Addendum 6
RFP 80-16 TDD-Advertising/Marketing for Public Relations and Social Media

1. Of the approximately $7 million budget, how much is dedicated for promotion and operation of the convention center?
   $294K is budgeted for convention center promotional items, trade show fees, website, media campaign, & directory listings

2. Is the $3.5 million for paid media inclusive of production, public relations and out of pocket costs?
   No. $3.47M is solely for the cost of paid media (print, digital, broadcast, outdoor)

3. If not, what portion of the budget typically has been allocated for those costs?
   $500K is budgeted for campaign production & $95K for public relations
   Out-of-pocket typically falls under campaign production

4. In January of this year, it was reported that the New Orleans agency which had been working with the department was being let go and that the intention was to bring the advertising, marketing and social media functions in-house. Has anyone been hired to provide these functions?
   In-house staff has not been hired. The purpose of this RFP is to retain an agency/agencies to provide these services, primarily in lieu of in-house staff.

5. The interim director left at the end of August; who will the selected vendor coordinate with and report to?
   Deputy Director of Sales & Marketing

6. Can you provide the names and titles of the department staff?
   Deputy Director of Sales & Marketing, Maureen Morgenthien
   The County is in the process of evaluating which additional staff positions need to be hired to supplement and provide guidance to the agency/agencies.
   To maximize efficiency, it is anticipated the vendor(s) selected will have one point person within the tourist development department appropriate for the scope of services.

7. With an almost 10 percent increase in bed tax collections in the most recent fiscal year, is there a sense that the tourism budget will be increased?
   The FY17 strategic marketing plan totaling $6.973M reflects this increase in bed tax collections.

8. Is there a preference in how you would like to be billed? i.e., hourly, fixed fee, commission?
   The County does not have a compensation structure preference.

9. Has any recent scientific research been conducted regarding perceptions and awareness of the Emerald Coast brand? If so, can you provide?
   None recently conducted.

10. Is there an existing advertising buy in place? If so, can you share details of the buy?
    Details of the prior year advertising buys are found on pages 101-200 of the FY16 strategic marketing plan attached hereto.

11. What are the biggest challenges faced by the TDC and its staff?
    The destination has marketed to the regional drive market for many years, but there is no recognition outside of that small area. Expansion into non-stop fly markets and select international markets is important.
    Increasing occupancy during the non-summer season.
    Goals, objectives and metrics need to be established and will evolve over time.

12. How does the TDC engage and inform the public of the work it is doing?
    This is currently a point of weakness. The public relations function will need to build local relationships and educate/inform the public of the benefits of the activities of the TDC to local residents.

13. International markets are mentioned in your RFP. Are there specific international markets that drive the most visitors to Okaloosa County?
    The Canadian snowbird market is important, and the destination is just beginning to branch out into other international markets (i.e. Latin America, England) through partnerships with VisitFlorida.

14. Who manages your social media accounts on a day-to-day basis?
    Primarily the advertising agency, with support from staff.

15. What is the “proposal security” that must be included in the RFP Response?
    It refers to the need for any kind of bond. This particular proposal does not required a bond.

16. Could you clarify what is meant by the following: “Each item must be proposed separately and no attempt is to be made to tie any item or items to any other item or items”?
    It means that the proposal amount needs to be clear and not cost can be combined, we need a clear and total picture of what your cost will be.

17. Is the County open to having the agency partner with vendors or other outside agencies, given that it is mentioned in the RFP documents that all services would have to be handled in-house?
    The intent is to award work to vendors possessing in-house capabilities. However, it you wish to clearly disclose and explain the relationship and subcontractors who would be performing the work, that arrangement may be considered by the RFP review committee.

18. What are the current handles on each platform dedicated to the Okaloosa County CVB marketing efforts?
    facebook.com/FloridasEmeraldCoast

    twitter.com/EmeraldCoastFLA

pinterest.com/EmeraldCoastFLA

instagram.com/EmeraldCoastFLA

19. Does Okaloosa County have internal analytics platforms already in place?

ROI, analytics, and metrics of campaign success are currently a point of weakness. Goals, objectives and metrics will be established at beginning of contract and will evolve over time. The County welcomes ideas for analytics as part of the response to the RFP.

20. What does the internal social and marketing team our agency would work with look like?

To maximize efficiency, it is anticipated the vendor(s) selected will have one point person within the tourist development department appropriate for the scope of services.

The Deputy Director of Sales & Marketing is currently the primary contact. The County is in the process of evaluating which additional staff positions need to be hired to supplement and provide guidance to the agency/agencies.

21. Is Okaloosa County willing to share their current TV, radio and digital buy plans,?

Details of the prior year advertising buys are found on pages 101-200 of the FY16 strategic marketing plan attached hereto.

22. Has the county ever done any particular market research, focus groups, targeting or polling they can share with us?

Visitor Profile Surveys are attached hereto.

23. Regarding the Federal E-Verify Compliance Certification, it states that "Respondent (DKC) will use the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the respondent during the contract term…" Please clarify if that means the entirety of DKC or persons who will be assigned to work on the account?

All employees will need to be verified

24. Another question (based on your answers below) that we're hoping to have clarity on is related to any key perceptions you want/need to overcome/address/build. We'd like to better understand the communications problem we need to solve.

From a local perspective – We need positive coverage in market to build local relationships and educate/inform the public of the benefits of the activities of the TDC to local residents.

From a national or international perspective – The destination has marketed to the regional drive market for many years, but there is minimal outside of that small area. With the growth of scheduled non-stop flights into the Destin-Fort Walton Beach Airport, we are positioned for growth and need to expand our attention to a national level, concentrating on feeder markets especially during the low occupancy, non-summer seasons.

Emerald Coast Visitor Profile

2014-15 Full Year Survey Report

HAAS CENTER
INNOVATIVE RESEARCH ◆ INTELLIGENT SOLUTIONS
[illegible]

Peter Mayer Advertising

Ellen Kempner - Vice President Account Director

Haas Center

Brice Harris, Ph.D.— Co-Director

Phyllis Pooley, J.D. — Co-Director

Project Team

Amy Webber, M.A.

Angela Sanders, B.A.

Primary Contact

Brice F. Harris, Ph.D.
Director, Strategic Initiatives
Office of Economic Development
& Engagement
University of West Florida
220 West Garden Street, Suite 303
Pensacola, Florida 32502
850-439-5400
bharris@uwf.edu

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.

Table of Contents

List of Tables

List of Figures

Introduction

The Haas Center was commissioned by the Emerald Coast Convention and Visitors Bureau to conduct a tourism study of the Emerald Coast. For a 12-month period between March 2014 and February 2015, the Haas Center had 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	$33.36	41.3%
Food & Beverage	$13.62	17.0%
Entertainment	$8.27	10.2%
Shopping	$19.58	24.2%
Transportation	$4.15	5.1%
Miscellaneous	$1.80	2.2%
Total	**$80.78**	**100.00%**

Purpose and Scope. The purpose of this report is to provide in-depth details about demographic and economic trends of Emerald Coast tourism. 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 was contracted to collect quarterly visitor and spending data that provides estimates for all visitor types. The average spending data per-person and per-night is provided in Table 1 for the Emerald Coast.

