazing!*
- *It's chilly this time of year but much* better than back home.
- Laid back, *many* good restaurants *in walking distance.*
- *The beautiful* white sands *and* emerald waters *of your area are superior to anywhere else I have been.*
- *Great* escape *location.*
- *The beaches and ocean are like* heaven on Earth. *It's getting a bit busy and crowded, but the beaches are worth it. Visiting at an off peak time is smart.*
- *Relaxing atmosphere, friendly people, lots of* attractions *and* wildlife exhibits. *Enjoyed the* historical sites.
- *It is hands down better than Panama City Beach.*
- *Awesome - one of the best vacations we have ever had. I* would highly recommend *the area to anyone.*
- Henderson Beach State Park *was a hidden gem. We rented a canoe and saw a lot of wildlife - watched an eagle - bonus!!!!*
- *Beautiful beaches, excellent restaurants, great accommodations. Some of our favorite places we visited were the jetties and the pier. Our family is always busy so it was nice to get away* and relax and just spend time together.

What Visitors Are Saying About the Destination *(All Responses):*

What Visitors Are Saying About the Destination *Excluding Top 6 Most Common Response Words:*
(Great, Love, Beautiful, Beach, Destin, Beaches)

What is the main reason that you are staying in this destination on this trip?

- *Get away to the beach,* fishing.
- *We come in October when it starts to* cool off.
- *Looking to go to beach before it gets too cold, but wanted to wait until* wasn't busy.
- *Vacation before the crazy holidays kick in,* relax time.
- *We have Thanksgiving week off school and wanted to take a quick trip to the beach. We were here during the summer and loved it.*
- *My friend was here this summer and said how beautiful it was. We had a few days off and* wanted to check it out.
- Black Friday *getaway! We love the* shopping *here and wanted to go to the beach before Christmas.*
- *Love the beach and the city. Lots of* golf *and* fishing.
- *We chose Destin because it's a* tradition *with us.*
- *It's still* warmer than Pittsburgh.
- Family reunion *for Christmas.*
- Different *location then normal - try something new.*
- *Access to shopping, restaurants, and lovely beach.*
- Safe *location with beautiful beaches, restaurants, shopping and attractions all with in such a* short distance from rental.
- *Got a* good deal *on the trip.*
- *We saw it on* HGTV *and it looked pretty. We wanted to come to the beach for the holidays.*
- Cheap flight *into Destin/Fort Walton Beach on Allegiant.*
- *Wanted to visit a beach with clear, clean water, and some place that is* warm in October.
- *Sand, water, weather, restaurants, etc. Love everything about Destin.*
- *My friends* recommended *this place. They were here last winter and said it was beautiful. It's the only time that I can get away from my job and we really don't like it to be too hot so this is* perfect for us.
- Work and play.
- *Love the white sand beaches and crystal clear waters and all the* activities and dining *and shopping opportunities in close proximity.*
- *Loved the area the first time we visited and* could get here in a day's drive.
- *Visiting* family stationed in the area.
- *Quiet, relaxing,* cost effective.
- *To* escape *Wisconsin* winter *for a little while and be in a safe/warm area while staying in the states.*
- *Pier fishing.*
- *Family reunion,* rent beach house.
- *Visiting relatives who winter in the area.*
- *Interesting area, nice fishing.*
- *Destin is my favorite area: lots to do and pretty water.*
- *Love the area with the* sailing *and* HarborWalk boardwalk.
- *We like the white sand beaches, the relaxed atmosphere, the shopping, golf, and* fresh seafood restaurants.
- *Distance to the beach, heard good things about the area, went to Gulf Shores and it was not for us so* going east was logical.
- Outlet shopping.
- *Affordable, nice weather, beaches are amazing, and the* fishing rodeo *(very fun).*
- *Easy to get to the beaches, great food, and things to do for adults and children alike.*
- *Emerald Coast* Basketball *Tournament.*
- *Beautiful beaches,* art community, *low crowds, friendly people.*

What is the main reason that you are staying in the destination on this trip?
(All Responses)

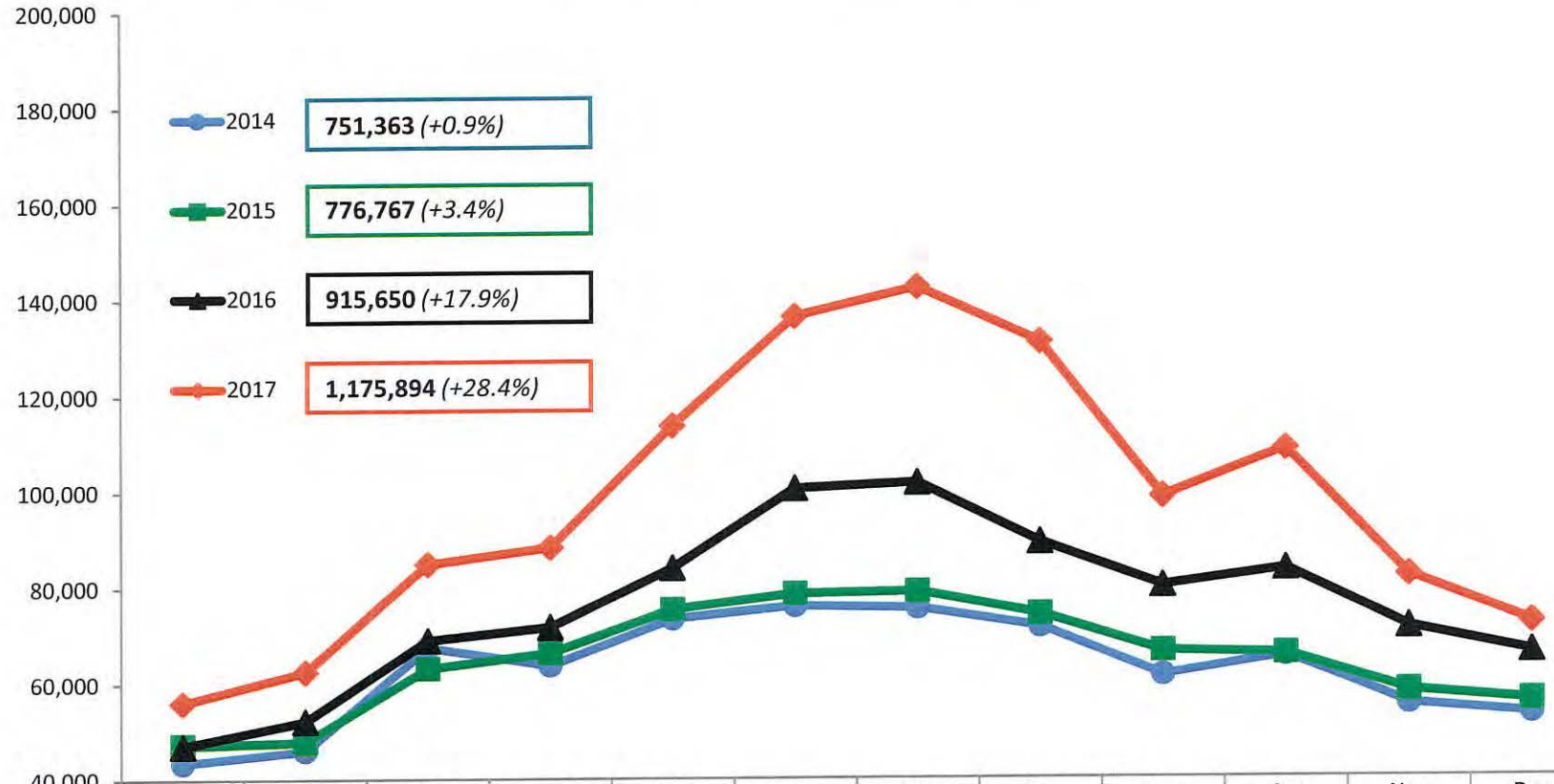
What is the main reason that you are staying in the destination on this trip?
(Excluding Top 6 Most Common Response Words: (Beach, Destin, Vacation, Area, Beaches, Wanted)

If a friend asked you where you visited, what would you call this area? *
(Open Ended Volunteered Multiple Response)

Destination Identifier	FY Q4 2017	FY Q1 2018
Destin/Destin Beach	59.0%	62.3%
Okaloosa Island	15.4	17.5
Fort Walton Beach	23.1	15.0
Panhandle	2.6	7.9
Emerald Coast	4.1	5.0
Gulf Coast of Florida	n/a	2.2

APPENDIX

Destin - Fort Walton Beach Airport Total Passenger Traffic



	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
2014	43,458	46,001	67,529	63,641	73,310	75,879	75,375	71,469	61,214	65,292	55,152	53,043
2015	47,178	47,830	63,119	66,302	75,278	78,419	78,860	74,114	66,278	65,712	57,865	55,812
2016	47,057	52,195	69,015	71,695	83,961	100,351	101,528	89,102	79,984	83,465	71,243	66,054
2017	56,061	62,481	84,915	88,343	113,648	136,265	142,328	130,878	98,528	108,399	81,967	72,081

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Destin/Fort Walton Beach Area FY Second Quarter 2018 *(Jan. – Mar.)* Visitor Profile

THE HEART OF FLORIDA'S EMERALD COAST
DESTIN | FT. WALTON BEACH
OKALOOSA ISLAND

Prepared for:
Okaloosa County Tourist Development Council

Prepared by:
Research Data Services, Inc.
Research@ResearchDataLLC.com

May 31, 2018

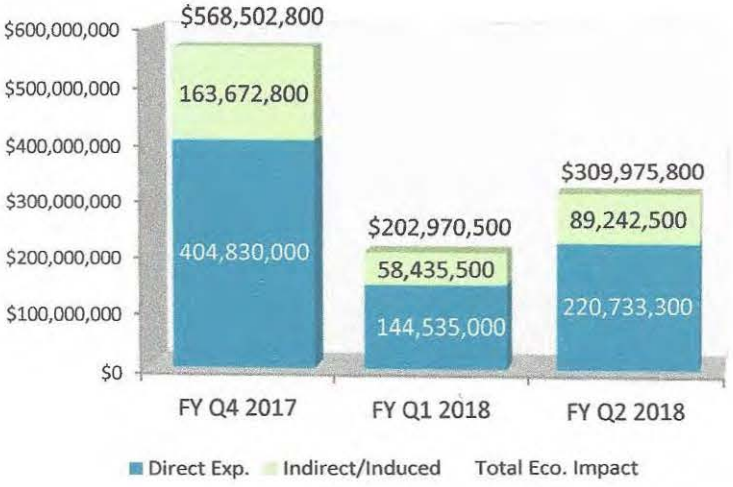
Research Data
market research+

FY Second Quarter 2018 *(Jan. – Mar.)*

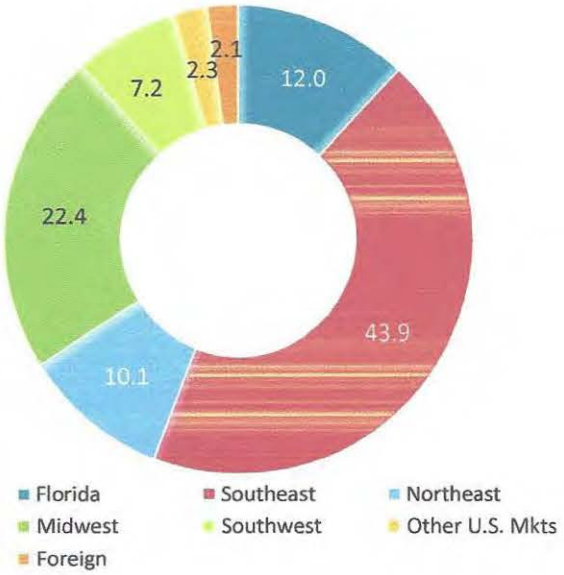
H/M/C/C * Visitor Stats	FY Q4 2017*	FY Q1 2018*	FY Q2 2018*
Visitors (#)	504,700	209,900	299,600
Direct Exp. ($)	$404,830,000	$144,535,000	$220,733,300
Total Eco. Impact ($)	**$568,502,800**	**$202,970,500**	**$309,975,800**
Tourist Tax Collections	$7,596,740	$2,197,720	$3,106,215

** Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)*

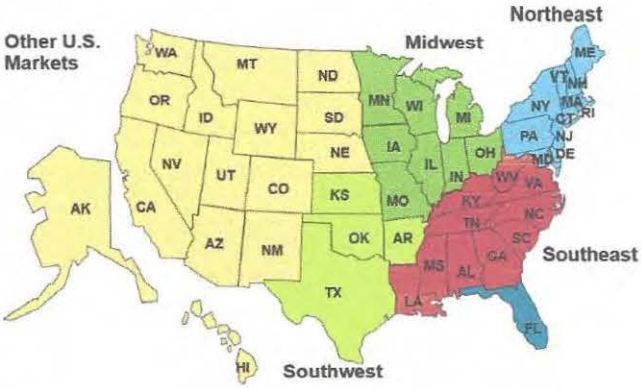
Economic Impact



FY Q2 2018 Visitor Origin Distribution *(%)*



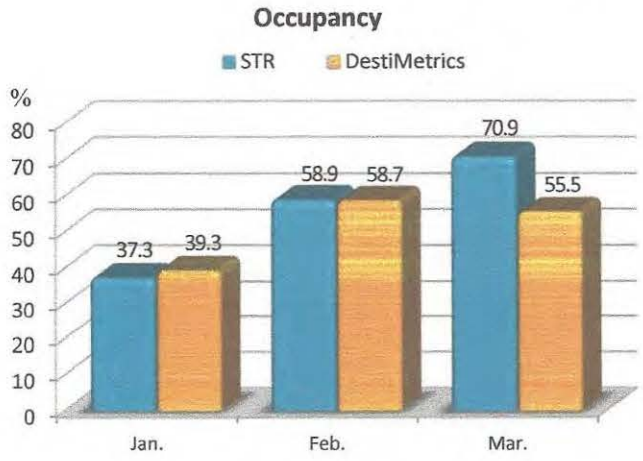
Visitor Origins	FY Q4 2017* *(Jul. – Sep.)* # of Visitors	FY Q1 2018* *(Oct. – Dec.)* # of Visitors	FY Q2 2018* *(Jan. – Mar.)* Share of Market	FY Q2 2018* *(Jan. – Mar.)* # of Visitors
Florida	40,880	21,830	12.0%	35,950
Southeast	252,850	99,700	43.9	131,530
Northeast	32,300	15,530	10.1	30,260
Midwest	113,560	51,220	22.4	67,110
Southwest	48,960	17,210	7.2	21,570
Other U.S.	10,090	2,520	2.3	6,890
Foreign	6,060	1,890	2.1	6,290
Total	**504,700**	**209,900**	**100.0**	**299,600**

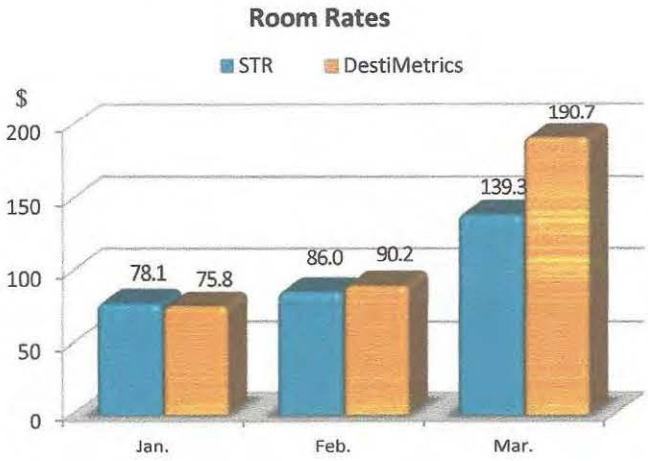


Occupancy and ADR – *Smith Travel Research**	**January 2018**	**February 2018**	**March 2018**
Occupancy	37.3%	58.9%	70.9%
ADR	$78.09	$85.98	$139.25
RevPAR	$29.16	$50.67	$98.74

Occupancy and ADR – *Inntopia/DestiMetrics*	**January 2018**	**February 2018**	**March 2018**
Occupancy	39.3%	58.7%	55.5%
ADR	$75.81	$90.23	$190.65
RevPAR	$29.30	$52.40	$104.79

* *Note: Calculations are based on Smith Travel Research's occupancy and ADR for properties in the Okaloosa County Tourist Development Tax District (March 2018 report). Additional changes in STR's reporting may result in modifications to these calculations.*





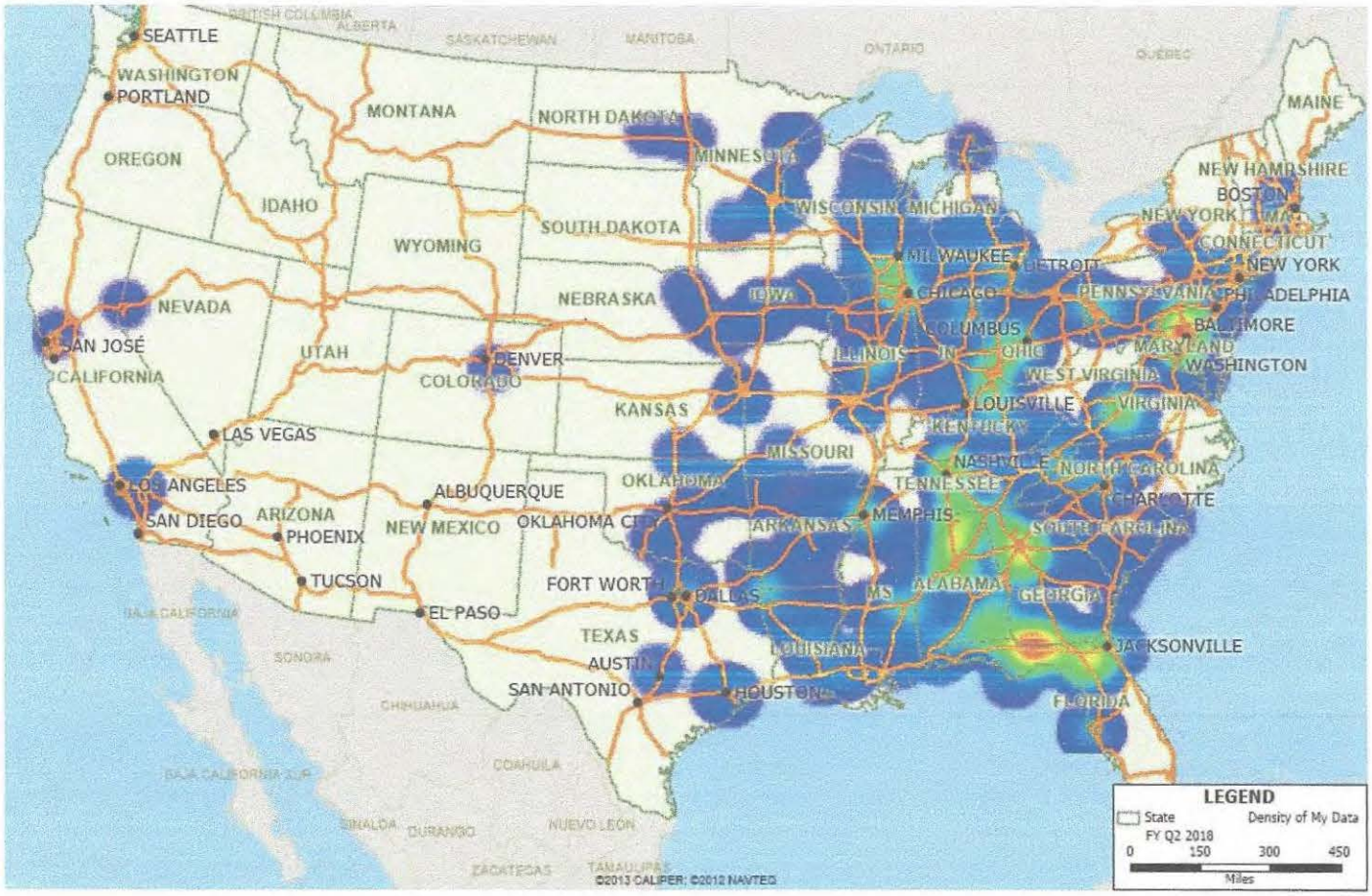
FY Second Quarter 2018 Top U.S. Feeder Markets

	DMA's: *Primary Markets*	FY Q2 2018
1.	**Tallahassee/Thomasville**	5.7%
2.	**Atlanta**	5.1
3.	**Nashville**	3.9
4.	**Chicago**	3.4
5.	**Birmingham**	3.2

	DMA's: *Secondary Markets*	FY Q2 2018
6.	**Huntsville/Decatur/Florence**	3.1%
7.	**Baltimore**	2.6
8.	**St. Louis**	2.4
9.	**Roanoke**	2.3
10.	**Montgomery/Selma**	1.8

Destin/Fort Walton Beach FY Second Quarter 2018 Visitor Origins

Zip Code Density Mapping



Visitor Profile Metrics:

FY Q2 2018 Core Visitor Origin Markets

Length of Stay *(Nights)*	**FY Q4 2017** *n = 781*	**FY Q1 2018** *n = 760*	**FY Q2 2018** *n = 773*	**Florida/ Southeast** *n = 432*	**Northeast/ Midwest** *n = 251*	**Southwest** *n = 56**
In Destin/Fort Walton Beach Area	5.6 *nights*	5.9 *nights*	6.1 *nights*	4.8 *nights*	8.0 *nights*	5.1 *nights*
1 - 3 nights	21.5%	25.8%	27.2%	42.1%	5.7%	17.4%
4 - 6 nights	39.1	33.7	35.9	35.2	34.1	60.9
7 - 9 nights	35.1	31.6	27.4	17.5	46.2	21.7
10 + nights	4.4	8.9	9.5	5.2	14.0	n/a

Party Size	**FY Q4 2017**	**FY Q1 2018**	**FY Q2 2018**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Average Number of People	3.8 *people*	2.9 *people*	3.2 *people*	3.2 *people*	3.3 *people*	3.1 *people*
1 - 2 people	34.8%	53.7%	41.2%	37.2%	43.7%	43.5%
3 - 4 people	38.7	35.6	49.5	54.7	44.5	47.8
5 - 6 people	13.5	8.0	5.6	4.8	7.0	4.3
7 + people	13.0	2.7	3.7	3.4	4.7	4.3

Travel Party Composition *(Multiple Response)*	**FY Q4 2017**	**FY Q1 2018**	**FY Q2 2018**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Family	62.1%	36.1%	42.7%	43.5%	43.7%	43.5%
Couple	27.2	44.3	36.1	31.5	42.8	30.4
Group of Friends	13.2	15.4	19.3	25.3	10.2	21.7
Extended Family	10.1	5.8	6.6	4.4	11.0	4.3
Single	2.6	1.8	2.3	2.3	1.7	n/a

Have Children or Young Adults In Immediate Travel Party	**FY Q4 2017**	**FY Q1 2018**	**FY Q2 2018**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
% Yes	53.4%	30.7%	39.7%	42.0%	37.2%	43.5%

** Please Note: Due to small sample size, use caution in interpreting.*

FY Q2 2018 Core Visitor Origin Markets

Transportation Mode *(Multiple Response, Percentaged to the Base of All Respondents)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Personal Car/RV	79.3%	74.5%	81.4%	94.8%	66.3%	69.6%
Plane	16.2	20.0	16.3	3.7	32.0	17.4
Rental Car	14.9	19.3	15.5	5.2	27.3	26.1

Airport Deplaned *(Base: Flew)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Destin/Ft. Walton Beach	53.8%	45.9%	43.0%	n/a	35.5%	n/a
Panama City Beach	16.6	32.4	37.4	n/a	36.7	n/a
Pensacola	21.1	12.6	16.5	n/a	22.9	n/a

Purpose of Trip *(Multiple Response)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Vacation	77.7%	66.5%	65.5%	47.5%	89.8%	73.9%
A Getaway	32.1	31.8	31.3	38.7	21.1	34.8
Spring Break	--	--	18.9	16.7	22.5	13.0
Visit with Friends/Relatives	16.8	17.3	17.1	16.4	16.8	8.7
Wedding/Honeymoon	5.0	5.4	6.7	10.4	1.7	4.3
Fishing Trip	4.2	5.7	4.6	5.6	2.6	8.7

Type of Lodging *(Multiple Response)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Hotel/Motel/Resort	38.7%	43.7%	45.4%	61.0%	29.2%	17.4%
Condominium	40.8	42.4	38.6	28.9	46.3	52.2
Vacation Rental	15.8	13.3	15.0	9.3	22.6	30.4

First Visit to *(% yes)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Destin/Fort Walton Beach	32.9%	33.4%	38.4%	24.1%	65.3%	30.4%
Florida	5.8	6.4	6.5	3.0	11.4	13.0

FY Q2 2018 Core Visitor Origin Markets

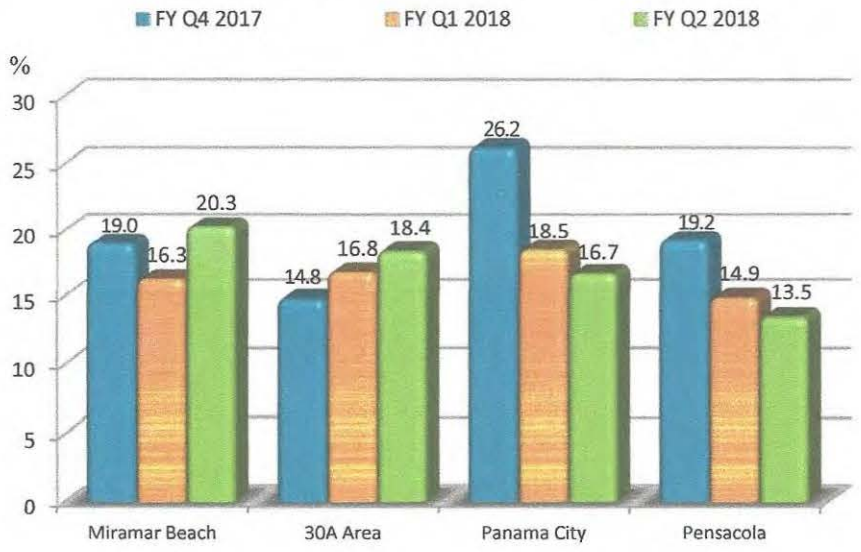
Number of Previous Stays in the Destination *(Base: Repeat Visitors)*	**FY Q4 2017**	**FY Q1 2018**	**FY Q2 2018**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Average Number of Times Previously Stayed in Destin/Fort Walton Beach *(Not including current trip)*	4.8 *times*	4.2 *times*	4.4 *times*	4.5 *times*	4.7 *times*	3.2 *times*
1 times	20.0%	20.1%	21.5%	17.6%	29.3%	n/a
2 times	20.2	23.6	18.1	16.7	23.3	n/a
3 times	18.1	16.6	16.9	16.7	11.7	n/a
4 times	11.7	11.3	14.9	17.2	12.0	n/a
5 times	8.6	9.0	9.5	11.3	4.5	n/a
More than 5 times	21.4	19.4	19.2	20.6	19.2	n/a

First Visit to Destin/Fort Walton Beach *(% Yes)*

FY Q2 2018 Core Visitor Origin Markets

Other Areas Considered for this Trip *(Open Ended Multiple Response)*	**FY Q4 2017**	**FY Q1 2018**	**FY Q2 2018**	**Florida/ Southeast**	**Northeast/ Midwest**	**Southwest**
Considered Only the Destination	39.3%	44.9%	43.8%	51.0%	34.3%	39.1%
Miramar Beach	19.0	16.3	20.3	17.8	24.9	13.0
30A Area	14.8	16.8	18.4	20.4	14.0	8.7
Panama City Beach	26.2	18.5	16.7	12.2	24.9	17.4
Pensacola	19.2	14.9	13.5	10.0	16.1	26.1
Santa Rosa Beach	11.4	10.2	13.5	12.2	16.3	4.3
Gulf Shores/Orange Beach	25.6	19.7	12.1	8.1	16.6	26.1
Navarre Beach	11.7	9.9	7.9	7.1	9.5	8.7
South Walton	10.8	5.8	5.5	5.2	7.0	4.3
Perdido Key	7.6	6.2	4.1	4.4	4.0	4.3

Other Areas Considered *(Top Four)*



FY Q2 2018 Core Visitor Origin Markets

Travel Planning Window	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
How Far in Advance Book Resv.	35.3 *days*	44.0 *days*	50.1 *days*	38.0 *days*	67.9 *days*	49.3 *days*
< 15 days	23.9%	27.9%	25.6%	37.2%	9.7%	14.3%
15 - 30 days	40.3	32.2	35.5	32.8	39.8	52.4
31 - 60 days	26.5	22.2	20.0	16.0	21.4	19.0
More than 60 days	9.3	17.7	18.9	14.0	29.1	14.3

Information Most Helpful to Visit *(Multiple Response)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Internet	90.1%	86.5%	88.7%	88.8%	87.2%	87.0%
Hotel/Accommodations	31.4	42.9	49.9	60.3	35.6	34.8
Previous Visit	26.8	38.7	38.9	47.2	19.1	47.8
Maps	37.2	37.8	38.1	37.2	43.9	34.8
Recommendation	26.1	29.7	30.6	26.0	36.2	30.4
Family	18.7	23.0	27.9	32.8	23.5	8.7
Print Media	14.7	17.9	19.3	9.3	34.5	26.1
Mobile App	14.3	9.8	12.0	10.8	14.0	13.0

Internet Information Sources Consulted *(Multiple Response)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Hotel Websites	56.5%	63.8%	69.7%	82.9%	52.2%	52.2%
Weather Sites	33.2	45.9	52.1	52.8	51.3	43.5
Destination Websites	51.9	48.5	46.6	40.5	56.9	47.8
VRBO/Airbnb/HomeAway, etc.	39.7	45.6	46.5	40.1	54.2	39.1
Booking Sites	36.9	36.4	35.8	37.1	33.2	34.8
Review/Rating Sites	34.1	30.5	34.2	32.7	38.4	26.1
Restaurant Websites	45.8	35.3	33.0	29.4	39.2	17.4
Map Quest/Google Maps, etc.	36.8	36.0	32.7	29.7	33.0	39.1
Attraction Websites	34.9	24.0	22.7	16.0	36.3	17.4
Rental Car Websites	13.6	19.5	17.3	6.7	31.6	17.4
Airline Websites	9.4	13.5	13.9	4.1	26.5	13.0
Social Networking Sites	18.2	12.9	10.4	11.5	9.4	8.7
Daily Deal/Coupon Sites	14.0	7.7	8.1	7.8	9.7	8.7

FY Q2 2018 Core Visitor Origin Markets

Satisfaction with Destination	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Very Satisfied	88.2%	90.9%	89.3%	92.6%	82.6%	91.3%
Satisfied	8.0	6.0	7.3	5.2	11.9	4.3
Satisfaction Level *(Combined)*	**96.2%**	**96.9%**	**96.7%**	**97.8%**	**94.5%**	**95.7%**

Plan to Return *(% Yes)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
To Local Area	86.5%	88.2%	86.6%	90.3%	79.0%	91.3%

Demographics	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Average Age Head of HH *(years)*	46.4 *years*	48.2 *years*	44.0 *years*	39.3 *years*	49.8 *years*	46.3 *years*
< 35 years of age	19.6%	24.3%	32.8%	47.6%	13.7%	17.4%
35 - 44 years of age	29.7	22.4	23.4	20.8	27.0	34.8
45 - 54 years of age	18.3	15.8	15.0	11.9	19.5	21.7
55 - 64 years of age	20.7	19.3	14.8	10.1	21.1	17.4
65 + years of age	11.1	18.2	12.7	8.9	17.1	8.7
Median Annual Household Income	$114,886	$103,016	$105,628	$94,003	$128,718	$97,916
% HH Income < $75,000	19.3%	27.4%	22.0%	28.6%	12.6%	17.6%
% HH Income $75,000 - $99,999	19.4	21.4	25.0	28.2	17.1	35.3
% HH Income $100,000 - $149,999	37.8	20.4	27.0	22.9	35.4	23.5
% HH Income $150,000 - $199,999	14.1	20.7	16.0	11.7	22.6	11.8
% Household Income of $200,000+	9.3	10.2	10.0	8.7	12.3	11.8

Seen/Read/Heard Destination Information	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
% Yes	49.8%	51.9%	54.6%	60.6%	52.1%	34.8%

Influenced by Destination Information	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
(Base: Resp. Reporting Seen/Heard/Read)	72.0%	73.1%	76.4%	71.8%	85.7%	75.0%

Seen/Read/Heard Destination Info

Information Influenced

FY Q2 2018 Core Visitor Origin Markets

Base Visitor Party Budget	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Total	$3,048.04	$1,996.91	$2,357.63	$1,856.74	$3,125.80	$1,995.65
Per Person/Stay	802.12	688.59	736.76	580.23	947.21	643.76
Per Person/Night	143.23	116.71	120.78	120.88	118.40	126.23

Booked Travel for this Trip on the Internet	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Yes	81.3%	85.4%	87.5%	88.5%	86.7%	82.6%

FY Q2 2018 Core Visitor Origin Markets

Activities Enjoyed *(Multiple Response)*	FY Q4 2017	FY Q1 2018	FY Q2 2018	Florida/ Southeast	Northeast/ Midwest	Southwest
Beach	94.5%	86.1%	93.2%	90.7%	96.0%	95.7%
Dining Out	87.2	88.0	86.7	85.8	87.9	87.0
Shopping	69.5	74.2	79.0	77.7	82.9	69.6
Walking on the Beach	75.2	63.7	70.2	66.8	77.2	60.9
Relaxing	73.9	67.9	62.2	55.8	70.6	65.2
Pool/Hot Tub	49.5	41.5	48.1	47.1	48.0	56.5
Local Attractions	43.2	41.2	43.1	35.7	54.8	34.8
Bars/Nightlife	20.6	37.0	38.9	43.9	32.6	34.8
Swimming	51.1	34.3	38.7	38.6	38.8	47.8
Sight Seeing	38.3	38.4	37.7	33.0	48.4	30.4
Boating	29.3	32.1	29.4	26.7	30.5	30.4
Fishing	18.8	25.1	28.5	29.4	25.8	26.1
Visiting with Friends/Relatives	14.9	21.6	28.2	30.2	25.5	17.4
Reading	26.3	23.2	20.1	15.2	28.7	13.0
Golfing	8.4	15.1	19.2	16.7	20.8	17.4
Miniature Golf	15.5	11.5	13.8	9.3	23.9	4.3
Biking	6.6	7.9	11.4	8.2	15.9	8.7
Wildlife/Environment	14.6	9.7	10.8	11.2	11.6	4.3
Paddleboarding/Kayaking/Canoeing	8.1	8.0	9.6	9.3	11.0	8.7
Special Event/Festival	7.9	6.9	9.2	11.5	4.8	13.0
Photography	12.0	7.4	8.5	9.0	7.3	8.7
Water Sports *(Jet Skiing, Surfing, Parasailing, Kite Boarding, Water Skiing, etc.)*	14.8	7.3	5.9	6.7	5.9	4.3

What Visitors Are Saying About the Destination:

- It's a busy little city with lots of stuff to do. Wish we could stay longer.
- Surf fishing is fun even though we haven't caught anything yet. We will definitely change to Destin as our beach getaway place.
- Destin was incredible—beautiful beaches, deluxe accommodations, and delicious food. Very family friendly, lots of good shopping. Loved it!
- Peaceful and relaxing family oriented community.
- The most beautiful beaches in the USA and the most friendly people!
- The condo was mostly retired couples such as us. All were friendly and we made many new friends. Time went way too fast!
- Destin was a pleasant surprise. Our accommodations were perfect. The gulf waters were beautiful. Lots to do very close to our place.
- The weather has been HORRIBLE, but we made the best of it. We would love to give Waterscape and Okaloosa Island another try when the weather is good.
- Wish Destin was dog friendlier.
- Not much to do there in March because the ocean was too cold to get in the water and we are not much for high end shopping outlets.
- Good attractions, but some areas were too busy with other spring breakers. We discovered quieter areas without as much traffic that we will stay for future visits.
- Wonderful place to vacation and/or own a second home. Although the 98 road construction is a pain, it will facilitate the flow of traffic. The bridge to Fort Walton must be quickly improved to carry more traffic.
- Shopping, dining, organized activities for all age groups, and beaches are exceptional although food prices are too high as compared to other coastal communities.
- There was a lot to do, but it was more family oriented than many other Florida destinations and still had a local flavor.
- Everyone should take a trip to the Emerald Coast.
- You never get bad seafood here.
- The water is so clear and calm.
- Great for kids and adults. There are so many restaurants. We can't decide where to eat! Beautiful beaches. We never want to go home.
- Destin is a wonderful place for people our age because of the golfing, fishing, and activities. We love the weather, not too cold for us.
- Fishing is phenomenal.
- The beach is just great and we're going to learn paddle boarding this year. The fishing is good too. We're determined to catch our dinner.
- We were here in the summer and wanted to come back when it was cooler.
- We could stay forever. The Harbor has amazing restaurants.
- We've been so busy shopping and eating ... and eating ... and eating.
- We were here about 10 years ago and remembered how gorgeous it was and now it's a whole different city, but still beautiful.
- I love the shopping. It seems like the amount of stores doubles every time I visit.
- We love Destin. I think all of the women in our family got married here. Beautiful backdrop for a wedding.
- So many historical places to visit or just sit on the beach and enjoy the view.
- I see why my parents come here every winter. Wish it was warmer so we could swim.
- So many things to do for all age ranges. You can relax as a couple or have fun as a family with all the different attractions. The pure white sand is absolutely beautiful and seemingly never gets hot. The entire area is safe and clean.

