UNIVERSITY of WEST FLORIDA | Haas Center

Navarre Beach
FLORIDA'S PANHANDLE

Tourism Market Economic Impact Study

UNIVERSITY of WEST FLORIDA | Haas Center

HAAS CENTER RESEARCH TEAM
Amy Newburn - Assistant Director
Phyllis K. Pooley – Director, OEDE
Anna-Maria Colombaro

Contact
UWF | Haas Center
220 West Garden Street, Suite 304
Pensacola, FL 32502
Phone: (850) 439-5400
Email: HaasCenter@uwf.edu

About us

The Haas Center is a research and consulting arm of the University of West Florida that engages in applied research and strategy development in economics and across the social sciences. The Haas Center has played a prominent role in economic development efforts across the Northwest Florida Region and around the state for the past two decades.

Our staff is composed of political scientists, multi-media specialists and GIS analysts, as well as database and IT experts. The Haas Center staff's extensive knowledge of regional and state economic and workforce issues allows us to engage in a wide variety of research projects, which include economic and tax impact studies, workforce development studies, industry cluster analyses, market and feasibility analyses, economic and demographic profiles, and custom database and analytics work.

Haas Center staff also work closely with regional economic development entities to provide data to cities, counties, and states in efforts designed to attract business and industries to the region. We specialize in studies tailored to meet our clients' specific needs in a timely and cost effective manner, while adhering to the highest standards of excellence.

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EXECUTIVE SUMMARY

Executive Summary

The Haas Center for Business Research and Economic Development was commissioned to complete a visitor profile of those who travel to Santa Rosa County. Survey professionals conducted intercept surveys for one year to capture multiple data points, including demographics, visitor satisfaction, length of stay, and spending patterns.

The *Tourism Market Economic Impact Study* is the conclusion of this yearlong effort to survey Santa Rosa County's tourists and quantify their impact on the community. The following report presents our key findings. We found that:

- Tourism of overnight guests help support approximately 5,257 jobs annually, 97% of which are private, non-farm employment.
- Tourism generates nearly $397 million annually in output (or sales), $230 million of which is value added to the economy.
- Nearly $143 million of personal income, 86% of which is disposable personal income, generated annually due to the tourism market.

These figures, produced by the REMI PI+ model, are based on a total loss scenario, in which Santa Rosa County's economy is forced to adjust after elimination of the spending done by its visitors. All model results are the net change in comparison to what is currently forecasted to happen to the county's economy. Furthermore, the model plays out this scenario over 10 years and suggests that after a decade:

- More than 47,000 jobs would be lost, and the labor force would decline by 36,000.
- The sum of output lost over the 10 years would approximately equal $3.92 billion, 58% of which would have been value added to the economy.

Utilizing survey and bed tax data between March 2017 and February 2018, Haas Center researchers have estimated the total number of annual visitors to the region. Including those who stay with family and friends, data suggests that approximately 530,579 visitors stayed overnight in Santa Rosa County during that 12-month period. On average, most of these visitors:

- Stayed in Navarre, in a condo and came to the area for vacation.
- Stayed for an average of 9.89 days, or a median of 5 days, with a group of 3.99 people (median, 3.0).
- Knew of the area from family and friends or "other" sources.

INTRODUCTION

Introduction

Table 1. Average Spending Profile of Overnight Visitors		
Expenditure Type	**Amount**	**%**
Accommodations	$948.50	50%
Food	$431.24	23%
Entertainment	$110.52	6%
Shopping	$207.50	11%
Transportation/Gas	$104.30	5%
Miscellaneous	$98.04	5%
Total	**$1,900.10**	**100%**

OVERNIGHT VISITORS SPENT ROUGHLY **$192 PER DAY**.

PURPOSE AND SCOPE

The purpose of this report is to provide in-depth details about demographic and economic trends of Santa Rosa County tourism from March 2017 to February 2018. While many beach communities collect bed taxes that provide visitor estimates, many 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, culminating into an economic impact assessment of the county's tourism industry (as shown in Table 1).

This study utilized 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 focused on in-area spending patterns. This report provides key marginal results from the survey.

METHODOLOGY

Survey Methodology

FIGURE 1 – AGE DISTRIBUTION OF SURVEY PARTICIPANTS

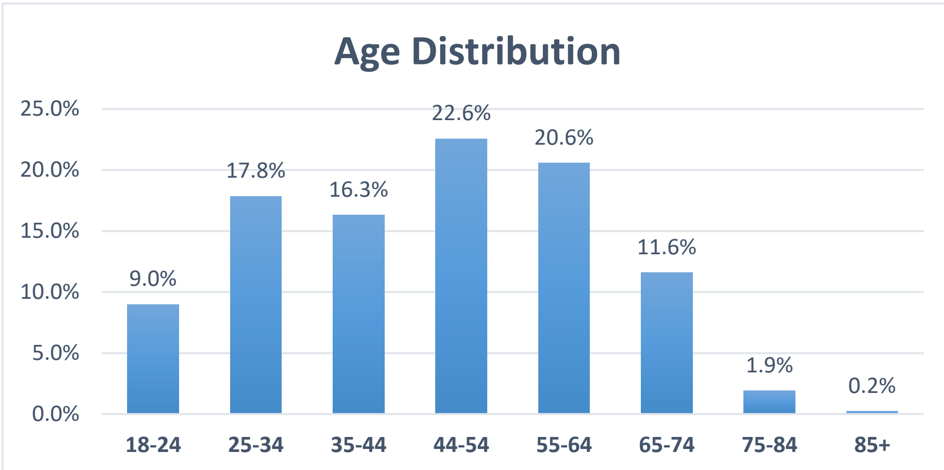
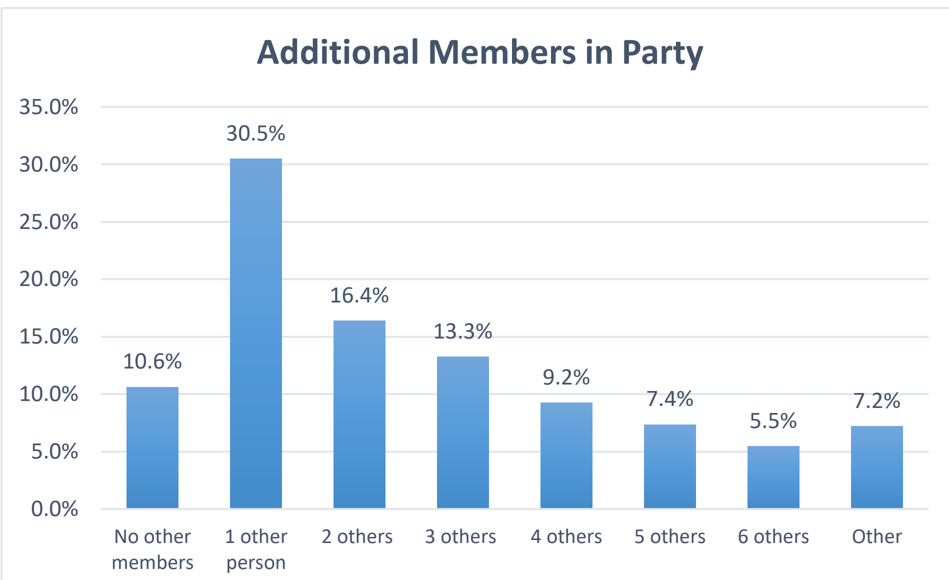


FIGURE 2 – DISTRIBUTION OF PARTY SIZE



METHODOLOGY

Throughout the survey period, the Haas Center administered intercept surveys that collected details about unique visits to the county. Survey professionals spent twenty hours a month throughout the survey (i.e., March 2017 to February 2018) 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 shopping areas, public beaches, community events, and commercial areas.

The intercept survey measured and tracked several key elements about the tourism market. This information includes demographics, in particular age, household income, primary residence, marital status, and party size (see Figures 1 through 5). The survey also collects estimates on spending in several categories, including accommodations, transportation, food, retail, entertainment, and shopping. Additionally, visitors were asked about their overall satisfaction with their visit to the area and likelihood to return to the area.

Key Demographics[1]