This study utilized intercept survey techniques to obtain tourist demographics, lodging and transportation habits, spending patterns and overall satisfaction. 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 period between March 2014 and February 2015, the

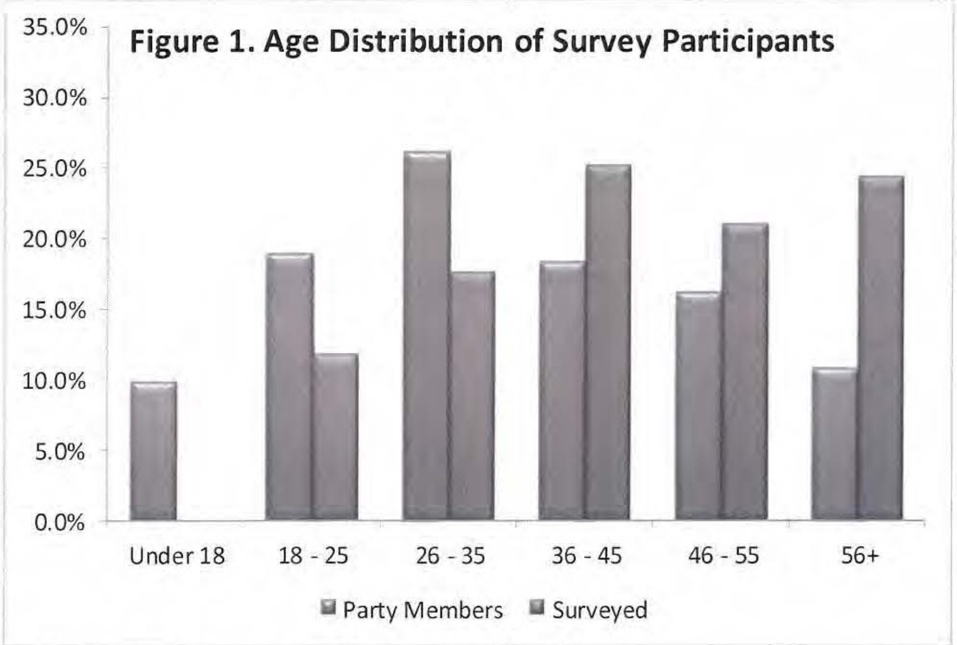

Figure 1. Age Distribution of Survey Participants

Haas Center administered intercept surveys that collected details about unique visits to the Emerald Coast. Survey professionals spent sixteen hours a week throughout the period 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 9,100 adults during the year-long collection period. Among the sampling frame, approximately 20%, or 1,797 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 on the previous page, the distribution of surveyed individuals is fairly normal. Approximately 25% 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 (11.8%). Nearly 55% of all members of the parties were 35 years old or younger. The party members who were reported as younger than 18 numbered nearly 10%.

Party Size. Another component measured was the party size of each respondent. As the data in Table 2 indicate, nearly 43% of all participants were traveling either by themselves or with one other person. Only 22% of all party sizes had five members within the visiting party or more. Additionally, two more statistics on party size have been calculated: average and median party size. The average party size, 3.34, is slightly higher than the median party size, 3.0.

Table 2. Distribution of Party Size

Party Size	Percent
One	8.7%
Two	34.1%
Three	18.7%
Four	16.5%
Five	10.9%
Six	4.9%
Seven	2.6%
Eight	1.0%
Nine	0.6%
Ten	1.9%
Fourteen	0.1%
Mean Party Size	3.34
Median Party Size	3.0

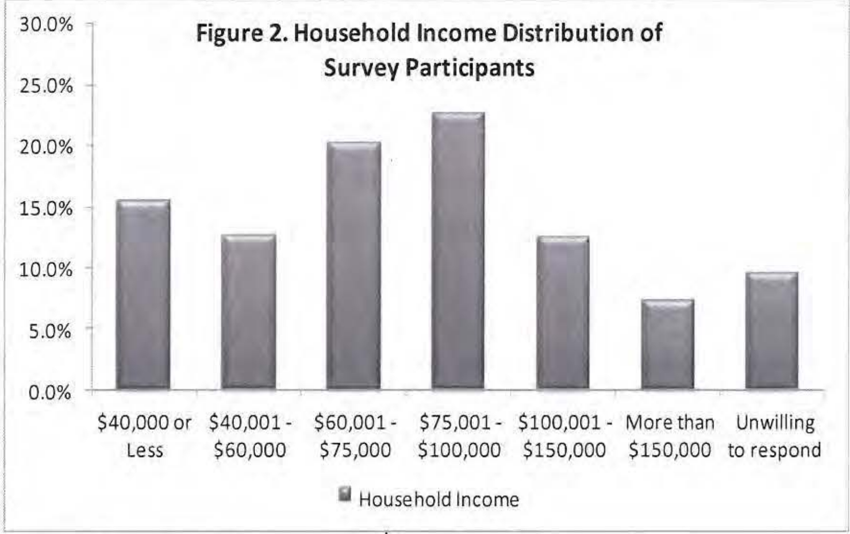

Figure 2. Household Income Distribution of Survey Participants

Household Income. Figure 2 presents the distribution of household income for all respondents. The distribution in this chart is fairly normal as well, though there were slightly more respondents in the two lower income brackets than the two highest brackets. Of all respondents, nearly 9.5% were unwilling to disclose their household income. Interestingly, the two brackets in the $60,001 — $100,000 range had the most visitors overall with over 42% of total visitors falling in that income range. However, 28% of survey participants indicated they received less than $60,000 in household income annually. The smallest share of survey participants, 7.3%, had a household income of more than $150,000.

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 7% of visitors came from California, New York and Pennsylvania. Figure 3 (on the following page) presents a geographical distribution of where all respondents report as their state of origin. Approximately 63% of respondents claim to be from the southeastern United States, including Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee and Texas.

Table 3. Top Ten Origin States of Visitors

State	Percent
Florida	21.1%
Alabama	8.6%
Georgia	7.3%
Texas	7.2%
Louisiana	4.6%
Tennessee	3.4%
Mississippi	3.3%
California	2.4%
Pennsylvania	2.3%
New York	2.3%

The largest group (21.1%) of Emerald Coast tourists are visiting from other Florida counties. Figure 4 (pg. 7) presents a geographical distribution of in-state respondents' zip code of origin. Residents of Escambia County were the largest group of in-state visitors represented in the survey, followed by Santa Rosa and Bay Counties. Visitors also came from Palm Beach, Orange, Alachua, Duval, Leon, Brevard 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

Lodging and Transportation. As presented in Table 4, approximately 46% of respondents stayed in the Destin area, followed by Fort Walton Beach (18.3%) and Okaloosa Island (14.5%). The remaining 20.3% of tourists were either taking a day trip to the area (12.2%); staying overnight, but not in the area (7.1%); or were unsure of their nightly accommodation location (1.5%). The respondents who stayed overnight, but not in the Emerald Coast area, stayed in various locations. Most were either staying in Panama City or Navarre; however, other common answers provided by respondents included Pensacola, Niceville and Miramar

Table 4. Location of Lodging

Location	Percent
Destin	46.4%
Okaloosa Island	14.5%
Fort Walton Beach	18.3%
Day Trip Only	12.2%
Staying overnight, but not in the area	7.1%
Unsure	1.5%