What Visitors Are Saying About the Destination *(All Responses):*

What Visitors Are Saying About the Destination *Excluding Top 8 Most Common Response Words:*
(Beautiful, Love, Great, Beach, Destin, Beaches, Area, Place)

What is the main reason that you are staying in this destination on this trip?

- *We picked Destin because we wanted a* nicer *place than Panama City. Too crazy there, not as* elite.
- *My kids are meeting college friends for* spring break. *I am chaperoning. They picked Destin for the beaches.*
- *We are on our way to New Orleans and we thought we'd take two nights in Destin because we heard about the beach.*
- *We have friends that are meeting us here. We come to Destin for the* beaches and shopping.
- Get away from the snow.
- *We like the food, shopping, boating, and fishing.*
- *This is a* friend reunion. *We get together after the holidays to blow off steam.*
- *We come to Destin for the coldest two weeks in Ontario.* Down south is too hot *for us.*
- *We live in Tallahassee and this is the best place near us for* fishing.
- *We were deciding whether or not to go to Orlando or somewhere different and we chose Destin because of* recommendations *from one of my friends who has been here before, and we just love it.* So glad we didn't go to the same, tired tourist cities.
- *My husband likes to* fish and golf. *We have heard good things about Destin. We have family that have stayed here before in the winter and they said it was beautiful and has tons of things to do and they're right!*
- The best fishing around.
- *We have a lot of friends that live in Destin for the winter, but we still work, so we are just visiting.*
- *We heard that Destin was a beautiful place,* saw the pictures online, *and wanted to see the beach.*
- *We were here last summer for a wedding and* couldn't wait to come back *for the beach.*
- *We come to Destin* every year. *We love the beaches and stores.* The fishing is great.
- *We have family that lives here. We visit when we can. It's beautiful.* Maybe we'll retire here too.
- *We heard Destin was pretty and we're taking a quick* beach getaway. *Usually we go to Alabama.*
- *We wanted a* quick trip *to the beach and we knew it would be a nice weekend. We've been here before and love the* beach and nightlife.
- *I heard it had* grown a lot *since we were here a few years ago and, whoa, it's awesome! So many* new places to eat and shop.
- *We love the condo we are renting and all of the* shopping on the harbor. *The beaches are the best.*
- *Me and my friends are here for spring break. We picked Destin because of the* beach photos *one of my friend's parents took.*
- *I'm on vacation with my family. I used to come here all the time as a kid. I love it here.* Great memories.
- *My family comes all the time, but this time I'm here with my friends. I love Destin. It is like my* home away from home.
- *We heard about the beautiful beaches and, because it was* closer, *we felt we could drive.*
- *We've been to Orange Beach, Alabama but a friend of ours told us to look at Destin because it's nicer and* there's a lot more to do here *and we love it!*
- *We love the* sugar white sand *and* emerald green water!
- Fit *in our short spring break schedule.*
- *Beautiful beaches,* great biking, *running, swimming,* canoeing, *totally relaxing.*

What is the main reason that you are staying in the destination on this trip?
(All Responses)

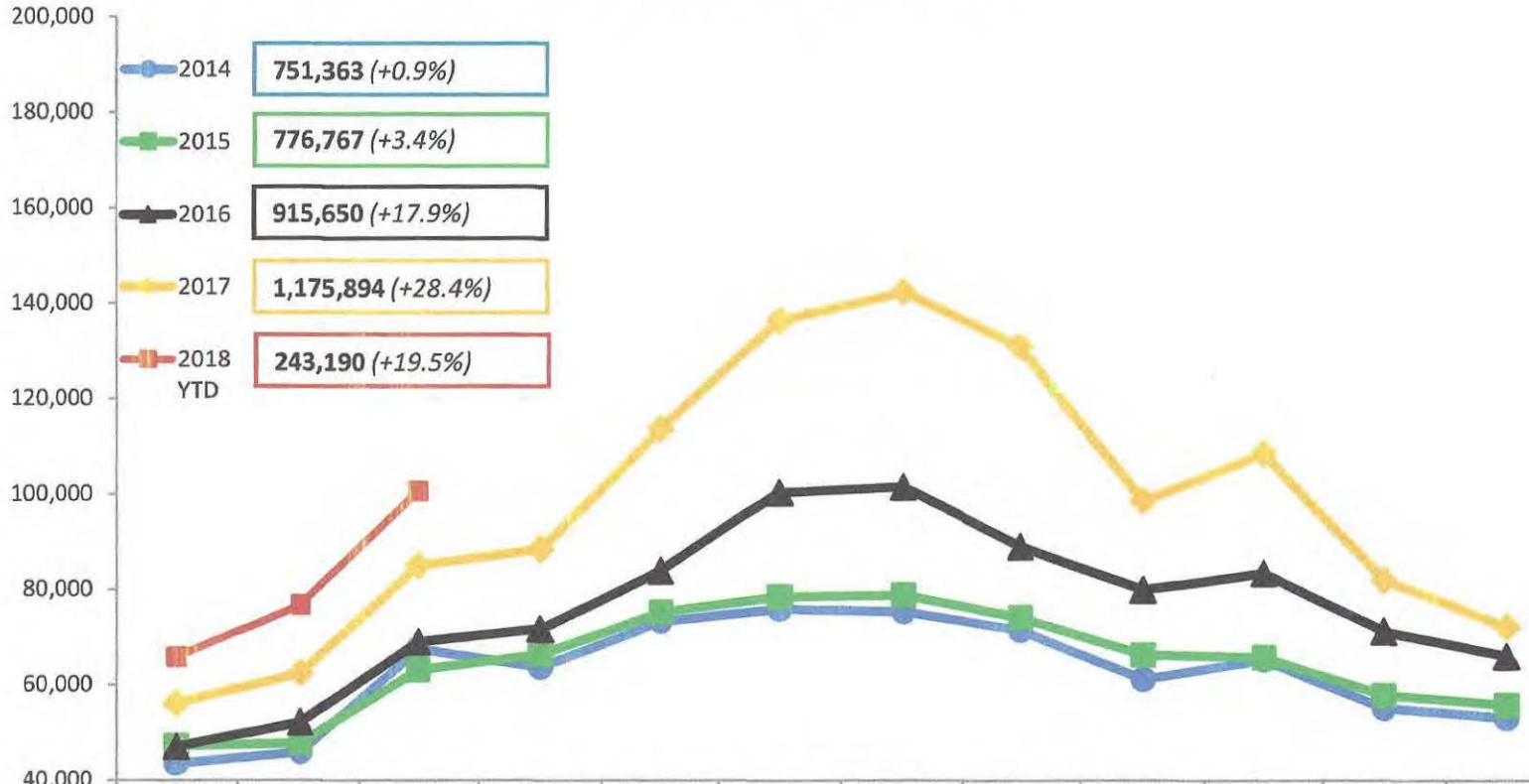
What is the main reason that you are staying in the destination on this trip?
(Excluding Top 9 Most Common Response Words: (Beach, Destin, Vacation, Love, Come, Beautiful, Beaches, Wanted)

If a friend asked you where you visited, what would you call this area? *
(Open Ended Volunteered Multiple Response)

Destination Identifier	FY Q4 2017	FY Q1 2018	FY Q2 2018
Destin/Destin Beach	59.0%	62.3%	67.9%
Okaloosa Island	15.4	17.5	11.9
Fort Walton Beach	23.1	15.0	16.1
Panhandle	2.6	7.9	8.1
Emerald Coast	4.1	5.0	4.9
Northwest Florida	n/a	n/a	2.7

APPENDIX

Destin - Fort Walton Beach Airport Total Passenger Traffic



	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
2014	43,458	46,001	67,529	63,641	73,310	75,879	75,375	71,469	61,214	65,292	55,152	53,043
2015	47,178	47,830	63,119	66,302	75,278	78,419	78,860	74,114	66,278	65,712	57,865	55,812
2016	47,057	52,195	69,015	71,695	83,961	100,351	101,528	89,102	79,984	83,465	71,243	66,054
2017	56,061	62,481	84,915	88,343	113,648	136,265	142,328	130,878	98,528	108,399	81,967	72,081
2018 YTD	65,772	76,783	100,635									

2017

Okaloosa County Exploratory Group Research: *Atlanta, Georgia and Columbus, Ohio*

Prepared for:

Okaloosa County Convention and Visitors Bureau

Prepared by:

Research Data Services, Inc.
www.ResearchDataLLC.com

September 7, 2017

CERTIFICATION

Research Data Services, Inc. hereby certifies that, except as otherwise noted in this report:

1. We have no present or contemplated future interest in the project that is the subject of this study.

2. We have no personal interest or bias with respect to the subject matter of this report or the parties involved.

3. To the best of our knowledge and belief, the statements of fact contained in this report, upon which the analyses, opinions, and conclusions expressed herein are based, are true and correct.

4. This report sets forth all of the limiting conditions (imposed by the terms of our assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.

5. Our findings are based on the attitudes and preferences of a limited group of participants and should not be taken as fully representative of the attitudes and opinions of the research population at large. Also, the underlying assumptions are based on present circumstances and information currently available.

6. Because circumstances may change and unanticipated events may occur subsequent to the date of this report, the reader must evaluate the assumptions and rationale of this report in light of the circumstances then prevailing.

September 7, 2017

Walter J. Klages, Ph.D., Chief Executive Officer

Date

PREFACE

The following report details the findings and conclusions of the consumer focus group research conducted on behalf of the **Okaloosa County Convention and Visitors Bureau** by Research Data Services, Inc. (RDS) on August 14 and 15, 2017 in Atlanta, Georgia, and Columbus, Ohio. The sessions were designed and implemented to explore the travel experiences, vacation preferences, and destination images of travelers who have visited the Panhandle of Florida and are familiar with or have stayed in commercial lodging in the Okaloosa County area. Specifically, the CVB is seeking consumer information to:

- Gauge the motivational factors that drive Okaloosa County's traffic to the destination.
- Categorize and explore the need/benefit equations of potential visitors.
- Identify what facilities and amenities play a significant role in the consideration and/or choice of Okaloosa County as a place to visit.
- Discover what information was helpful in the decision to visit.
- Determine perceptions and choice factors engaged.

To this end, RDS recruited a total of 24 vacation travelers among the two groups held in Atlanta, Georgia and Columbus, Ohio. All participants were prescreened for age demographics and prior travel experiences.

INTRODUCTION

Advantages and Limitations of Focus Group Interviews

Focus group interviews are an extensively used form of qualitative market research. The typical focus group interview is structured as a free-flowing discussion among a small group of people (ideally 6 - 12 participants) whose selection is based on specific predetermined demographic and socio-economic characteristics. Focus group interviews provide the researcher the opportunity to learn directly from consumers, in their own words, their reasons for choosing a product or service, and their performance/benefit expectations. This technique enables the researcher to:

- Generate hypotheses about products or services that can be further tested quantitatively.
- Generate new strategies that are helpful in promoting the destination.
- Get feedback on new travel trends for which there is little information available.
- Stimulate new ideas about the marketing of existing products or services.
- Generate ideas for new creative concepts and advertising/promotional platforms.
- Uncover overwhelming group responses, i.e., concepts that are perceived so negatively that further development is precluded, short of total redesign, or so positively that further research seems unwarranted.
- Interpret previously obtained quantitative results.

It must be noted that a focus group is, by design, a limited representation of the research population because its membership is selected in accordance with ad hoc, pre-defined demographic and socio-economic variables. The opinions of the participants, therefore, are not entirely projectable to the population which they represent.

METHODOLOGY

The research method used for the extant study is that of a moderated group interview or focus group. As practiced at Research Data Services, Inc., focus groups involve discussions that typically:

- Last from 1 ½ to 2 hours.
- Include 6 - 12 participants.
- Are led by a moderator qualified and experienced in both behavioral science and market research.

The moderator leads the group through a series of agenda topics and encourages interaction and discussion among participating consumers. To preserve spontaneity and avoid respondent bias, the groups are conducted "blind," that is, respondents do not know the identity of the study's sponsor prior to session commencement.

The sessions are audio and video recorded and analyzed in the preparation of the report. Findings and consensus-based conclusions are highlighted in the *Summary of Findings* section of this report.

The research findings summarized in the following reflect the protocols of the focus group session. The groups were structured to obtain information regarding key feeder market travelers' vacation destination preferences. For this purpose, consumers with specific demographic, economic, and vacation characteristics were invited to central locations to discuss the subject matter at length and in-depth.

SUMMARY OF FINDINGS

The Destin/Fort Walton/Okaloosa Island area is known as part of the shoreline of the Panhandle of Florida and offers world class beaches and resorts. Its crystal white beaches and thriving tourism economy are at the core of the brand. The objective of the extant study is to profile and personify the Destin/Fort Walton/Okaloosa Island area among upscale ($150,000+ household income) travelers who have visited the Panhandle and stayed in commercial lodgings. To this end, two focus groups were held in key feeder markets of the destination: Atlanta, Georgia and Columbus, Ohio. The group sessions were video recorded and broadcast via YouTube to include and inform key stakeholders.

Reasons for Vacationing on the Gulf Coast

"The beaches in the Gulf have warm water and beautiful sand. It's calmer there and it's more convenient, fast, and cheaper (to get there than other locations)."

All of the respondents have visited the Panhandle of Florida. The group included consumers who were familiar with Okaloosa County, but had not visited, as well as consumers who had visited Okaloosa County over the past three years. As a lead-in to the group discussions, respondents were asked to share what a beach vacation in the Panhandle of Florida means to them. The volunteered responses include:

- Traveling there is easier and more affordable than flying
- Warm water
- Proximity to the beaches
- Family oriented (except during spring break)
- Comfortable
- Familiar
- Very blue water
- Tradition
- Great options for housing rentals furnished with large kitchens and large gathering spaces
- Beautiful beaches
- White, powdery sand

Okaloosa County Area Destination Perceptions

"If it rains at the beach there is always something to do."

Destin is seen as the "outdoorsy" cousin when compared to competing tourist destinations in the surrounding counties. From the focus groups' consensus, the beaches of Destin/Ft. Walton/Okaloosa Island get high marks for their signature sand, beaches, shopping opportunities, and the influence of the military's presence. When queried how they would describe the Destin/Ft. Walton/Okaloosa Island area, the group volunteered the following:

- Kid-friendly
- Crystal clear water
- Fresh seafood
- Party barges
- Charter fishing boats
- Romantic sunsets
- Crab Island
- Shrimp boils and bonfires
- Sand between your toes
- Opportunities for kayaking
- Bright, sugar-white sand
- Touristy
- Numerous dining options
- More commercialized than other nearby areas
- The place in the Panhandle where you go to golf and parasail
- An action-packed vacation
- Good for families that want to go to the beach
- Access to boat rentals
- High density of bars
- A five-hour drive away from Atlanta
- You can fish there
- More traffic than other Panhandle beaches
- Outlet stores and shops
- Many high rises
- Bikers
- Dolphin cruises
- Locals
- Spring breakers
- Attractive to 20- and 30-year-olds
- Great access to the beach on Okaloosa Island

"It feels good to show my kids where I used to vacation."

To the Destin visitor, "vacationing is a tradition" and visits to the area are "awe inspiring." Destin evokes an image of familiarity, a remote beach place where you can soak up the sun and be spoiled with fresh seafood from the Gulf. A trip to this destination serves as a restorative reward, and provides opportunities for connecting with family and friends while enjoying ample entertainment options.

Considered non-pretentious compared to its neighboring beach communities, Okaloosa County has a laid-back vibe yet is teeming with entertainment options such as golf, shopping, fishing, and dining out. While visitors subscribe to the casual and down-to-earth environment, they have the financial means to make the most of their vacation.

Brand Awareness

"As a tourist, I don't say 'I'm going to the Emerald Coast,' but I'm sure the locals refer to it that way. It's probably their niche."

Visitors to Destin are generationally connected and groups of families use this area as a place to vacation together. Indeed, one of the strongest reasons this destination is chosen for vacation is to continue with familial tradition, with "word of mouth," being another resource for attracting consumers.

Regardless of its strong traditional appeal, the image of the destination does not have a well-defined identity and there are few ads that consumers recall. Respondents in both focus groups indicate a need for a clear and unique identity and opined that the moniker "the Emerald Coast" does not have a meaningful association indicating the specific geographic location. Hence, the brand is obscured. Volunteered responses from the groups suggest a major contributing cause is the well-defined personalities of close-by comp sets. The nearby 30A Area has a strong brand identity among respondents from Atlanta, Georgia as the current "it" place to vacation, which can be attributed to its association as being chic and upscale. With a strengthened brand identity, Okaloosa County would have the potential to attract a growing market share to its shoreline.

"If you can get people to go there, they will come back."

DRAFT

Exploratory Research Summary

Okaloosa County Tourism Development Department

September 27, 2017

Submitted by:

Aqua

MARKETING & COMMUNICATIONS, INC.

Exploratory Research Summary
Okaloosa County Tourism Development Department

Background

On the evenings of August 14 and 15 in the cities of Atlanta and Columbus, Ohio, the agency conducted initial, qualitative research for the county as part of the initiation of a comprehensive, long-term destination research program for the county. The research was conducted in conjunction with the selected research vendor, Research Data Services of Tampa, Florida led by Walter Klages, PhD.

Format

The sessions were conducted through moderated focus groups at research facilities designed to facilitate private group discussion and were observed by representatives of the agency and the TDD. Respondents were recruited by each facility based upon a determined demographic profile as well as whether they had vacationed in Florida, specifically within the destination and/or adjacent counties. After recruitment, the groups were composed of 60% who had visited adjacent counties and 40% who had visited Okaloosa County. Although the vast majority of Florida beach vacation decisions involve females, given Okaloosa's strong boating and fishing component, care was taken to also recruit males. Males composed about 25% of the respondents.

The moderator took the group through a series of discussions designed to determine motivations concerning vacation destination choice. Specifically, discussion endeavored to reveal:

- *Why respondents took a vacation*
- *What they were seeking from a Florida beach vacation*
- *Where they have visited in Florida or elsewhere*
- *What they liked or dislike about the destinations visited*
- *How they made their travel decision, and the process or tools used*
- *Mode of travel*
- *Season or period of visitation*
- *Travel party composition*

- *Type of lodging*
- *Activities engaged in during the visit*
- *Specific familiarity with Okaloosa County as a destination*
- *Known or second-hand likes or dislikes about the destination*
- *How they refer to, or identify the destination*
- *Familiarity with the term, "Emerald Coast"*
- *Subjective reaction to the tern, "Emerald Coast"*

Agency observations and takeaways

Atlanta

The Atlanta cohorts were very familiar with the destination as well as others along Florida's northern gulf coast. However, the household income of the group averaged over $200,000 a year, far above what is probably the current HHI for the county's visitors. In general, the group expressed that Destin was a place they visited with their families as children, but as they established their own families, and their HHI increased, their visitation moved east to Walton County. In particular, the group preferred and habitually visited the area in Walton County branded as "30A." In contrasting 30A with "Destin" (as they referred to the area), they appeared to appreciate 30A's ability to provide a "home away from home," a place of cocooning for the entire family with less "rah rah, go go, cheap thrills" than Okaloosa County. Respondents indicated that they repeatedly rent the same property in the same 30A community. To this group, going to Florida was going to 30A. The visit to 30A appeared repeated at least on an annual basis. To them, it was no big deal, and the "go to," default destination. The group joked that so many of their friends and neighbors from Atlanta vacation in 30A that it's basically a neighborhood of Atlanta.

<u>Other comments made by the group included:</u>

Reasons for traveling to the Florida panhandle are:

- *The water. It's warmer, blue water, less waves.*
- *Easier to get to. Doesn't require plane tickets*
- *Overall, it's cheaper than other destinations*

30A is becoming a destination for college and high school kids on spring break. It used to be Panama City Beach. The kids don't behave. Adult Atlantans avoid the area during spring break.

Traffic getting to 30A is terrible

Destin is seen as a "family" destination.

The destination selected is important, but it's really about unplugging.
It (vacation in the panhandle or 30A) forces the family to be together in a time that families are getting scattered. It provides a connection you can't get at home.

Respondents described the Destin area competitive set as:

- Seaside
- Watercolor
- 30A

It used to be that a vacation was Destin or PCB. But now Destin is high rises and condos. Not quaint. Commercialized. People have moved on to 30A to get the "quaint" back.

Destin and PCB is "downscale" from 30A

The rise of Seaside and Watercolor took it away from Destin and the rest of Ft. Walton

They see and respond to ads in local magazines such as Atlanta Magazine, but get Info and influence from "each other."

They see the "Bigger" beachy stuff is in Destin: Parasailing, jet skis, etc.

Destin offers more to do. More restaurants. More shops. Golf. Fishing.

An advantage of Destin is that you can be "right on the water. Close to the beach."

How they'd describe Destin:

- *5 hours away*
- *Fishing*
- *Family*
- *Golf*
- *Easy to fly to*
- *Good beach for families*
- *More "commercial"*
- *A lot of places to eat.*
- *A lot of activities*
- *It's not just about the beach*
- *If it rains, there's still plenty to do there*

When asked, who vacations in the Destin area, they responded:

- *The young*
- *Those without kids.*
- *Those seeking affordability*

- *Those who want more to do than just chill at Seaside. There's bars, nightlife. Golfing.*
- *People going there are more millennials. There's lots of bars and eating out. It's beach during the day, and the nightlife at night.*
- *Visitors aren't "blue collar." They're young professionals, starting out. $65 to $85k in income.*
- *It's not like Daytona Beach or PCB. It's a little nicer and more upscale.*

Columbus

Although specifically recruited for their familiarity with Florida panhandle destinations, it was surprising how deeply familiar the Columbus respondents were with the area, with several revealing extensive, deep knowledge of the Destin area. The Columbus group's HHI seemed more consistent with the targeted $150,000 Okaloosa County visitor. Respondents cited a generational history of beach vacations that included the east coast areas of Myrtle Beach, but have recently moved on to discover the Florida panhandle. As expected from respondents further from the destination (than those in Atlanta), respondents cited far more other areas of visitation, and were familiar with many other areas of Florida. The group wasn't entirely familiar with the term, "Emerald Coast." Those that weren't were put off by the term, citing that "green" water didn't seem appealing. Those familiar with the term, were ambivalent about the term, with some citing that it's probably "more important to locals."

<u>Other comments made by the group included:</u>

- Respondents expressed their belief that it's cheaper to fly to Tampa/St. Pete than fly to Pensacola
- If you like white, powdery, sandy beaches, once you go to the panhandle, you never go back to east coast beaches. Even St.Pete, Clearwater or Ft. Myers. It's "better than the Bahamas."
- Going to North Florida "a gamble." It's a short visitation season. You have to hit it right.
- Water is warmer than east coast. It offers a longer swim season than east coast.
- Flying is expensive, but it's also drivable.
- Direct flights and cheaper flights are important.
- Everything seems new in Destin over Myrtle Beach. Everything's "upscale and classy."

- 7 of the 10 raised hands that they'd heard of the "The Emerald Coast" but some of those are not sure where it is.
- Some expressed that The 'Emerald Coast' is different than the Panhandle. "It's the beaches."
- Some expressed that the phrase is probably more important to the locals. "I don't say, 'I'm going to the Emerald Coast.'"
- Destin and PCB are "condos, putt-put golf, go carts, touristy."
- Gulf Shores/Orange Beach for a more "mature" crowd.
- Accessibility an issue. Time to get there and cost are important. Especially if you have kids.
- People may not know the quality of the sand/beach in the Destin area.
- Destin is for "everybody," It isn't exclusive.
- For travel research, respondents cited their use of Tripadvisor
- For flights, they search the discount sites, then go to the airlines for a cheaper cost.

Agency conclusions

In general, the groups provided insight into the motivations and aspirations for their travel. The groups could cite differences between the various Florida panhandle destinations, and separate reasons for visiting each. Although a small sample, and overwhelmed by responses concerning 30A in the Atlanta cohort, it seems that the different panhandle destinations provide different experiences for visitors. All, with the exception of Panama City Beach are considered "family" destinations, with 30A offering a relaxed, removed family getaway contrasted to the Destin area's more "busy, harder-driving, family fun in the sun" image. Both groups made it clear that moving east from Destin (specifically) into Walton County, the visitation experience became more upscale, then fell off again moving further east to Panama City Beach.

The Destin area was seen as a "beach" vacation with all the beach amenities (parasailing, jet ski rentals, staying "right on the beach" etc.) 30A's visitors appreciated the beach, but weren't visiting 30A solely because of the beach. They seeking family togetherness in a more relaxing, removed environment.

Although the Atlanta group was dominated by 30A responses, the group provided good insight into who visits the Destin area, who doesn't and why. It also may have revealed the strong correlation between household income and destination choice (at least with those in Atlanta).

In general, the respondents referred to the Okaloosa County area as, "Destin." The term, "Emerald Coast" didn't resonate, and more importantly, didn't matter.

Emerald Coast Visitor Profile Survey

Winter Quarterly Report: December 2014 - February 2015

HAAS CENTER

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ABOUT US

Located in the SunTrust Tower in historic downtown Pensacola, Florida, the Haas Center collects, analyzes and distributes economic data for clients seeking expert economic advice. We exist to help entrepreneurs and industry leaders—from traditional manufacturing to emerging technologies—meet their information needs in the modern economy.

The Haas Center specializes in data analysis for the purposes of economic forecasting, marketing research, business expansion, tourism, and real estate development, as well as industry and academic studies. The Haas Center's staff combine academic credentials with varied experience, ranging from economists to survey specialists. Each professional combines innovation with attention to detail to produce high-quality research products for Center clients.

For further information please visit our website at haas.uwf.edu, or contact Brice Harris at bharris@uwf.edu.

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Executive Summary

The Haas Center has been commissioned by the Emerald Coast Convention and Visitors Bureau to complete a visitor profile of those who travel to the Emerald Coast (Fort Walton Beach, Okaloosa Island and Destin). Survey professionals will conduct intercept surveys for one year to capture multiple data points, including demographics, visitor satisfaction, length of stay and spending patterns. This report profiles visitor information for the winter quarter (December, January and February) 2014-2015. As the demographic composition of visitors changes from quarter to quarter, the statistics captured in this report are completely unique to the winter quarter.

The Haas Center surveyed 281 visitors over the quarter. These participants provided a diverse age sample, though skewed much older. Overall, it is estimated that more than 163,371 unique visitors traveled to the Emerald Coast during the winter quarter. This figure is based on visitors who stayed in hotels, motels, condominiums and house rentals. Approximately 69,381 of these visitors stayed in hotels or motels, while another 78,720 used condos for their accommodations. Another 15,269 tourists rented houses for their trip. It is estimated that approximately 36% of hotel rooms were booked for the winter quarter, while 60% of condos were also occupied.

The median party size was 3.0 people, while the average group size was slightly larger at 3.05. The party size had some impact on the type of lodging that was chosen for accommodations. For example, smaller parties (2.47 people) tended to stay in a hotel, while larger parties (4.28 people) were more likely to rent a house. Approximately 57.5% of visitors in the winter quarter stayed for five days or less. Most visitors to the Emerald Coast stayed in Destin, traveled to the area by car and used a condo or hotel for their accommodations. Approximately 38% visited the area for vacation purposes, while another 29% came to the area to visit family or friends. Visitors participated in a range of activities, including beaches (44.4%), shopping (59.5%) and local attractions (27.6%). In total, more than 90% of visitors were satisfied or very satisfied with their trip, and over 90% were willing to refer the area to their friends or family.

Introduction

The Haas Center for Business Research and Economic Development has been commissioned by the Emerald Coast Convention and Visitors Bureau to conduct a tourism study of the Emerald Coast. The study will utilize survey data to estimate the number of unique visitors coming to the region on a quarterly basis. For a 12-month period between March 2014 and February 2015, the Haas Center will have survey professionals in the field conducting visitor intercept surveys throughout Fort Walton Beach, Okaloosa Island and Destin, Florida. Data collected from these surveys, in conjunction with bed tax collections as well as with county and state data regarding condo and hotel unit availability, are used to estimate the total number of visitors who arrive in the region on a quarterly basis.