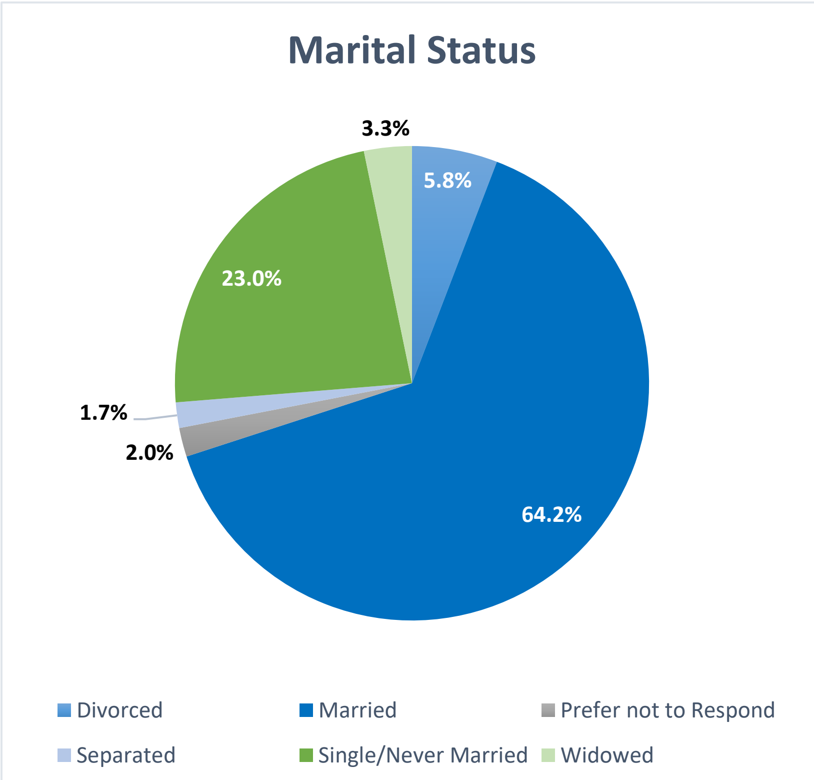


FIGURE 3 – MARITAL STATUS OF SURVEY PARTICIPANTS

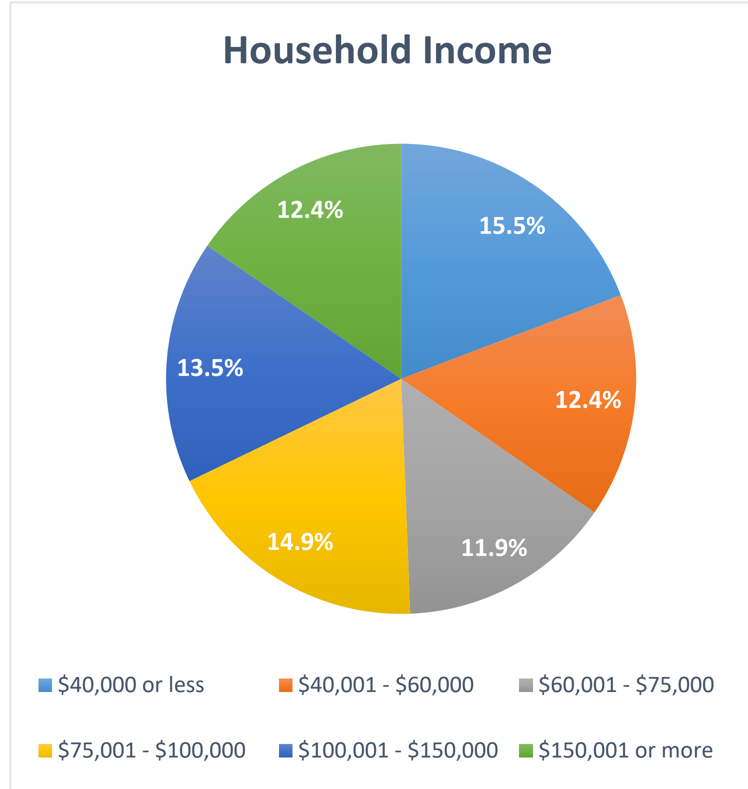


FIGURE 4 – HOUSEHOLD INCOME OF SURVEY PARTICIPANTS

[1] Figure 4 only sums to 80.6% - 18.2% of respondents chose not to respond to the question, while 1.2% were unsure of their household income.

Geographic Distribution of Visitors

FIGURE 5 – GEOGRAPHIC DISTRIBUTION OF SURVEY PARTICIPANTS (BY RESIDENCE ZIP CODE)

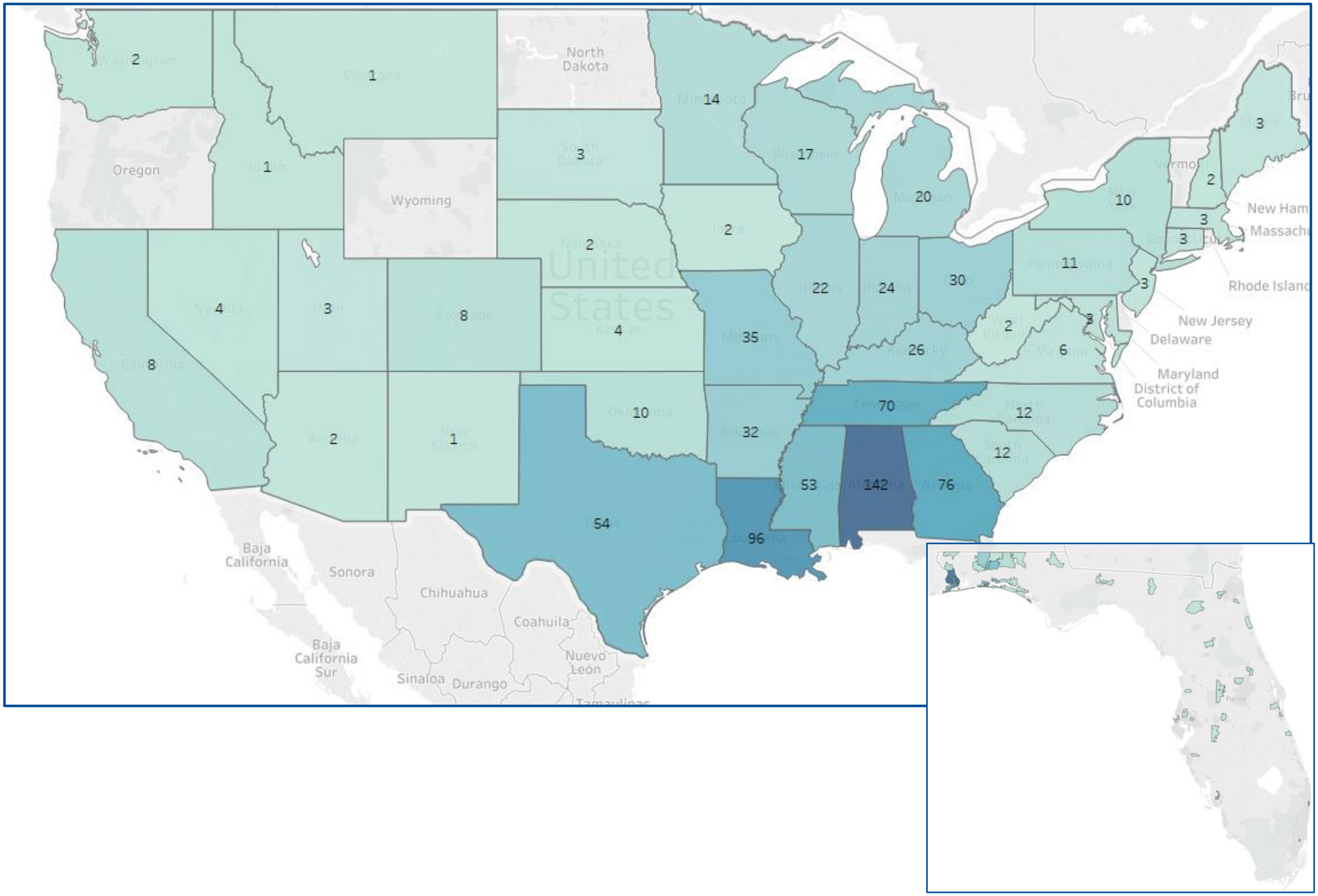
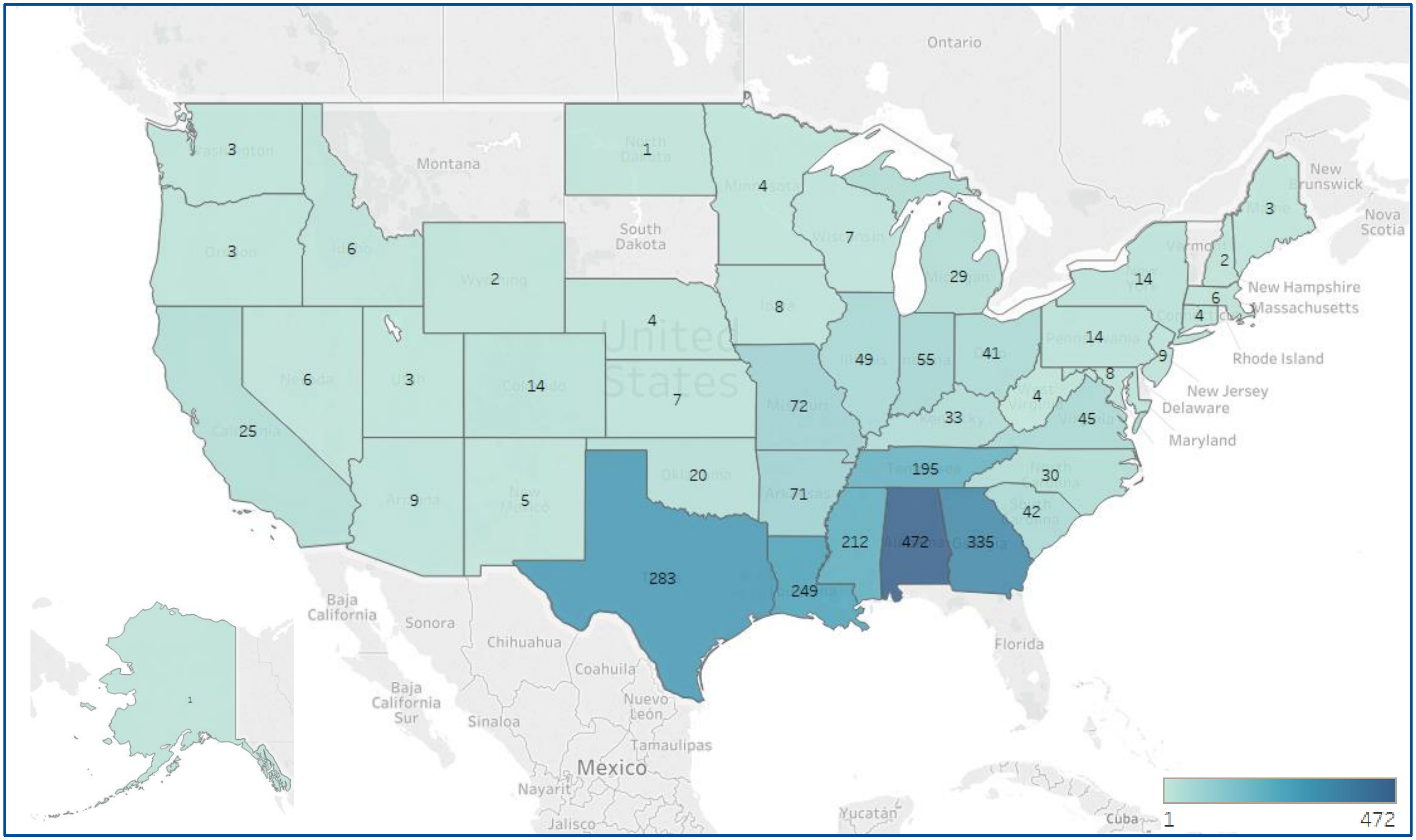