Table 5. Transportation Type

Mode	Percent
Car	85.5%
Other	0.6%
Plane	11.2%
RV	2.7%

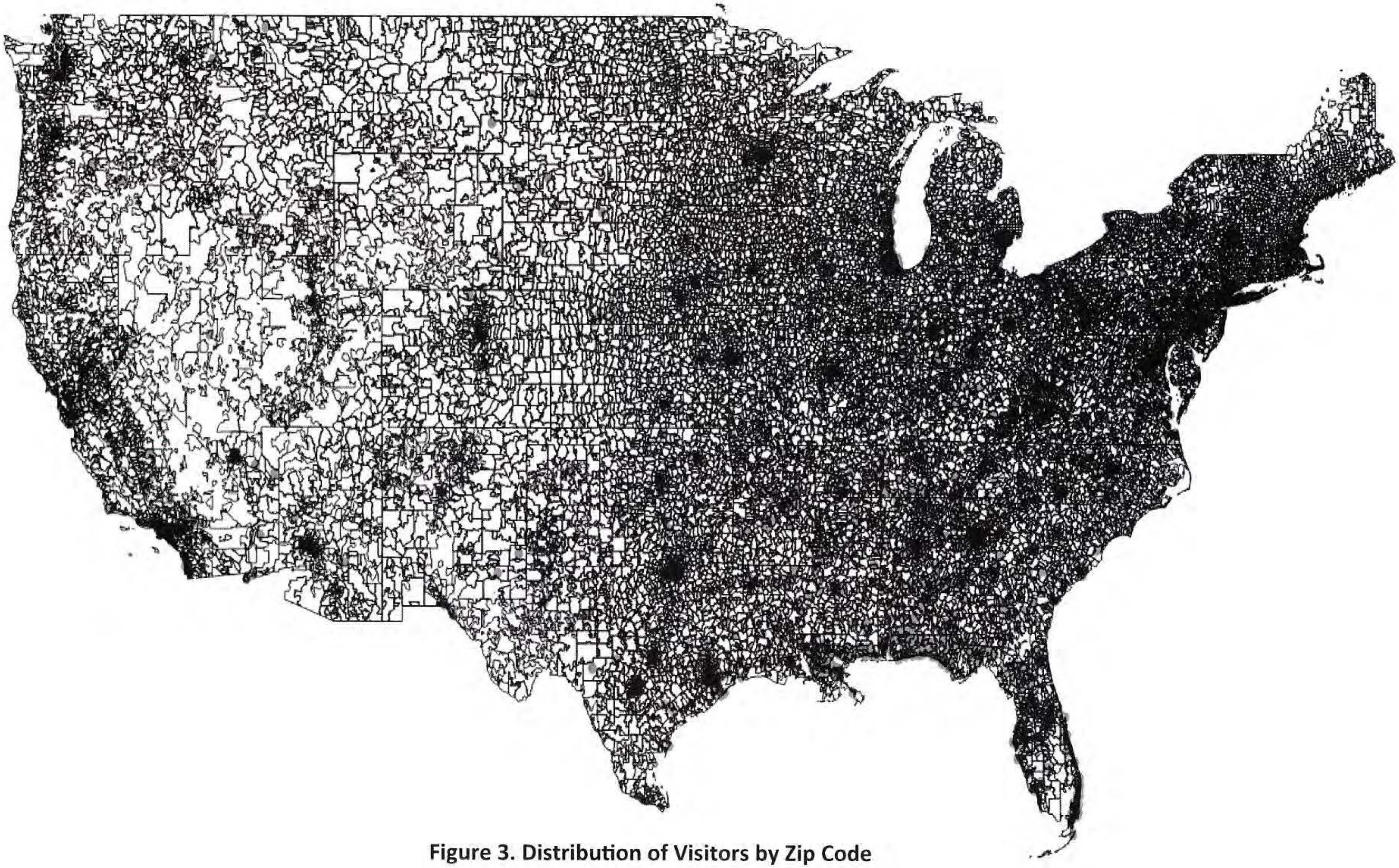

Figure 3. Distribution of Visitors by Zip Code

Figure 4. Distribution of Florida Visitors by Zip Code

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, nearly 86%, used a car to reach their destination. Traveling by plane (11.2%) and RV (2.7%) 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 show the distribution of visitors' lodging accommodations. Approximately three-fourths of respondents stayed in either a hotel (32.8%) or a condo (40%). About 8% of respondents reported using a house rental. Just over 7% of respondents indicated that he or she was staying with friends or family, while just under 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 6. Type of Lodging

Location	Percent
Campground or RV	1.5%
Condo	40.0%
Hotel	32.8%
House Rental	8.0%
Stay with Friends or Family	7.1%
Unwilling to respond	0.3%

Table 7. Length of Stay

Range	Percent
< 3 days	12.2%
3 - 5 days	45.5%
6 - 7 days	22.5%
8 - 10 days	6.9%
11 - 14 days	5.5%
15 - 30 days	5.6%
31 - 60 days	1.3%

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 7.33 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, followed by six or seven day stays. Considered together, approximately 80% of respondents indicated they were visiting the Emerald Coast for a week or less. In addition, more than 12% 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 expense for visitors. For the entire length of stay, the estimated mean spending on lodging is $813, whereas the median is $680. The average expenditures for shopping, $479, are the second -highest expense for visitors. On average, visitors also spend hundreds of dollars on food, entertainment and transportation.

Table 8. Average Estimated Spending for Length of Stay

Type of Spending	Mean	Median
Accommodations	$813.43	$680
Food	$333.57	$250
Entertainment	$202.53	$200
Shopping	$479.30	$300
Transportation	$101.72	$80
Miscellaneous	$44.06	$55

Tables 9 through 11 (on page 10) explore several patterns of per-person, per-night spending for all six categories of expenditures by different groups. In 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 $41.03. However, participants who stayed in hotels spent the most overall, approximately $101.75. Indeed, visitors staying in hotels also spent more on shopping and food. Visitors who used campground/RV for trip accommodations spent the most on entertainment, transportation and miscellaneous, though otherwise they consistently spent less on the other three types of expenditures. Those respondents staying with family or friends spent the least on accommodations at $4.95 per-person, per-night and only $49 per-night in total for all expenditures.

In Table 10, per-person, per-night spending is examined by household income. Those who reported earning an annual income over $150,000 spent more than any other income level at $127.04 per-person, per-night. Those who earned between $100,000 and $150,000 a year consistently 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, spent the least in all categories. More specifically, respondents with household incomes of $40,000 or less only spent approximately $48.35 per-person, per-night.