Table 1. Average Spending Per-Person, Per-Night Emerald Coast

Expenditure Type	Amount	Percentage
Accommodations	$66.80	29.7%
Food & Beverage	$40.27	17.9%
Entertainment	$29.72	13.2%
Shopping	$55.94	24.8%
Transportation	$21.18	9.4%
Miscellaneous	$11.32	5.0%
Total	$225.23	100.0%

As data is collected over a 12-month period, Haas Center researchers will report these figures via four quarterly reports. Each report will provide a number of data points describing visitor traffic to the area, including demographics, residency, spending patterns, length of stay, party size, reason for visit and visitor satisfaction. Furthermore, each report will provide a breakdown of estimated visitors by accommodation type. Table 1 provides the overall estimates for per-person, per-night visitor expenditures. As shown in the table, survey respondents reported spending approximately 29.7% of all expenditures on accommodations, followed by 24.8% on shopping, 17.9% on food and beverage, 9.4% on transportation, 13.2% on entertainment and approximately 5% on miscellaneous items.

Purpose and Scope. The purpose of this report is to provide in-depth details about demographic and economic trends of Emerald Coast tourism for the winter quarter (December, January and February) of 2014/15. Located in the panhandle of Florida, the Emerald Coast is home to many tourist attractions, including beaches, water-based activities, parks and mid-to high-end shopping centers. While many beach communities collect bed taxes that provide visitor estimates,

most fail to capture spending patterns of these visitors. As such, the Haas Center has been contracted to collect quarterly visitor and spending data that provides estimates for all visitor types. Ultimately, this data will provide a distinct visitor count per quarter. At the end of the collection period, the Haas Center will utilize these data to conduct an economic impact assessment of the tourism industry along the Emerald Coast.

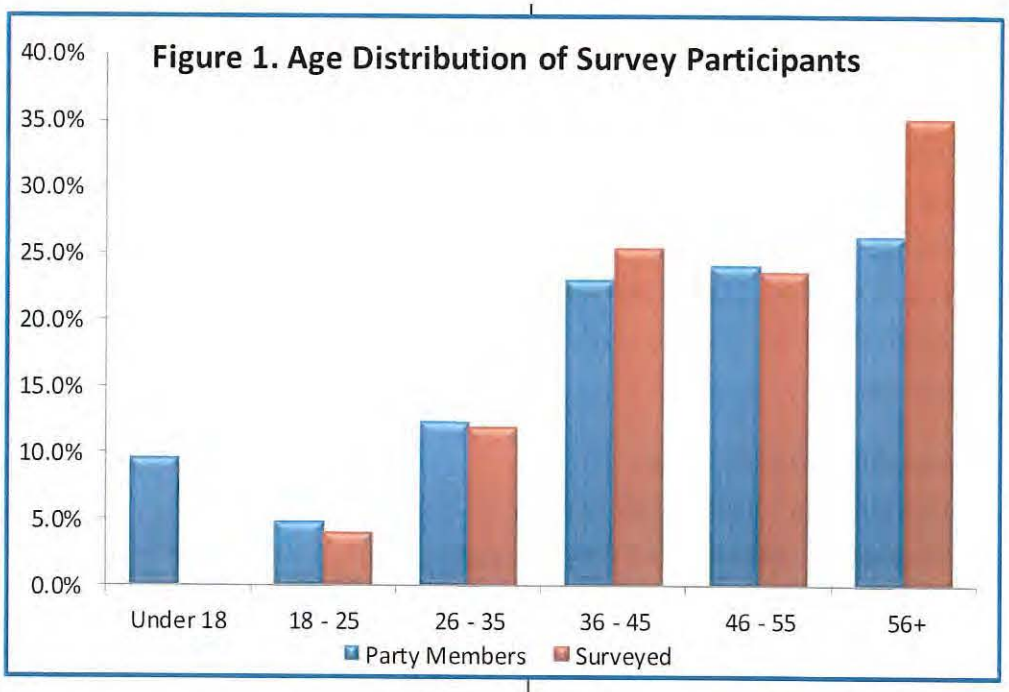
This study utilizes intercept survey techniques to obtain tourist demographics, lodging and transportation habits, spending patterns and overall satisfaction. In order to ultimately calculate the economic impact, the survey focuses on in-area spending patterns. This report does not attempt to quantify the externalities that are undoubtedly associated with the Emerald Coast tourism industry; rather, the report provides key marginal results from the survey, as well as estimated visitor totals.

Methodology

Throughout the winter quarter of 2014/15, the Haas Center has administered intercept surveys that collected details about unique visits to the Emerald Coast. Survey professionals spent sixteen hours a week throughout the quarter conducting interviews. Several aspects of data collection were randomized, with interviewers alternating the days of the week, locations and time of day in which they approached visitors. These locations included multiple shopping centers, public beaches, commercial areas and waterfront boardwalks. Survey researchers approached more than 2,617 adults during the winter quarter. Among the sampling frame, approximately 10.7%, or 281 respondents, participated in the survey.

The intercept survey measured and tracked several key elements about the Emerald Coast tourism market. This information included demographics, particularly age and household income, primary residence, method of transportation, lodging, and party size. The survey also collected estimates on spending in several categories, including accommodations, transportation, food, entertainment and shopping. Additionally, visitors were asked about their overall

satisfaction with their visit to the area. The survey questions sought details on visitors' likelihood to return to the area and their willingness to refer the area to a friend or family member.



Survey Results

In order to better understand tourism patterns along the Emerald Coast, it was necessary to identify the demographic make-up of those visiting the region, including their age, income, party size and place of origin.

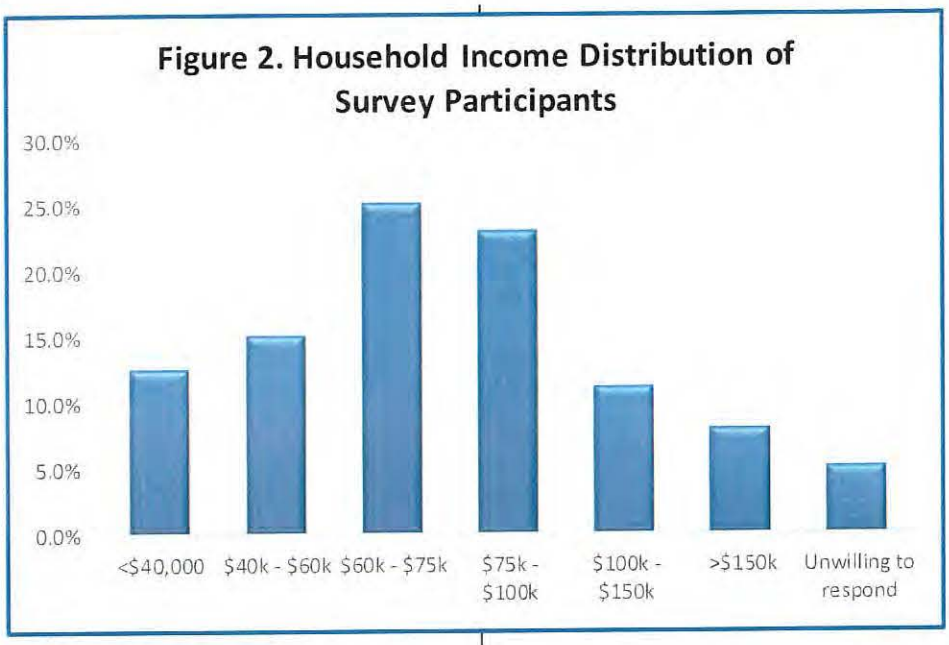
Age. The survey captured several demographic elements used to measure the type of visitors traveling to the Emerald Coast. Figure 1 presents the age distribution of survey respondents, as well as that of members of their party. As can be seen, the distribution of surveyed individuals skews to the right. More than 35% of those surveyed were 56 years old or older. Those aged between 18 and 25 years were the smallest amount of the surveyed population (4.0%). The age distribution of all party members is also skewed to the right, with approximately half of all party members reporting their age as 46 years old or older. Indeed, only 14.6% of non-surveyed members in the party were 25 years old or younger. These data most likely capture the beginning of the "Snow Bird" population of out-of-towners who come to visit for long periods of time in the winter.

Table 2. Distribution of Party Size

Party Size	Percent
One	11.5%
Two	34.2%
Three	18.7%
Four	18.0%
Five	11.2%
Six	5.0%
Seven	0.4%
Eight	1.1%
Mean Party Size	3.05
Median Party Size	3.0

Party Size. Another component measured is the party size of each respondent. As the data in Table 2 indicate, approximately 46% of all participants were traveling either by themselves or with one other person. Less than 20% (17.6%) of those polled had a party size of five

or more. Additionally, two more statistics on party size have been calculated: average and median party size. The average party size for the Winter quarter, 3.05 is slightly higher than the median party size, 3.0.



Household Income. Figure 2 presents the distribution of household income for all respondents. Of all respondents, only 5.0% were unwilling to disclose their household income. Interestingly, the $60,000 — $75,000 income bracket had the most visitors in the winter quarter. Nevertheless, there were only 2% more visitors in this group than in the next closest income group. The distribution is slightly skewed to the left in Figure 2, with under 20% of visitors reporting household incomes of $100,000 or more. Nearly half of all visitors reported a household income of either $60k-$75k (25.2%) or $75k-$100k (23.0%). Another 27.7% of visitors indicated that their household earned between $40k-$60k (15.1%) or less than $40,000 (12.6%).

Table 3. Top Ten Origin States of Visitors

State	Percent
Florida	36.03%
Alabama	11.40%
Georgia	8.09%
Texas	6.25%
Mississippi	5.15%
Louisiana	4.41%
Tennessee	3.68%
South Carolina	2.57%
New York	2.21%
Arkansas	1.84%

Place of Origin. The top ten origin states of survey respondents are listed in Table 3. Figure 3 (on the following page) presents a geographical distribution of where all respondents report as their state of origin. Approximately 80.2% of respondents for the winter quarter reported being from the southeast portion of the United States, including Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee and Texas. This figure continues a substantial increase in the relative proportion of visitors from the southeast United States over the spring and summer quarters.

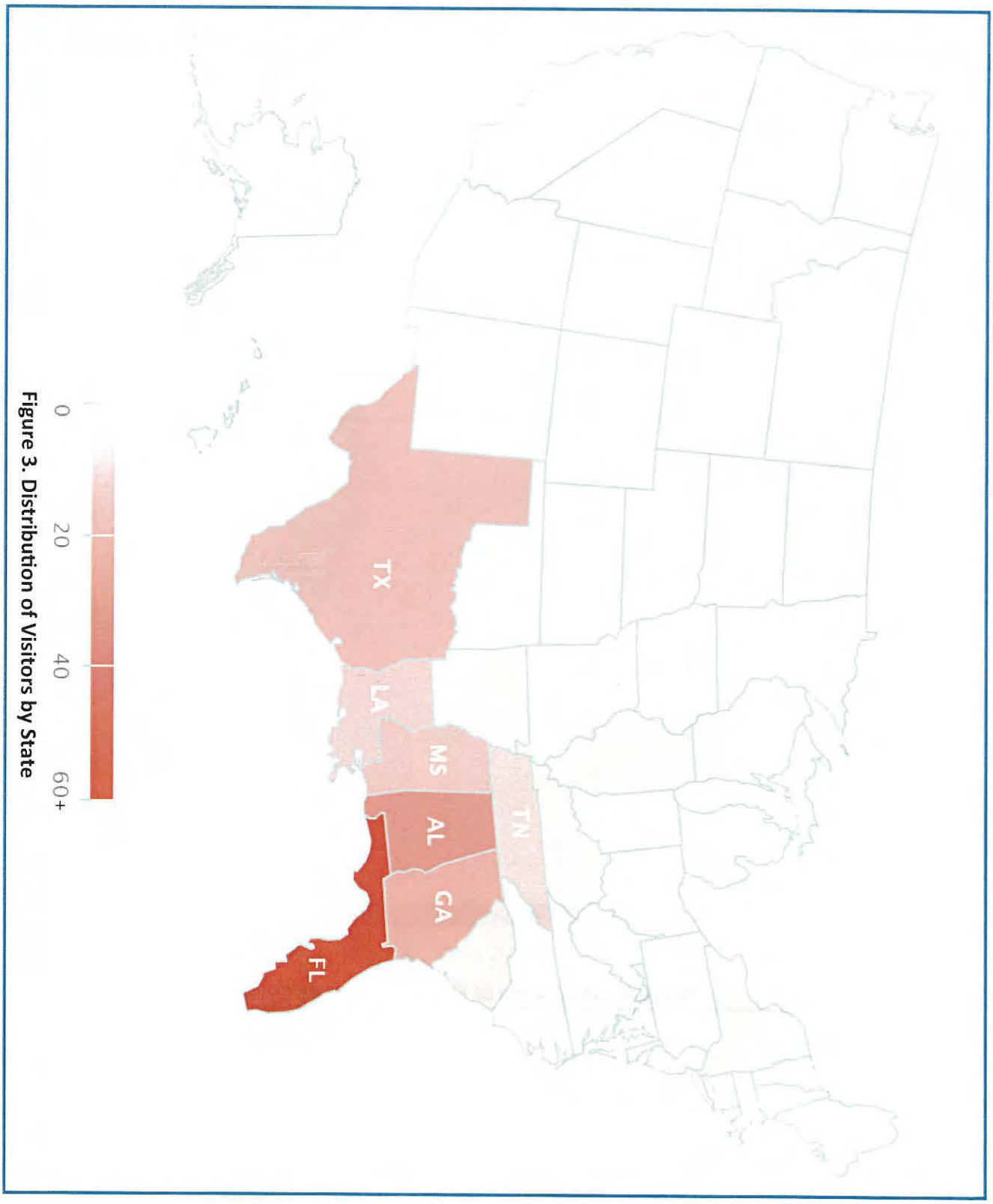


Figure 3. Distribution of Visitors by State

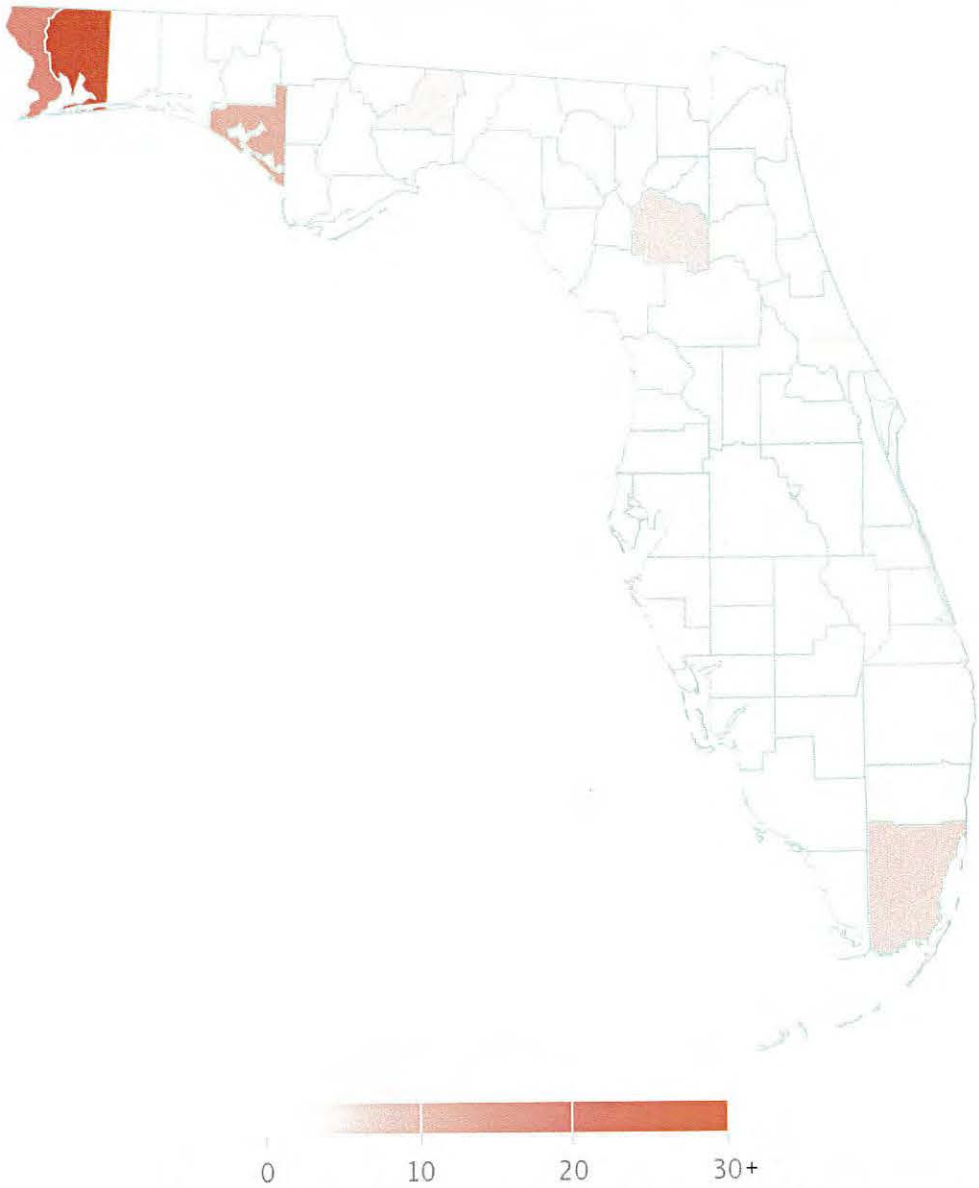


Figure 4. Distribution of Florida Visitors by County

The largest group (36%) of Emerald Coast tourists were visiting from other Florida counties. Figure 4 (pg. 10) presents a geographical distribution of in-state respondents' county of origin. Residents of Santa Rosa County were the largest group of in-state visitors represented in the survey, at more than 43%. This large group of Florida visitors was closely followed by Escambia County (18.5%), Bay County (11.3%) and Miami-Dade (6.2%). Other Florida visitors came from Orange, Alachua, Duval, Leon, Volusia and Brevard counties. Many of these counties represent densely populated areas throughout the state, increasing their odds of representation.

Lodging and Transportation. As presented in Table 4, approximately 37.6% of respondents stayed in the Destin area, followed by Fort Walton Beach (26.2%) and Okaloosa Island (20.1%). The remaining 16.1% of tourists were either taking a day trip to the area (6.1%), staying overnight but not in the area (9.3%) or were unsure of their nightly accommodation location (0.7%).

Table 4. Location of Lodging

Location	Percent
Destin	37.6%
Okaloosa Island	20.1%
Fort Walton Beach	26.2%
Day Trip Only	6.1%
Staying overnight, but not in the area	9.3%
Unsure	0.7%

Table 5. Transportation Type

Mode	Percent
Car	80.4%
Plane	16.3%
RV	3.3%

Table 6. Type of Lodging

Location	Percent
Campground or RV	2.5%
Condo	39.1%
Hotel	19.8%
House Rental	3.5%
Stay with Friends or Family	35.1%

The results presented in Table 5 indicate that an overwhelming majority of people who traveled to the Emerald Coast used only one mode of transportation. Most visitors, 80.4%, used a car to reach their destination. Traveling by plane (16.3%) and RV (3.3%) were distant runners-up.

Similarly, the results in Table 6 show the distribution of visitors' lodging accommodations. Approximately 58.9% of respondents stayed in either a hotel (19.8%) or a condo (39.1%). Only 3.5% of respondents reported using a house rental. For the winter, more than one-third (35.1%) of respondents indicated that he or she was staying with friends or family, while approximately 2.5% of respondents reported that they were staying at a campground or in an RV. It is important to note that this group (friends/family and campground/RV) does not

contribute to bed tax collections. As bed tax collections are the primary source for visitor estimates, those visitors who stay in accommodations not subject to the bed tax may not be counted in annual tourism estimates.

Length of Stay. Table 7 presents data demonstrating the range of responses for length of stay along the Emerald Coast. The median number of nights stayed is 5.0, while the mean is 7.98 nights. However, the mean is skewed upward by those respondents who stayed for multiple weeks. The median is a more accurate representation of length of stay as it eliminates the distorting effects of those few longer-term visitors. The most common lengths of stay reported in the winter quarter ranged from 3 to 5 days. Approximately 57.5% of respondents during the winter months indicated they were visiting the Emerald Coast for 5 calendar days or less.

Table 7. Length of Stay

Range	Percent
<3	10.5%
3-5	47.0%
6-7	21.0%
8-10	6.5%
11-14	6.0%
15-30	7.0%
31-60	1.0%
>60	1.0%
Average Stay	7.98
Median Stay	5.0

Spending Patterns. A comprehensive list of estimated, average spending is provided for visitors in Table 8. Once again, statistics for both mean and median spending are provided to eliminate the distorting effects of long-term visitors. According to the data, expenditures on accommodations are estimated to be the highest expense for visitors. For the entire length of stay, the estimated mean spending on lodging is $569.67 whereas the median is $337.50. The average expenditures for shopping, $365.01, are the second-highest expense for visitors, followed by an average of $265.30 for entertainment purposes. On average, visitors also spend hundreds of dollars on entertainment, miscellaneous expenses and transportation.

Table 8. Average Estimated Spending for Length of Stay

Type of Spending	Mean	Median
Accommodations	$569.67	$337.50
Food	$265.30	$200
Entertainment	$207.23	$200
Shopping	$365.01	$300
Transportation	$114.11	$90
Miscellaneous	$84.62	$75

Tables 9 through 11 explore several patterns of per-person, per-night spending for all six categories of expenditures by different groups.[1] In Table 9, per-person, per-night spending is examined by type of lodging. While campground and RV visitors spent much more

1. With analysis of only one quarter's data, caution should be taken when analyzing per-person, per-night spending by sub group, as sample size decreases significantly for certain groups. After four quarters of data have been collected, sample sizes for each sub group will increase, therefore increasing the statistical significance for each sub group's spending patterns.

Table 9. PER-NIGHT, PER-PERSON by Lodging

Type of Lodging	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Campground/RV	$24.70	$30.67	$42.40	$38.90	$19.90	$7.82	$164.39
Condo	$18.80	$18.37	$26.20	$15.20	$8.79	$5.33	$92.69
Hotel	$28.65	$28.65	$30.37	$17.85	$16.37	$5.34	$127.23
House Rental	$21.22	$15.70	$21.32	$7.57	$4.02	$2.60	$72.43
Friends/Family	$15.40	$15.85	$27.40	$13.47	$9.69	$4.14	$85.95

Table 10. PER-NIGHT, PER-PERSON by Household Income

Household Income	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
$40K or Less	$13.21	$28.14	$16.75	$50.11	$15.03	$6.78	$130.02
$40K - $60K	$41.81	$47.38	$21.37	$58.32	$16.07	$8.95	$193.90
$60K - $75K	$78.21	$47.64	$35.83	$70.89	$20.44	$10.60	$263.61
$75K - $100K	$123.32	$75.13	$52.53	$106.17	$31.23	$17.73	$406.11
$100K - $150K	$146.93	$89.43	$85.80	$145.16	$45.72	$19.03	$532.07
< $150K	$233.29	$121.70	$85.00	$134.09	$37.15	$19.71	$630.94

Table 11. PER-NIGHT, PER-PERSON by Reason for Visit

Reason for Trip	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Business	$68.63	$35.68	$20.98	$33.23	$23.83	$10.52	$192.87
Part of a Group	$118.92	$59.38	$56.64	$75.94	$33.59	$17.19	$361.66
Shopping	$0.00	$62.28	$50.44	$247.61	$23.92	$7.42	$391.67
Vacation	$88.33	$38.10	$28.42	$47.61	$15.08	$11.17	$228.71
Visiting Family/ Friends	$23.47	$44.42	$36.73	$58.48	$22.54	$15.71	$201.35

compared to other visitors, it should be noted that the sample size from which these results are drawn is extremely small. However, considering the accommodations category only, respondents staying in hotels spent the most money per-person and per-night, at an average of $28.65 per night. Furthermore, those respondents staying in a house rental spent the least amount of money on food, shopping or transportation. Those respondents staying with family or friends spent the least on accommodations at $15.40 per-person, per-night.

In Table 10, per-person, per-night spending is examined by household

income. For the winter quarter, visitors who reported yearly earnings greater than $150,000 a year spent the most in total expenditures per person, per night. Intuitively, this would fit an expectation of groups reporting the highest incomes as having a greater amount of disposable income. However, the $100k-$150k group of respondents spent the most on entertainment, shopping and transportation. Also as expected, those with the least amount of presumed disposable income, with less than $40,000 in household income, reported the lowest amount of overall spending.

Finally, Table 11 presents per-person, per-night spending patterns by reason for visit. Winter visitors who traveled to the Emerald Coast for shopping reported by far the highest rates of total spending, though none of them were overnight visitors. However, those traveling as part of a group purposes spent the most on accommodations, entertainment and transportation. Visitors to the area who listed their primary reason for travel as visiting family/ friends consistently spent the least amount in transportation and accommodations.

Visiting the Emerald Coast. While respondents visited the Emerald Coast for a host of different reasons, it is clear that the most common reason was to vacation. In Table 13, the primary reasons for visiting the Emerald Coast are listed. Approximately 38.3% of all respondents listed that their primary motivation for traveling to the area was for vacation. The second most common reason was to visit family and friends (28.9%). Table 13 also shows that people came specifically to shop (22.0%), to participate in group activities (3.6%) or for business (6.9%).

Survey professionals also asked participants what activities they were participating in if they had traveled for vacation, to visit family or friends or were in the area as part of a group. The responses in Table

Table 12. Mean Party Size by Type of Lodging

Type of Lodging	Party Size
Campground or RV	2.60
Condo	3.43
Hotel	2.74
House Rental	4.17
Stay With Friends or Family	3.68

Table 13. Visitors' Purpose for Trip

Purpose	Percent
Business	6.9%
Other	0.4%
Part of a Group	3.6%
Shopping	22.0%
Vacation	38.3%
Visiting Family or Friends	28.9%

Table 14. Visitors' Activities While in Area

Activities	Percent
Beaches	44.4%
Fishing	19.4%
Local Attractions	27.6%
Shopping	59.5%
Special Events	17.2%
Water Sports	3.9%

14 show that more than 44% reported visiting beaches, while more than half (59.5%) listed going shopping. This figure reflects the busy Christmas shopping season in the beginning of the quarter. Many visitors frequented local attractions (27.6%) or headed to special events (17.2%). Emerald Cost visitors also took advantage of the area's excellent fishing (19.4%) or watersports (3.9%) during their time in Okaloosa County.[2]

Additionally, participants were asked about the frequency of their trips to the Emerald Coast. Participants reported in Table 15 that only one in four (26.0%) were visiting the area for the first time. Alternatively, 73.0% of respondents had previously visited the area. As indicated in Table 17, nearly half (47.7%) of respondents reported that they were already planning to return to the area in the next year, whereas 14.6% said that they were not, and 37.7% did not know.

Survey respondents also gave information on their overall satisfaction with their trip, provided in Table 18. For all visitors, nearly 100% responded that they were either satisfied or very satisfied with their visit to the Emerald Coast. Approximately 0.4% of respondents felt neutral regarding their trip, and zero respondents reported being dissatisfied. Finally, Table 19 shows that an overwhelming majority (95.0%) of participants were likely to refer the Emerald Coast to a friend or family member.

Table 15. First Time Visitors to the Area

First-Time Visitor	Percent
No	73.0%
Yes	26.0%
Don't Know	1.1%

Table 16. Annual Visits to Emerald Coast

Number of Visits	Percent
One	33.3%
Two	24.1%
Three	10.3%
Four	10.3%
Five	1.1%
Six	4.6%
Ten	1.1%
Often	14.9%

Table 17. Visitors Who Plan to Return in the Next Twelve Months

Likely to Return	Percent
Don't Know	37.7%
No	14.6%
Yes	47.7%

Table 18. Visitor Satisfaction with Trip

Satisfied with Trip	Percent
Neutral	0.4%
Satisfied	20.9%
Very Satisfied	78.8%

Table 19. Likely to Refer Family or Friends

Likely to Refer	Percent
Don't Know	1.1%
Yes	95.0%
No	3.9%

Visitor Estimates by Accommodation

In order to provide visitor estimates for the winter quarter, Haas Center researchers utilized several data points collected from various sources. A primary input into visitor

2. Please note, these percentages sum to more than 100% as respondents are allowed to provide more than one answer.

Table 20. Number of Unique Visitors to the Emerald Coast Winter Quarter 2014/15								
Type	Distribution of Bed Tax	Bed Tax Winter 2014/15	Revenue	Avg. Nightly Rate	Total Nights	Party Size	Length of Stay (Days)	Visitors
Condo	76%	$907,816	$28,444,403	$83.03	342,580	2.7	11.8	78,720
Hotel/Motel	16%	$192,384	$12,432,352	$114.83	108,267	2.5	3.9	69,381
House Rental	6%	$66,226	$4,972,931	$98.00	50,744	4.3	14.3	15,269
Total Unique Visitors: 163,371[3]								

estimate calculations is bed taxes, which are collected on all short-term rentals in the southern portions of Okaloosa County. Data on these collections are reported by the Okaloosa County Tax Collector (OCTC) on a monthly basis; however, there is typically a two-month lag in reporting times. As of this report, the most recent data available is from January 2015. Because of these limitations, year-over-year bed tax data have been used to estimate growth from winter quarter 2013/14 to 2014/15. Based on data derived from the OCTC, last winter's bed tax collections were reported at approximately $1.05 million. The year-over-year change in bed tax collections was approximately 8.7% between the months of December and January. Assuming collections for February 2015 would also grow at this rate, bed tax collections for the winter 2014/15 quarter are estimated to be $1.2 million. This figure, in turn, is used to estimate unique visitor counts.

The other primary input into our visitor calculations is the survey data collected by the visitor intercept surveys. Values highlighted in Table 20 indicate primary data collected via these surveys. Here, average nightly rate, average party size and average length of stay, in addition to the bed tax data, are used to calculate the number of unique visitors to the Emerald Coast during winter 2014-15.[4] As the table indicates, it is estimated that over 163,371 visitors traveled to the Emerald Coast during the winter quarter.

Furthermore, based on lodging data from the Florida Department of Business & Professional Regulation, over 6,000 condo units and 3,200

3. Excluding those visitors who stayed with friends/family or at a campground/RV park.

4. Please note that the figures reported by survey participants are estimates and may vary from those reported by accommodation establishments.

hotel/motel units are reported to have been available throughout Destin, Okaloosa Island and Fort Walton Beach. Utilizing these data, in conjunction with total nights stayed, Haas Center researchers are able to estimate condo and hotel/motel occupancy rates. As indicated in Table 21, these rates are 60% and 36%, respectively.

Table 21. Occupancy Rates for Condo and Hotel Units Winter Quarter 2014/15

Type	Units Available	Total Nights	Quarterly Supply of Units	Occupancy Rate
Condo	6,206	342,580	570,952	60%
Hotel/Motel	3,243	108,267	298,356	36%

Once visitor estimates have been calculated, it is now possible to determine total visitor spending by those staying in either condo or hotel accommodations. Based on the per-person, per-night spending figures of those staying in a condo or hotel (reported in Table 9), total spending estimates have been calculated for each group and are presented in Table 22. Drawing from information gathered this winter, it is estimated that visitors staying in a hotel during the quarter continued to spend nearly $9 million along the Emerald Coast, while visitors staying in condos during the winter quarter are estimated to have spent over $7.2 million.