FIGURE 6 – STATE LICENSE PLATE COUNTS, JUNE '17 – FEBRUARY '18 (SOURCE: TDC)



Annual Visitor Profile

Visiting Santa Rosa County charts

FIGURE 7 – OVERNIGHT VISITORS

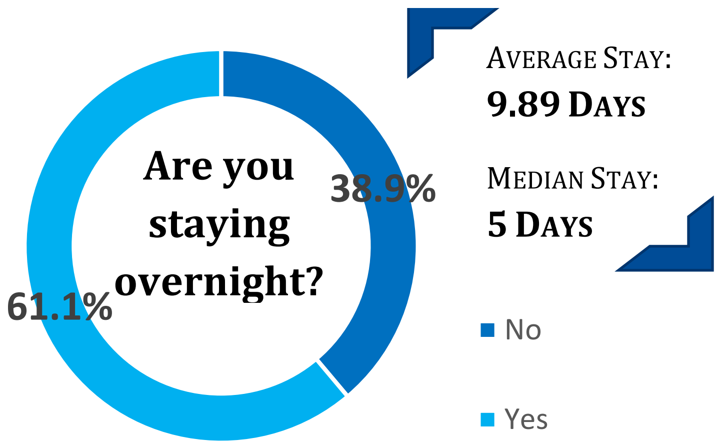


Table 2: Lodging Choices, by Type and Location				
Location	**Paid**	**Unpaid**	**Type of Lodging**	**%**
Gulf Breeze	2.6%	11.9%	Campground/ RV	9.9%
Jay	-	1.0%	Condo	48.4%
Milton	5.4%	17.5%	Hotel	10.7%
Navarre	90.1%	61.3%	House rental	6.9%
Pace	0.8%	0.5%	Friends/family	24.2%
Other	1.0%	7.7%		

OVERNIGHT STAYS, LENGTH OF TIME

Approximately 61% of visitors stayed overnight (shown in Figure 7). While the average stay was 9.89 days, the median stay was only 5.0 days. Just over 80% of respondents stayed in the area for a week or less. Participants who stayed for 8-15 days and greater than 30 days tied at 8.1%, followed by 16-30 days (3.7%).

LODGING CHOICES

As Table 2 shows, most visitors stayed in Navarre during their trip to the county – this is true for those who paid for their lodging and those who stayed with friends or family. Following Navarre, unpaid lodgers stayed in Milton (17.5%), Gulf Breeze (11.9%), Jay (1.0%), and Pace (0.5%).

Staying in condos was the most common lodging (48.4%), followed by staying with friends and family (24.2%). Hotel (10.7%) and Campground/RV rentals (9.9%) were nearly tied for the third most popular accommodation.

Purpose of Visit

VISITING SANTA ROSA COUNTY

Figure 8 shows that more than 45% of respondents travelled to the area for “Other” reasons, which included events like Bands on the Blackwater, Zoo Lights, and volleyball tournaments. Over twenty-eight percent were in Santa Rosa County to visit family and friends, while just over 20% were on vacation.

Figure 9 illustrates that approximately 40% of the respondents traveled to the area for specific events or festivals. Approximately 74% of those who did were not overnight guests. Nearly 78% of visitors were repeat visitors, with over 75% having visited the area at least 5 times or more.

78% OF VISITORS WERE REPEAT VISITORS, WHILE APPROXIMATELY 22% WERE IN SANTA ROSA COUNTY FOR THE FIRST TIME.

FIGURE 8 – TRIP PURPOSE

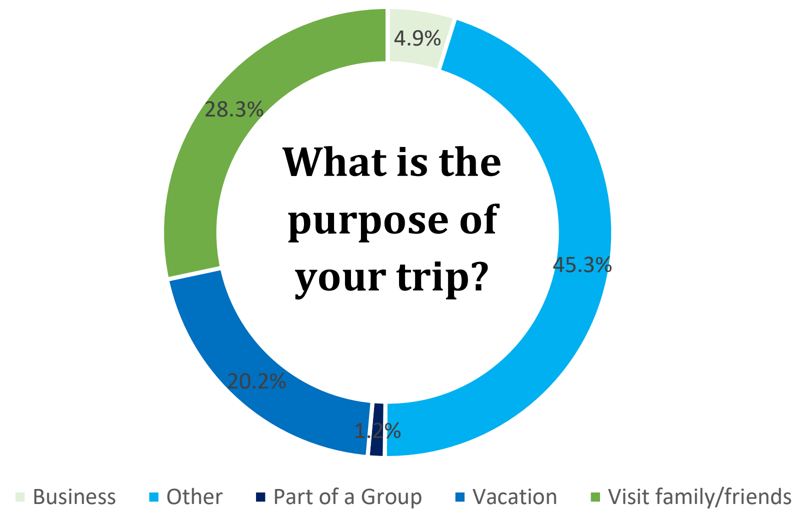
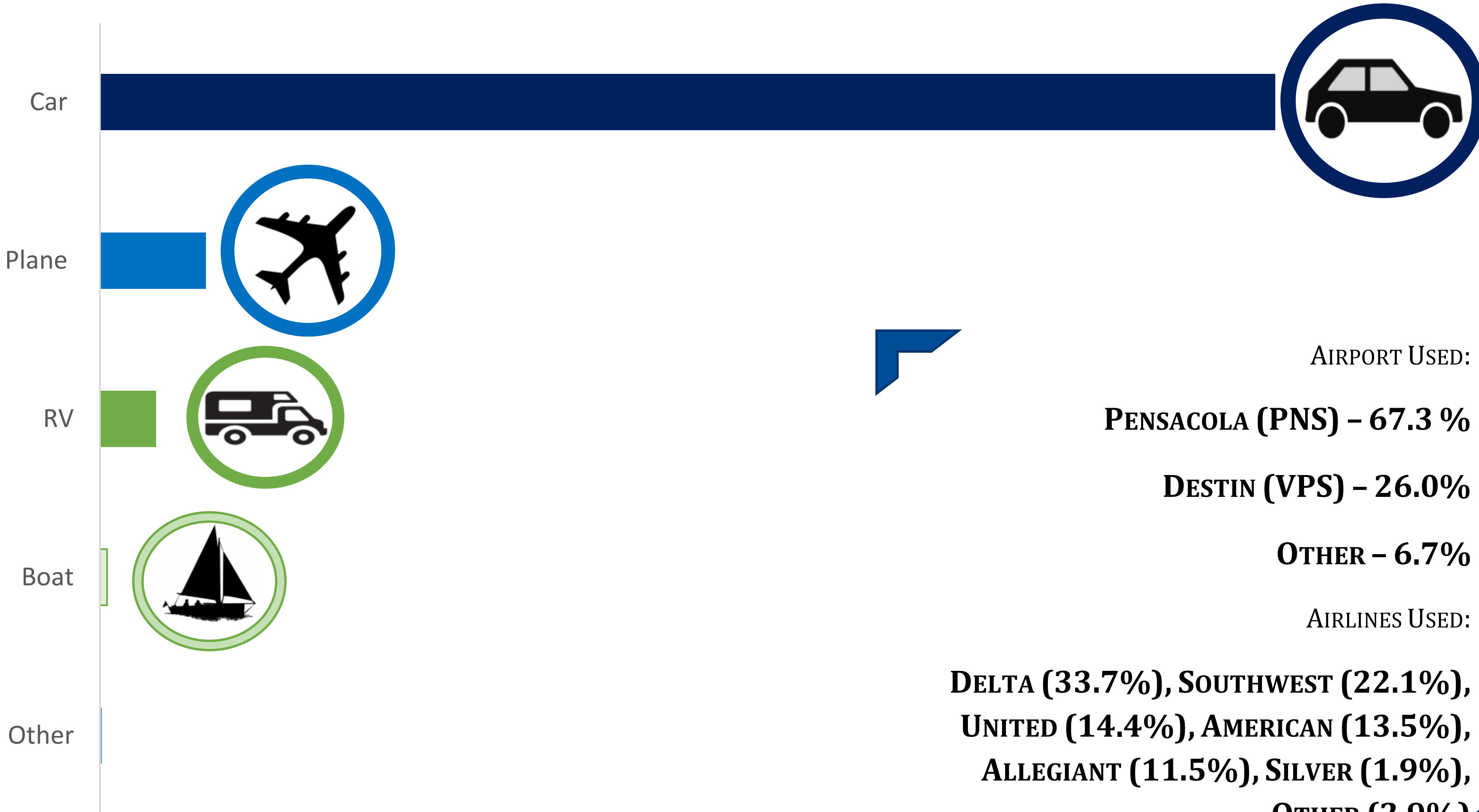


Table 3: Respondents by Events Attended

4th of July Fireworks on Navarre	0.6%	Navarre Beach Volleyball	1.5%
Bands on the Blackwater	4.4%	Navarre Chamber	0.2%
Kiln Walk Festival	2.2%	None of the above	60.9%
Mardi Gras Parade in Navarre	2.8%	Other	21.0%
Monarch Madness	0.1%	River Fest in Milton	2.0%
Navarre Beach Run for the Reef	0.1%	Riverwalk Arts Festival	2.3%
Navarre Beach Songwriters	0.1%	Scratch Ankle Festival	1.8%

Transportation to the Area

FIGURE 10. TYPE OF TRANSPORTATION USED



AIRPORT USED:

PENSACOLA (PNS) – 67.3 %

DESTIN (VPS) – 26.0%

OTHER – 6.7%

AIRLINES USED:

DELTA (33.7%), SOUTHWEST (22.1%), UNITED (14.4%), AMERICAN (13.5%), ALLEGIANT (11.5%), SILVER (1.9%), OTHER (2.9%)

Spending Patterns of Visitors

Table 4 highlights the spending patterns of visitors by type (i.e. overnight or daytrip) and by expenditure categories.