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

Type of Lodging	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Campground/RV	$16.23	$16.47	$13.67	$21.59	$7.34	$3.29	$78.59
Condo	$41.03	$13.89	$8.97	$21.75	$3.89	$1.78	$91.32
Hotel	$37.94	$20.60	$10.93	$24.11	$6.20	$1.97	$101.75
House Rental	$26.08	$10.15	$4.25	$12.03	$2.45	$0.94	$55.89
Friends/Family	$4.95	$11.54	$8.88	$16.03	$5.23	$2.66	$49.28

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

Household Income	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
$40K or Less	$24.63	$6.95	$4.39	$2.53	$9.02	$0.84	$48.35
$40K - $60K	$29.09	$9.35	$4.89	$3.02	$11.92	$1.42	$59.69
$60K - $75K	$32.30	$12.44	$8.71	$4.78	$15.78	$1.96	$75.97
$75K - $100K	$35.56	$15.61	$8.63	$4.56	$21.76	$1.75	$87.86
$100K - $150K	$41.96	$18.08	$11.70	$5.46	$26.65	$2.31	$106.16
< $150K	$44.50	$21.68	$15.31	$5.48	$36.61	$3.46	$127.04

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

Reason for Trip	Accommodations	Food	Entertainment	Shopping	Transportation	Misc	Total
Business	$66.08	$21.60	$15.87	$18.52	$12.60	$4.81	$139.49
Other	$27.73	$7.71	$7.84	$4.26	$2.51	$0.53	$50.59
Part of a Group	$28.95	$20.93	$14.63	$19.27	$6.90	$3.74	$94.41
Shopping	$8.16	$24.11	$17.32	$104.45	$11.37	$2.96	$168.38
Vacation	$34.78	$14.32	$7.97	$20.67	$3.96	$1.60	$83.29
Visiting Family/ Friends	$12.33	$10.62	$8.85	$14.06	$5.26	$2.82	$53.94

Finally, Table 11 presents per-person, per-night spending patterns by reason for visit. Visitors who traveled to the Emerald Coast for shopping have a higher rate of total spending, at $168.38 per night, per person, although the data reveal that these parties stay the shortest amount of time and have the least number of party members on average. As anticipated, those who visited the Emerald Coast for shopping indicated they spent more on shopping per person than any other group ($104.45 per-person, per-night). Shopping visitors also spent nearly as much money on transportation as business travelers, with approximately $11.37 spent per person, per night. Of interesting note, those traveling on business to the Emerald Coast spent more on accommodations than other travelers. In fact, business travelers spent almost twice as much on accommodations as the next highest group, visitors on vacation. Visitors who traveled for other reasons ($50.59 per-person, per-night) and visitors who came only to see family or friends ($53.94 per-person, per-night) spent the least overall on expenditures.

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 12 the primary reasons for visiting the Emerald Coast are listed. Approximately 68% 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 (15.3%). Table 12 also shows that people came specifically to shop (6.9%), to participate in group activities (3.2%) or for business (4.3%). Also, Table 13 shows that party size varied by type of lodging. House rentals usually had a party size of roughly 5.5 people, while the average for hotels was typically smaller at 2.96 people.

Table 12. Visitors' Purpose for Trip

Purpose	Percent
Business	4.3%
Other	2.3%
Part of a Group	3.2%
Shopping	6.9%
Vacation	68.0%
Visiting Family or Friends	15.3%

Table 13. Mean Party Size by Type of Lodging

Type of Lodging	Party Size
Campground or RV	3.54
Condo	3.36
Hotel	2.96
House Rental	5.51
Stay With Friends or	3.28

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 88% reported visiting beaches, while approximately 73% went shopping. Many visitors frequented local attractions (26.2%) or headed to special events (15.6%). Emerald Cost visitors also took advantage of the area's excellent fishing (23.4%) or water sports (12.7%) during their time in Okaloosa County.[2]

Table 14. Visitors' Activities While in Area

Activities	Percent
Beaches	88.0%
Fishing	23.4%
Local Attractions	26.2%
Shopping	73.1%
Special Events	15.6%
Water Sports	12.7%

Additionally, participants were asked about the frequency of their trips

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[2] *Please note, these percentages sum to more than 100% as respondents were allowed to provide more than one answer.*

to the Emerald Coast. Participants reported in Table 15 (on the following page) that just over one-third (35.2%) were visiting the area for the first time. Alternatively, 42.6% of respondents had previously visited the area and 22.2% were unsure. As indicated in Table 17, just over 30% of respondents reported that they were already planning to return to the area in the next year, whereas 47% said no, and 22.7% did not know.

Survey respondents reported usually only taking one annual trip to the Emerald Coast (49.4%), while another 19.6% reported taking two total visits. Participants also gave information on their overall satisfaction with their trip, provided in Table 18. For all visitors, 98.8% responded that they were either satisfied or very satisfied with their visit to the Emerald Coast. Of those, approximately 83.3% indicated that they were very satisfied with their trip. Only 1.2% of respondents felt neutral regarding their trip, and zero reported being dissatisfied. Finally, Table 19 shows that three out of four participants would be likely to refer the Emerald Coast to a friend or family member. In general, the others were still unsure (23.3%) and the "no" signified a participant who was unhappy with the weather.

Table 15. First Time Visitors to the Area

First-Time Visitor	Percent
No	42.6%
Yes	35.2%
Don't Know	22.2%

Table 16. Annual Visits to Emerald Coast

Number of Visits	Percent
One	49.4%
Two	19.6%
Three	12.8%
Four	5.2%
Five	3.2%
Six	1.9%
Seven or More	7.9%

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

Likely to Return	Percent
Don't Know	47.0%
No	22.7%
Yes	30.3%

Table 18. Visitor Satisfaction with Trip

Satisfied with Trip	Percent
Neutral	1.2%
Satisfied	15.6%
Very Satisfied	83.3%

Table 19. Likely to Refer Family or Friends

Likely to Refer	Percent
Don't Know	23.3%
No	0.1%
Yes	76.6%

Visitor Estimates by Accommodation

In order to provide visitor estimates for the summer quarter, Haas Center researchers utilized 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. A full year of data was used to estimate annual visitors.

Table 20. Number of Unique Visitors to the Emerald Coast 2014

Type	Distribution of Bed Tax	Bed Tax 2014	Revenue	Avg. Nightly Rate	Total Nights	Party Size	Length of Stay (Days)	Visitors
Condo	60%	$9,056,163	$209,249,218	$137.90	1,517,398	4.4	9.4	542,389
Hotel/Motel	24%	$3,595,183	$34,848,527	$112.38	739,182	3.0	4.6	476,684
House Rental	12%	$1,811, 498	$20,489,643	$143.67	291,334	5.5	11.9	135,236

Total Unique Visitors: 1,154,309[3]

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 annual unique visitors to the Emerald Coast.[4] As the table indicates, it is estimated that over 1.1 million visitors traveled to the Emerald Coast throughout the year.

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

Type	Units Available	Total Nights	Annual Supply of Units	Occupancy Rate
Condo	6,206	1,517.398	2,265,190	67%
Hotel/Motel	3,243	739,182	1,183,695	62%

Table 22. Total Visitor Spending by Accommodation Type

Type	Per-Person, Per-Night Expenditures	Number of Unique Visitors	Total Direct Spending
Condo	$91.32	542,389	$465,594,119
Hotel	$101.75	476,684	$222,627,945

Additionally, according to the bed tax collection reports, there were over 6,200 condo units and 3,200 hotel/motel units 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 67% and 62%, respectively.