Table 22. Total Visitor Spending by Accommodation Type

Type	Per-Person, Per-Night Expenditures	Number of Unique Visitors	Total Direct Spending
Condo	$92.69	78,720	$7,296,601
Hotel	$127.23	69,381	$8,827,306

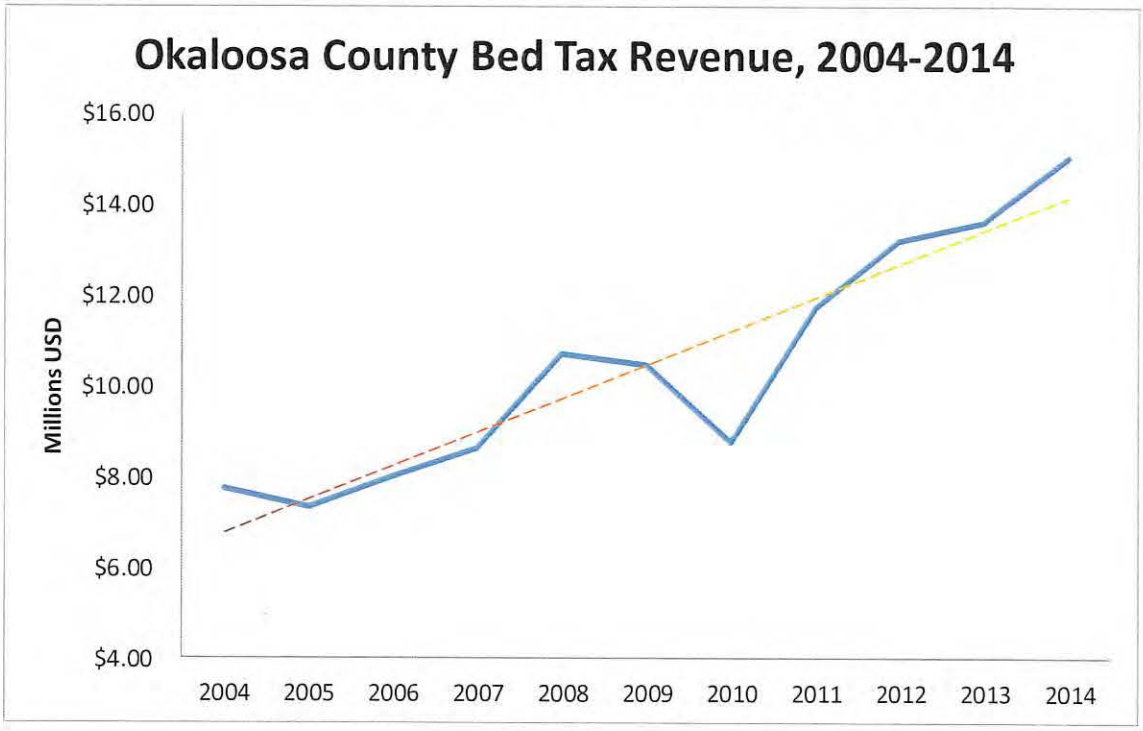
Conclusion

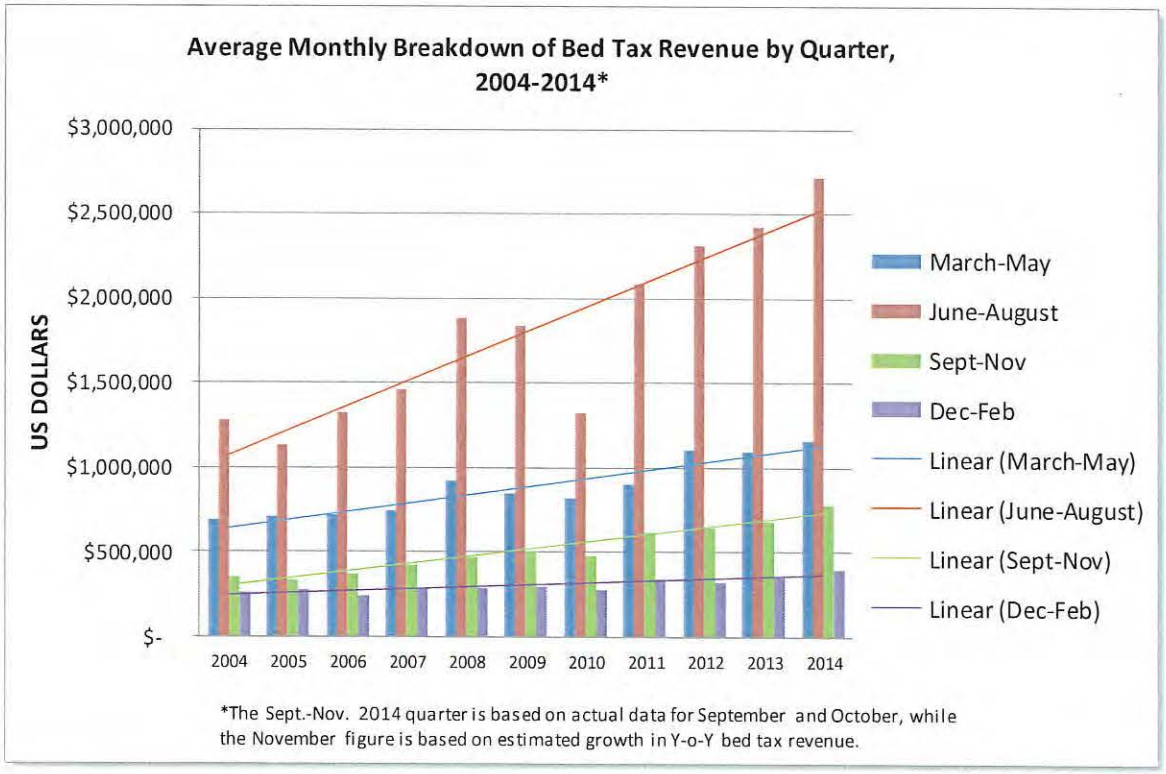
Based on the survey data collected during the winter quarter 2014/15, it is estimated that more than 163,371 visitors traveled to the Emerald Coast during this period. Those visitors staying in either a condo or a hotel/motel are estimated to have spent more than $16 million on accommodations, food, entertainment and other expenditures. Drawing into the winter season, occupancy rates for condos and hotels were calculated as reaching averages around 60% and 36%, respectively.

During this quarter, the Haas Center surveyed 281 visitors. The average party had 3.05 guests, stayed in a hotel or condo, traveled by car to the area and planned to stay for a week or less. For the winter quarter, most of these visitors were from the Southeast, and approximately 36% were from other parts of Florida. Close to 70% of Emerald Coast visitors answered that they were traveling to the area for either vacation or

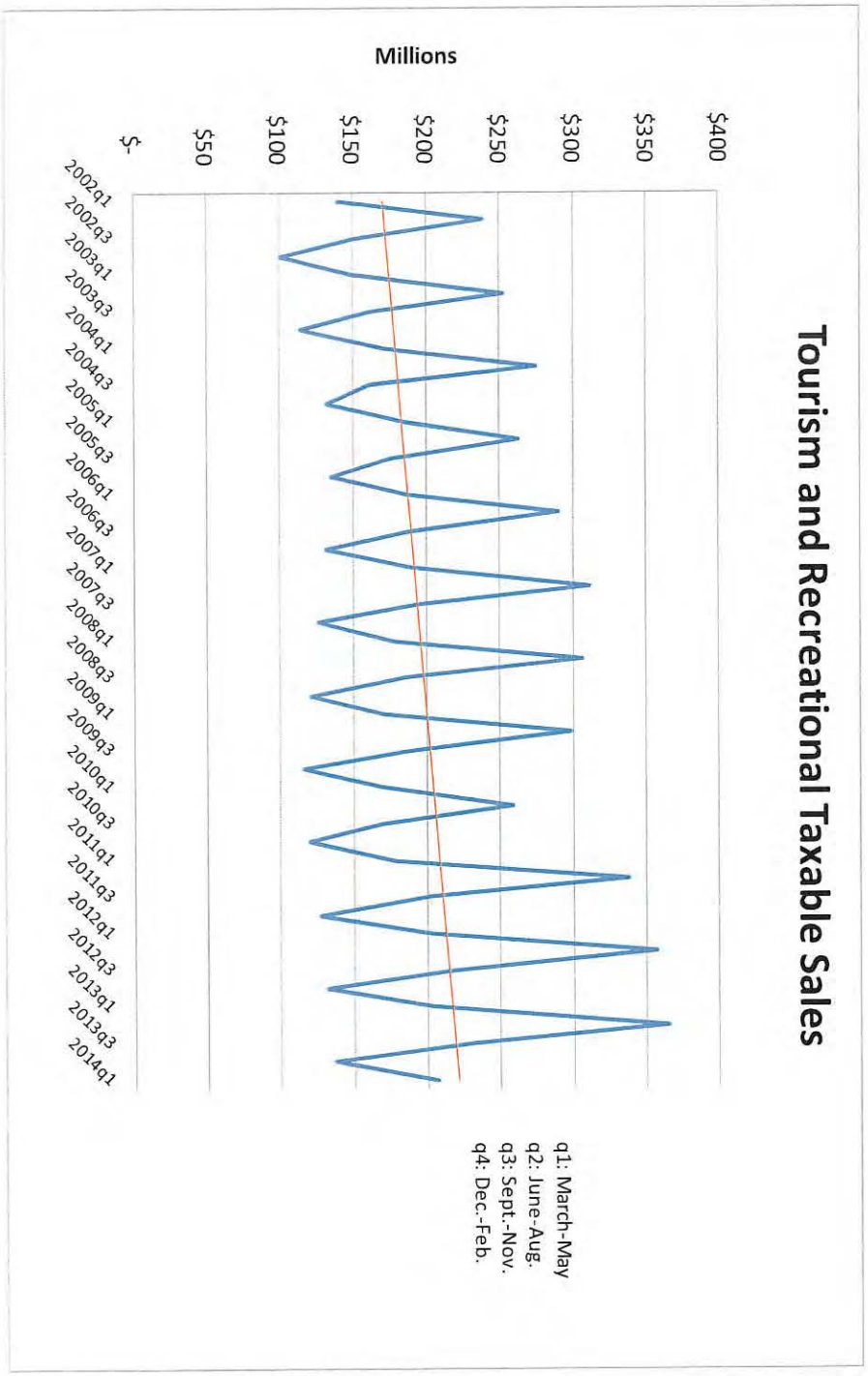
visiting friends and family. Funds spent on accommodations generally accounted for the largest portion of total expenditures for the trip. Over 73% of visitors in the winter quarter answered that it was not their first Emerald Coast visit, and more than 47% indicated that they were planning further visits in the following 12 months. Visitor satisfaction levels remained exceedingly high in the winter quarter, with over 99% of those who answered questions about their satisfaction rating that they were either satisfied or very satisfied.

Appendix A: Okaloosa County Bed Tax Summaries 2004-Present





Appendix B: Tourism and Recreation Taxable Retail Sales Summary



Appendix C: Emerald Coast Tourism Survey Instrument

Tourism and the Okaloosa County Economy

Final Survey Questions

February 26, 2014

Hello, my name is _____ from the Haas Center at the University of West Florida. We are conducting marketing research regarding visitation to the Emerald Coast. Would you be willing to take a short 5-8 minute survey regarding your time spent in southern Okaloosa County?

1. If yes, are you visiting the area and at least 18 years old?

   If no, end of survey.

2. If yes, are you currently staying overnight in the Destin, Ft. Walton Beach or Okaloosa Island area?
   a. Destin
   b. Ft. Walton
   c. Okaloosa Island
   d. If not: other:_____

3. [If yes to Q2]. What type of lodging accommodations are you using during your visit?
   a. Condo
   b. Hotel
   c. House rental
   d. Stay with friends/family
   e. Campground/ RV park

4. [If yes to Q2].How many nights do you plan on staying in the area?
5. What is the purpose of your trip?
   a. Vacation
   b. Visit family/friends
   c. Part of a Group

Appendix C: Emerald Coast Tourism Survey Instrument

d. Business

e. Shopping

f. Other(please specify)_____

a. [If response is "A," "B" or "C" ask] What activities are you participating in:

b. Local Attraction

c. Water Sports

d. Fishing

e. Beaches

f. Special Events

6. Is this your first visit to the area?

a. [If no]. How many times do you visit annually?

7. What type of transportation did you use to travel to the area?

a. Car

b. RV

c. Plane

d. Boat

e. Other (specify)

8. How many people are in your party?

a. [If more than one] What are the ages of those in your party?

i. Age group: 18-25, 25-35, 35-45, 45-55, 55+

9. For the length of your stay, how much do you estimate you will spend on the following items?

a. Accommodations

b. Food

c. Entertainment

Appendix C: Emerald Coast Tourism Survey Instrument

d. Shopping

e. Transportation/Gas (in the area)

f. Miscellaneous

10. How satisfied are you with your visit to the Emerald Coast?

a. Very Dissatisfied

b. Dissatisfied

c. Neutral

d. Satisfied

e. Very Satisfied

i. [If very dissatisfied/dissatisfied] Why? (open ended)

11. Are you likely to refer the Emerald Coast to a friend or family member?

a. Yes

b. No

12. Do you plan to return to the area in the next 12 months?

a. Yes

b. No

i. If yes, how often? (open ended)

13. Please indicate your age group.

a. 18-25, 25-35, 35-45, 45-55, 55+

14. In what ZIP code do you currently reside?

15. What best describes your household income before taxes?

a. Less than $40K

b. $40-60K

Appendix C: Emerald Coast Tourism Survey Instrument

c. $60-75K

d. $75-100K

e. $100-150K

f. $150K+

g. Unsure

h. Unwilling to answer

Thank you very much for your time and helping us with our survey.

Emerald Coast Visitor Profile Survey

Spring Quarterly Report: March - May, 2014

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ABOUT US

Located in the SunTrust Tower in historic downtown Pensacola, Florida, the Haas Center collects, analyzes and distributes economic data for clients seeking expert economic advice. We exist to help entrepreneurs and industry leaders—from traditional manufacturing to emerging technologies—meet their information needs in the modern economy.

The Haas Center specializes in data analysis for the purposes of economic forecasting, marketing research, business expansion, tourism, and real estate development, as well as industry and academic studies. The Haas Center's staff combine academic credentials with varied experience, ranging from economists to survey specialists. Each professional combines innovation with attention to detail to produce high-quality research products for Center clients.

For further information please visit our website at haas.uwf.edu, or contact Brice Harris at bharris@uwf.edu.

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Executive Summary

The Haas Center has been commissioned by the Emerald Coast Convention and Visitors Bureau to complete a visitor profile of those who travel to the Emerald Coast (Fort Walton Beach, Okaloosa Island and Destin). Survey professionals will conduct intercept surveys for one year to capture multiple data points, including demographics, visitor satisfaction, length of stay and spending patterns. This report profiles visitor information for the spring quarter (March, April and May) 2014. As the demographic composition of visitors changes from quarter to quarter, the statistics captured in this report are completely unique to the spring quarter.

The Haas Center surveyed 638 visitors over the quarter. These participants provided a diverse age sample, though skewed slightly older due, most likely, to the presence of snow birds, as well as minimal break time for school-aged children. In addition, these figures may have been impacted by the wet and chilly conditions that disrupted some spring break tourism.

Overall, it is estimated that more than 200,000 unique visitors traveled to the Emerald Coast during the spring quarter. This figure is based on visitors who stayed in hotels, motels, condominiums and house rentals. More than 101,000 of these visitors stayed in hotels or motels, while another 73,000 used condos for their accommodations. Another 26,000 tourists rented houses for their trip. It Is estimated that approximately 60% of hotel rooms were booked for the spring quarter, while 69% of condos were occupied.

The median party size was 2 people, while the average group size was slightly larger at 2.9. The party size had a significant impact on the type of lodging. For example, smaller parties (2.05 people) tended to stay with family and friends, while larger parties (4.88 people) were more likely to rent a house. Approximately 73% of visitors stayed for a week or less, though a few visitors with lengthy trips skewed the mean stay to 9.6 nights. Most visitors to the Emerald Coast stayed in Destin, traveled to the area by car and used a condo or hotel for their accommodations. Nearly 80% visited for vacation purposes, and most participated in beach and shopping activities. In total, more than 99% of visitors were satisfied with their trip and 99.7% would refer the area to their friends or family.

Introduction

The Haas Center for Business Research and Economic Development has been commissioned by the Emerald Coast Convention and Visitors Bureau to conduct a tourism study of the Emerald Coast. The study will utilize survey data to estimate the number of unique visitors coming to the region on a quarterly basis. For a 12-month period between March 2014 and February 2015, the Haas Center will have survey professionals in the field conducting visitor intercept surveys throughout Fort Walton Beach, Okaloosa Island and Destin, Florida. Data collected from these surveys, in conjunction with county and state data regarding condo and hotel unit availability as well as bed tax collections, are used to estimate the total number of visitors that arrive in the region on a quarterly basis.

Table 1. Average Spending Per-Person, Per-Night Emerald Coast

Expenditure Type	Okaloosa	Okaloosa %
Accommodations	$32.10	39.88%
Transportation	$12.61	15.66%
Food & Beverage	$8.73	10.84%
Shopping	$21.80	27.08%
Entertainment	$3.96	4.92%
Miscellaneous	$1.30	1.61%

As data is collected over a 12-month period, Haas Center researchers will report these figures via four quarterly reports. Each report will provide a number of data points describing visitor traffic to the area, including demographics, residency, spending patterns, length of stay, party size, reason for visit and visitor satisfaction. Furthermore, each report provides a breakdown of estimated visitors by accommodation type. Table 1 provides the overall estimates for per-person, per-night visitor expenditures. As can be seen, survey respondents reported spending approximately 40% of all expenditures on accommodations, followed by 27% on shopping, nearly 16% on transportation, 11% on food, 5% on entertainment and nearly 2% on miscellaneous items.

Purpose and Scope. The purpose of this report is to provide in-depth details about demographic and economic trends of Emerald Coast tourism for the spring quarter of 2014 (March, April and May). Located in the panhandle of Florida, the Emerald Coast is home to many tourist attractions, including beaches, water-based activities, parks and mid-to-high end shopping centers. While many beach communities collect bed taxes that provide visitor estimates, most fail to capture spending patterns of these visitors. As such, the Haas Center has been contracted to collect quarterly visitor and spending

data that provides estimates for all visitor types. Ultimately, this data will provide a distinct visitor count per quarter. At the end of the collection period, the Haas Center will utilize these data to conduct an economic impact assessment of the tourism industry along the Emerald Coast.

This study utilizes intercept survey techniques to obtain tourist demographics, lodging and transportation habits, spending patterns and overall satisfaction. In order to ultimately calculate the economic impact, the survey focuses on in-area spending patterns. This report does not attempt to quantify the externalities that are undoubtedly associated with the Emerald Coast tourism industry, rather the report provides key marginal results from the survey, as well as estimated visitor totals.

Methodology

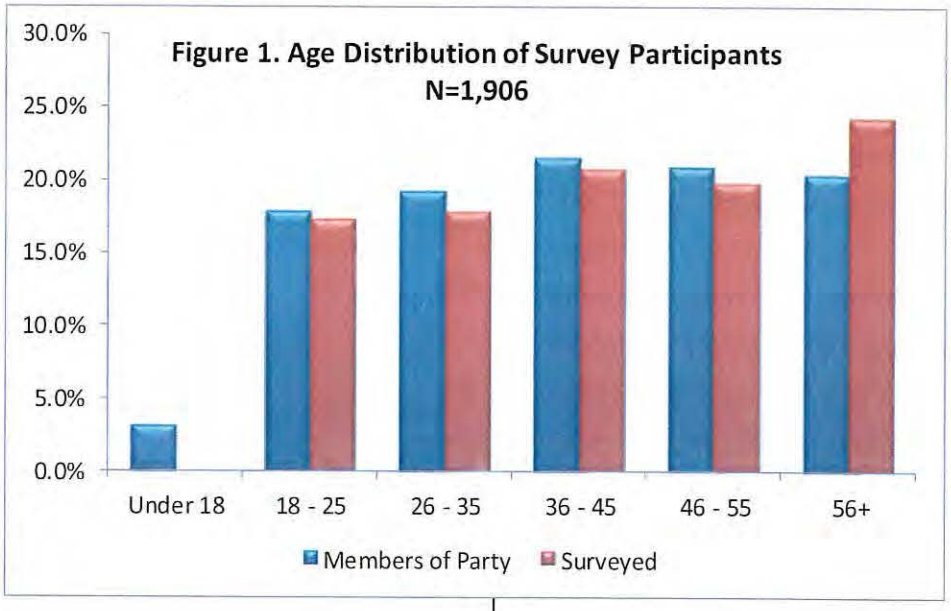
Throughout the spring quarter of 2014, the Haas Center has administered intercept surveys collecting details about unique visits to the Emerald Coast. Survey professionals spent sixteen hours a week throughout the quarter conducting interviews. Several aspects of data collection were randomized, with interviewers alternating the days of the week, locations and time of day in which they approached visitors. These locations included multiple shopping centers, public beaches, commercial areas and waterfront boardwalks. Survey researchers approached more than 2,000 adults during the spring quarter. Among the sampling frame, approximately 32%, or 638 respondents, participated in the survey.

The intercept survey measures and tracks several key elements about the Emerald Coast tourism market. This information includes demographics, particularly age and household income; primary residence; method of transportation; lodging; and party size. The survey also collects estimates on spending in several categories, including accommodations, transportation, food, retail, entertainment and shopping. Additionally, visitors are asked about their overall satisfaction with their visit to the area. The survey questions seek

details on visitors' likelihood to return to the area and their willingness to refer the area to a friend or family member.

Survey Results

In order to better understand tourism patterns along the Emerald Coast, it is necessary to identify the demographic make-up of those visiting the region, including their age, income, party size and place of origin.



Age. The survey captures several demographic elements used to measure the type of visitors traveling to the Emerald Coast. Figure 1 presents the age distribution for survey respondents, as well as for the members of their party. As can be seen, the distribution is slightly skewed rightward, signifying survey participants were generally older. In fact, nearly 65% of all participants reported to be over 35 years of age, with only 3% of all party members reported as being under the age of 18. Undoubtedly, these data capture the older snowbird population through March and April, as well as the younger college-age population visiting on spring break. Regardless, the distribution is relatively flat, indicating a diverse sample.

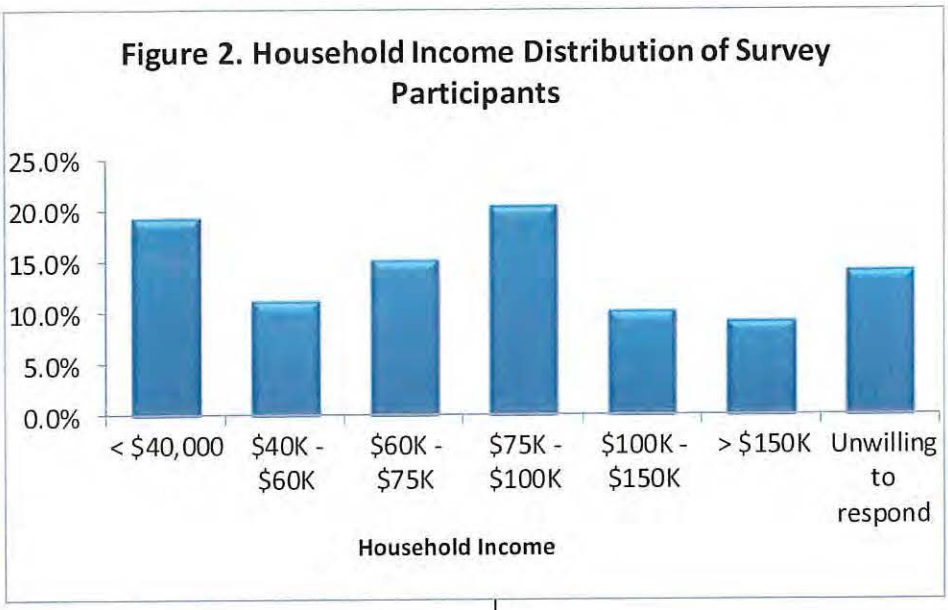
Table 2. Distribution of Party Size

Party Size	Percent
One	11.2%
Two	46.2%
Three	17.5%
Four	8.6%
Five	8.3%
Six	3.1%
Seven	2.4%
Eight	0.8%
Nine	0.6%
Ten	1.3%
Average Party Size	2.9
Median Party Size	2.0

Party Size. Another component measured is the party size of each respondent. As the data in Table 2 indicate, more than half of all participants were traveling either by themselves or only with one other person. In fact, just over 90% of all parties surveyed were traveling with less than six members. Additionally, two more statistics on party size have been calculated: average and median party size. The average party size, 2.9, is slightly higher than the median party size, 2.0.

Household Income. Figure 2 (on the following page) presents the distribution of household income for all respondents. Of these, more

than 14% were unwilling to disclose their household income. Interestingly, the two income brackets with the most visitors are quite different. The most frequent group of visitors (20.5%) reported a household income between $75,001 and $100,000. However, close behind were visitors making $40,000 or less (19.4%). The higher visitation by the lower income group may potentially be another pattern particular to this quarter. Two groups who often visit the Emerald Coast during the spring, retirees and spring breakers, are more likely to have lower household incomes. The data indicate that 19.5% of people surveyed have a household income of more than $100,000 a year, while the remaining 26.5% make between $40,000 and $75,000 a year.



Place of Origin. The top ten origin states of survey respondents are listed in Table 3. While most states represented are from the Southeast, it is worth noting that visitors from California, New York and Missouri made up near 10% of all respondents. Figure 3 (on the following page) presents a geographical distribution of where all out-of-state respondents report as their place of origin. The data show 48 states are represented, with only Wyoming and Utah not included. With approximately 45% of respondents claiming to be from the southeast US (Florida, Georgia, Louisiana, Texas, Alabama and Tennessee), more than half of all respondents are from outside the region.

Table 3. Top Ten Origin States of Visitors

State	Percent
Florida	18.5%
Georgia	8.2%
Louisiana	6.0%
Texas	5.2%
Alabama	4.1%
Tennessee	3.6%
California	3.3%
New York	2.8%
Virginia	2.8%
Missouri	2.7%

The largest group (18.5%) of Emerald Coast tourists are visiting from other Florida counties. Figure 4 (pg. 10) presents a geographical distribution of in-state respondents' county of origin. Residents of

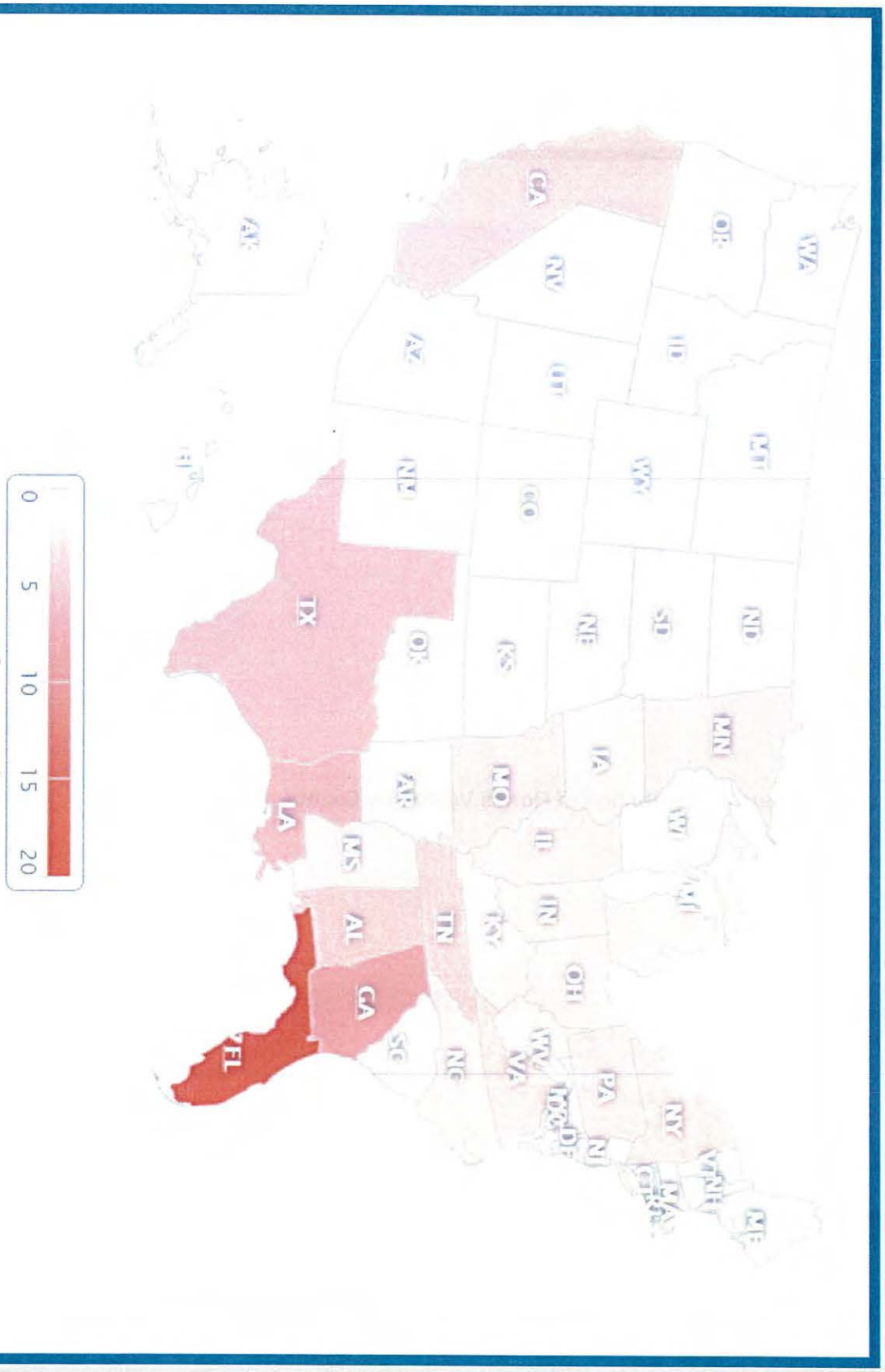


Figure 3. Distribution of Visitors by State

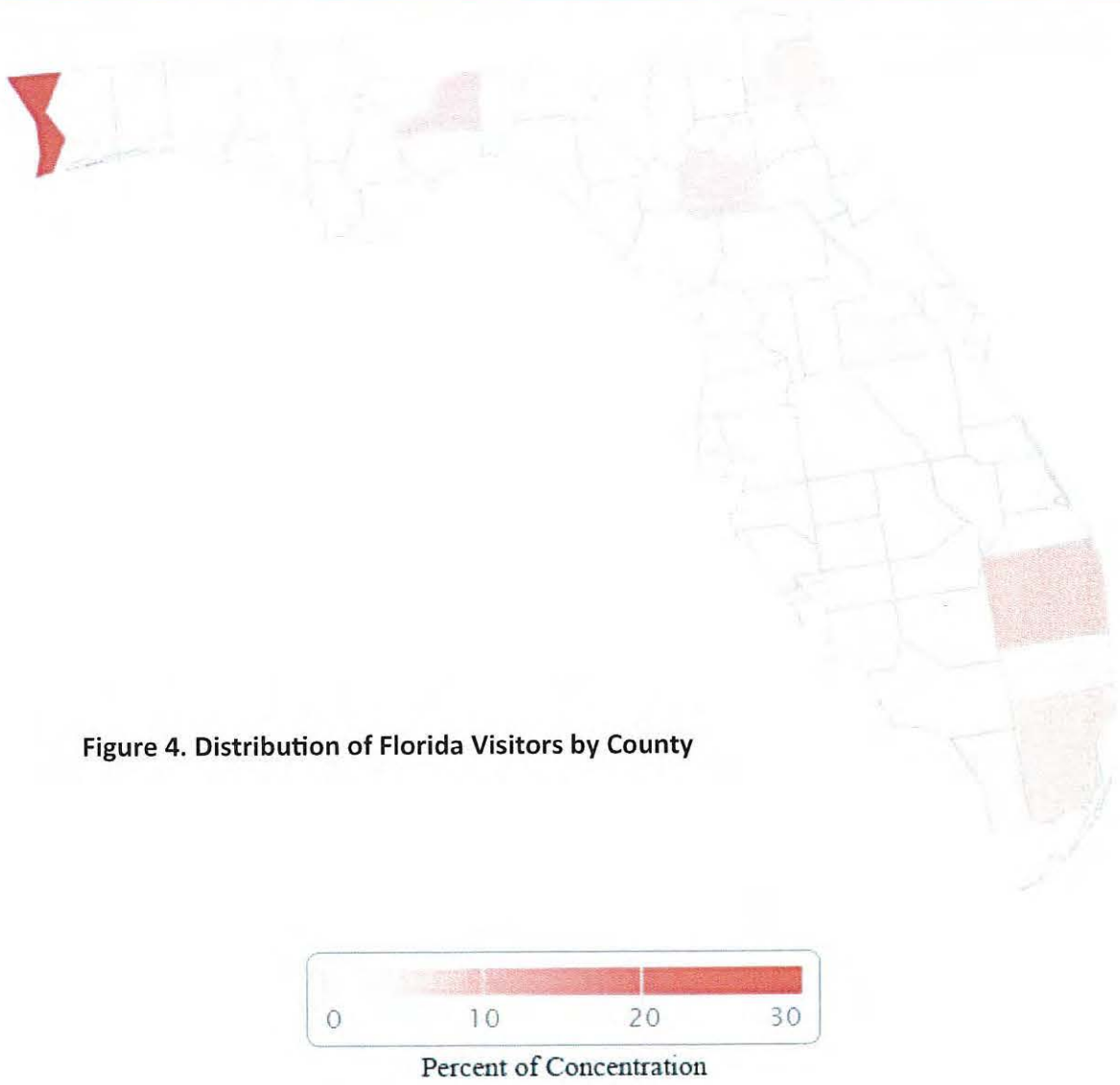


Figure 4. Distribution of Florida Visitors by County

Escambia County were the largest group of in-state visitors represented in the survey, followed by Palm Beach, Leon, Alachua, Duval and Miami-Dade counties. Many of these counties represent densely populated areas throughout the state, increasing their odds of representation.

Finally, approximately 2.8% of visitors traveled to the Emerald Coast from foreign countries. Of these countries, Canada has the largest representation, followed by Puerto Rico (U.S. territory), England and Argentina.

Lodging and Transportation. As presented in Table 4, approximately 49% of respondents stayed in the Destin area, followed by Okaloosa Island (19.1%) and Fort Walton Beach (14.8%). The remaining 16.7% of tourists were either taking a day trip to the area (9.0%); staying overnight, but not in the area (5.8%); or were unsure of their nightly accommodation location (1.9%). The nearly 6% of respondents who stayed overnight, but not in the Emerald Coast area, stayed in various locations. Approximately half of this group were either staying in Pensacola or Navarre; however, other common answers provided by respondents included Alabama and Gulf Breeze, FL.