Perhaps expectedly, individuals who were in the area for the day spent much less money than the typical overnight visitor. Day trippers, on average, spent $172.96, with over 30% of those funds almost equally distributed between food (35%) and shopping (31%).

Overnight guests spent much more money, about $192 a day on average. Half of these costs were allocated to accommodations expenses, with 23% going to food. Shopping (11%), Entertainment (6%), Transportation (5%), and miscellaneous (5%) items were somewhat minor expenses, comparatively.

Table 4: Spending Patterns by Category and Visitor Type

Expenditure Type	Overnight		Daytrip		Total	
	Amount	%	Amount	%	Amount	%
Accommodations	$948.50	50%			$567.26	47%
Food	$431.24	23%	$53.56	35%	$282.60	24%
Entertainment	$110.52	6%	$18.94	12%	$77.99	7%
Shopping	$207.50	11%	$47.45	31%	$133.24	11%
Transportation/Gas	$104.30	5%	$18.05	12%	$68.08	6%
Miscellaneous	$98.04	5%	$15.60	10%	$67.67	6%
Total	**$1,900.1**	**100%**	**$172.96**	**100%**	**$1,196.84**	**100%**

Satisfaction with Visit

FIGURE 11. VISITOR SATISFACTION

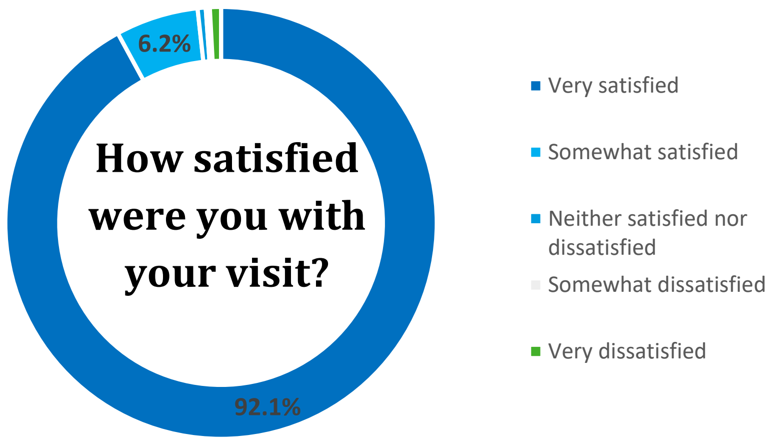


FIGURE 12. LIKELIHOOD OF RETURNING

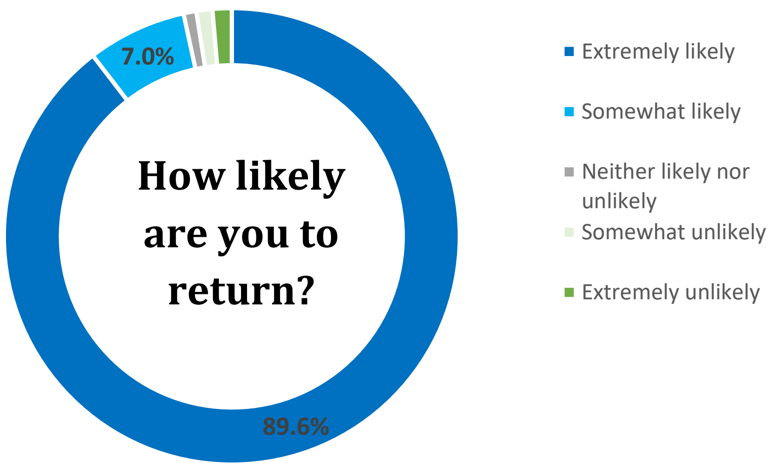


Figure 11 highlights visitor satisfaction. Just over 92% of respondents were very satisfied with their visit to Santa Rosa County. Another 6.2% were somewhat satisfied. In total, less than 2% of respondents in the entire quarter replied that they were somewhat or very dissatisfied.

Figure 12 presents visitors' likelihood of returning. Nearly ninety percent of respondents said they were extremely likely to return to the county, while another 7.0% thought it was somewhat likely. Less than 3% of respondents said they were either somewhat or extremely unlikely to return.

Booking the Trip

Table 5 presents visitors' sources of information about visiting Santa Rosa County. The most common (45.3%) source of information was from family and friends. Another 26.9% of respondents indicated that they knew of the location from other sources. Social media and the Internet also served as sources of information for 22.4% of visitors. Other sources of information are detailed in Appendix Table A7.

Figure 13 highlights that nearly 64% of visitors booked some part of their trip (accommodations, activities, etc.) on the Internet. Appendix Tables A2-A5 (pp. 34-35) detail more specifics related to this question.

Figure 14 shows that over 75% of all respondents considered another location. Other destinations considered are presented in Appendix Table A1 (p. 33).

Table 5: Source of Information on Destination

Category	Count	%
Family/friends	636	45.3%
Internet	198	14.1%
Newspapers/magazines	32	2.3%
Other	378	26.9%
Radio	4	0.3%
Social media	116	8.3%
Tourism tradeshow/fairs	8	0.6%
Travel agency	3	0.2%
Travel brochures	11	0.8%
TV	18	1.3%

FIGURE 13. INTERNET BOOKINGS

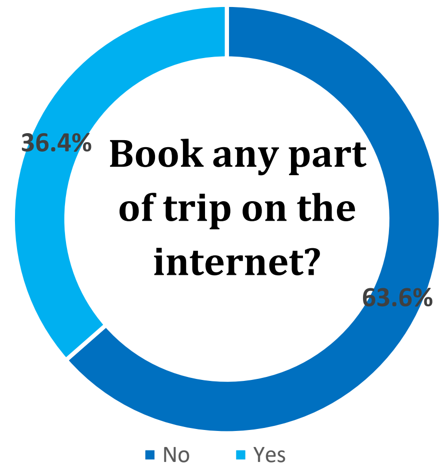
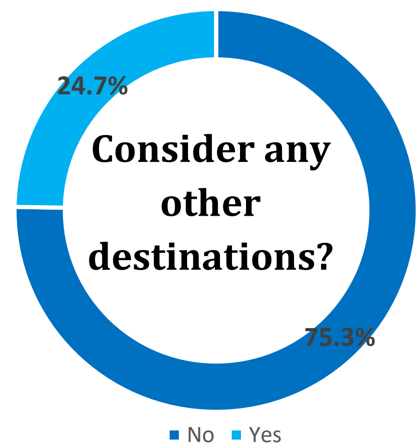


FIGURE 14. CONSIDERED OTHER SITES



ECONOMIC IMPACT ANALYSIS

Economic Impact

Econometric simulation models combine the sector detail and geography detail of input/output models but provide for functioning economic linkages between sectors and regions over time. The current study uses REMI PI+ Version 2.1.1 (Regional Economic Models Inc.), in a 67 region structural econometric model of the state of Florida. It incorporates the basic input/output linkages, but also uses econometrically estimated county-specific parameters, for example, interregional migration in response to changes in economic opportunities, in generating impact results. Because of these between-sector linkages, the model incorporates general equilibrium tendencies as the economy responds to shocks over time. That is, changes in spending in a region affect not just conditions in that market, but also in other markets within the region (economists term this a "general equilibrium") and outside the region (via trade and also via migration in response to changes in economic opportunities). This describes the phenomenon whereby, for example, a new financial services back office call center opens in a county, and bank managers throughout the county find they have to give staff a raise in order to keep them from leaving to take a job at the new call center. A traditional input-output model description of the economic impact would have held everything else fixed (including bank wages across the county) and simply documented the employment and job creation effects resulting directly at the new call center and indirectly via businesses in its supply chain, as well as household spending induced by the new income flows.

A simulation model such as REMI captures not only the spending effects flowing from the call center and its local suppliers and employees and owners, but also the spillover effects into other markets as wages and prices change due to competition for the same employees and other resources. These effects are the general equilibrium (equilibrium across all markets simultaneously) tendencies of the model. It also simulates the adjustment path over time of these market responses, using historical parameters estimated specifically for that county (the dynamic component).

We have used the direct spending estimate of Santa Rosa County's ***overnight tourists*** as the input into the model. In our scenario, the spending has been removed from the county's economy in one year. The effects are modeled for the immediate year the loss occurs (2017), as well as over ten years. We provide the total 10-year impacts in Table 6 and 7 as well.