Once visitor estimates were 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

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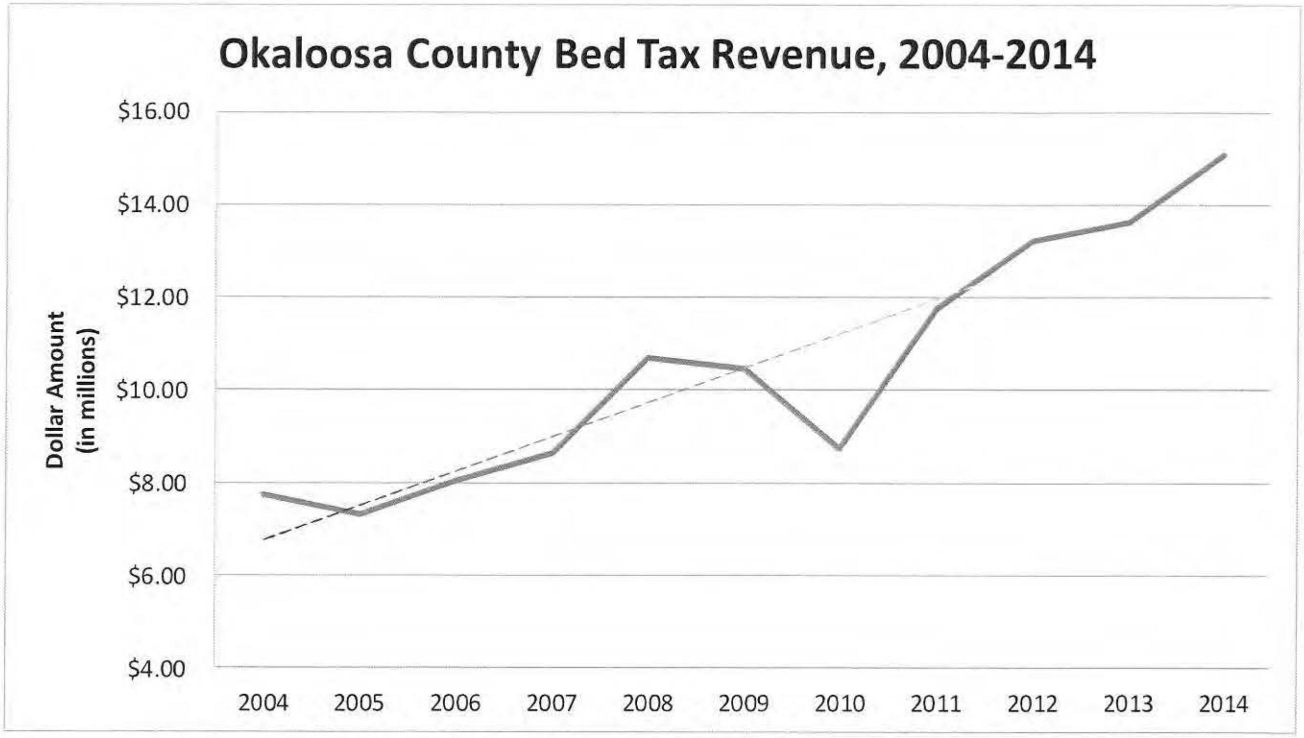
3. Excluding those visitors who stayed with friends/family or at a campground/RV park.

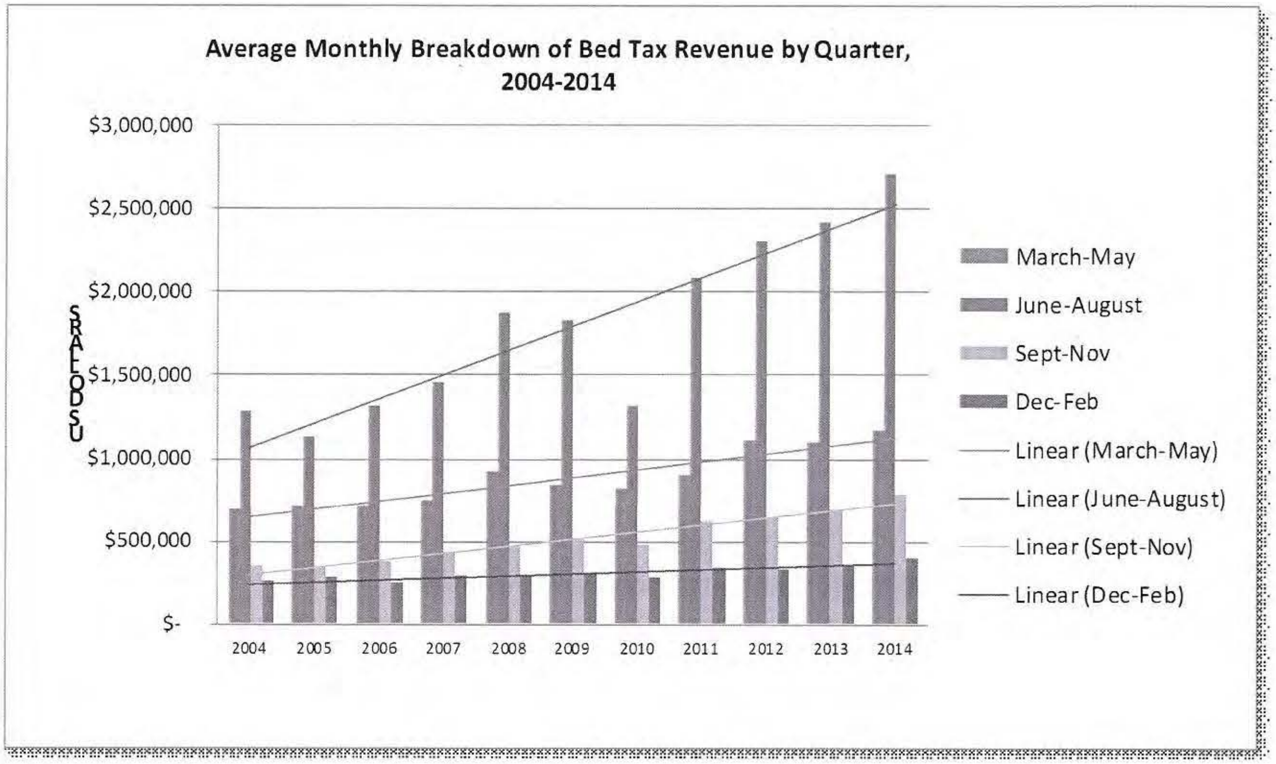
4. Please note that the figures reported by survey participants are estimates and may vary from those reported by accommodation establishments.

estimates were calculated for each group and are presented in Table 22. Visitors to the Emerald Coast who used condos as their accommodations generated more than $465 million in direct spending, while hotel visitors spent more than $222 million.

Appendix A: Okaloosa County Bed Tax Summaries 2004-Present



Okaloosa County Bed Tax Revenue, 2004-2014



Average Monthly Breakdown of Bed Tax Revenue by Quarter, 2004-2014

Appendix B: 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 B: 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 B: 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 B: 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

Winter Quarterly Report: December 2014 - February 2015

HAAS CENTER

PETER MAYER ADVERTISING

Ellen Kempner - Vice President Account Director

HAAS CENTER

Brice Harris, Ph.D.— Co-Director

Phyllis Pooley, J.D. — Co-Director

PROJECT TEAM

Amy Webber, M.A.

Angela Sanders, B.A.

Taylor Dalton, M.A.

James Simpson

PRIMARY CONTACT

Brice F. Harris, Ph.D.
Director, Strategic Initiatives
Office of Economic Development
& Engagement
University of West Florida
220 West Garden Street, Suite 303
Pensacola, Florida 32502
850-439-5400
bharris@uwf.edu

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.