Table 4. Location of Lodging

Location	Percent
Destin	49.4%
Fort Walton Beach	14.8%
Day Trip Only	9.0%
Okaloosa Island	19.1%
Staying overnight outside the area	5.8%
Unsure	1.9%

Table 5. Transportation Type

Mode	Percent
Boat	0.2%
Car	86.9%
Other (specify)	0.9%
Plane	9.8%
RV	2.2%

Table 6. Type of Lodging

Location	Percent
Campground or RV	0.7%
Condo	44.4%
Hotel	38.6%
House Rental	5.3%
Stay with Friends or Family	10.9%
Unwilling to respond	0.2%

The results presented in Table 5 indicate that an overwhelming majority of people who traveled to the Emerald Coast used only one mode of transportation. Most visitors, 86.9%, used a car to reach their destination. Traveling by plane (9.8%) and RV (2.2%) were distant runners-up. Using a boat or other means of transportation, like buses or trains, account for roughly 1% of survey responses.

Similarly, the results in Table 6 show the distribution of visitors' lodging accommodations. An overwhelming majority, 83%, of respondents stayed in either a hotel (38.6%) or a condo (44.4%). Only 5.3% of respondents reported using a house rental. Approximately

one out of every 10 respondents surveyed indicated that they were staying with friends or family, while less than 1% of respondents reported that they were staying at a campground or in an RV. It is important to note that this group (friends/family and campground/RV) does not contribute to bed tax collections. As bed tax collections are the primary source for visitor estimates, those visitors who stay in accommodations not subject to the bed tax may not be counted in annual tourism estimates.

Length of Stay. Table 7 presents data demonstrating a relatively wide range of responses for length of stay along the Emerald Coast. The median number of nights stayed is 5, while the mean is 9.6 nights. However, the mean is skewed upward by those respondents who stay for multiple weeks and months. The median is a more accurate representation of length of stay as it eliminates the distorting effects of those few long-term visitors. The two single most common lengths of stay are three and seven nights with respective percentages of 18.2% and 18.1%. Consequently, the ranges provided in Table 7 show that nearly 73% of visitors stayed for a week or less.

Table 7. Length of Stay

Range	Percent
< 3 days	8.5%
3 - 5 days	42.8%
6 - 7 days	21.4%
8 - 10 days	6.2%
11 - 14 days	8.0%
15 - 30 days	9.6%
31 - 60 days	2.8%
> 60 days	0.7%

Table 8. Average Estimated Spending for Length of Stay

Type of Spending	Mean	Median
Accommodations	$896	$500
Food	$352	$300
Entertainment	$244	$100
Shopping	$609	$300
Transportation	$111	$80
Miscellaneous	$37	$0

Spending Patterns. A comprehensive list of estimated, average spending is provided for visitors in Table 8. Once again, statistics for both mean and median spending are provided to eliminate the distorting effects of long-term visitors. According to the data, expenditures on accommodations is estimated to be the highest expense for visitors. For the entire length of stay, the estimated mean spending on lodging is $896, whereas the median is $500. The average expenditures for shopping, $609, is the second-highest expense for visitors. On average, visitors also spend hundreds of dollars on food, entertainment and transportation.

Tables 9 through 11 (on the following page) explore several patterns of per-person, per-night spending for all six categories of expenditures by different groups. Rows which are highlighted signify the groups that spent the most for that category. In Table 9, per-person, per-night

Table 9. PER-NIGHT, PER-PERSON by Lodging							
Type of Lodging	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Campground/RV	$9.59	$13.76	$11.28	$20.30	$6.65	$3.38	**$64.96**
Condo	$38.68	$11.37	$7.07	$21.56	$3.35	$0.96	**$82.99**
Hotel	$39.11	$20.43	$12.88	$24.91	$5.96	$1.64	**$104.95**
House Rental	$16.42	$5.05	$2.53	$9.41	$1.71	$0.56	**$35.69**
Friends/Family	$2.85	$10.31	$4.96	$13.21	$3.74	$1.03	**$36.10**

Table 10. PER-NIGHT, PER-PERSON by Household Income							
Household Income	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
$40K or Less	$22.51	$5.93	$4.03	$7.58	$2.11	$0.49	**$42.66**
$40K - $60K	$35.96	$8.49	$5.02	$11.28	$2.77	$1.14	**$64.66**
$60K - $75K	$32.11	$10.17	$7.13	$14.06	$4.20	$0.98	**$68.66**
$75K - $100K	$33.17	$13.17	$6.38	$16.74	$3.62	$0.89	**$73.97**
$100K - $150K	$36.74	$13.63	$8.95	$30.83	$4.91	$1.08	**$96.15**
< $150,000	$50.28	$27.40	$20.95	$60.41	$6.56	$2.67	**$168.27**

Table 11. PER-NIGHT, PER-PERSON by Reason for Visit							
Reason for Trip	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Business	$91.60	$18.21	$19.16	$14.73	$4.93	$2.41	**$151.04**
Part of a Group	$48.73	$44.17	$16.34	$42.93	$8.50	$1.24	**$161.91**
Vacation	$32.70	$12.14	$7.34	$21.09	$3.66	$1.05	**$77.98**
Family/Friends	$9.94	$7.59	$4.11	$10.65	$2.70	$0.84	**$35.82**
Other	$12.51	$5.57	$3.29	$2.54	$1.86	$0.11	**$25.89**

spending is examined by type of lodging. Those who stayed in a hotel were likely to spend more money in every category with the exception of transportation and miscellaneous and, on average, spend $104.95 per person, per-night. The data indicate that respondents staying in hotels spend 32% more on food ($20.43) per day than the category with the next highest food expenditures (campground/RV). Furthermore, those respondents staying in a house rental spend the least amount across every category with the exception of accommodations. Those respondents staying with family/friends spend the least on accommodations at $2.85 per-person, per-night.

In Table 10, per-person, per-night spending is examined by household

income. Those who reported earning an annual income of more than $150,000 spend more than any other income level. On entertainment alone, this group spends 57% more per-person, per-night than the next closest income group. Intuitively, this is to be expected as this income group *should* have the greatest amount of disposable income. Also as expected, those with the least amount of *presumed* disposable income, $40,000 or less in household income, spend less in all six categories.

Finally, Table 11 (on the previous page) presents per-person, per-night spending patterns by reason for visit. Visitors who traveled to the Emerald Coast as part of a group have a higher rate of total spending. This group spends at least 57% more on food per-person, per-night than any other type of visitor. Visitors in a group also spend at least 50% more on shopping as any other type of visitor. However, it should be noted that this group was a small percentage (1.9%) of respondents, and further data is needed to substantiate this trend. Of interesting note, those here on business spend significantly more on accommodations, nearly 47%, than any other group.

Visiting the Emerald Coast. While respondents visited the Emerald Coast for a host of different reasons, it is clear that the most common reason was to vacation. In Table 13, the primary reasons for visiting the Emerald Coast are listed. Nearly 80% of all respondents listed that their primary motivation for traveling to the area was to vacation. The second most common reason was to visit family and friends (8.7%), whereas business and other reasons were also listed. During the spring quarter, some other common reasons to visit were for a cheerleading competition in the area, as well as just passing through during travel.

Survey professionals also asked participants what activities they were participating in if they had traveled for vacation, to visit family or

Table 12. Mean Party Size by Type of Lodging

Type of Lodging	Party Size
Campground or RV	4.67
Condo	3.04
Hotel	2.76
House Rental	4.88
Stay With Friends or Family	2.05

Table 13. Visitors' Purpose for Trip

Purpose	Percent
Business	3.6%
Other	3.6%
Part of a Group	1.9%
Shopping	2.2%
Unwilling to Respond	0.2%
Vacation	79.8%
Visiting Family or Friends	8.7%

Table 14. Visitors' Activities While in Area

Activities	Percent
Beaches	92.5%
Fishing	22.2%
Local Attractions	18.7%
Shopping	67.4%
Special Events	5.1%
Water Sports	12.2%

friends or were in the area as part of a group. The responses in Table 14 show that nearly 93% reported visiting beaches, while another 67% went shopping. Between 18% and 22% of respondents indicated that they had visited local attractions or gone fishing. Another 12% of visitors had participated in watersports during their time in Okaloosa County.[1]

Additionally, participants were asked about the frequency of their trips to the Emerald Coast. Participants reported in Table 15 that just over half (51.7%) were visiting the area for the first time. Alternatively, 48% of respondents had previously visited the area. As indicated in Table 17, just over 35% of respondents reported that they were already planning to return to the area in the next year, whereas 34% said no and 30.7% did not know.

Survey respondents also gave information on their overall satisfaction with their trip, provided in Table 18. For all visitors, 99.1% responded that they were either satisfied or very satisfied with their visit to the Emerald Coast. Of those, nearly 89% indicated that they were very satisfied with their trip. The only respondent who reported being dissatisfied cited poor weather as an explanation. Finally, Table 19 shows that nearly every respondent (99.7%) would be likely to refer the Emerald Coast to a friend or family member.

Table 15. First Time Visitors to the Area

First Time Visitor	Percent
Don't Know	0.3%
No	48.0%
Yes	51.7%

Table 16. Annual Visits to Emerald Coast

Number of Visits	Percent
Zero	2.7%
One	48.8%
Two	16.2%
Three	11.5%
Four	10.4%
Five	4.2%
Six	2.3%
Seven or More	3.8%

Table 17. Visitors Who Plan to Return in Next Twelve Months

Likely to Return	Percent
Don't Know	30.7%
No	34.0%
Yes	35.3%

Table 18. Visitor Satisfaction with Trip

Satisfied With Trip	Percent
Dissatisfied	0.2%
Neutral	0.8%
Satisfied	10.2%
Very Satisfied	88.8%

Table 19. Likely to Refer Family or Friends

Likely to Refer	Percent
No	0.3%
Yes	99.7%

Visitor Estimates by Accommodation

In order to provide visitor estimates for the spring quarter, Haas Center researchers utilize several data points collected from various sources. A primary input into visitor estimate calculations are bed taxes, which are collected on all short-term rentals in the southern portions

1. Please note, these percentages sum to more than 100% as respondents are allowed to provide more than one answer.

Table 20. Number of Unique Visitors to the Emerald Coast Spring Quarter 2014								
Type	Distribution of Bed Tax	Bed Tax Q2 2014	Revenue	Avg. Nightly Rate	Total Nights	Party Size	Length of Stay (Days)	Visitors
Condo	57%	$1,867,956	$37,359,119	$124.84	299,256	3.04	12.44	73,130
Hotel/Motel	29%	$943,041	$18,860,813	$109.32	172,528	2.76	4.70	101,315
House Rental	15%	$489,003	$9,780,069	$85.87	113,894	4.88	21.12	26,316
Total Unique Visitors: 200,761[2]								

of Okaloosa County. Data on these collections are reported by the Okaloosa County Tax Collector (OCTC) on a monthly basis; however, there is typically a two-month lag in reporting times. As of this report, the most recent data available is April 2014. Due to these limitations, year-over-year bed tax data has been used to estimate growth from spring quarter 2013 to 2014. Based on data derived from the OCTC, spring 2013 bed tax collections were reported at approximately $3.289 million. When summed, March and April 2014 collections are up 1.1% year-over-year. Assuming collections for May 2014 grow at that this rate, bed tax collections for the spring 2014 quarter are estimated to be $3.3 million. This figure, in turn, is used to estimate unique visitor counts.

The other primary input into our visitor calculations are the survey data collected by the visitor intercepts surveys. Values highlighted in Table 20 indicate primary data collected via these surveys. Here, average nightly rate, average party size and average length of stay, in addition to the bed tax data, are used to calculate the number of unique visitors to the Emerald Coast during spring 2014.[3] As the table indicates, it is estimated that just over 200,000 visitors traveled to the Emerald Coast during the spring months.

Furthermore, based on lodging data from the Florida Department of Business & Professional Regulation (May 2014), over 4,600 condo units and 3,100 hotel/motel units are reported to be available throughout Destin, Okaloosa Island and Fort Walton Beach. Utilizing these data, in conjunction with total nights stayed, Haas Center researchers are able to

2. Excluding those visitors who stayed with friends/family, or at a campground/RV park.

3. Please note, the figures reported by survey participants are estimates and may vary from those reported by accommodation establishments.

estimate condo and hotel/motel occupancy rates. As indicated in Table 21, these rates are 69% and 60%, respectively.

Once visitor estimates have been calculated, it is now possible to determine total visitor spending by those staying in either condo or hotel accommodations. Based on the per-person, per-night spending figures of those staying in a condo or hotel (reported in Table 9), total spending estimates have been calculated for each group and are presented in Table 22. As the table indicates, it its estimated that condo visitors, during the spring quarter, spent just over $6 million along the Emerald Coast, while those staying in a hotel spent approximately $10.6 million.

Table 21. Occupancy Rates for Condo and Hotel Units Spring Quarter 2014

Type	Units Available	Total Nights	Quarterly Supply of Units	Occupancy Rate
Condo	4,681	299,256	430,652	69%
Hotel/Motel	3,111	172,528	286,212	60%

Table 22. Total Visitor Spending by Accommodation Type

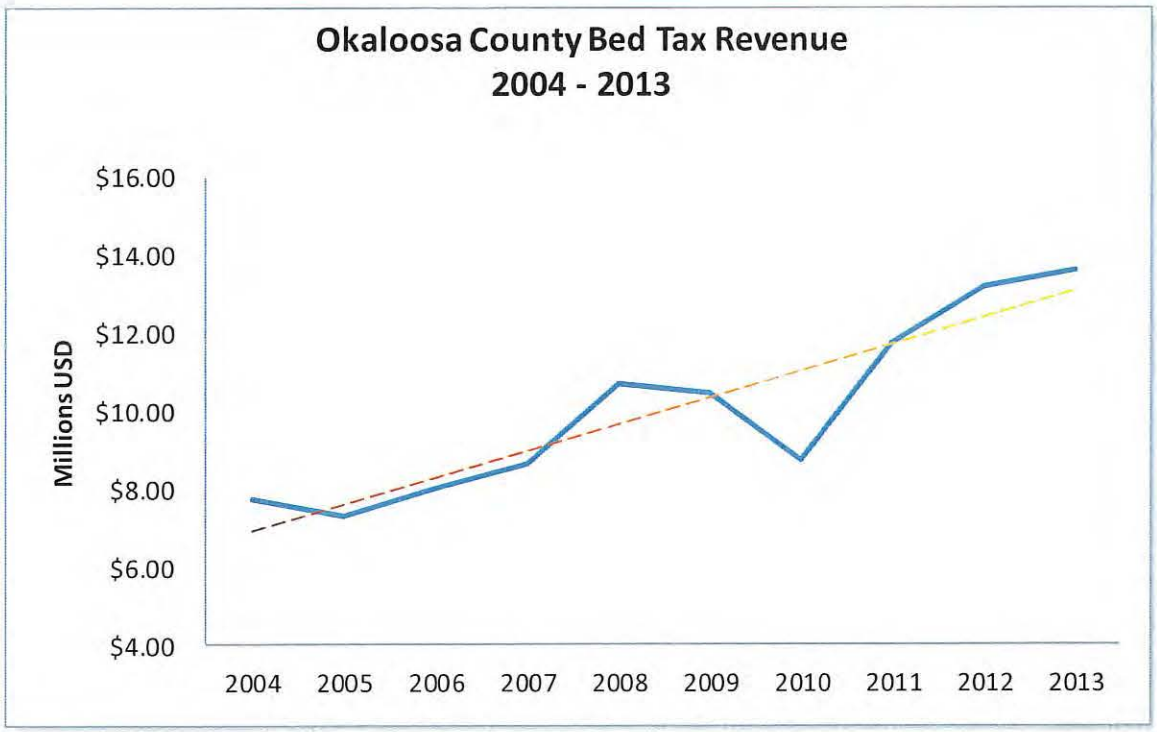
Type	Per-Person, Per-Night Expenditures	Number of Unique Visitors	Total Direct Spending
Condo	$82.99	73,130	$6,069,131
Hotel	$104.95	101,315	$10,632,623

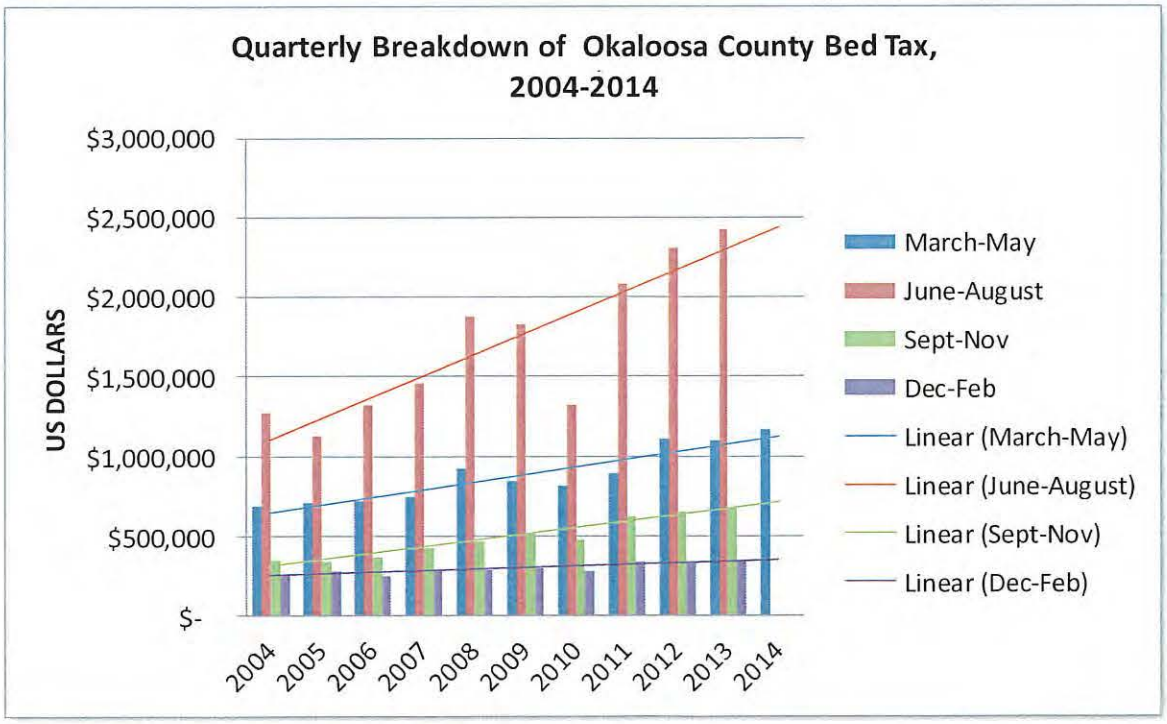
Conclusion

Based on the survey data collected during the spring quarter 2014, it is estimated that more than 200,000 visitors traveled to the Emerald Coast during this period. Those visitors staying in either a condo or a hotel/motel spent nearly $17 million on accommodations, food, entertainment and other expenditures. Despite unfavorable weather conditions, occupancy rates still reached an average of 69% for condos and 60% for hotels and motels.

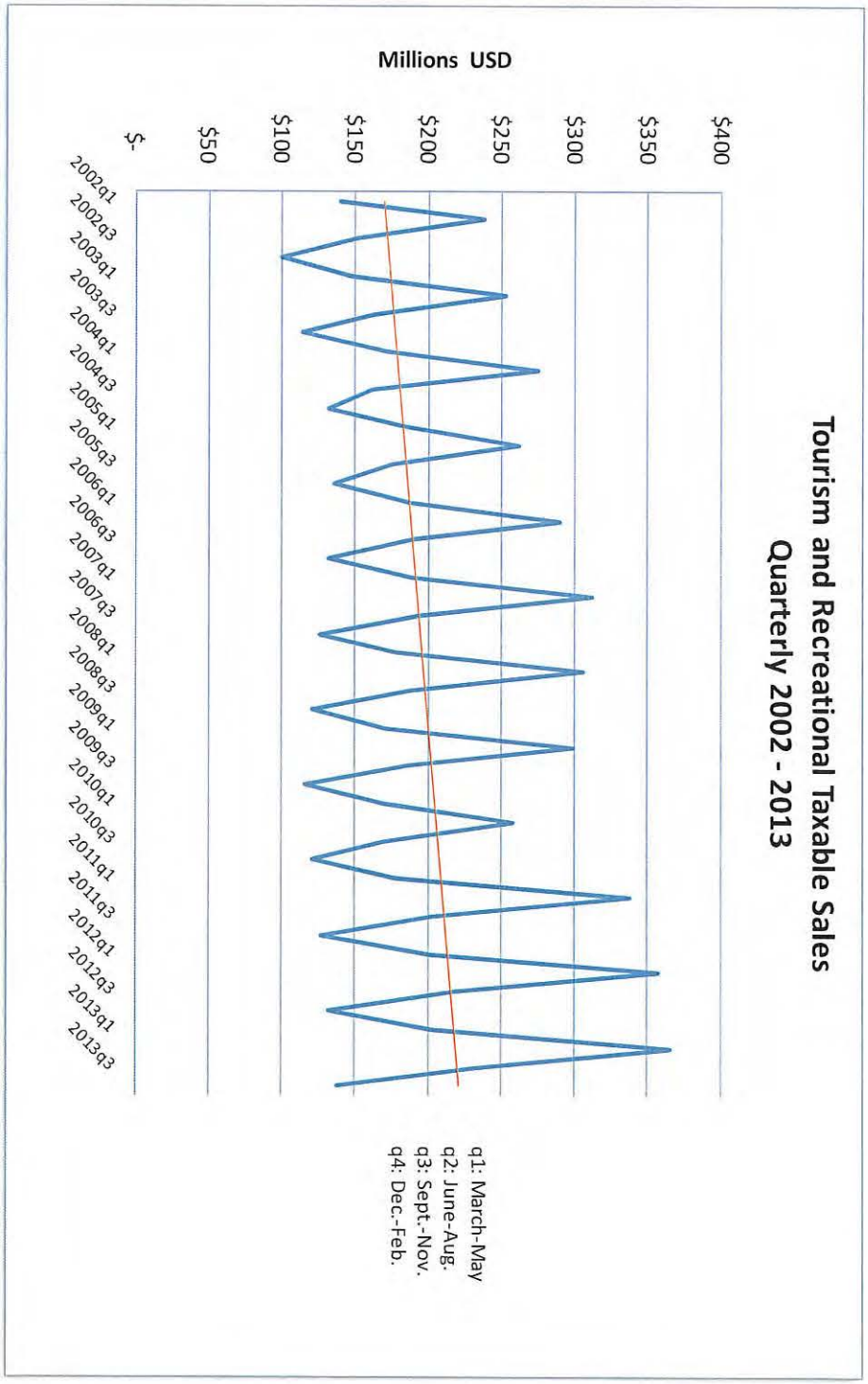
During this quarter, the Haas Center surveyed 638 visitors. The average party had 2.9 guests, stayed in a hotel or condo, traveled by car to the area and planned to stay for a week or less. Many of these visitors were from the Southeast, and nearly a fifth were from other parts of Florida. Approximately 80% of Emerald Coast visitors traveled to the area for vacation. More than 92% of all visitors reported visiting the beaches, while another 67% reported visiting the area's shopping centers. Accommodations were often the largest portion of total expenditures for the trip. Visitors were split evenly between first-time and returning guests. Overwhelmingly, 99% of visitors were satisfied with their trip to the Emerald Coast and would refer it to their friends and family. In fact, more than 35% of visitors were already planning to

Appendix A: Okaloosa County Bed Tax Summaries 2004-Present





Appendix B:Tourism and Recreation Taxable Retail Sales Summary



Appendix C: Emerald Coast Tourism Survey Instrument

Tourism and the Okaloosa County Economy

Final Survey Questions

February 26, 2014

Hello, my name is _____ from the Haas Center at the University of West Florida. We are conducting marketing research regarding visitation to the Emerald Coast. Would you be willing to take a short 5-8 minute survey regarding your time spent in southern Okaloosa County?

1. If yes, are you visiting the area and at least 18 years old?

   If no, end of survey.

2. If yes, are you currently staying overnight in the Destin, Ft. Walton Beach or Okaloosa Island area?
   a. Destin
   b. Ft. Walton
   c. Okaloosa Island
   d. If not: other:_____

3. [If yes to Q2]. What type of lodging accommodations are you using during your visit?
   a. Condo
   b. Hotel
   c. House rental
   d. Stay with friends/family
   e. Campground/ RV park

4. [If yes to Q2].How many nights do you plan on staying in the area?

5. What is the purpose of your trip?
   a. Vacation
   b. Visit family/friends
   c. Part of a Group

Appendix C: Emerald Coast Tourism Survey Instrument

d. Business

e. Shopping

f. Other(please specify)_____

a. [If response is "A," "B" or "C" ask] What activities are you participating in:

b. Local Attraction

c. Water Sports

d. Fishing

e. Beaches

f. Special Events

6. Is this your first visit to the area?

a. [If no]. How many times do you visit annually?

7. What type of transportation did you use to travel to the area?

a. Car

b. RV

c. Plane

d. Boat

e. Other (specify)

8. How many people are in your party?

a. [If more than one] What are the ages of those in your party?

i. Age group: 18-25, 25-35, 35-45, 45-55, 55+

9. For the length of your stay, how much do you estimate you will spend on the following items?

a. Accommodations

b. Food

c. Entertainment

Appendix C: Emerald Coast Tourism Survey Instrument

d. Shopping

e. Transportation/Gas (in the area)

f. Miscellaneous

10. How satisfied are you with your visit to the Emerald Coast?

a. Very Dissatisfied

b. Dissatisfied

c. Neutral

d. Satisfied

e. Very Satisfied

i. [If very dissatisfied/dissatisfied] Why? (open ended)

11. Are you likely to refer the Emerald Coast to a friend or family member?

a. Yes

b. No

12. Do you plan to return to the area in the next 12 months?

a. Yes

b. No

i. If yes, how often? (open ended)

13. Please indicate your age group.

a. 18-25, 25-35, 35-45, 45-55, 55+

14. In what ZIP code do you currently reside?

15. What best describes your household income before taxes?

a. Less than $40K

b. $40-60K

Appendix C: Emerald Coast Tourism Survey Instrument

c. $60-75K

d. $75-100K

e. $100-150K

f. $150K+

g. Unsure

h. Unwilling to answer

Thank you very much for your time and helping us with our survey.

Emerald Coast Visitor Profile Survey

Summer Quarterly Report: June - August 2014

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About Us

Located in the SunTrust Tower in historic downtown Pensacola, Florida, the Haas Center collects, analyzes and distributes economic data for clients seeking expert economic advice. We exist to help entrepreneurs and industry leaders—from traditional manufacturing to emerging technologies—meet their information needs in the modern economy.

The Haas Center specializes in data analysis for the purposes of economic forecasting, marketing research, business expansion, tourism, and real estate development, as well as industry and academic studies. The Haas Center's staff combine academic credentials with varied experience, ranging from economists to survey specialists. Each professional combines innovation with attention to detail to produce high-quality research products for Center clients.

For further information please visit our website at haas.uwf.edu, or contact Brice Harris at bharris@uwf.edu.

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Executive Summary

The Haas Center has been commissioned by the Emerald Coast Convention and Visitors Bureau to complete a visitor profile of those who travel to the Emerald Coast (Fort Walton Beach, Okaloosa Island and Destin). Survey professionals will conduct intercept surveys for one year to capture multiple data points, including demographics, visitor satisfaction, length of stay and spending patterns. This report profiles visitor information for the summer quarter (June, July and August) 2014. As the demographic composition of visitors changes from quarter to quarter, the statistics captured in this report are completely unique to the summer quarter.

The Haas Center surveyed 626 visitors over the quarter. These participants provided a diverse age sample, though skewed slightly younger because of the frequency of larger parties with children. Overall, it is estimated that more than 566,000 unique visitors traveled to the Emerald Coast during the summer quarter. This figure is based on visitors who stayed in hotels, motels, condominiums and house rentals. Nearly 200,000 of these visitors stayed in hotels or motels, while another 298,000 used condos for their accommodations. Another 68,000 tourists rented houses for their trip. It is estimated that approximately 85% of hotel rooms were booked for the summer quarter, while 100% of condos were occupied.

The median party size was 4.0 people, while the average group size was slightly larger at 4.07. The party size had a significant impact on the type of lodging that was chosen for accommodations. For example, smaller parties (3.40 people) tended to stay with family and friends, while larger parties (6.13 people) were more likely to rent a house. Approximately 61% of visitors stayed for a week or less, with the mean stay at 6.41 nights. Most visitors to the Emerald Coast stayed in Destin, traveled to the area by car and used a condo or hotel for their accommodations. Nearly 83% visited the area for vacation purposes, and most participated in beach and shopping activities. In total, more than 99% of visitors were satisfied with their trip, and 99.1% would refer the area to their friends or family.

Introduction

The Haas Center for Business Research and Economic Development has been commissioned by the Emerald Coast Convention and Visitors Bureau to conduct a tourism study of the Emerald Coast. The study will utilize survey data to estimate the number of unique visitors coming to the region on a quarterly basis. For a 12-month period between March 2014 and February 2015, the Haas Center will have survey professionals in the field conducting visitor intercept surveys throughout Fort Walton Beach, Okaloosa Island and Destin, Florida. Data collected from these surveys, in conjunction with bed tax collections as well as with county and state data regarding condo and hotel unit availability, are used to estimate the total number of visitors who arrive in the region on a quarterly basis.

Table 1. Average Spending Per-Person, Per-Night Emerald Coast

Expenditure Type	Okaloosa	Okaloosa %
Accommodations	$45.09	42.34%
Food & Beverage	$17.46	16.39%
Entertainment	$12.36	11.61%
Shopping	$22.73	21.34%
Transportation	$4.60	4.32%
Miscellaneous	$4.27	4.01%
Total	**$106.50**	**100.00%**

As data is collected over a 12-month period, Haas Center researchers will report these figures via four quarterly reports. Each report will provide a number of data points describing visitor traffic to the area, including demographics, residency, spending patterns, length of stay, party size, reason for visit and visitor satisfaction. Furthermore, each report will provide a breakdown of estimated visitors by accommodation type. Table 1 provides the overall estimates for per-person, per-night visitor expenditures. As can be seen, survey respondents reported spending approximately 42% of all expenditures on accommodations, followed by 21% on shopping, 16% on food and beverage, 4% on transportation, 12% on entertainment and just over 4% on miscellaneous items.

Purpose and Scope. The purpose of this report is to provide in-depth details about demographic and economic trends of Emerald Coast tourism for the summer quarter of 2014 (June, July and August). Located in the panhandle of Florida, the Emerald Coast is home to many tourist attractions, including beaches, water-based activities, parks and mid-to high-end shopping centers. While many beach communities collect bed taxes that provide visitor estimates, most fail

to capture spending patterns of these visitors. As such, the Haas Center has been contracted to collect quarterly visitor and spending data that provides estimates for all visitor types. Ultimately, this data will provide a distinct visitor count per quarter. At the end of the collection period, the Haas Center will utilize these data to conduct an economic impact assessment of the tourism industry along the Emerald Coast.

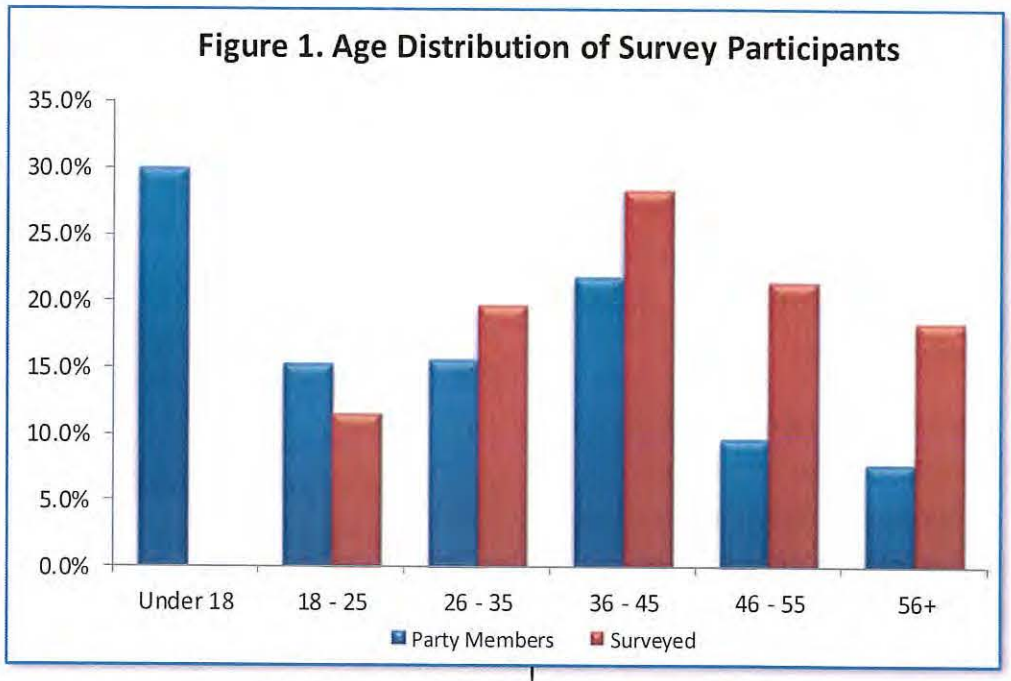
This study utilizes intercept survey techniques to obtain tourist demographics, lodging and transportation habits, spending patterns and overall satisfaction. In order to ultimately calculate the economic impact, the survey focuses on in-area spending patterns. This report does not attempt to quantify the externalities that are undoubtedly associated with the Emerald Coast tourism industry; rather, the report provides key marginal results from the survey, as well as estimated visitor totals.