Impact of Tourism on Santa Rosa County

Table 6: Economic Impact of Tourism		
Category	**2017**	**10-Year Impact**
Total Employment	5,257	47,402
Private Non-Farm Employment	5,121	44,947
Residence Adjusted Employment	4,863	48,099
Population	1,748	51,911
Labor Force	1,669	36,290
Output	$396,890,812	$3,918,217,010
Value Added	$230,130,350	$2,286,905,544
Personal Income	$142,811,756	$2,549,622,360
Disposable Personal Income	$122,881,772	$2,235,031,334

Table 6 reports the economic impact of tourism on Santa Rosa County. As modeled, approximately 5,257 jobs would be lost if Santa Rosa County no longer supported the tourism industry. More than 5,100 of those are private non-farm jobs.[2] When adjusted for "place of residence," the job loss is nearly 4,900. In addition, the County would see a net loss of 1,748 residents and 1,669 fewer people in the labor force.

In addition, more than $230 million is added to the county's economy each year due to the presence of the tourism industry. Nearly $143 million in personal income, or $123 million in disposable personal income, is generated because of the tourism industry. Moreover, approximately $399 million in output (or sales) is generated each year from the tourism industry.

[2] See Appendix B: Glossary for definition.

Economic Impact by Season

Table 7: Single-Year Impact of Tourism by Season				
Category	**Summer**	**Spring**	**Fall**	**Winter**
Total Employment	1,972	1,347	1,060	871
Private Non-Farm Employment	1,921	1,312	1,033	849
Residence Adjusted Employment	1,824	1,246	981	806
Population	643	438	344	282
Labor Force	622	424	334	274
Output	$148,879,862	$101,695,242	$80,061,988	$65,766,612
Value Added	$86,320,285	$58,962,079	$46,419,062	$38,130,635
Personal Income	$53,520,844	$36,552,473	$28,774,690	$23,635,726
Disposable Personal Income	$46,035,301	$31,438,073	$24,747,803	$20,327,607

Table 7 highlights the economic impact by season. As expected, the largest share of jobs lost, approximately 1,972, are supported by tourism activity that happens in the summer. In addition, more than $86 million in value added to the economy is generated by tourist activity in those months. That season's tourism spending also generate the most personal income, disposable income and output.

The spring tourism season contributes the second-most to the economy, followed by fall and winter respectively. If the tourism industry were to disappear for the spring season, 1,347 jobs would be lost, along with more than $31 million in disposable personal income, nearly $59 million in value added, and $101 million in sales.

Economic Impact: Effects on Top Industries and Occupations

Table 8: Occupations Most Impacted by Tourism		
Category	**Count**	**%**
Management, business, and financial occupations	275	5.2%
Computer, mathematical, architecture, and engineering occupations	55	1.0%
Life, physical, and social science occupations	11	0.2%
Community and social service occupations	12	0.2%
Legal occupations	9	0.2%
Education, training, and library occupations	57	1.1%
Arts, design, entertainment, sports, and media occupations	100	1.9%
Healthcare occupations	71	1.4%
Protective service occupations	61	1.2%
Food preparation and serving related occupations	2,373	45.1%
Building and grounds cleaning and maintenance, personal care and service occupations	378	7.2%
Sales and related, office and administrative support occupations	1,006	19.1%
Farming, fishing, and forestry occupations	8	0.1%
Construction and extraction occupations	247	4.7%
Installation, maintenance, and repair occupations	147	2.8%
Production occupations	77	1.5%
Transportation and material moving occupations	369	7.0%

Table 8 and 9 report the job impacts of tourism by occupation and industry. As reported in Table 8, more than 45% of jobs lost would be those in the Food Preparation and serving-related occupation. Another 19% of those jobs would be concentrated in the supporting occupations of sales, office and administrative.

Table 9: Industries Most Impacted by Tourism		
Category	**Count**	**%**
Forestry, Fishing, and Related Activities	15	0.3%
Mining	69	1.4%
Utilities	5	0.1%
Construction	333	6.5%
Manufacturing	9	0.2%
Wholesale Trade	11	0.2%
Retail Trade	698	13.6%
Transportation and Warehousing	315	6.1%
Information	8	0.1%
Finance and Insurance	27	0.5%
Real Estate and Rental and Leasing	42	0.8%
Professional, Scientific, and Technical Services	70	1.4%
Management of Companies and Enterprises	17	0.3%
Administrative and Waste Management Services	120	2.3%
Educational services; private	1	0.0%
Health Care and Social Assistance	48	0.9%
Arts, Entertainment, and Recreation	371	7.2%
Accommodation and Food Services	2,864	55.9%
Other Services, except Public Administration	97	1.9%

In addition, Table 9 reports that more than half of the jobs lost would be found in the Accommodation and Food Services Industry. Retail Trade (13.6%), Arts, Entertainment, and Recreation (7.2%), Construction (6.5%) would also significantly feel the impacts of lost tourism, with more than 1,400 jobs lost between those three industries.

TOURISM SPENDING: PATTERNS BY MSA

Tourism Spending: Credit Card Analysis

Tables 10 and 11 provide MSA data for 2017. Fort Walton Beach residents spent the most money dining out, followed by Atlanta residents, in both Q2 and Q3 (Table 10). However, New Orleans residents were the third highest spenders in restaurants during Q2, whereas Dallas-Fort Worth came in third during Q3. Perhaps interestingly, Atlanta and New Orleans residents spent nearly equally for lodging in Q2 (Table 11). As a group, New Orleans residents spent approximately $20,000 more for accommodations than Atlanta residents during Q3.

The top ten residential areas for sales are broken down by quarter on page 25. Perhaps not surprisingly, Fort Walton Beach residents were the top spenders for each quarter in 2017.

Table 10: Top MSAs by Spending in Restaurants

MSA	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Fort Walton Beach	$855,796	$964,735	$931,224	$801,767
Atlanta, GA	$321,446	$957,641	$792,883	$332,808
Mobile, AL	$261,548	$454,553	$417,878	$219,420
Birmingham, AL	$185,339	$352,314	$389,824	$180,835
Dallas-Fort Worth, Texas	$181,757	$415,692	$705,670	$170,843
New Orleans, LA	$166,894	$521,759	$576,612	$184,515
Chicago-Gary-Kenosha IL-IN-WI	$164,400	$200,064	$161,814	$89,965
Houston-Galvaston-Brazoria, TX	$156,263	$326,734	$480,575	$144,301
Nashville, TN	$152,327	$294,980	$326,666	$220,060
Washington-Baltimore DC-MD-VA-WV	$141,797	$251,183	$280,348	$178,515
Saint Louis, MO-IL	$98,459	$213,850	$267,907	$88,180
Jacksonville, FL	$87,576	$123,188	$148,706	$100,986
Baton Rouge, LA	$80,149	$313,150	$314,919	$93,639
Orlando, FL	$79,370	$113,474	$124,416	$106,616

Table 11: Top MSAs by Spending in Lodging

MSA	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Atlanta, GA	$80,200	$279,879	$241,794	$135,607
Houston-Galvaston-Brazoria, TX	$57,893	$154,661	$189,202	$63,886
New Orleans, LA	$54,750	$279,620	$266,349	$94,133
Birmingham, AL	$48,716	$131,244	$133,282	$57,877
Dallas-Fort Worth, Texas	$42,589	$150,561	$216,672	$60,906
Washington-Baltimore DC-MD-VA-WV	$40,185	$97,743	$121,924	$65,652
Nashville, TN	$39,505	$145,939	$117,149	$64,958
Tampa-Saint Petersburg-Clearwater, FL	$34,431	$57,112	$53,672	$43,626
Mobile, AL	$34,063	$82,201	$67,532	$36,345
Chicago-Gary-Kenosha IL-IN-WI	$33,337	$112,535	$44,199	$39,529
Orlando, FL	$31,776	$54,347	$55,503	$40,884
Baton Rouge, LA	$28,836	$150,429	$117,480	$33,161

Table 12: 2017 Q1 Sales by MSA	
MSA	Sales
Fort Walton Beach, FL	$5,501,452
Mobile, AL	$1,197,715
Atlanta, GA	$979,934
Dallas-Fort Worth, Texas	$708,123
Birmingham, AL	$594,634
Chicago-Gary-Kenosha IL-IN-WI	$577,657
Washington-Baltimore DC-MD-VA-	$554,119
New Orleans, LA	$549,634
Houston-Galveston-Brazoria, TX	$537,030
Norfolk-Virginia Beach-Newport	$517,786

Table 13: 2017 Q2 Sales by MSA	
MSA	Sales
Fort Walton Beach, FL	$6,021,414
Atlanta, GA	$2,639,599
Mobile, AL	$1,833,236
New Orleans, LA	$1,710,435
Dallas-Fort Worth, Texas	$1,433,470
Houston-Galveston-Brazoria,	$1,076,647
Baton Rouge, LA	$1,054,013
Birmingham, AL	$1,028,047
Nashville, TN	$862,002
Norfolk-Virginia Beach-	$655,919

Table 14: 2017 Q3 Sales by MSA	
MSA	Sales
Fort Walton Beach, FL	$5,788,069
Dallas-Fort Worth, Texas	$2,364,834
Atlanta, GA	$2,316,800
New Orleans, LA	$1,892,185
Mobile, AL	$1,796,346
Houston-Galveston-Brazoria, TX	$1,573,439
Birmingham, AL	$1,185,365
Baton Rouge, LA	$979,689
Nashville, TN	$925,734
Norfolk-Virginia Beach-Newport	$701,939

Table 15: 2017 Q4 Sales by MSA	
MSA	Sales
Fort Walton Beach, FL	$5,602,969
Mobile, AL	$1,405,621
Atlanta, GA	$1,216,911
Dallas-Fort Worth, Texas	$773,237
New Orleans, LA	$632,746
Birmingham, AL	$613,931
Nashville, TN	$606,076
Norfolk-Virginia Beach-Newport	$572,944
Houston-Galveston-Brazoria, TX	$533,771
Jacksonville, FL	$517,946

Santa Rosa's Tourism Market

Introduction

The following section presents key details regarding Santa Rosa County's tourism market. Three key points are presented:

- Public Lodging Establishments registered with Florida's Division of Hotels and Restaurants
- Bed Tax Collections (Tourist Development Office)
- Occupancy and ADR (STR, Inc.)