Table of Contents

List of Tables

List of Figures

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

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%

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.

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.

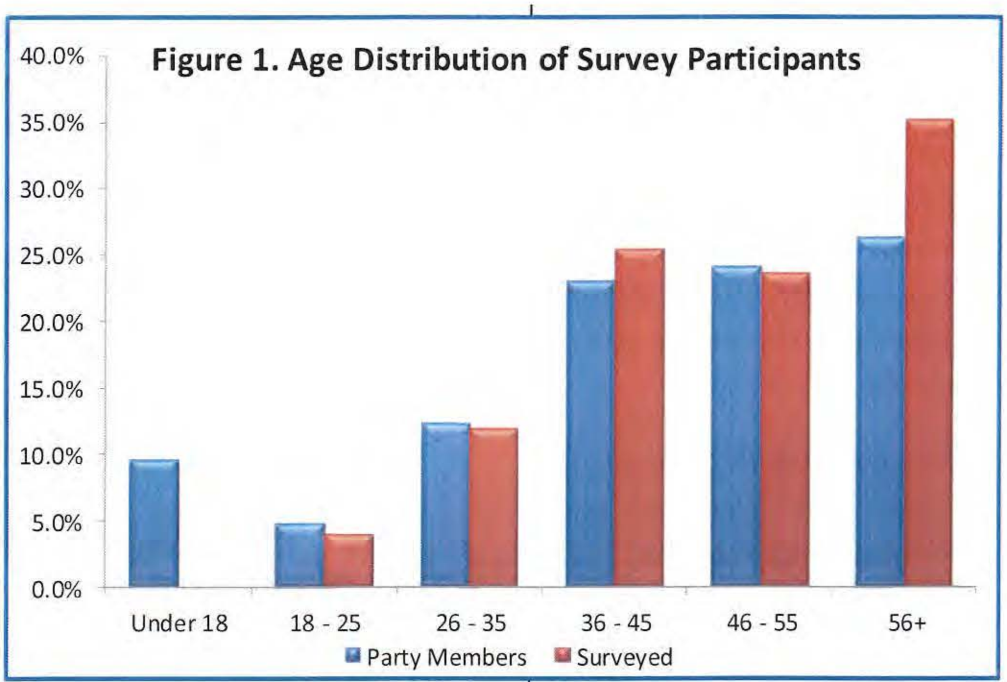


Figure 1. Age Distribution of Survey Participants

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.

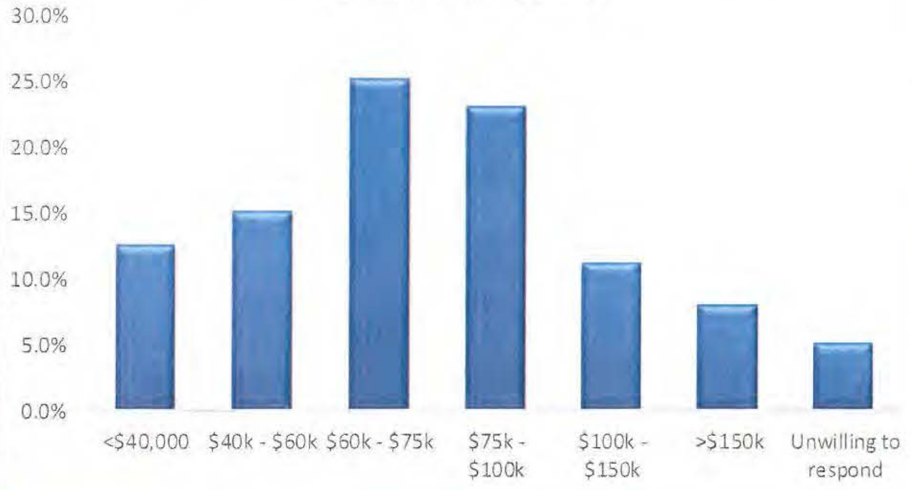
Age. The survey captured several demographic elements used to measure the type of visitors traveling to the Emerald Coast. Figure 1 presents the age distribution of survey respondents, as well as that of members of their party. As can be seen, the distribution of surveyed individuals skews to the right. 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.

Figure 2. Household Income Distribution of Survey Participants



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.