Methodology

Throughout the summer quarter of 2014, the Haas Center has administered intercept surveys that collected details about unique visits to the Emerald Coast. Survey professionals spent sixteen hours a week throughout the quarter conducting interviews. Several aspects of data collection were randomized, with interviewers alternating the days of the week, locations and time of day in which they approached visitors. These locations included multiple shopping centers, public beaches, commercial areas and waterfront boardwalks. Survey researchers approached more than 1,919 adults during the summer quarter. Among the sampling frame, approximately 33%, or 626 respondents, participated in the survey.

The intercept survey measures and tracks several key elements about the Emerald Coast tourism market. This information includes demographics, particularly age and household income; primary residence; method of transportation; lodging; and party size. The survey also collects estimates on spending in several categories, including accommodations, transportation, food, entertainment and shopping. Additionally, visitors are asked about their overall

satisfaction with their visit to the area. The survey questions seek details on visitors' likelihood to return to the area and their willingness to refer the area to a friend or family member.



Survey Results

In order to better understand tourism patterns along the Emerald Coast, it is necessary to identify the demographic make-up of those visiting the region, including their age, income, party size and place of origin.

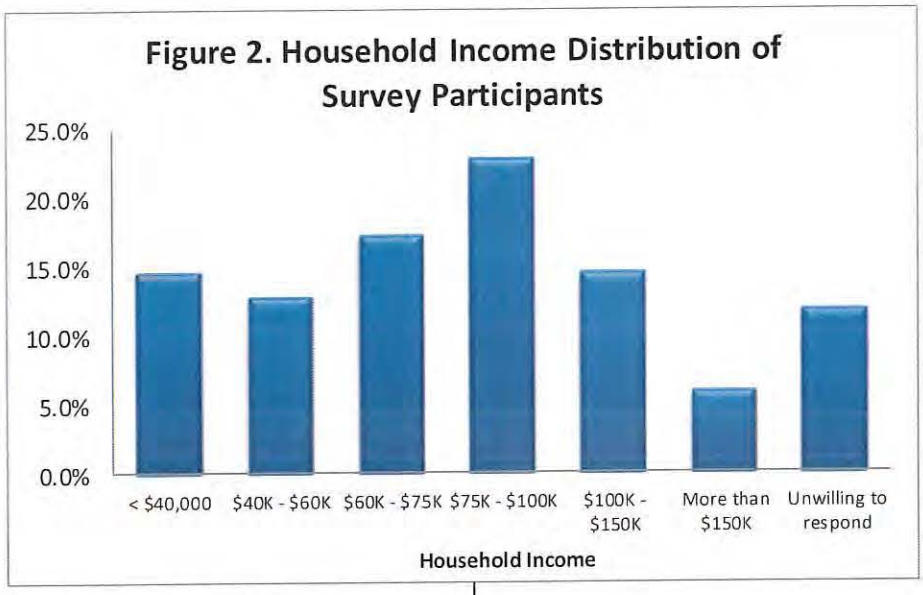
Age. The survey captures several demographic elements used to measure the type of visitors traveling to the Emerald Coast. Figure 1 presents the age distribution of survey respondents, as well as that of members of their party. As can be seen, the distribution of surveyed individuals is fairly normal. Approximately 28% of those surveyed were between the ages of 36 and 45. Those aged between 18 and 25 years were the smallest amount of the surveyed population (11.5%). However, the age distribution of all party members is much more skewed to the left, with 30% of all party members reported as being under the age of 18. Indeed, nearly 61% of non-surveyed members of the party were 35 years old or younger. Undoubtedly, these data capture the high frequency of family and group vacations that occur in the summer months.

Table 2. Distribution of Party Size

Party Size	Percent
One	4.7%
Two	22.6%
Three	20.5%
Four	20.2%
Five	13.5%
Six	6.4%
Seven	4.3%
Eight	1.7%
Nine	1.4%
Ten	4.5%
Fourteen	0.2%
Mean Party Size	4.07
Median Party Size	4.0

Party Size. Another component measured is the party size of each respondent. As the data in Table 2 indicate, just over a quarter (27.3%) of all participants were traveling either by themselves or with one other person. More than 70% of those polled had a party size of

three or more. Additionally, two more statistics on party size have been calculated: average and median party size. The average party size, 4.07, is slightly higher than the median party size, 4.0.



Household Income. Figure 2 presents the distribution of household income for all respondents. Of all respondents, nearly 12% were unwilling to disclose their household income. Interestingly, the $75,001 — $100,000 income bracket had the most visitors in the summer quarter. There were approximately 5.5% more visitors in this group than in the next closest income group. Since the distribution is relatively normal in Figure 2, the two most proximate income groups are quite similar to one another. About 17% of households claimed between $60,001 and $75,000, while another 14.6% made between $100,001 and $150,000. However, nearly 30% of survey participants indicated they received less than $60,000 in household income annually. The smallest share of survey participants, nearly 6%, had a household income of more than $150,000.

Table 3. Top Ten Origin States of Visitors

State	Percent
Florida	17.1%
Texas	10.3%
Georgia	4.7%
Alabama	4.6%
Louisiana	3.6%
California	3.3%
Pennsylvania	3.3%
Tennessee	3.3%
Illinois	2.9%
New York	2.6%

Place of Origin. The top ten origin states of survey respondents are listed in Table 3. While six of the top represented states are from the Southeast, it is worth noting that 13.4% of visitors come from California, New York, Pennsylvania and Illinois. Figure 3 (on the following page) presents a geographical distribution of where all respondents report as their state of origin. The data show 48 states are represented, with only Hawaii and Rhode Island not included. Approximately 52% of respondents claim to be from the southeast United States, including Alabama, Florida, Georgia,

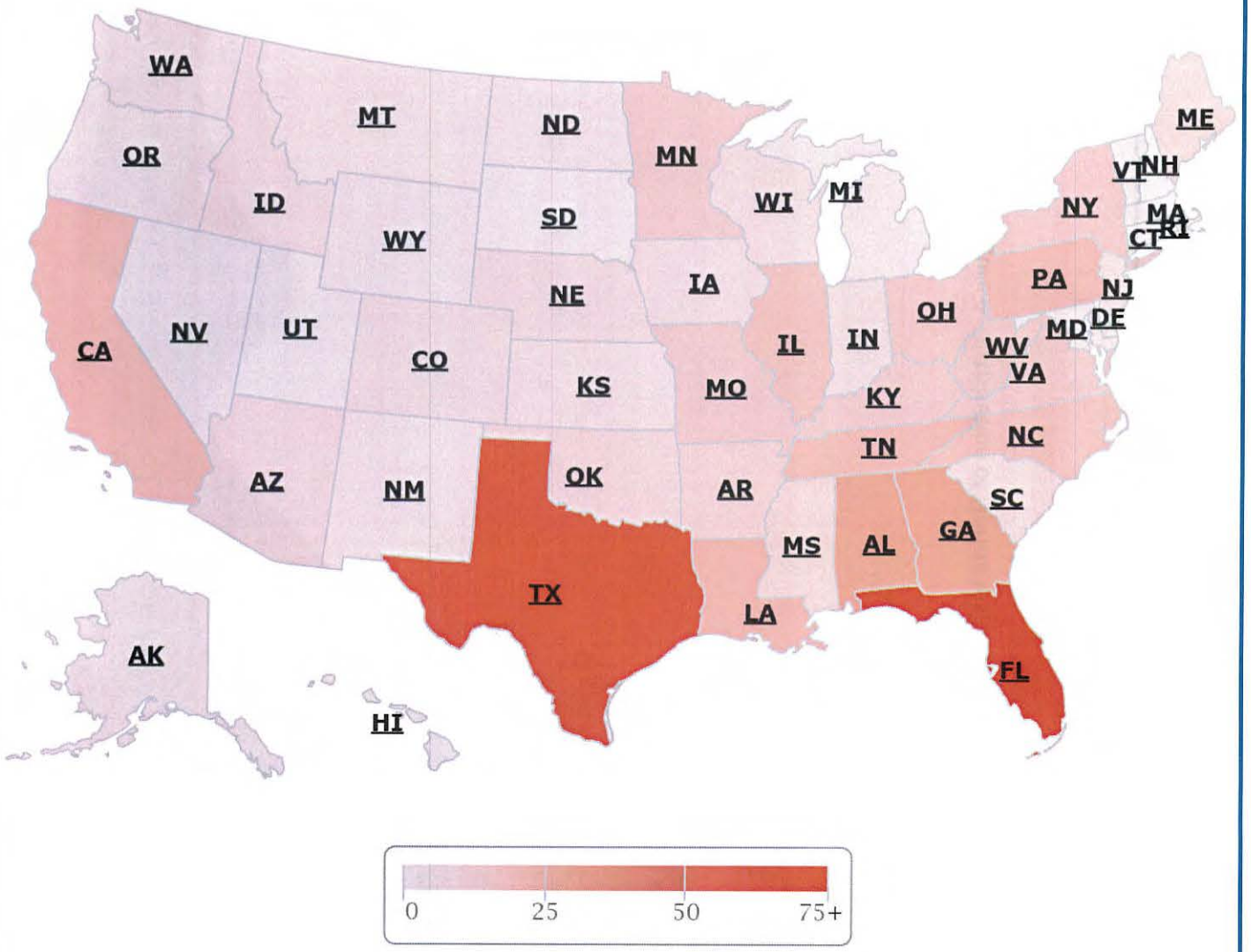


Figure 3. Distribution of Visitors by State

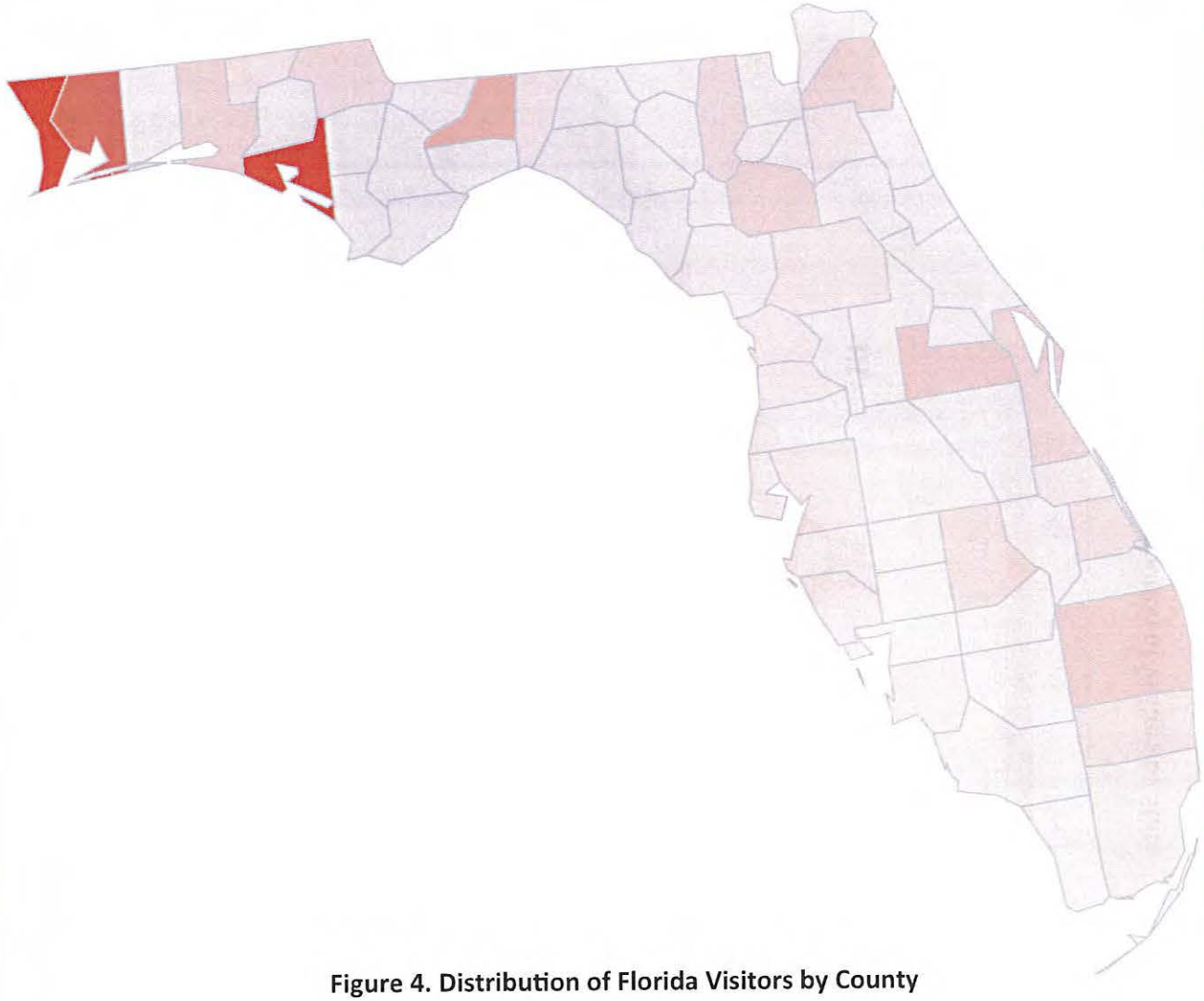
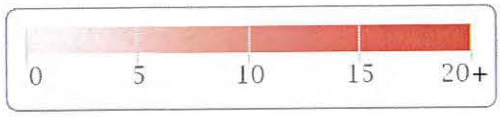


Figure 4. Distribution of Florida Visitors by County



Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee and Texas. Nearly half of all visitors were from outside the region.

The largest group (17.1%) of Emerald Coast tourists are visiting from other Florida counties. Figure 4 (pg. 10) presents a geographical distribution of in-state respondents' county of origin. Residents of Escambia County were the largest group of in-state visitors represented in the survey, at approximately 22%. This large group of Florida visitors was closely followed by Bay County (18.1%), Santa Rosa County (12.4%) and Leon County (5.7%). Visitors also came from Palm Beach, Orange, Alachua, Duval and Miami -Dade counties. Many of these counties represent densely populated areas throughout the state, increasing their odds of representation.

Finally, approximately 1% of visitors traveled to the Emerald Coast from foreign countries. Of these countries, Canada has the largest representation, followed by Puerto Rico (U.S. territory) and India.

Lodging and Transportation. As presented in Table 4, approximately 43% of respondents stayed in the Destin area, followed by Fort Walton Beach (21.3%) and Okaloosa Island (17.2%). The remaining 18.6% of tourists were either taking a day trip to the area (7.0%); staying overnight, but not in the area (8.6%); or were unsure of their nightly accommodation location (3.0%). The nearly 9% of respondents who stayed overnight, but not in the Emerald Coast area, stayed in various locations. Approximately one-third of this group were either staying in Panama City or Navarre; however, other common answers provided by respondents included Pensacola, Niceville and Miramar Beach.

The results presented in Table 5 indicate that an overwhelming majority of people who traveled to the Emerald Coast used only one mode of transportation. Most visitors, 86%, used a car to reach their

Table 4. Location of Lodging

Location	Percent
Destin	42.9%
Okaloosa Island	17.2%
Fort Walton Beach	21.3%
Day Trip Only	7.0%
Staying overnight, but not in the area	8.6%
Unsure	3.0%

Table 5. Transportation Type

Mode	Percent
No Response	0.6%
Car	86.0%
Other	0.5%
Plane	10.0%
RV	2.9%

Table 6. Type of Lodging

Location	Percent
Campground or RV	1.4%
Condo	31.5%
Hotel	33.7%
House Rental	14.0%
Stay with Friends or Family	9.5%
Unwilling to respond	0.2%

destination. Traveling by plane (10%) and RV (2.9%) were distant runners-up. Using other means of transportation, like buses, accounts for less than 1% of survey responses.

Similarly, the results in Table 6 (on the previous page) show the distribution of visitors' lodging accommodations. Approximately two-thirds of respondents stayed in either a hotel (33.7%) or a condo (31.5%). About 14% of respondents reported using a house rental. Approximately one out of every 10 respondents indicated that he or she was staying with friends or family, while just over 1% of respondents reported that they were staying at a campground or in an RV. It is important to note that this group (friends/family and campground/RV) does not contribute to bed tax collections. As bed tax collections are the primary source for visitor estimates, those visitors who stay in accommodations not subject to the bed tax may not be counted in annual tourism estimates.

Table 7. Length of Stay

Range	Percent
< 3 days	2.3%
3 - 5 days	28.9%
6 - 7 days	30.1%
8 - 10 days	14.9%
11 - 14 days	10.7%
15 - 30 days	11.5%
31 - 60 days	1.6%

Table 8. Average Estimated Spending for Length of Stay

Type of Spending	Mean	Median
Accommodations	$444.24	$699.30
Food	$346.00	$246.67
Entertainment	$189.16	$182.19
Shopping	$376.82	$263.73
Transportation	$90.68	$85.08
Miscellaneous	$37.09	$28.83

Length of Stay. Table 7 presents data demonstrating a relatively wide range of responses for length of stay along the Emerald Coast. The median number of nights stayed is 4.59, while the mean is 6.41 nights. However, the mean is skewed slightly upward by those respondents who stay for multiple weeks. The median is a more accurate representation of length of stay as it eliminates the distorting effects of those few long-term visitors. The two most common lengths of stay are between three and five days, as well as between six and seven days. Considered together, approximately 61% of respondents indicated they were visiting the Emerald Coast for a week or less. In addition, more than a quarter of respondents were staying between 8 and 14 days.

Spending Patterns. A comprehensive list of estimated, average spending is provided for visitors in Table 8. Once again, statistics for both mean and median spending are provided to eliminate the distorting effects of long-term visitors. According to the data, expenditures on accommodations are estimated to be the highest

Table 9. PER-NIGHT, PER-PERSON by Lodging							
Type of Lodging	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Campground/RV	$11.61	$12.05	$6.96	$15.10	$2.97	$0.63	$49.31
Condo	$48.69	$19.74	$9.64	$27.72	$4.28	$2.67	$112.75
Hotel	$34.19	$19.41	$7.65	$22.34	$4.96	$1.46	$90.01
House Rental	$32.70	$13.09	$5.31	$13.78	$3.04	$1.24	$69.17
Friends/Family	$1.57	$13.57	$7.00	$19.38	$4.17	$1.40	$47.08

Table 10. PER-NIGHT, PER-PERSON by Household Income							
Household Income	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
$40K or Less	$25.90	$8.09	$4.20	$10.02	$2.67	$0.92	$51.79
$40K - $60K	$21.61	$9.56	$3.54	$11.97	$2.76	$1.59	$51.03
$60K - $75K	$35.40	$16.94	$8.93	$20.05	$4.80	$1.99	$88.10
$75K - $100K	$34.98	$18.96	$7.25	$28.62	$4.41	$1.35	$95.57
$100K - $150K	$63.38	$31.71	$15.18	$36.65	$7.19	$3.28	$157.39
< $150K	$53.72	$23.26	$10.52	$23.16	$5.64	$5.02	$121.32

Table 11. PER-NIGHT, PER-PERSON by Reason for Visit							
Reason for Trip	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Business	$35.42	$14.16	$6.13	$13.69	$8.59	$2.81	$80.79
Other	$64.52	$11.44	$33.29	$9.29	$4.79	$1.34	$124.65
Part of a Group	$20.64	$17.41	$13.17	$10.12	$5.39	$4.66	$71.39
Shopping	$14.09	$13.09	$3.52	$50.16	$9.18	$1.79	$91.84
Vacation	$37.20	$17.34	$7.33	$22.01	$4.17	$1.88	$89.94
Visiting Family/	$14.81	$11.47	$7.39	$16.59	$3.83	$1.64	$55.73

expense for visitors. For the entire length of stay, the estimated mean spending on lodging is $444, whereas the median is $699. The average expenditures for shopping, $377, are the second-highest expense for visitors. On average, visitors also spend hundreds of dollars on food, entertainment and transportation.

Tables 9 through 11 explore several patterns of per-person, per-night spending for all six categories of expenditures by different groups.[1] In

1. With analysis of only one quarter's data, caution should be taken when analyzing per-person, per-night spending by sub group, as sample size decreases significantly for certain groups. After four quarters of data have been collected, sample sizes for each sub group will increase, therefore increasing the statistical significance for each sub group's spending patterns.

Table 9, per-person, per-night spending is examined by type of lodging. The data indicate that respondents staying in condos spent the most money per person and per night on accommodations, at $48.69, and overall, at $112.75. Indeed, visitors staying in condominiums spent more in every category except in that of transportation. Visitors who used hotels for trip accommodations spent the most on transportation, though otherwise they consistently spent the second most on all other type of expenditures. Furthermore, those respondents staying in a house rental spent the least amount of money on entertainment and shopping. Those respondents staying with family or friends spend the least on accommodations at $1.57 per person, per night.

In Table 10, per-person, per-night spending is examined by household income. Those who reported earning an annual income between $100,000 and $150,000 spend more than any other income level. On shopping alone, this group spends nearly 60% more per person, per night than the next closest income group. Those who earn more than $150,000 a year spent the second most in total expenditures per person, per night. Intuitively, this is to be expected as higher income groups *should* have the greatest amount of disposable income. Also as expected, those with the least amount of *presumed* disposable income, $60,000 or less in household income, spend the least in all categories.

Table 12. Mean Party Size by Type of Lodging

Type of Lodging	Party Size
Campground or RV	4.33
Condo	4.09
Hotel	3.37
House Rental	6.13
Stay With Friends or Family	3.40

Table 13. Visitors' Purpose for Trip

Purpose	Percent
Business	2.2%
Other	1.4%
Part of a Group	2.4%
Shopping	2.9%
Unwilling to Respond	0.2%
Vacation	83.1%
Visiting Family or Friends	7.8%

Table 14. Visitors' Activities While in Area

Activities	Percent
Beaches	86.8%
Fishing	15.1%
Local Attractions	22.6%
Shopping	74.6%
Special Events	10.8%
Water Sports	10.8%

Finally, Table 11 presents per-person, per-night spending patterns by reason for visit. Visitors who traveled to the Emerald Coast for other reasons have a higher rate of total spending, at $124.65 per night, per person. Based on preliminary data, this group spends much more on accommodations as well as on entertainment. As anticipated, those who visited the Emerald Coast for shopping indicated they spent more

on shopping per person than any other group. Shopping visitors also spent more money on transportation with approximately $9.18 spent per person, per night. Of interesting note, those visiting the Emerald Coast as part of a group spent more on food and beverage.

Visiting the Emerald Coast. While respondents visited the Emerald Coast for a host of different reasons, it is clear that the most common reason was to vacation. In Table 13 (previous page), the primary reasons for visiting the Emerald Coast are listed. Approximately 83% of all respondents listed that their primary motivation for traveling to the area was to vacation. The second most common reason was to visit family and friends (7.8%). Table 13 also shows that people came specifically to shop (2.9%), to participate in group activities (2.4%) or for business (2.2%).

Survey professionals also asked participants what activities they were participating in if they had traveled for vacation, to visit family or friends or were in the area as part of a group. The responses in Table 14 show that nearly 87% reported visiting beaches, while approximately 75% went shopping. Many visitors frequented local attractions (22.6%) or headed to special events (10.8%). Emerald Cost visitors also took advantage of the area's excellent fishing (15.1%) or watersports (10.8%) during their time in Okaloosa County.[2]

Additionally, participants were asked about the frequency of their trips to the Emerald Coast. Participants reported in Table 15 that over half (54.7%) were visiting the area for the first time. Alternatively, 45.3% of respondents had previously

Table 15. First Time Visitors to the Area

First-Time Visitor	Percent
No	45.3%
Yes	54.7%

Table 16. Annual Visits to Emerald Coast

Number of Visits	Percent
Zero	2.8%
One	48.9%
Two	16.2%
Three	7.4%
Four	4.6%
Five	3.2%
Six	1.8%
Seven or More	4.6%
Don't Know	10.6%

Table 17. Visitors Who Plan to Return in the Next Twelve Months

Likely to Return	Percent
Don't Know	31.3%
No	30.4%
Yes	38.3%

Table 18. Visitor Satisfaction with Trip

Satisfied with Trip	Percent
Neutral	0.8%
Satisfied	11.1%
Very Satisfied	88.1%

Table 19. Likely to Refer Family or Friends

Likely to Refer	Percent
Don't Know	0.7%
No	0.2%
Yes	99.1%

2. Please note, these percentages sum to more than 100% as respondents are allowed to provide more than one answer.

Table 20. Number of Unique Visitors to the Emerald Coast Summer Quarter 2014								
Type	Distribution of Bed Tax	Bed Tax Summer 2014	Revenue	Avg. Nightly Rate	Total Nights	Party Size	Length of Stay (Days)	Visitors
Condo	62%	$4,969,142	$99,382,837	$198.93	499,599	4.1	6.9	298,301
Hotel/Motel	22%	$1,742,426	$34,848,527	$115.14	302,662	3.4	5.1	199,603
House Rental	13%	$1,024,482	$20,489,643	$200.30	102,296	6.1	9.1	68,607
Total Unique Visitors: 566,511[3]								

visited the area. As indicated in Table 17, just over 38% of respondents reported that they were already planning to return to the area in the next year, whereas 30.4% said no, and 31.3% did not know.

Survey respondents also gave information on their overall satisfaction with their trip, provided in Table 18. For all visitors, 99.2% responded that they were either satisfied or very satisfied with their visit to the Emerald Coast. Of those, approximately 88% indicated that they were very satisfied with their trip. Only 0.8% of respondents felt neutral regarding their trip, and zero reported being dissatisfied. Finally, Table 19 shows that nearly every respondent (99.1%) would be likely to refer the Emerald Coast to a friend or family member.

Visitor Estimates by Accommodation

In order to provide visitor estimates for the summer quarter, Haas Center researchers utilize several data points collected from various sources. A primary input into visitor estimate calculations are bed taxes, which are collected on all short-term rentals in the southern portions of Okaloosa County. Data on these collections are reported by the Okaloosa County Tax Collector (OCTC) on a monthly basis; however, there is typically a two -month lag in reporting times. As of this report, the most recent data available is from July 2014. Because of these limitations, year-over-year bed tax data have been used to estimate growth from summer quarter 2013 to 2014. Based on data derived from the OCTC, summer 2013 bed tax collections were reported at approximately $7.28 million. The year-over-year change in bed tax collections was approximately 15% between

3. Excluding those visitors who stayed with friends/family or at a campground/RV park.

July 2013 and 2014. Assuming collections for August 2014 would also grow at this rate, bed tax collections for the summer 2014 quarter are estimated to be $7.7 million. This figure, in turn, is used to estimate unique visitor counts.

The other primary input into our visitor calculations is the survey data collected by the visitor intercept surveys. Values highlighted in Table 20 indicate primary data collected via these surveys. Here, average nightly rate, average party size and average length of stay, in addition to the bed tax data, are used to calculate the number of unique visitors to the Emerald Coast during summer 2014.[4] As the table indicates, it is estimated that over 566,000 visitors traveled to the Emerald Coast during the summer months.

Table 21. Occupancy Rates for Condo and Hotel Units Summer Quarter 2014

Type	Units Available	Total Nights	Quarterly Supply of Units	Occupancy Rate
Condo	4,681	299,256	430,652	100%
Hotel/Motel	3,111	172,528	286,212	85%

Table 22. Total Visitor Spending by Accommodation Type

Type	Per-Person, Per-Night Expenditures	Number of Unique Visitors	Total Direct Spending
Condo	$112.75	298.301	$33,633,420
Hotel	$90.01	199,603	$17,966,237

Furthermore, based on lodging data from the Florida Department of Business & Professional Regulation (May 2014), over 4,600 condo units and 3,100 hotel/motel units are reported to have been available throughout Destin, Okaloosa Island and Fort Walton Beach. Utilizing these data, in conjunction with total nights stayed, Haas Center researchers are able to estimate condo and hotel/motel occupancy rates. As indicated in Table 21, these rates are 100% and 85%, respectively.

Once visitor estimates have been calculated, it is now possible to determine total visitor spending by those staying in either condo or hotel accommodations. Based on the per-person, per-night spending figures of those staying in a condo or hotel (reported in Table 9), total spending estimates have been calculated for each group and are presented in Table 22. As the table indicates, it is estimated that condo visitors, during the summer quarter, spent over $33 million along the Emerald Coast, while those staying in a hotel spent nearly $18 million.

Conclusion

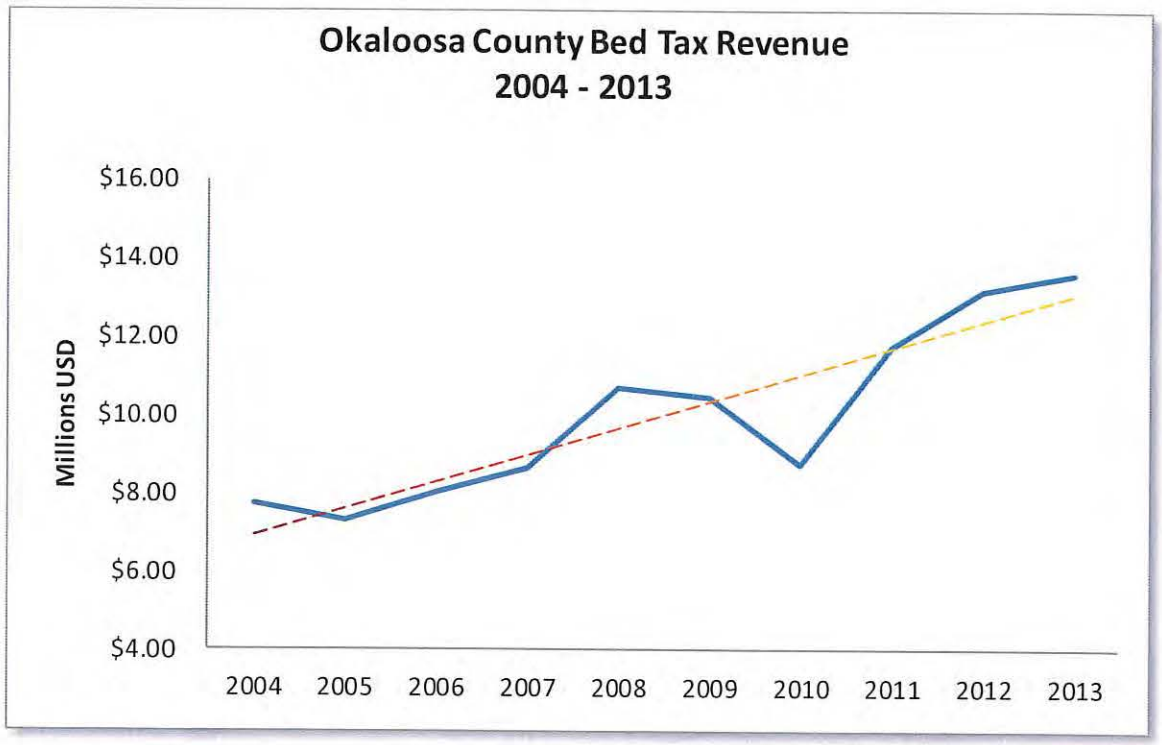
Based on the survey data collected during the summer quarter 2014, it is

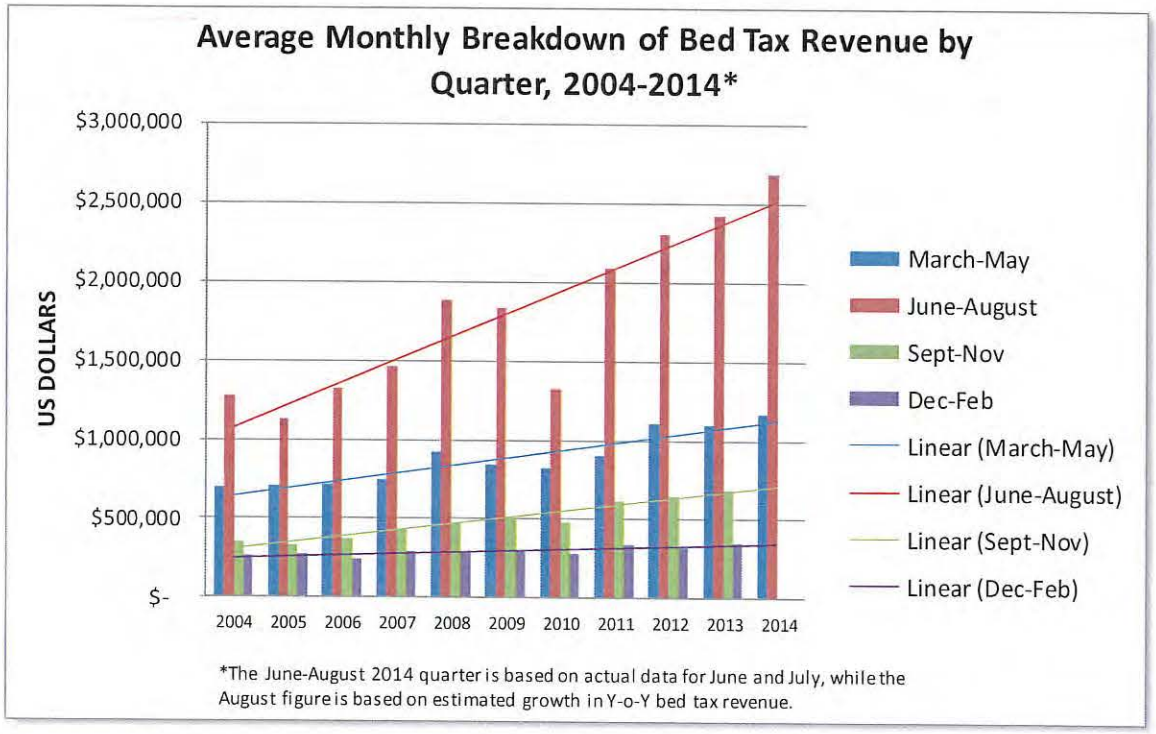
4. Please note that the figures reported by survey participants are estimates and may vary from hose reported by accommodation establishments.

estimated that more than 566,000 visitors traveled to the Emerald Coast during this period. Those visitors staying in either a condo or a hotel/motel spent an estimated $51 million on accommodations, food, entertainment and other expenditures. Throughout a record-breaking summer, occupancy rates reached an average of 100% for condos and 85% for hotels and motels.