Public lodging establishments can be defined as those which are rented to guests more than three times in a calendar year for periods less than 30 days, or advertised as such, OR a place regularly rented or advertised for rental for at least 30 days. Data points are presented for hotels, motels, condos and resort dwellings, but apartments have been excluded.

Bed tax collections are also presented, though they have been standardized at a 2% rate for comparison. Santa Rosa County currently collects bed taxes at a rate of 5% - however, collections were at 4% between 2006 and 2014. Standardization at the 2% level allows comparison over years in which there were different collection rates. The annual percent growth in bed tax collections has been provided in Figure 16. Santa Rosa County's growth is compared to the NWFL region, defined as Escambia, Okaloosa, Bay and Walton.

Figure 17 utilized Occupancy and ADR as reported by STR. Occupancy is calculated by taking the amount of rooms sold divided by the rooms available and multiplying by 100. ADR, or Average Daily Rate, is calculated by taking room revenue divided by rooms sold. Each data point in Figure 17 represents a single month between November 2014 and February 2018. The location of the data represents the intersection between occupancy and ADR, while the size of the bubble represents the amount of bed tax collections that month. Color is indicative of the season.

Utilizing the data provided here, we have also presented an estimated visitor count. This is based on several points of data: bed tax collections, average daily accommodations rate, party size, length of stay and the percent of survey respondents who resided with friends and family. Of course, many of these data points are survey data, and thus subject to a small individual sample size for each category and month. In total, we have estimated that Santa Rosa County had more than 520,000 overnight visitors over our survey period. While daytime visitors are not included in our estimate, it is likely that total visitors (overnight and daytrip) is nearly 868,000.

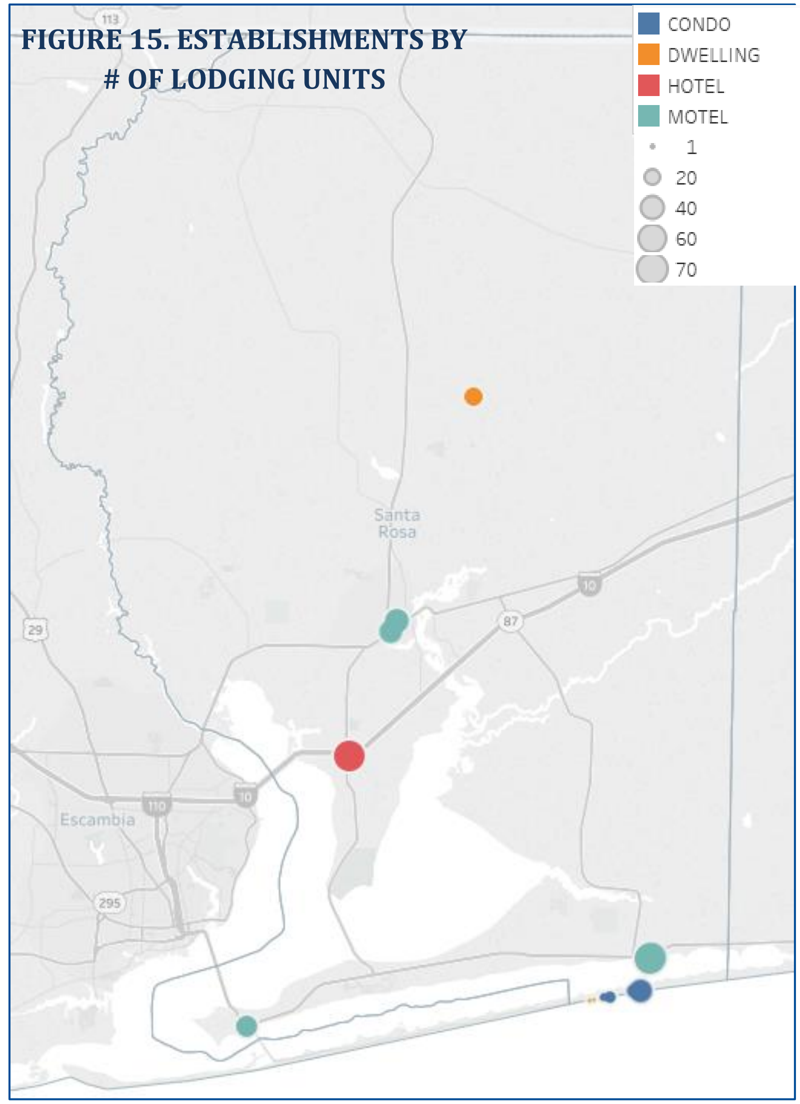
Public Lodging Establishments in Santa Rosa County[3]

Table 5 and Figure 15 present data on active public lodging establishments, (i.e., hotels, motels, resort condominiums and resort dwellings). Table 5 indicates that there are far more registered Condo and Dwellings registered than Hotels or Motels. However, the Hotels and Motels have more units available. In the current Fiscal Year, which started on July 1, Santa Rosa has had 5 new lodging establishments. Figure 15 maps all the county's establishments by their number of lodging units.

Table 16: Lodging Licenses in Santa Rosa County

Lodging Type	Count	# Units	New Lodging Units in FY '17 – '18
Condo	36	421	3
Dwelling	22	101	2
Hotel	5	487	-
Motel	8	465	-

FIGURE 15. ESTABLISHMENTS BY # OF LODGING UNITS



[3] Data received from Florida's Department of Business and Professional Regulation