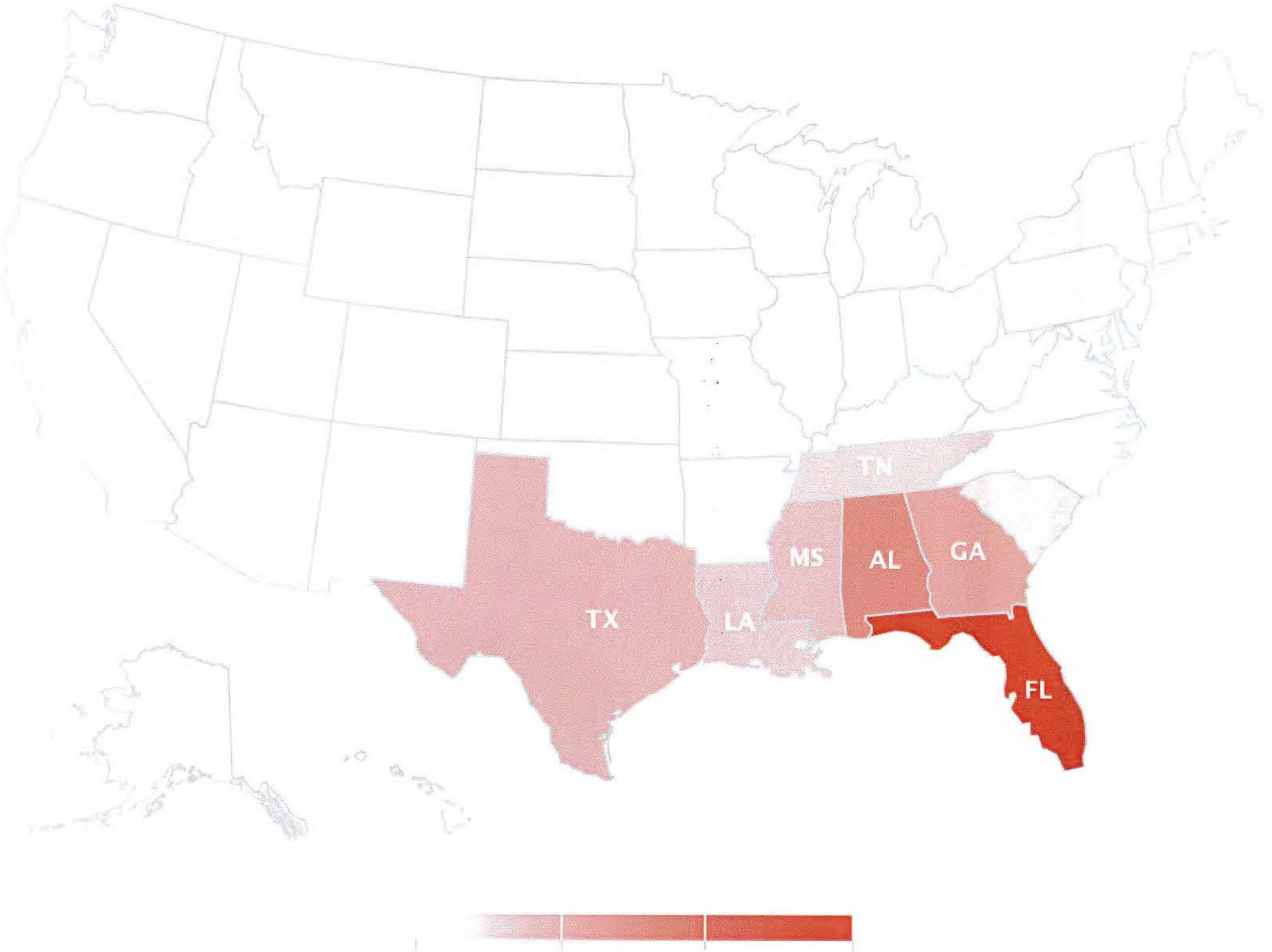


Figure 3. Distribution of Visitors by State

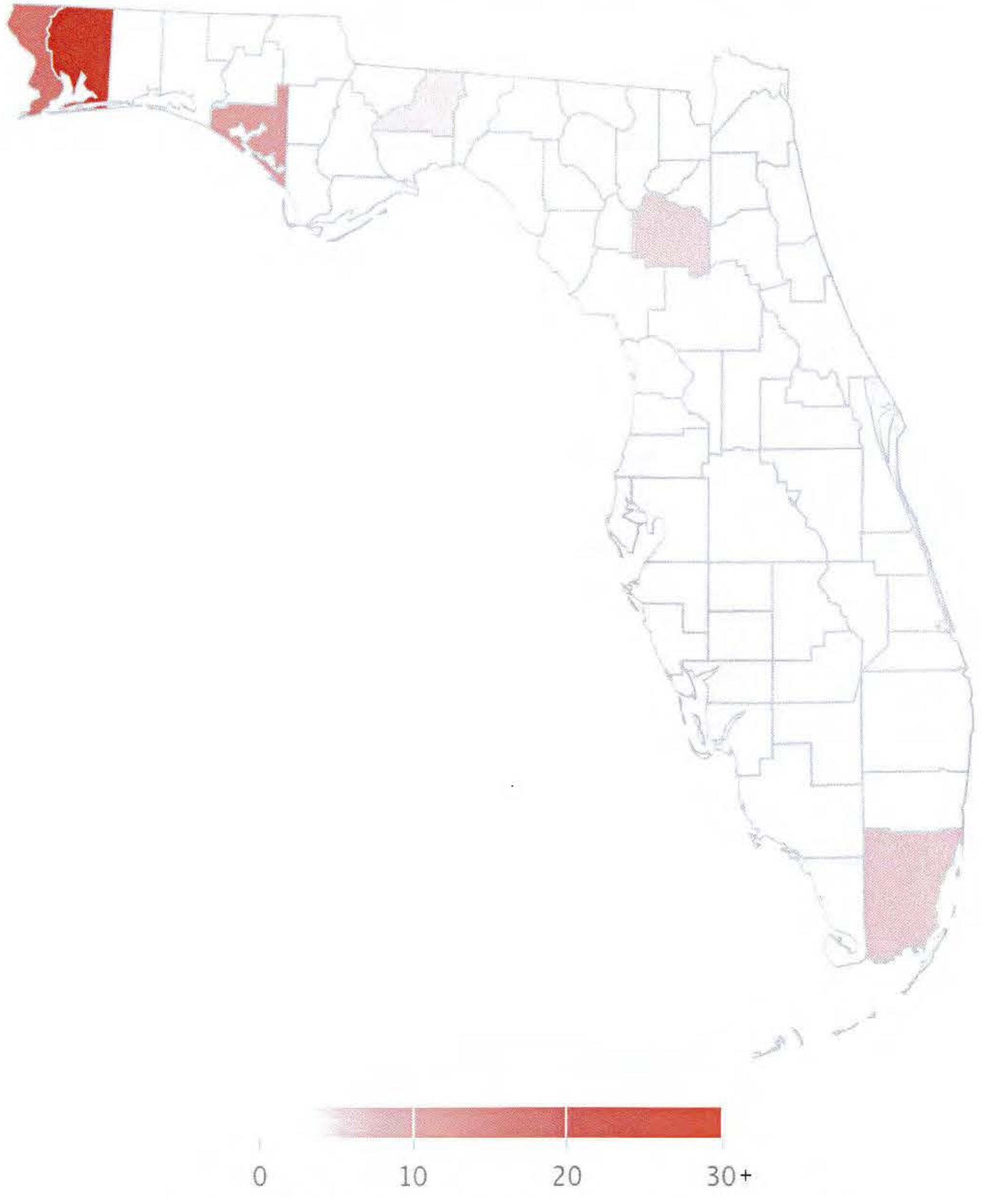


Figure 4. Distribution of Florida Visitors by County

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

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[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%).

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%

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 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

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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.

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%

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 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

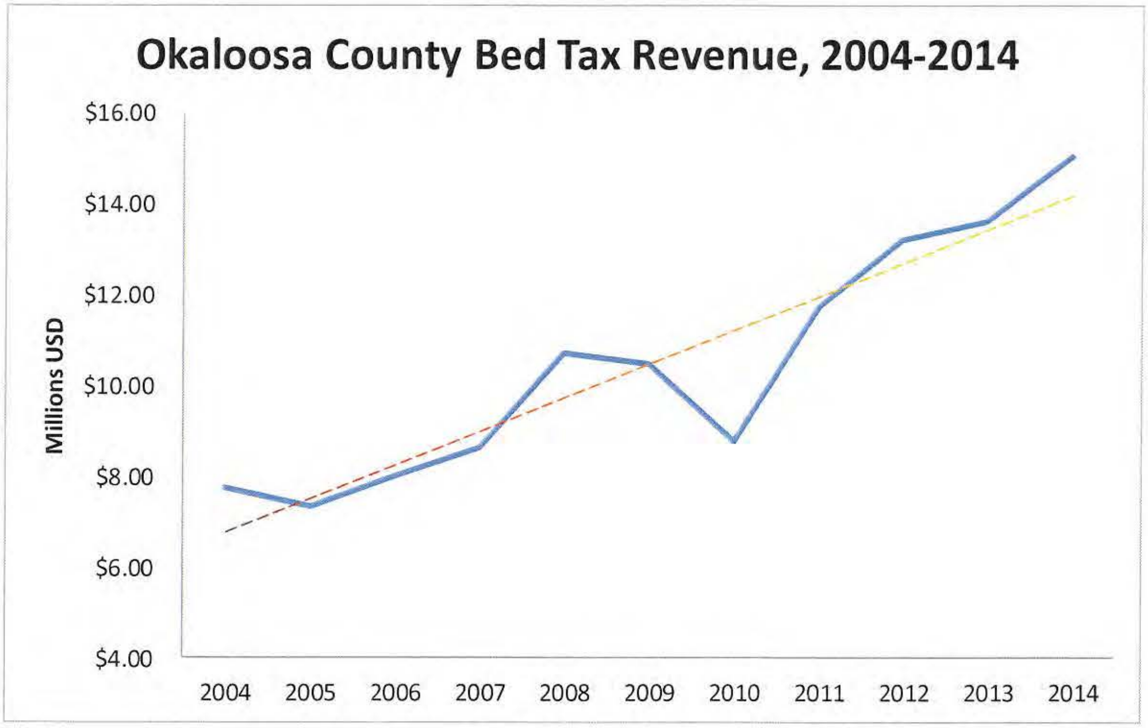
Once visitor estimates have been calculated, it is now possible to determine total visitor spending by those staying in either condo or hotel accommodations. Based on the per-person, per-night spending figures of those staying in a condo or hotel (reported in Table 9), total spending estimates have been 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.