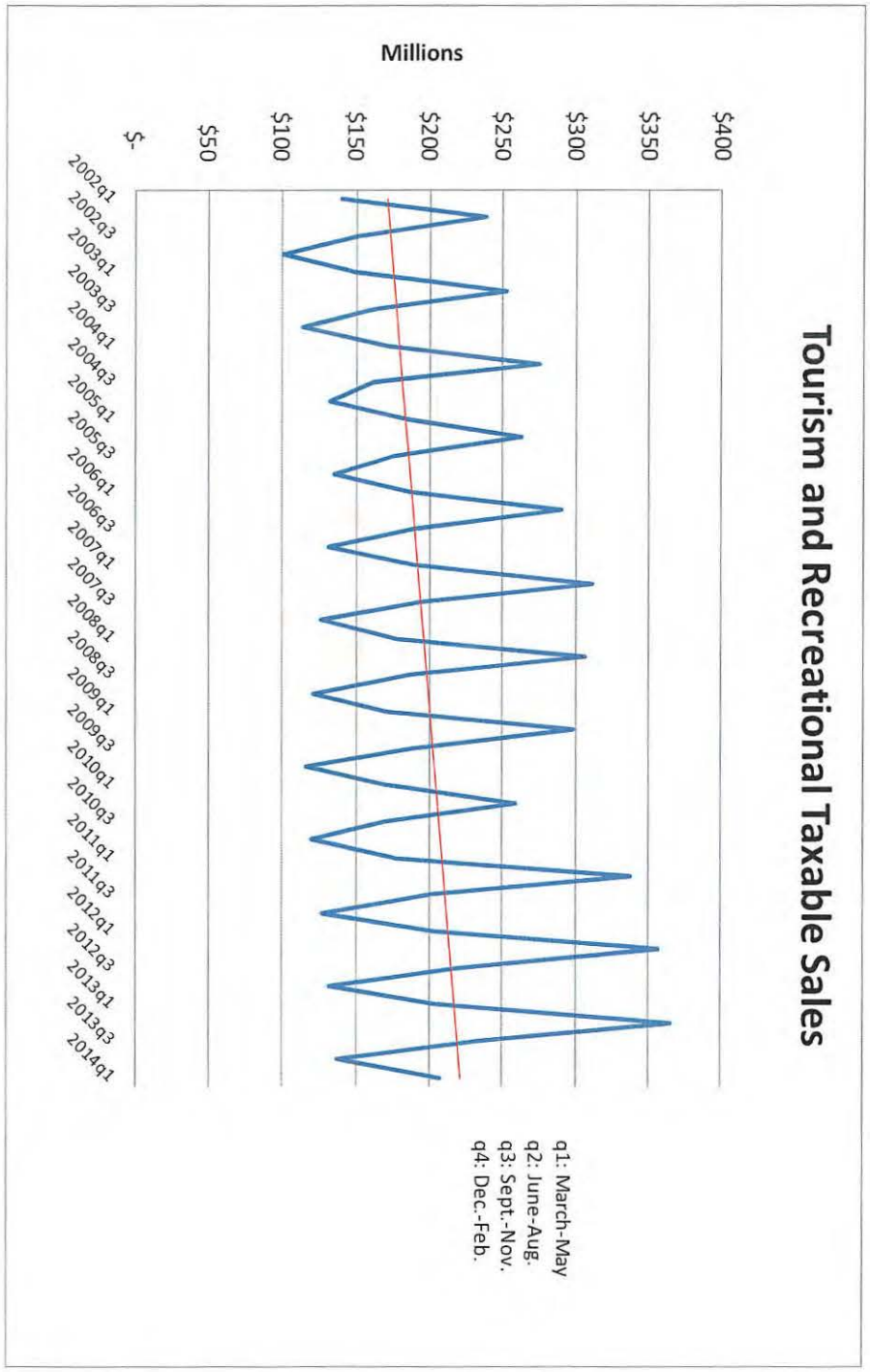
During this quarter, the Haas Center surveyed 638 visitors. The average party had 4.07 guests, stayed in a hotel or condo, traveled by car to the area and planned to stay for a week or less. Many of these visitors were from the Southeast, and approximately 17% were from other parts of Florida. Approximately 83% of Emerald Coast visitors traveled to the area for vacation. More than 86% of all visitors reported visiting the beaches, while another 75% reported visiting the area's shopping centers. Accommodations were often the largest portion of total expenditures for the trip. Visitors were split evenly between first-time and returning guests. Overwhelmingly, 99% of visitors were satisfied with their trip to the Emerald Coast and would refer the area to their friends and family. In fact, more than 38% of visitors were already planning to visit the area again within the next twelve months.

Appendix A: Okaloosa County Bed Tax Summaries 2004-Present





Appendix B:Tourism and Recreation Taxable Retail Sales Summary



Appendix C: Emerald Coast Tourism Survey Instrument

Tourism and the Okaloosa County Economy

Final Survey Questions

February 26, 2014

Hello, my name is _____ from the Haas Center at the University of West Florida. We are conducting marketing research regarding visitation to the Emerald Coast. Would you be willing to take a short 5-8 minute survey regarding your time spent in southern Okaloosa County?

1. If yes, are you visiting the area and at least 18 years old?

   If no, end of survey.

2. If yes, are you currently staying overnight in the Destin, Ft. Walton Beach or Okaloosa Island area?
   a. Destin
   b. Ft. Walton
   c. Okaloosa Island
   d. If not: other:_____

3. [If yes to Q2]. What type of lodging accommodations are you using during your visit?
   a. Condo
   b. Hotel
   c. House rental
   d. Stay with friends/family
   e. Campground/ RV park

4. [If yes to Q2].How many nights do you plan on staying in the area?
5. What is the purpose of your trip?
   a. Vacation
   b. Visit family/friends
   c. Part of a Group

Appendix C: Emerald Coast Tourism Survey Instrument

d. Business

e. Shopping

f. Other(please specify)_____

a. [If response is "A," "B" or "C" ask] What activities are you participating in:

b. Local Attraction

c. Water Sports

d. Fishing

e. Beaches

f. Special Events

6. Is this your first visit to the area?

a. [If no]. How many times do you visit annually?

7. What type of transportation did you use to travel to the area?

a. Car

b. RV

c. Plane

d. Boat

e. Other (specify)

8. How many people are in your party?

a. [If more than one] What are the ages of those in your party?

i. Age group: 18-25, 25-35, 35-45, 45-55, 55+

9. For the length of your stay, how much do you estimate you will spend on the following items?

a. Accommodations

b. Food

c. Entertainment

Appendix C: Emerald Coast Tourism Survey Instrument

d. Shopping

e. Transportation/Gas (in the area)

f. Miscellaneous

10. How satisfied are you with your visit to the Emerald Coast?

a. Very Dissatisfied

b. Dissatisfied

c. Neutral

d. Satisfied

e. Very Satisfied

i. [If very dissatisfied/dissatisfied] Why? (open ended)

11. Are you likely to refer the Emerald Coast to a friend or family member?

a. Yes

b. No

12. Do you plan to return to the area in the next 12 months?

a. Yes

b. No

i. If yes, how often? (open ended)

13. Please indicate your age group.

a. 18-25, 25-35, 35-45, 45-55, 55+

14. In what ZIP code do you currently reside?

15. What best describes your household income before taxes?

a. Less than $40K

b. $40-60K

Appendix C: Emerald Coast Tourism Survey Instrument

c. $60-75K

d. $75-100K

e. $100-150K

f. $150K+

g. Unsure

h. Unwilling to answer

Thank you very much for your time and helping us with our survey.

Emerald Coast Visitor Profile Survey

Fall Quarterly Report: September-November 2014

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ABOUT US

Located in the SunTrust Tower in historic downtown Pensacola, Florida, the Haas Center collects, analyzes and distributes economic data for clients seeking expert economic advice. We exist to help entrepreneurs and industry leaders—from traditional manufacturing to emerging technologies—meet their information needs in the modern economy.

The Haas Center specializes in data analysis for the purposes of economic forecasting, marketing research, business expansion, tourism, and real estate development, as well as industry and academic studies. The Haas Center's staff combine academic credentials with varied experience, ranging from economists to survey specialists. Each professional combines innovation with attention to detail to produce high-quality research products for Center clients.

For further information please visit our website at haas.uwf.edu, or contact Brice Harris at bharris@uwf.edu.

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Executive Summary

The Haas Center has been commissioned by the Emerald Coast Convention and Visitors Bureau to complete a visitor profile of those who travel to the Emerald Coast (Fort Walton Beach, Okaloosa Island and Destin). Survey professionals will conduct intercept surveys for one year to capture multiple data points, including demographics, visitor satisfaction, length of stay and spending patterns. This report profiles visitor information for the fall quarter (September, October and November) 2014. As the demographic composition of visitors changes from quarter to quarter, the statistics captured in this report are completely unique to the fall quarter.

The Haas Center surveyed 319 visitors over the quarter. These participants provided a diverse age sample, though skewed slightly younger. Overall, it is estimated that more than 241,365 unique visitors traveled to the Emerald Coast during the fall quarter. This figure is based on visitors who stayed in hotels, motels, condominiums and house rentals. Approximately 111,847 of these visitors stayed in hotels or motels, while another 104,633 used condos for their accommodations. Another 24,885 tourists rented houses for their trip. It is estimated that approximately 31% of hotel rooms were booked for the fall quarter, while 31% of condos were also occupied.

The median party size was 3.0 people, while the average group size was slightly larger at 3.23. The party size had some impact on the type of lodging that was chosen for accommodations. For example, smaller parties (2.75 people) tended to stay in a hotel, while larger parties (4.17 people) were more likely to rent a house. Approximately 50.2% of visitors in the fall quarter stayed for three to five days. Most visitors to the Emerald Coast stayed in Destin, traveled to the area by car and used a condo or hotel for their accommodations. Nearly 40% visited the area for vacation purposes, while another 30% came to the area to visit family or friends. Visitors participated in a range of activities, including beaches (54.2%), shopping (38.2%) and local attractions (27.4%). In total, more than 90% of visitors were satisfied or very satisfied with their trip, and over 90% were willing to refer the area to their friends or family.

Introduction

The Haas Center for Business Research and Economic Development has been commissioned by the Emerald Coast Convention and Visitors Bureau to conduct a tourism study of the Emerald Coast. The study will utilize survey data to estimate the number of unique visitors coming to the region on a quarterly basis. For a 12-month period between March 2014 and February 2015, the Haas Center will have survey professionals in the field conducting visitor intercept surveys throughout Fort Walton Beach, Okaloosa Island and Destin, Florida. Data collected from these surveys, in conjunction with bed tax collections as well as with county and state data regarding condo and hotel unit availability, are used to estimate the total number of visitors who arrive in the region on a quarterly basis.

Table 1. Average Spending Per-Person, Per-Night Emerald Coast

Expenditure Type	Okaloosa	Okaloosa %
Accommodations	$43.56	32.58%
Food & Beverage	$21.52	16.10%
Entertainment	$25.59	19.14%
Shopping	$24.96	18.67%
Transportation	$13.81	10.33%
Miscellaneous	$4.25	3.18%
Total	$133.69	100.00%

As data is collected over a 12-month period, Haas Center researchers will report these figures via four quarterly reports. Each report will provide a number of data points describing visitor traffic to the area, including demographics, residency, spending patterns, length of stay, party size, reason for visit and visitor satisfaction. Furthermore, each report will provide a breakdown of estimated visitors by accommodation type. Table 1 provides the overall estimates for per-person, per-night visitor expenditures. As can be seen, survey respondents reported spending approximately 32.58% of all expenditures on accommodations, followed by 18.67% on shopping, 16.10% on food and beverage, 10.33% on transportation, 19.14% on entertainment and just over 3% on miscellaneous items.

Purpose and Scope. The purpose of this report is to provide in-depth details about demographic and economic trends of Emerald Coast tourism for the fall quarter of 2014 (September, October, and November). Located in the panhandle of Florida, the Emerald Coast is home to many tourist attractions, including beaches, water-based activities, parks and mid-to high-end shopping centers. While many beach communities collect bed taxes that provide visitor estimates,

most fail to capture spending patterns of these visitors. As such, the Haas Center has been contracted to collect quarterly visitor and spending data that provides estimates for all visitor types. Ultimately, this data will provide a distinct visitor count per quarter. At the end of the collection period, the Haas Center will utilize these data to conduct an economic impact assessment of the tourism industry along the Emerald Coast.

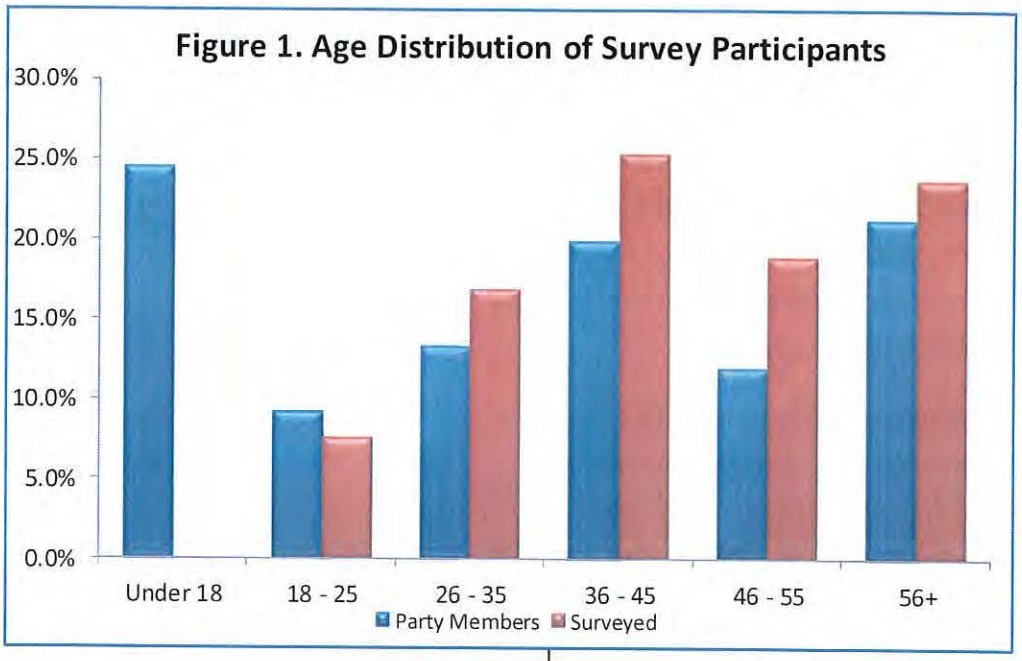
This study utilizes intercept survey techniques to obtain tourist demographics, lodging and transportation habits, spending patterns and overall satisfaction. In order to ultimately calculate the economic impact, the survey focuses on in-area spending patterns. This report does not attempt to quantify the externalities that are undoubtedly associated with the Emerald Coast tourism industry; rather, the report provides key marginal results from the survey, as well as estimated visitor totals.

Methodology

Throughout the fall quarter of 2014, the Haas Center has administered intercept surveys that collected details about unique visits to the Emerald Coast. Survey professionals spent sixteen hours a week throughout the quarter conducting interviews. Several aspects of data collection were randomized, with interviewers alternating the days of the week, locations and time of day in which they approached visitors. These locations included multiple shopping centers, public beaches, commercial areas and waterfront boardwalks. Survey researchers approached more than 2,344 adults during the fall quarter. Among the sampling frame, approximately 13.6%, or 319 respondents, participated in the survey.

The intercept survey measures and tracks several key elements about the Emerald Coast tourism market. This information includes demographics, particularly age and household income; primary residence; method of transportation; lodging; and party size. The survey also collects estimates on spending in several categories, including accommodations, transportation, food, entertainment and shopping. Additionally, visitors are asked about their overall

satisfaction with their visit to the area. The survey questions seek details on visitors' likelihood to return to the area and their willingness to refer the area to a friend or family member.



Survey Results

In order to better understand tourism patterns along the Emerald Coast, it is necessary to identify the demographic make-up of those visiting the region, including their age, income, party size and place of origin.

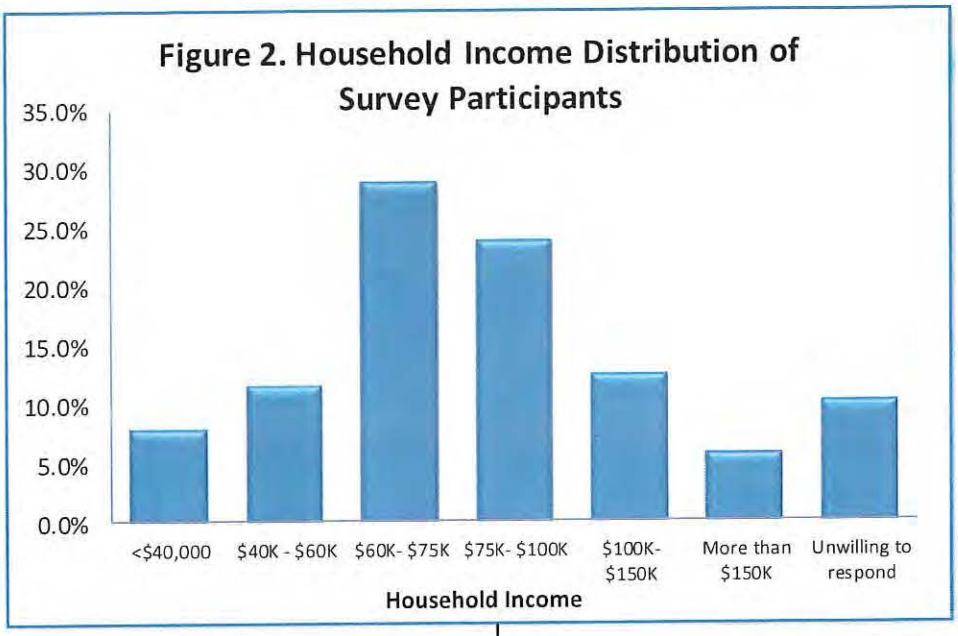
Age. The survey captures several demographic elements used to measure the type of visitors traveling to the Emerald Coast. Figure 1 presents the age distribution of survey respondents, as well as that of members of their party. As can be seen, the distribution of surveyed individuals is fairly normal. Approximately 25.3% of those surveyed were between the ages of 36 and 45. Those aged between 18 and 25 years were the smallest amount of the surveyed population (7.6%). However, the age distribution of all party members is slightly skewed to the left, with 24.5% of all party members reported as being under the age of 18. Indeed, nearly 47% of non-surveyed members of the party were 35 years old or younger. These data most likely capture the remainder of family and group vacations that still occur in warmer months like September.

Table 2. Distribution of Party Size

Party Size	Percent
One	7.3%
Two	29.4%
Three	16.3%
Four	22.7%
Five	9.9%
Six	5.2%
Seven	1.7%
Did not answer	7.6%
Mean Party Size	3.23
Median Party Size	3.0

Party Size. Another component measured is the party size of each respondent. As the data in Table 2 indicate, approximately 37% of all participants were traveling either by themselves or with one other person. More than 55% of those polled had a party size of three or

more. Additionally, two more statistics on party size have been calculated: average and median party size. The average party size for the fall quarter, 3.23 is slightly higher than the median party size, 3.0.



Household Income. Figure 2 presents the distribution of household income for all respondents. Of all respondents, nearly 10.2% were unwilling to disclose their household income. Interestingly, the $60,000 — $75,000 income bracket had the most visitors in the fall quarter. There were approximately 5% more visitors in this group than in the next closest income group. Since the distribution is relatively normal in Figure 2, the two most proximate income groups are quite similar to one another. About 23.8% of households claimed between $75,000and $100,00, while another 12.5% made between $100,001 and $150,000. Nearly 20% of survey participants indicated they received less than $60,000 in household income annually. The smallest share of survey participants, nearly 6%, had a household income of more than $150,000.

Table 3. Top Ten Origin States of Visitors

State	Percent
Florida	27.8%
Alabama	22.7%
Georgia	9.8%
Mississippi	7.6%
Texas	6.6%
Louisiana	3.8%
South Carolina	3.2%
Oklahoma	2.5%
Tennessee	2.5%
Arkansas	2.2%

Place of Origin. The top ten origin states of survey respondents are listed in Table 3. Figure 3 (on the following page) presents a geographical distribution of where all respondents report as their state of origin. Approximately 86% of respondents for the fall quarter reported being from the southeast portion of the United States, including Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee and Texas. This figure represents a substantial increase in the relative proportion of visitors from the southeast United States

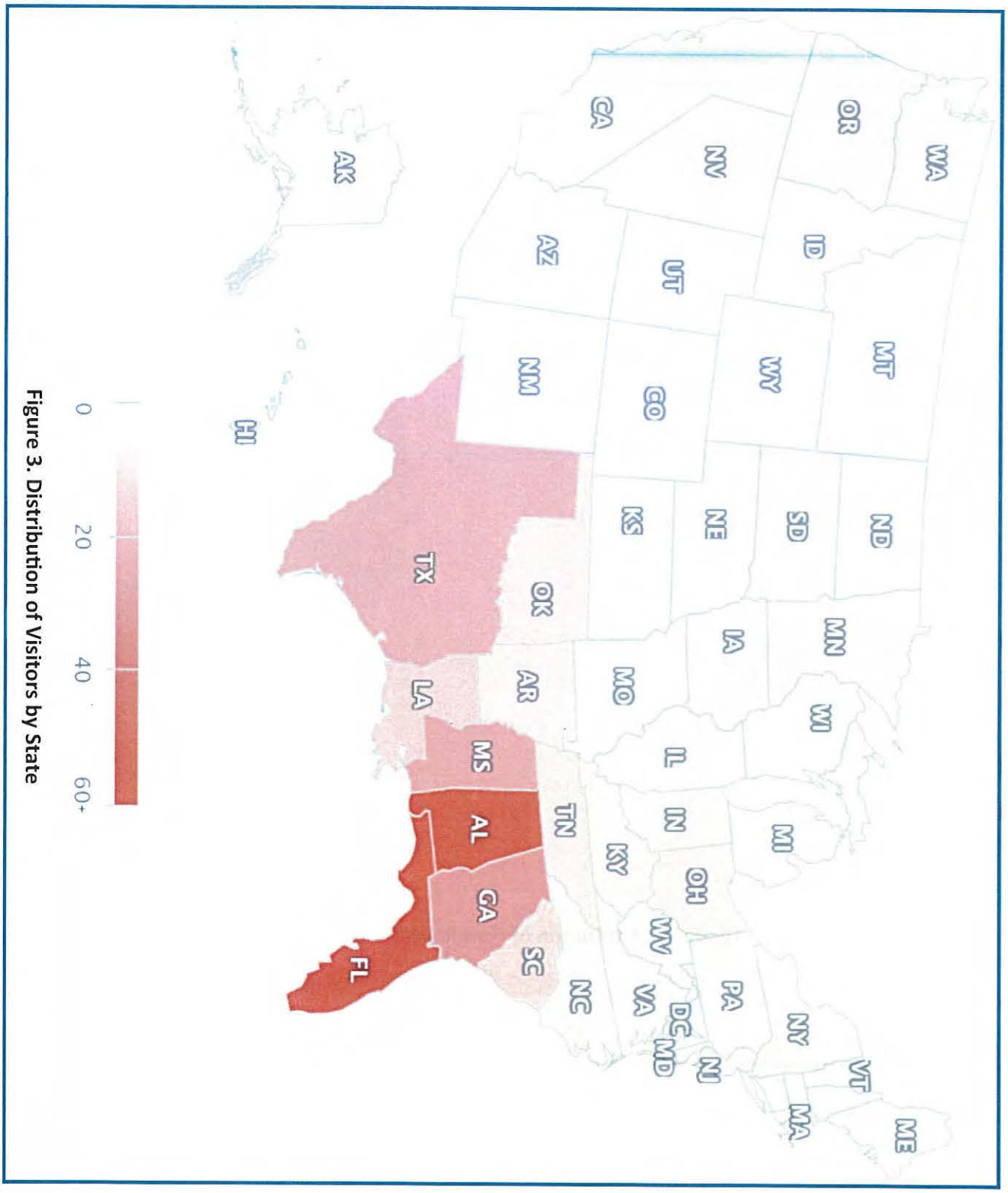


Figure 3. Distribution of Visitors by State

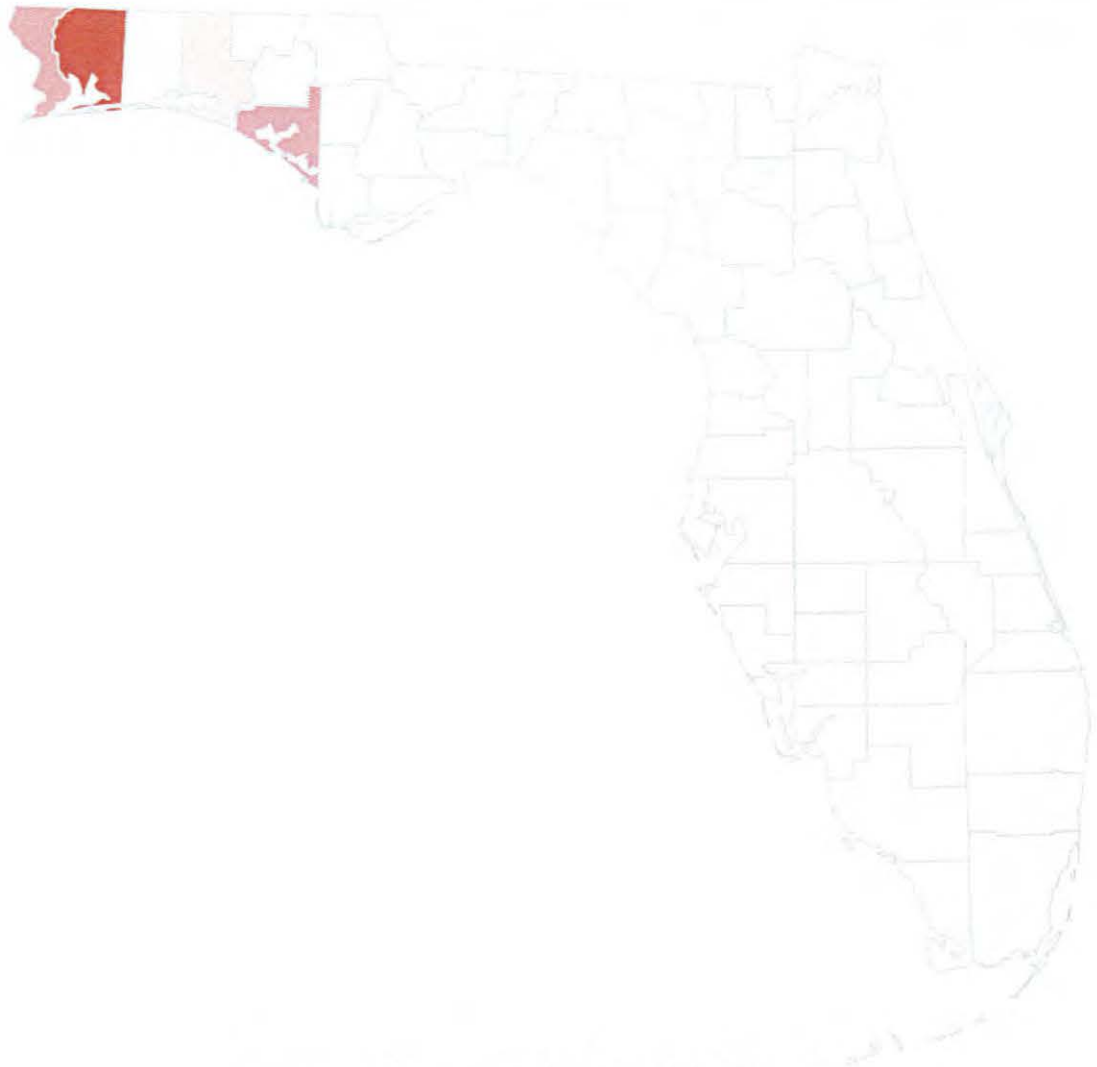


Figure 4. Distribution of Florida Visitors by County

over previous quarters.

The largest group (27.8%) of Emerald Coast tourists were visiting from other Florida counties. Figure 4 (pg. 10) presents a geographical distribution of in-state respondents' county of origin. Residents of Santa Rosa County were the largest group of in-state visitors represented in the survey, at nearly 46%. This large group of Florida visitors was closely followed by Bay County (16.5%), Escambia County (15.2%) and Walton County (6.3%). Other Florida visitors came from Palm Beach, Orange, Alachua, Duval, Leon, Volusia and Miami-Dade counties. Many of these counties represent densely populated areas throughout the state, increasing their odds of representation.

Lodging and Transportation. As presented in Table 4, approximately 54.7% of respondents stayed in the Destin area, followed by Fort Walton Beach (17.0%) and Okaloosa Island (4.7%). The remaining 23.6% of tourists were either taking a day trip to the area (19.2%); staying overnight, but not in the area (3.8%); or were unsure of their nightly accommodation location (0.6%). Out of the respondents who stayed overnight, but not in the Emerald Coast area, stayed in various locations. Nearly two-thirds of this group were either staying in Shalimar or Navarre; however, other common answers provided by respondents included Pensacola, Mary Esther and Panama City.

The results presented in Table 5 indicate that an overwhelming majority of people who traveled to the Emerald Coast used only one mode of transportation. Most visitors, 79.1%, used a car to reach their destination. Traveling by plane (10.5%) and RV (1.7%) were distant runners-up. Using other means of transportation, like buses, accounted for less than 1% of survey responses.

Table 4. Location of Lodging

Location	Percent
Destin	54.7%
Okaloosa Island	4.7%
Fort Walton Beach	17.0%
Day Trip Only	19.2%
Staying overnight, but not in the area	3.8%
Unsure	0.6%

Table 5. Transportation Type

Mode	Percent
No Response	8.4%
Car	79.1%
Other	0.3%
Plane	10.5%
RV	1.7%

Table 6. Type of Lodging

Location	Percent
Campground or RV	2.0%
Condo	42.9%
Hotel	20.1%
House Rental	2.4%
Stay with Friends or Family	32.3%
Unwilling to respond	0.4%

Similarly, the results in Table 6 (on the previous page) show the distribution of visitors' lodging accommodations. Approximately 63% of respondents stayed in either a hotel (20.1%) or a condo (42.9%). Only 2.4% of respondents reported using a house rental. For the fall, nearly one-third (32.3%) of respondents indicated that he or she was staying with friends or family, while approximately 2% of respondents reported that they were staying at a campground or in an RV. It is important to note that this group (friends/family and campground/RV) does not contribute to bed tax collections. As bed tax collections are the primary source for visitor estimates, those visitors who stay in accommodations not subject to the bed tax may not be counted in annual tourism estimates.