Bed Tax Collections

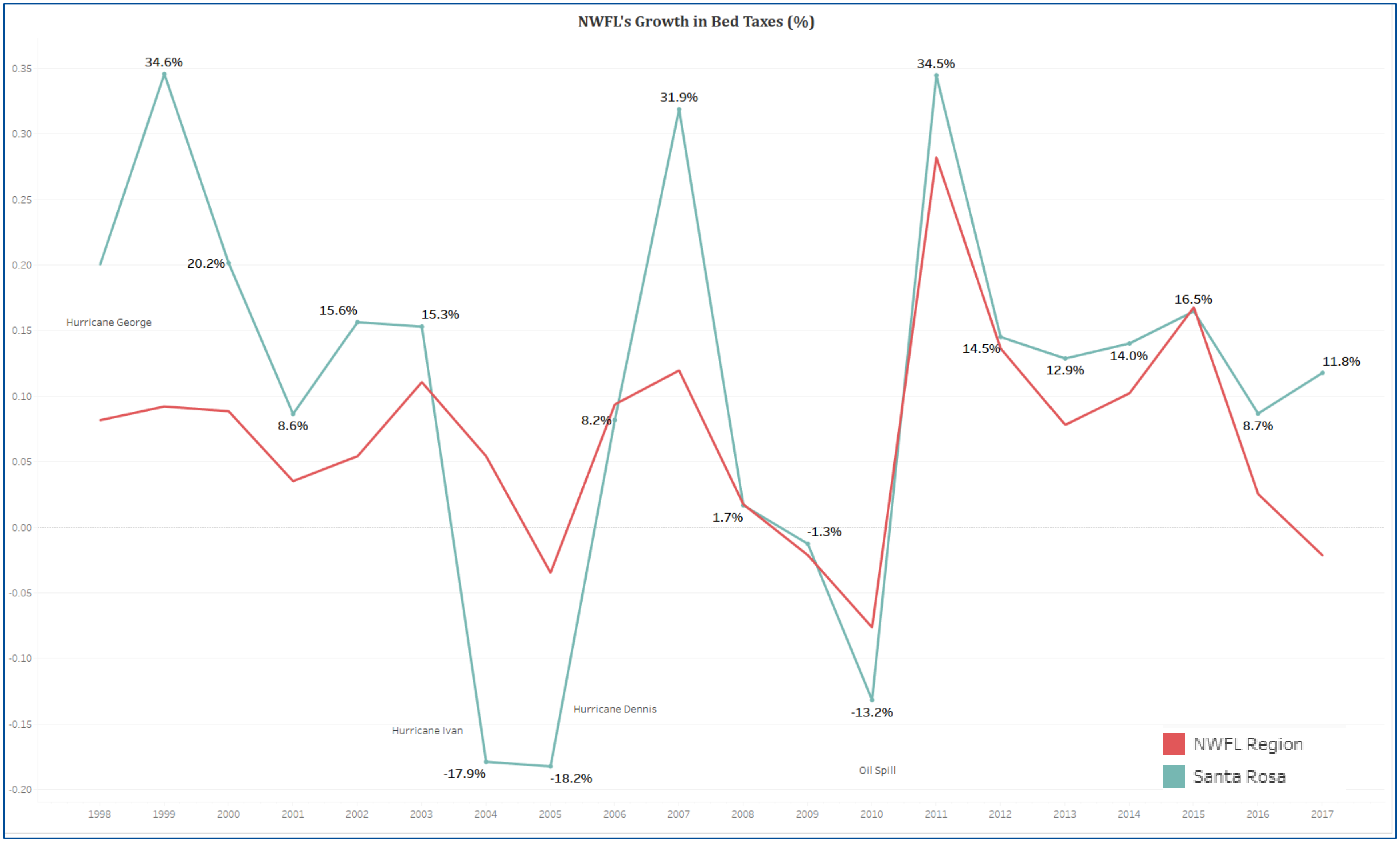


FIGURE 16. BED TAX COLLECTIONS % GROWTH, 2% STANDARDIZED, SANTA ROSA COUNTY AND REGION

Occupancy and ADR

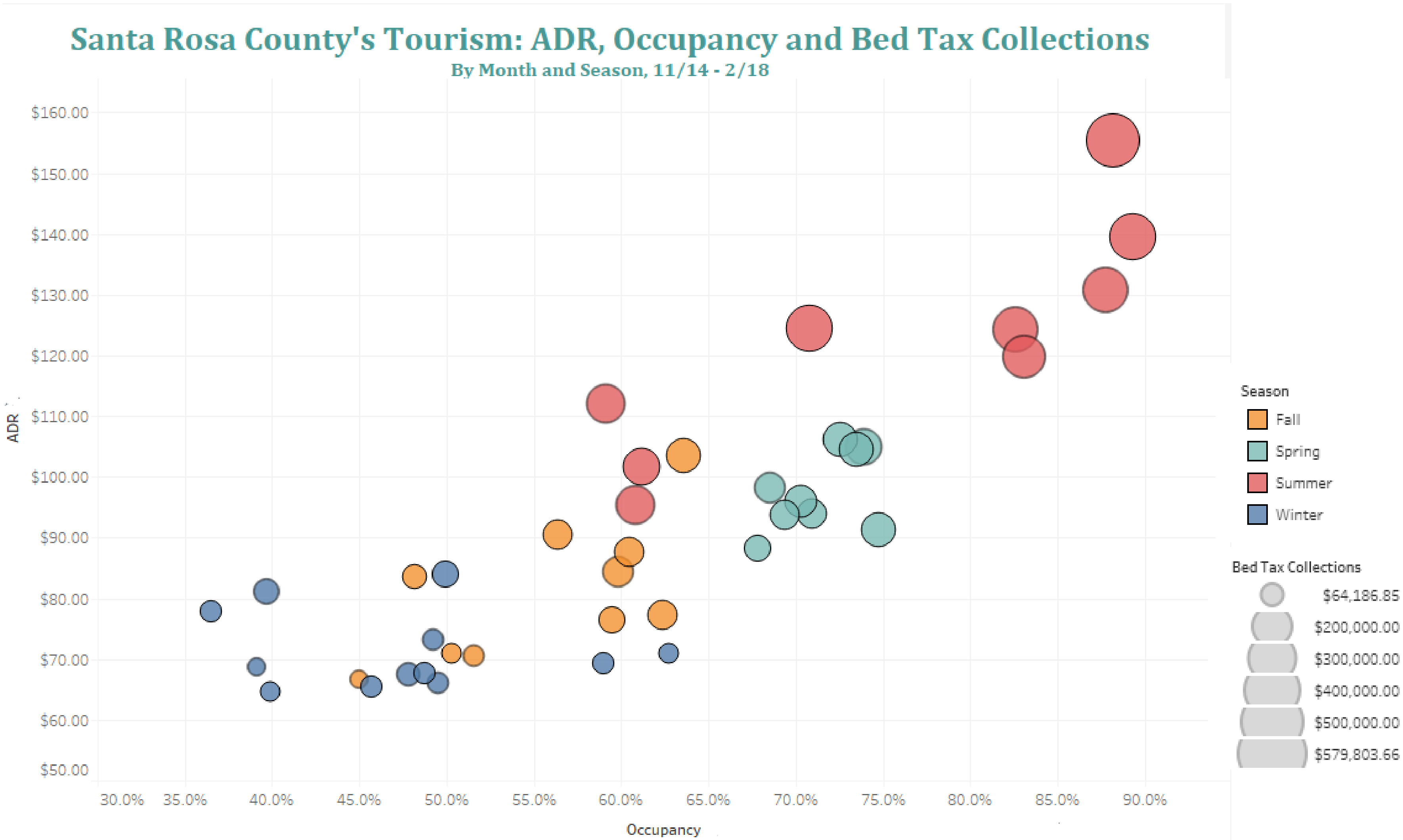


FIGURE 17. BED TAX COLLECTIONS, ADR AND OCCUPANCY, 2014-2017 (SOURCE: STR)

Estimated Visitor Count

Table 17: Estimated Visitors by Month and Quarter						
Month	Bed Taxes	Projected revenue	Total Nights Paid For	Room Nights	Paid Accommodations Visitors	All Visitors
March	$242,069.07	$4,841,381.40	78,255	13,034	44,738	53,015
April	$208,093.89	$4,161,877.80	48,126	9,972	30,724	36,407
May	$262,069.88	$5,241,397.60	41,259	9,095	33,051	39,166
Subtotal	$712,232.84	$14,244,656.80	167,641	32,101	108,513	128,588
June	$436,290.97	$8,725,819.40	48,460	11,551	52,005	61,626
July	$579,803.66	$11,596,073.20	61,074	12,883	53,674	63,604
August	$299,815.35	$5,996,307.00	54,883	12,155	49,835	59,054
Subtotal	$1,315,909.98	$26,318,199.60	164,417	36,589	155,514	184,284
September	$246,668.36	$4,933,367.20	50,759	10,812	43,246	58,079
October	$176,851.48	$3,537,029.60	31,364	8,655	34,197	45,926
November	$119,885.26	$2,397,705.20	26,473	10,018	41,001	55,064
Subtotal	$543,405.10	$10,868,102.00	108,597	29,485	118,444	159,070
December	$129,592.20	$2,591,844.00	41,139	3,229	15,441	18,298
January	$94,216.38	$1,884,327.60	52,651	8,938	18,439	21,850
February	$141,041.51	$2,820,830.20	58,749	6,460	15,603	18,489
Subtotal	$364,850.09	$7,297,001.80	152,539.15	18,627	49,483	58,637
Total	**$2,936,398.01**	**$58,727,960.20**	**593,193**	**116,802**	**431,954**	**530,579**

Appendix

Appendix A: Supplemental Information

Table A1: What other destinations did you consider?							
Pensacola/Pensacola Beach	102	Florida Keyes	2	Cruise	1	Marco Island	1
Destin	69	Sandestin	2	Crystal river	1	Mexico	1
Fort Walton	21	Alabama	1	Dog show	1	Miami	1
Gulf Shores	19	Antique store	1	Ecofina	1	Milton Bakery	1
Panama City	17	Atlantic City	1	Fairhope	1	Miramar Beach	1
Orange Beach	16	Australia	1	Florabama	1	Mobile	1
Tampa	4	Bahamas	1	Florida (all of)	1	Myrtle Beach	1
Orlando	4	Beastly park	1	Freeport, FL	1	Norfolk, VA	1
Panama City Beach	3	Blackwater River	1	Ft. Lauderdale	1	Pace	1
Perdido Key	3	Blakey State Park	1	Ft. Myers	1	Panhandle (all of)	1
Atlanta	3	Cancun	1	Grand Bay	1	Seaside	1
Okaloosa Island	3	Carolina	1	Gulf shores sea grove	1	Seville Quarter	1
Dauphin island	3	Carpenters park	1	Gulfport, MS	1	Siesta Key	1
New Orleans	3	Casino beach	1	Hattiesburg	1	South Carolina	1
Key West	3	Cozumel	1	Holt, FL	1	South Walton Beach	1
California	2	Charlestown	1	Home	1	Spanish Fort	1
Foley	2	Clearwater	1	Jekyll Island	1	St. John's	1
Hawaii	2	Coastal	1	Hattiesburg	1	Tennessee	1
Jamaica	2	Cocoa beach	1	Lakeland, FL	1	Tybee Beach	1
Louisiana	2	Costa Rica	1	Lumber Jack Festival	1	Utah	
Mississippi	2	Cozumel	1	Main areas nearby	1		

Table A2. Other Sites Used To Book Trip			
VRBO	56	Budgetary.com	1
Airbnb	13	Campground website	1
Home away	12	Chamber of Commerce	1
Delta	10	Cheap Tickets.com	1
Google	9	Destin Fishing	1
Booking.com	8	Email	1
Southwest	7	Enterprise	1
Allegiant	5	Facebook	1
Trip Advisor	5	Flip Key	1
Orbitz	4	Good Sam app	1
United	4	Hotel	1
American Airlines	3	Last Minute.com	1
Hotels.com	3	Navarre Campground	1
Navarre Beach Rental	3	Plunge Site	1
Navarre Properties	3	Santa Rosa RV Resort.com	1
Resort Quest	3	Tournament Registration	1
Dale Peterson	2	Yelp	1
AAA	1	Zoo Website	1
AVP	1		

Table A3: Direct Sites Used to Book Activities			
Thunder Tix	16	Google	1
My Father's Arrow	4	Reserve America	1
Adventures Unlimited	3	Resort Quest	1
Airbnb	2	Respiratory Quest	1
Marine Science	2	Santa Rosa RV Resort	1
Active.com	1	Southwest	1
Booking.com	1	Ticket Fly	1
Campground Website	1	Tripadvisor	1
Chamber of Commerce	1	VRBO	1
Eventbrite	1	Zoo	1

Table A4: Direct Hotel Sites Used			
VRBO	33	Days Inn	1
Navarre Properties/Listings/Rentals	14	Drury Inn	1
Home Away	7	Gulf Coast Getaways	1
Summer Winds	5	Gulf Winds	1
Marriot	4	Hampton	1
Wyndham Vacations	4	Holiday Inn	1
BBR	2	Hotels.com	1
Hilton	2	IHG	1
Southern Vacation Rentals	2	RBB	1
Trip Advisor	2	Realtor	1
Acacia Rentals	1	RV Site	1
Best Western	1	Santa Rosa RV	1
Bob the Vacation Guy	1	Southern Resort	1
Campground	1	SPG	1
Century 21	1	Springhill	1
Dale Peterson Vacations	1	VRVA	1

Table A5: Other Sites Used for Activities	
Direct website for activities	60
Direct website for hotel/condo	151
Expedia	31
Hotwire	2
Kayak	13
Other	207
Priceline	14
Travelocity	17
Trivago	5