Table 7. Length of Stay

Range	Percent
< 3 days	34.1%
3 - 5 days	50.2%
6 - 8 days	14.9%
Over 8 days	0.8%
Average Stay	3.6
Median Stay	3.0

Table 8. Average Estimated Spending for Length of Stay

Type of Spending	Mean	Median
Accommodations	$422.38	$400.00
Food	$183.93	$160.00
Entertainment	$201.67	$200.00
Shopping	$202.22	$200.00
Transportation	$83.08	$70.00
Miscellaneous	$30.02	$50.00

Length of Stay. Table 7 presents data demonstrating the range of responses for length of stay along the Emerald Coast. The median number of nights stayed is 3.0, while the mean is 3.6 nights. However, the mean is skewed slightly upward by those respondents who stayed for a week or more. The median is a more accurate representation of length of stay as it eliminates the distorting effects of those few longer-term visitors. The most common lengths of stay reported in the fall quarter ranged from 3 to 5 days. Approximately 84.1% of respondents in the fall indicated they were visiting the Emerald Coast for 5 calendar days or less.

Spending Patterns. A comprehensive list of estimated, average spending is provided for visitors in Table 8. Once again, statistics for both mean and median spending are provided to eliminate the distorting effects of long-term visitors. According to the data, expenditures on accommodations are estimated to be the highest expense for visitors. For the entire length of stay, the estimated mean spending on lodging is $422.38 whereas the median is $400.00. The average expenditures for shopping, $202.22, are the second-highest expense for visitors, closely followed by an average of $201.67 for entertainment purposes. On average, visitors also spend hundreds of dollars on food, entertainment and transportation.

Table 9. PER-NIGHT, PER-PERSON by Lodging							
Type of Lodging	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Campground/RV	$61.80	$27.20	$104.00	$58.90	$71.00	$16.20	$339.10
Condo	$70.09	$22.13	$26.30	$23.97	$11.56	$3.46	$157.51
Hotel	$56.10	$29.79	$30.19	$29.95	$23.78	$7.65	$177.46
House Rental	$58.67	$19.31	$20.28	$18.94	$4.85	$1.24	$123.29
Friends/Family	$8.79	$19.94	$23.34	$26.98	$10.93	$3.62	$93.60

Table 10. PER-NIGHT, PER-PERSON by Household Income							
Household Income	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
$40K or Less	$10.01	$21.96	$33.61	$40.74	$17.85	$1.10	$125.27
$40K - $60K	$30.67	$24.32	$27.25	$37.78	$9.15	$3.55	$132.72
$60K - $75K	$51.43	$21.06	$28.29	$22.81	$18.93	$6.31	$148.83
$75K - $100K	$53.81	$23.18	$27.04	$24.80	$12.98	$4.91	$146.72
$100K - $150K	$52.83	$20.61	$21.77	$21.13	$16.80	$2.35	$135.49
< $150K	$50.21	$36.64	$33.89	$38.68	$8.40	$5.69	$173.51

Table 11. PER-NIGHT, PER-PERSON by Reason for Visit							
Reason for Trip	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Business	$67.83	$35.37	$26.82	$32.44	$33.95	$11.27	$207.68
Other	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Part of a Group	$14.01	$11.14	$14.37	$9.17	$7.23	$2.11	$58.03
Shopping	$4.67	$105.00	$113.33	$283.33	$26.67	$9.83	$542.83
Vacation	$66.07	$23.17	$30.33	$24.57	$12.20	$3.72	$160.06
Visiting Family/ Friends	$16.39	$14.14	$17.48	$16.14	$11.90	$3.40	$79.45

Tables 9 through 11 explore several patterns of per-person, per-night spending for all six categories of expenditures by different groups.[1] In Table 9, per-person, per-night spending is examined by type of lodging. While campground and RV visitors spent nearly double compared to other visitors, it should be noted that the sample size these results are drawn from is extremely small. However, on accommodations alone, respondents staying in condos spent the most

1. With analysis of only one quarter's data, caution should be taken when analyzing per-person, per-night spending by sub group, as sample size decreases significantly for certain groups. After four quarters of data have been collected, sample sizes for each sub group will increase, therefore increasing the statistical significance for each sub group's spending patterns.

money per person and per night on accommodations, at an average of $70.09 per night. Furthermore, those respondents staying in a house rental spent the least amount of money on food or transportation. Those respondents staying with family or friends spent the least on accommodations at $8.79 per person, per night.

In Table 10, per-person, per-night spending is examined by household income. For the fall quarter, visitors who reported yearly earnings greater than $150,000 a year spent the most in total expenditures per person, per night. Intuitively, this would fit a general expectation of groups reporting the comparatively highest incomes as having a greater amount of disposable income. Also as expected, those with the least amount of presumed disposable income, with $60,000 or less in household income, reported overall lower levels of spending on accommodations and overall spending.

Finally, Table 11 presents per-person, per-night spending patterns by reason for visit. Fall visitors who traveled to the Emerald Coast for shopping reported by far the highest rates of total spending, while those visiting for either business or vacation reported spending the most on accommodations. As anticipated, those who visited the Emerald Coast for shopping indicated spending more on shopping per person than any other group by a large margin; nevertheless, the sample size for this group was extremely small. Visitors to the area who listed their primary reason for visiting as part of a group or visiting family/friends consistently spent the least amounts across all areas.

Visiting the Emerald Coast. While respondents visited the Emerald Coast for a host of different reasons, it is clear that the most common reason was to vacation. In Table 13, the primary reasons for visiting the Emerald Coast are listed. Approximately 39.3% of all respondents listed that their primary motivation for traveling to the area was for

Table 12. Mean Party Size by Type of Lodging

Type of Lodging	Party Size
Campground or RV	2.60
Condo	3.43
Hotel	2.74
House Rental	4.17
Stay With Friends or Family	3.68

Table 13. Visitors' Purpose for Trip

Purpose	Percent
Business	7.9%
Other	3.5%
Part of a Group	6.6%
Shopping	12.3%
Vacation	39.3%
Visiting Family or Friends	30.5%

Table 14. Visitors' Activities While in Area

Activities	Percent
Beaches	54.2%
Fishing	26.8%
Local Attractions	27.4%
Shopping	38.2%
Special Events	25.1%
Water Sports	9.6%

vacation. The second most common reason was to visit family and friends (30.5%). Table 13 also shows that people came specifically to shop (12.3%), to participate in group activities (6.6%%) or for business (7.9%).

Survey professionals also asked participants what activities they were participating in if they had traveled for vacation, to visit family or friends or were in the area as part of a group. The responses in Table 14 show that nearly 54% reported visiting beaches, while approximately 38% specifically listed going shopping. Many visitors frequented local attractions (27.4%) or headed to special events (25.1%). Emerald Cost visitors also took advantage of the area's excellent fishing (26.8%) or watersports (9.6%) during their time in Okaloosa County.[2]

Additionally, participants were asked about the frequency of their trips to the Emerald Coast. Participants reported in Table 15 that only one in four (25.3%) were visiting the area for the first time. Alternatively, 67.2% of respondents had previously visited the area. As indicated in Table 17, close to 36% of respondents reported that they were already planning to return to the area in the next year, whereas 27.8% said that they were not and 36.5 % did not know.

Survey respondents also gave information on their overall satisfaction with their trip, provided in Table 18. For all visitors, nearly 90% responded that they were either satisfied or very satisfied with their visit to the Emerald Coast. Approximately 3.2% of respondents felt neutral regarding their trip, and zero respondents reported being dissatisfied. Finally, Table

Table 15. First Time Visitors to the Area

First-Time Visitor	Percent
No	67.2%
Yes	25.3%

Table 16. Annual Visits to Emerald Coast

Number of Visits	Percent
Zero	1.3%
One	20.5%
Two	16.6%
Three	6.6%
Four	5.7%
Five	1.7%
Six	3.5%
Seven or More	19.7%
Don't Know	24.5%

Table 17. Visitors Who Plan to Return in the Next Twelve Months

Likely to Return	Percent
Don't Know	36.5%
No	27.8%
Yes	35.7%

Table 18. Visitor Satisfaction with Trip

Satisfied with Trip	Percent
Neutral	3.2%
Satisfied	32.3%
Very Satisfied	57.0%
Did not answer	7.6%

Table 19. Likely to Refer Family or Friends

Likely to Refer	Percent
Don't Know	9.3%
Yes	90.7%

2. Please note, these percentages sum to more than 100% as respondents are allowed to provide more than one answer.

Table 20. Number of Unique Visitors to the Emerald Coast Fall Quarter 2014								
Type	Distribution of Bed Tax	Bed Tax Fall 2014	Revenue	Avg. Nightly Rate	Total Nights	Party Size	Length of Stay (Days)	Visitors
Condo	59%	$1.370.512	$28,444,403	$210.06	135,408	3.4	4.4	104,633
Hotel/Motel	26%	$599,017	$12,432,352	$141.47	87,880	2.8	2.2	111,847
House Rental	10%	$239,606	$4,972,931	$220.87	22,515	4.2	3.8	24,885
Total Unique Visitors: 241,365[3]								

19 shows that a vast majority (90.7%) of participants were likely to refer the Emerald Coast to a friend or family member.

Visitor Estimates by Accommodation

In order to provide visitor estimates for the fall quarter, Haas Center researchers utilize several data points collected from various sources. A primary input into visitor estimate calculations are bed taxes, which are collected on all short-term rentals in the southern portions of Okaloosa County. Data on these collections are reported by the Okaloosa County Tax Collector (OCTC) on a monthly basis; however, there is typically a two -month lag in reporting times. As of this report, the most recent data available is from October 2014. Because of these limitations, year-over-year bed tax data have been used to estimate growth from fall quarter 2013 to 2014. Based on data derived from the OCTC, fall 2013 bed tax collections were reported at approximately $2.05 million. The year-over-year change in bed tax collections was approximately 14.1% between the months of September and October in 2013 and 2014. Assuming collections for November 2014 would also grow at this rate, bed tax collections for the fall 2014 quarter are estimated to be $2.34 million. This figure, in turn, is used to estimate unique visitor counts.

The other primary input into our visitor calculations is the survey data collected by the visitor intercept surveys. Values highlighted in Table 20 indicate primary data collected via these surveys. Here, average nightly rate, average party size and average length of stay, in addition to the bed tax data, are used to calculate the number of unique visitors to the

3. Excluding those visitors who stayed with friends/family or at a campground/RV park.

Emerald Coast during fall 2014.[4] As the table indicates, it is estimated that over 241,365 visitors traveled to the Emerald Coast during the fall quarter.

Furthermore, based on lodging data from the Florida Department of Business & Professional Regulation (May 2014), over 4,600 condo units and 3,100 hotel/motel units are reported to have been available throughout Destin, Okaloosa Island and Fort Walton Beach. Utilizing these data, in conjunction with total nights stayed, Haas Center researchers are able to estimate condo and hotel/motel occupancy rates. As indicated in Table 21, these rates are 31% and 31%, respectively.

Table 21. Occupancy Rates for Condo and Hotel Units Fall Quarter 2014

Type	Units Available	Total Nights	Quarterly Supply of Units	Occupancy Rate
Condo	4,681	135,408	430,652	31%
Hotel/Motel	3,111	87,880	286,212	31%

Table 22. Total Visitor Spending by Accommodation Type

Type	Per-Person, Per-Night Expenditures	Number of Unique Visitors	Total Direct Spending
Condo	$157.51	73,130	$11,518,719
Hotel	$177.46	101,315	$17,979,287

Once visitor estimates have been calculated, it is now possible to determine total visitor spending by those staying in either condo or hotel accommodations. Based on the per-person, per-night spending figures of those staying in a condo or hotel (reported in Table 9), total spending estimates have been calculated for each group and are presented in Table 22. Drawing from information gathered this fall, it is estimated that visitors staying in a hotel during the fall quarter continued to spend nearly $18 million along the Emerald Coast, while visitors staying in condos during the fall quarter are estimated to have spent over $11.5 million.

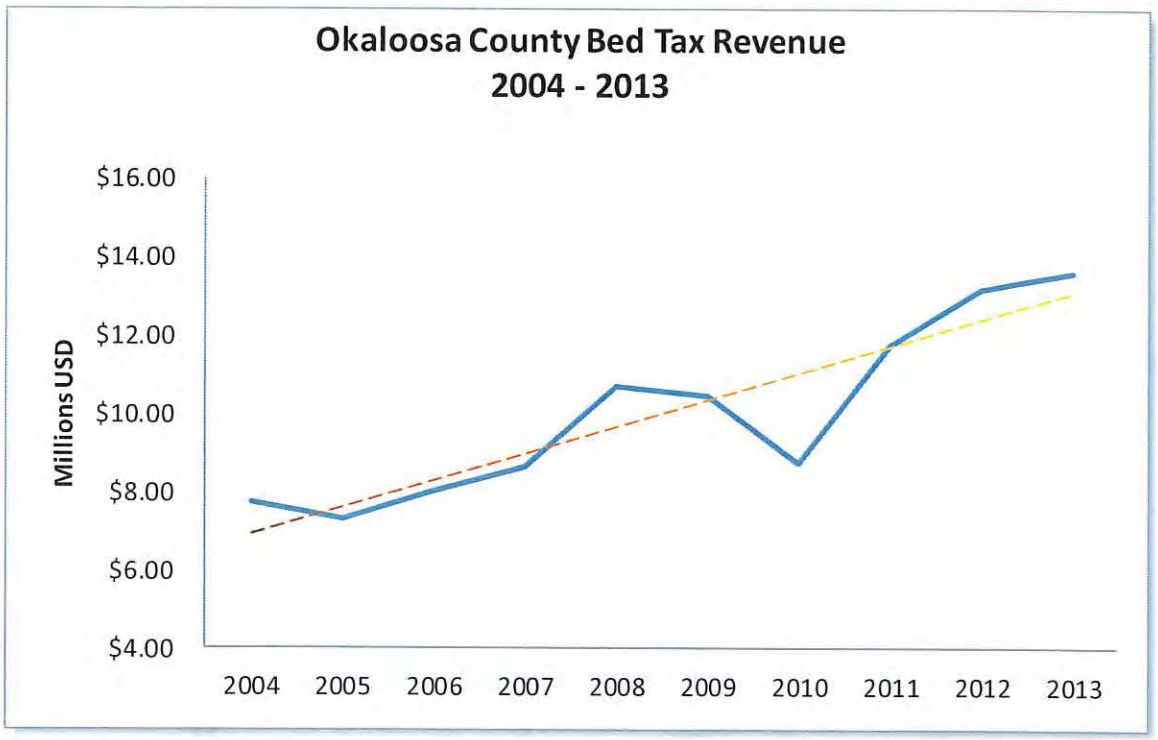
Conclusion

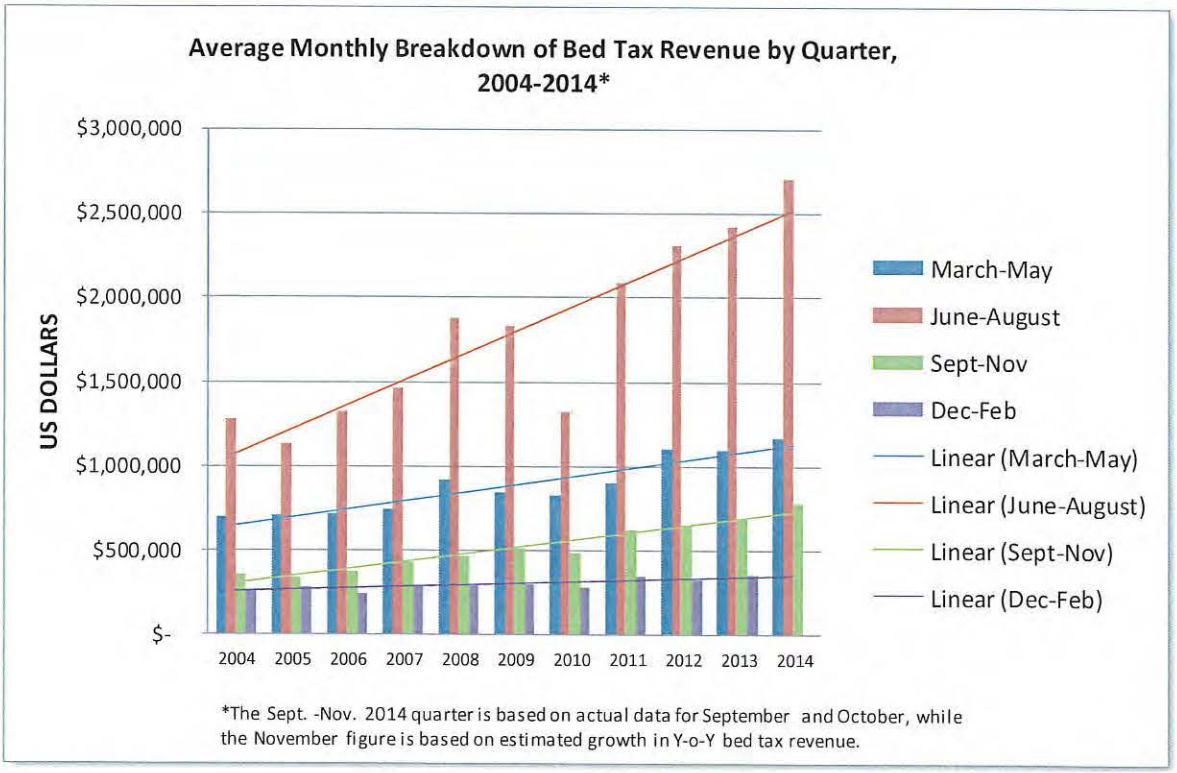
Based on the survey data collected during the fall quarter 2014, it is estimated that more than 241,365 visitors traveled to the Emerald Coast during this period. Those visitors staying in either a condo or a hotel/ motel are estimated to have spent nearly $30 million on accommodations, food, entertainment and other expenditures. Drawing into the fall season, occupancy rates for both condos and hotels were calculated as reaching an average of roughly 31% .

4. Please note that the figures reported by survey participants are estimates and may vary from hose reported by accommodation establishments.

During this quarter, the Haas Center surveyed 319 visitors. The average party had 3.23 guests, stayed in a hotel or condo, traveled by car to the area and planned to stay for a week or less. For the fall quarter, most of these visitors were from the Southeast, and approximately 27.6% were from other parts of Florida. Close to 70% of Emerald Coast visitors answered that they were traveling to the area for either vacation or visiting friends and family. Approximately 81% of all visitors reported visiting the beaches and/or fishing. Funds spent on accommodations generally accounted for the largest portion of total expenditures for the trip. Over 67% of visitors in the fall quarter answered that it was not their first Emerald Coast visit, and more than 35% indicated that they were planning further visits in the following twelve months. Visitor satisfaction levels remained exceedingly high in the fall quarter, with over 96% of those who answered questions about their satisfaction rating that they were either satisfied or very satisfied.

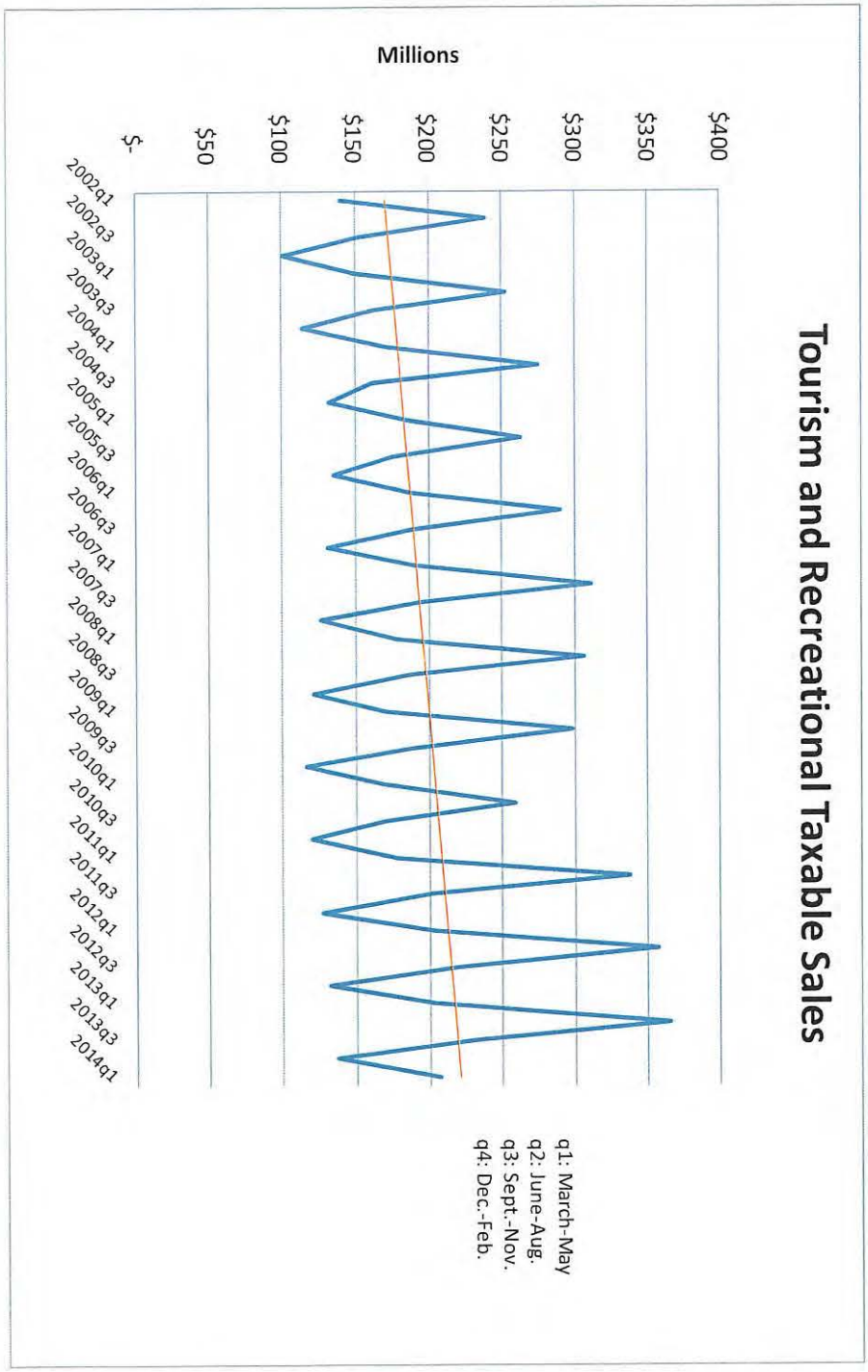
Appendix A: Okaloosa County Bed Tax Summaries 2004-Present





*The Sept. -Nov. 2014 quarter is based on actual data for September and October, while the November figure is based on estimated growth in Y-o-Y bed tax revenue.

Appendix B: Tourism and Recreation Taxable Retail Sales Summary



Appendix C: Emerald Coast Tourism Survey Instrument

Tourism and the Okaloosa County Economy

Final Survey Questions

February 26, 2014

Hello, my name is _____ from the Haas Center at the University of West Florida. We are conducting marketing research regarding visitation to the Emerald Coast. Would you be willing to take a short 5-8 minute survey regarding your time spent in southern Okaloosa County?

1. If yes, are you visiting the area and at least 18 years old?

   If no, end of survey.

2. If yes, are you currently staying overnight in the Destin, Ft. Walton Beach or Okaloosa Island area?
   a. Destin
   b. Ft. Walton
   c. Okaloosa Island
   d. If not: other:_____

3. [If yes to Q2]. What type of lodging accommodations are you using during your visit?
   a. Condo
   b. Hotel
   c. House rental
   d. Stay with friends/family
   e. Campground/ RV park

4. [If yes to Q2].How many nights do you plan on staying in the area?
5. What is the purpose of your trip?
   a. Vacation
   b. Visit family/friends
   c. Part of a Group

Appendix C: Emerald Coast Tourism Survey Instrument

d. Business

e. Shopping

f. Other(please specify)_____

a. [If response is "A," "B" or "C" ask] What activities are you participating in:

b. Local Attraction

c. Water Sports

d. Fishing

e. Beaches

f. Special Events

6. Is this your first visit to the area?

a. [If no]. How many times do you visit annually?

7. What type of transportation did you use to travel to the area?

a. Car

b. RV

c. Plane

d. Boat

e. Other (specify)

8. How many people are in your party?

a. [If more than one] What are the ages of those in your party?

i. Age group: 18-25, 25-35, 35-45, 45-55, 55+

9. For the length of your stay, how much do you estimate you will spend on the following items?

a. Accommodations

b. Food

c. Entertainment

Appendix C: Emerald Coast Tourism Survey Instrument

d. Shopping

e. Transportation/Gas (in the area)

f. Miscellaneous

10. How satisfied are you with your visit to the Emerald Coast?

a. Very Dissatisfied

b. Dissatisfied

c. Neutral

d. Satisfied

e. Very Satisfied

i. [If very dissatisfied/dissatisfied] Why? (open ended)

11. Are you likely to refer the Emerald Coast to a friend or family member?

a. Yes

b. No

12. Do you plan to return to the area in the next 12 months?

a. Yes

b. No

i. If yes, how often? (open ended)

13. Please indicate your age group.

a. 18-25, 25-35, 35-45, 45-55, 55+

14. In what ZIP code do you currently reside?

15. What best describes your household income before taxes?

a. Less than $40K

b. $40-60K

Appendix C: Emerald Coast Tourism Survey Instrument

c. $60-75K

d. $75-100K

e. $100-150K

f. $150K+

g. Unsure

h. Unwilling to answer

Thank you very much for your time and helping us with our survey.

Tourist Development Tax
Total Tax Remitted, not just amount received by County

FY 2013-14		
	Monthly	YTD
Oct-13	680,331	680,331
Nov-13	273,038	953,369
Dec-13	291,672	1,245,041
Jan-14	332,036	1,577,077
Feb-14	430,183	2,007,261
Mar-14	1,009,475	3,016,735
Apr-14	1,038,269	4,055,004
May-14	1,441,156	5,496,161
Jun-14	2,909,099	8,405,260
Jul-14	3,330,612	11,735,872
Aug-14	1,907,946	13,643,818
Sep-14	1,143,073	14,786,891
Total	14,786,891	9.34%

FY 2014-15		
	Monthly	YTD
Oct-14	886,981	886,981
Nov-14	313,442	1,200,423
Dec-14	320,916	1,521,339
Jan-15	410,853	1,932,192
Feb-15	492,951	2,425,144
Mar-15	1,033,763	3,458,907
Apr-15	1,248,990	4,707,897
May-15	1,628,069	6,335,966
Jun-15	3,247,331	9,583,298
Jul-15	3,688,645	13,271,942
Aug-15	2,009,054	15,280,997
Sep-15	1,434,557	16,715,554
Total	16,715,554	13.04%

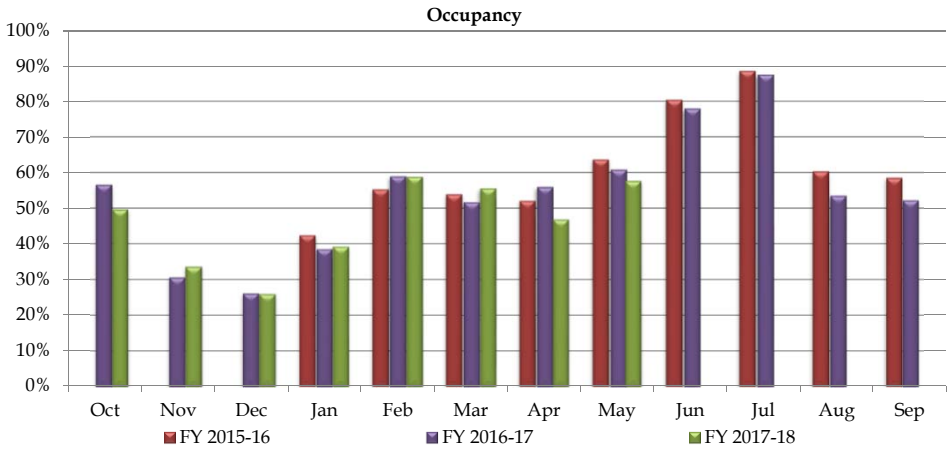
FY 2015-16		
	Monthly	YTD
Oct-15	1,068,987	1,068,987
Nov-15	356,655	1,425,643
Dec-15	390,078	1,815,720
Jan-16	436,047	2,251,767
Feb-16	554,344	2,806,111
Mar-16	1,276,174	4,082,285
Apr-16	1,313,571	5,395,856
May-16	1,744,277	7,140,133
Jun-16	3,354,266	10,494,399
Jul-16	4,127,134	14,621,534
Aug-16	1,901,099	16,522,633
Sep-16	1,559,595	18,082,228
Total	18,082,228	8.18%

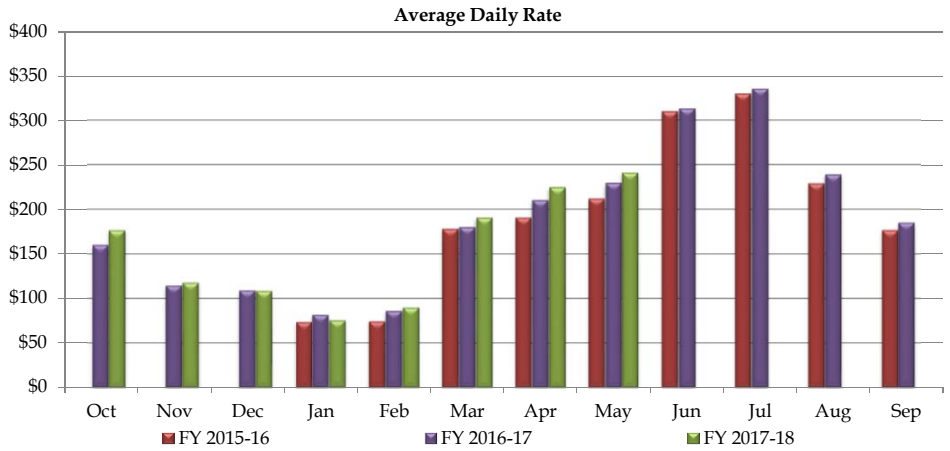
FY 2016-17		
	Monthly	YTD
Oct-16	1,199,607	1,199,607
Nov-16	407,635	1,607,241
Dec-16	427,969	2,035,210
Jan-17	409,650	2,444,861
Feb-17	559,627	3,004,488
Mar-17	1,312,771	4,317,259
Apr-17	1,731,619	6,048,877
May-17	2,058,172	8,107,050
Jun-17	3,830,671	11,937,721
Jul-17	3,992,590	15,930,311
Aug-17	2,114,325	18,044,636
Sep-17	1,489,825	19,534,461
Total	19,534,461	8.03%

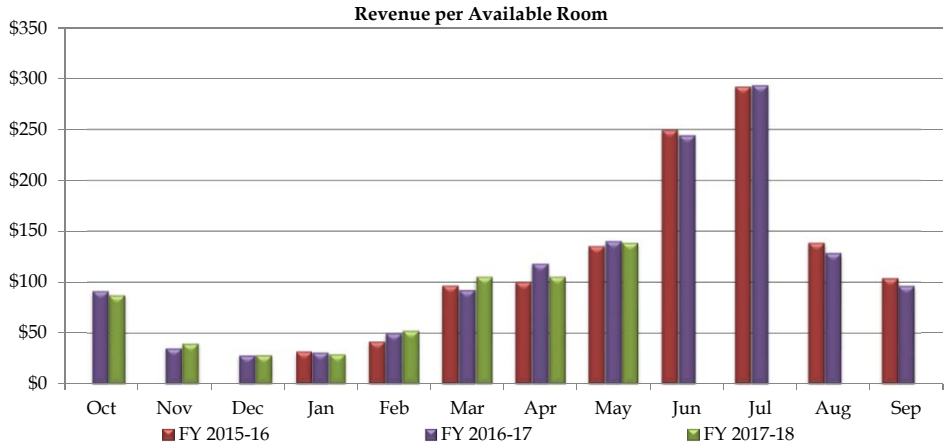
FY 2017-18		
	Monthly	YTD
Oct-17	1,214,482	1,214,482
Nov-17	547,282	1,761,764
Dec-17	435,956	2,197,720
Jan-18	546,010	2,743,730
Feb-18	755,232	3,498,962
Mar-18	1,804,973	5,303,935
Apr-18	1,611,133	6,915,067
May-18		6,915,067
Jun-18		6,915,067
Jul-18		6,915,067
Aug-18		6,915,067
Sep-18		6,915,067
Total	6,915,067	

total amount remitted, not just tax distributed to County

	1,366,674		1,452,233		Annualized	23,246,782	18.61%
Jun/Jul	41%	Jun/Jul	40%		Last MTD	(120,486)	-6.96%
May/Aug	62%	May/Aug	61%		Last YTD	866,190	14.32%


Occupancy
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
FY 2015-16
FY 2016-17
FY 2017-18


Average Daily Rate
$400
$350
$300
$250
$200
$150
$100
$50
$0
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
FY 2015-16
FY 2016-17
FY 2017-18


Revenue per Available Room
$350
$300
$250
$200
$150
$100
$50
$0
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
FY 2015-16
FY 2016-17
FY 2017-18