Table A6: “Other“ Reasons for Visiting Santa Rosa County					
Zoo lights	30	Navarre beach run	4	vacation/ school orientation	1
Bands on the Blackwater	29	Evacuation	4	Event	1
Blackwater water festival	29	Shopping	4	Winter get away	1
Volleyball	25	Surf	3	Pow Wow	1
Riverwalk Arts Festival	22	Driving through	3	Church booth	1
Snowbird	21	Retired	3	Get drunk	1
BJ Thomas concert	20	Car show	3	Staycation	1
Sasquatch run	16	Penguin plunge	3	Navarre Beach Run	1
Tunes on the dunes	13	Women's expo	2	Navarre Mardi Gras ball	1
Blueberry bash	13	House hunting	2	Church benefit	1
Wedding	10	4th of July fireworks	2	Visiting	1
Mardi Gras Parade	9	Plunge and Paddle	2	Second Home	1
Lagerheads on the gulf	9	Songwriter Beach Blast	2	Navarre Snowbird Expo	1
Bike/car show	9	Entertainment	1	Shelling and fishing	1
Beach	8	Give away free kittens	1	Part time rv	1
Songwriters beach blast	8	Pat Huggins fishing event	1	Kids live here	1
Scratch Ankle Festival	7	Apartment flooded	1	Work in Navarre	1
Kiln walk festival	7	Day off	1	Navarre Christmas Parade	1
Adventure unlimited	7	Pirate Plunge	1	Navarre Mardi Gras	1

Table A7: “Other” Events or Festivals Which Motivated Travel			
Blackwater River Festival	31	Navarre Christmas Parade	2
Tunes on the Dunes	27	Penguin Plunge	2
BJ Thomas Concert	22	Snowbird Bird Talk	2
Blueberry Bash	18	Cheer Competition	1
Sasquatch Run	16	Expo	1
Songwriters Beach Blast	14	Family Reunion	1
Bands on the Blackwater	9	Festival	1
Lagerheads on the Gulf	9	Hangout Fest	1
Wedding	8	Marine Science Camp	1
Adventures Unlimited	6	Navarre Chamber Women’s Expo	1
Navarre Beach Run	5	Navarre Home Show	1
Navarre Women’s Expo	5	New Years	1
Graduation	4	Pirate Plunge	1
Mardi Gras	4	Plunge and Paddle	1
Navarre Snowbird Expo	4	St. Patrick’s Festival	1
Christmas in the Park	3	Santa Rosa County Creek Indian Pow Wow	1
Autism OdysSea	2	Seafood Festival	1
High School Graduation	2	Visit Beach	1
Kiln Opening	2	Volleyball Tournament	1

Table A8: "Other" Ways People Know of Tourism Destination							
Former Resident	38	Billboards	1	Imogene Theater Member	1	Picked from a Map	1
Drive By	20	Board Member Santa Rosa Kids House	1	Just Ended Up Here	1	Previous Visitors	1
Escambia County Resident (Past or Present)	15	Book	1	Knows Area	1	Real Estate Agent	1
Volleyball Tournament/Community	12	Boss Sent Him	1	Krewe Jester	1	Research	1
Lives "Nearby"	10	Bridge to Bridge 3 Mile Swim	1	Long Time Artist at Festival	1	Rode Bicycles Across Country and Found it	1
Work	9	Bulldogs Beach	1	Looking for Possible Places to Retire in a Few Years	1	Santa Rosa County RV Resort	1
Business	8	Camping	1	Luck/Random	1	School	1
Lives Nearby in Okaloosa County	3	Church	1	Milton Youth Council	1	Signs	1
Co Worker	2	Condo Owner	1	Navarre Chamber of Commerce	1	Snowbird News Letter	1
Radio	2	County Commissioner	1	Navarre Snowbirds Club	1	Songwriters Beach Blast	1
Random	2	Daughter's Wedding in Navarre (2013)	1	Newspaper Article (1990)	1	Travel Agent	1
Run Pensacola	2	Employer	1	Not Sure	1	Travel Channel	1
Travel	2	Facebook	1	Online	1	Upward Church	1
VRBO	2	Found It	1	Owns Condo	1	Visitors Center	1
Airbnb	1	Friends	1	Pensacola Beach Visitor Center	1	Word of Mouth	1
Beach Drive By	1	Groupon	1	Personal Preference	1	Works in County	1

Appendix B: Economic Impact Glossary

Employment

Employment comprises estimates of the number of jobs, full-time plus part-time, by place of work. Full-time and part-time jobs are counted at equal weight. Employees, sole proprietors, and active partners are included, but unpaid family workers and volunteers are not included.

Labor Force

The labor force includes all people classified in the civilian labor force, plus members of the U.S. Armed Forces (people on active duty with the United States Army, Air Force, Navy, Marine Corps, or Coast Guard). The civilian labor force consists of people classified as employed or unemployed.

Non-farm employment

A measure of the number of U.S. workers in the economy that excludes proprietors, private household employees, unpaid volunteers, farm employees, and the unincorporated self-employed. This measure accounts for approximately 80 percent of the workers who contribute to Gross Domestic Product (GDP).

Output

Output is the amount of industry production, including all intermediate goods purchased as well as Value Added (compensation and profit). It can also be thought of as sales or supply. The components of Output are Self Supply and Exports (Multiregions, Rest of Nation, and Rest of World).

Personal Income

Personal Income is the income that is received by all persons from all sources. It is calculated asthe sum of Wage and Salary Disbursements, Supplements to Wages and Salaries, Proprietors' Income with inventory valuation and capital consumption adjustments, Rental Income of persons with capital consumption adjustment, Personal Dividend Income, Personal Interest Income, and Personal Current Transfer Receipts, less Contributions for Government Social Insurance.

The personal income of an area is the income that is received by, or on behalf of, all the individuals who live in the area; therefore, the estimates of personal income are presented by the place of residence of the income recipients.

Population

Population reflects mid-year estimates of people, including survivors from the previous year, births, special populations, and three types of migrants (economic, international, and retired).

Value Added

Value Added is a measure of the contribution of each private industry and of government to a region's Gross Domestic Product. It is defined as an industry's gross output (which consists of sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (which consist of energy, raw materials, semi-finished goods, and services that are purchased from domestic industries or from foreign sources). Value Added by industry can also be measured as the sum of compensation of employees, taxes on production and imports less subsidies, and gross operating surplus.

Appendix C: Tourism Market Economic Impact Survey

Hello, my name is _________ from the Haas Center at the University of West Florida. We are conducting marketing research regarding visitation to Santa Rosa County. Would you be willing to take a short survey regarding your time spent in Santa Rosa County?

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

If no, end of survey.

2a. If yes, are you currently staying overnight?

2b. If so, where are your accommodations located?

Gulf Breeze, Navarre, Pace, Milton, Jay, 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. How long are you staying in the area? (day trip, 1 night, 2 nights, etc)

5. What is the purpose of your trip?

a. Vacation
b. Visit family/friends
c. Part of a Group
d. Business
e. Other(please specify)________

5b. Did you travel to the area for any specific events or festivals?
Mardi Gras Parade in Navarre
Kiln Walk Festival
Navarre Beach Volleyball Tournament at the Pier
Scratch Ankles Festival
Riverwalk Arts Festival
Navarre Beach Funfest
Bands on the Blackwater
Navarre Beach Run for the Reef
Monarch Madness
Bagdad Riverfront Festival
4th of July Fireworks on Navarre Beach
River Fest in Milton
Navarre Chamber Thursdays Concert Series
Navarre Beach Songwriters Festival

6a. Is this your first visit to the area? Yes/No/Unsure
6b. If not, approximately how many times?
7a. What type of transportation did you use to travel to the area?
a. Car
b. RV
c. Plane
d. Boat
e. Other (specify)

7b. If traveled by plane, can you tell me what airline you used?
7c. If traveled by plane, what airport did you use? Destin, Pensacola, Some Other Airport
8. How many other people are in your party?

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: $____________________
d. Shopping: $____________________
e. Transportation/Gas (in the area) : $____________________
f. Miscellaneous: $____________________

10. How satisfied are you with your visit?
a. Very Dissatisfied
b. Dissatisfied
c. Neutral
d. Satisfied
e. Very Satisfied
i. [If very dissatisfied/dissatisfied] Why? (open ended)

11. How likely are you to return to Santa Rosa County?
a. Extremely likely
b. Somewhat likely
c. Neither likely nor unlikely
d. Somewhat unlikely
e. Extremely unlikely

12a. How did you hear about this tourism destination?

Internet, TV, Radio, newspapers/magazines, travel agency, travel brochures, tourist fairs, family/friends, social media

12b. Did you consider any other destinations?

13a. Did you book any part of your trip (accommodations, activities, etc.) on the Internet?

13b. If so, what sites did you use?

These last questions are for statistical purposes only. Again, all of your responses will remain confidential.

14. Please indicate your age group.
18-24, 25-34, 35-44, 45-54, 54-65, 66-74, 75-84, 85+, prefer not to respond
15. In what ZIP code do you currently reside?
16. What best describes your household income before taxes?
a. $40,000 or less
b. $40,001-60,000
c. $60,001-75,000
d. $75,001-100,000
e. $100,001-150,000
f. $150,001 or more
g. Unsure
h. Prefer not to respond

17. Can you please indicate your marital status?
a. Married
b. Single
c. Divorced
d. Separated
e. Widowed
f. Prefer not to Respond

Thank you for your time. This survey was conducted by the University of West Florida and the Haas Center for research purposes. The conduct of this sponsored research project by the Haas Center does not imply University or Haas Center endorsement. Have a great day!