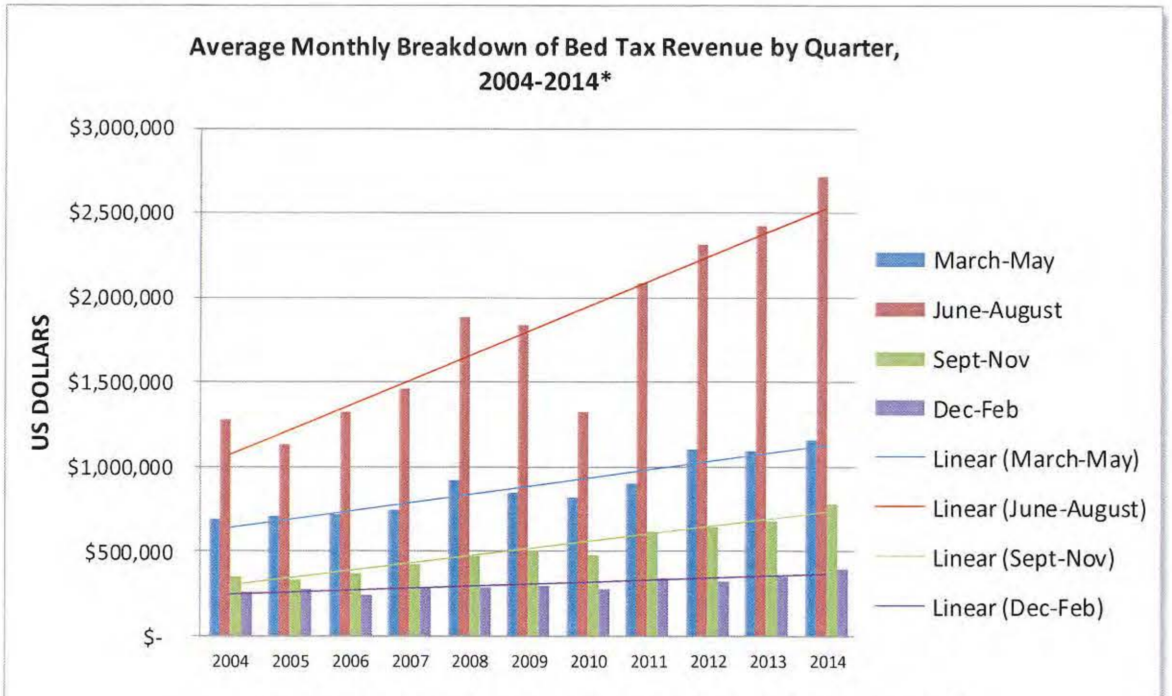
Conclusion

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.

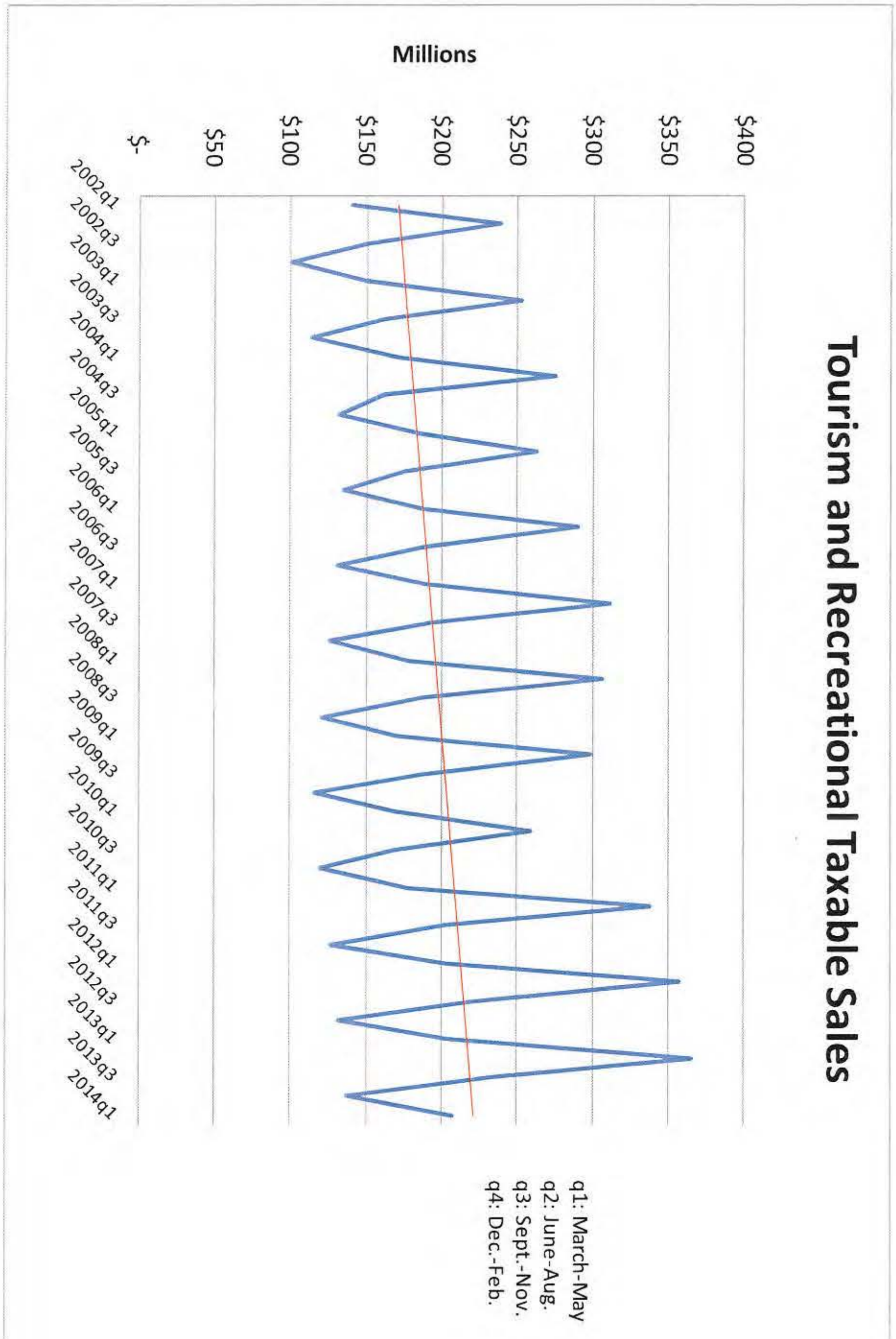
Appendix A: Okaloosa County Bed Tax Summaries 2004-Present


Okaloosa County Bed Tax Revenue, 2004-2014


Average Monthly Breakdown of Bed Tax Revenue by Quarter, 2004-2014*

*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.

FY 2015-16 STRATEGIC MARKETING PLAN

TDC - May 28, 2015
BCC – July 7, 2015

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EMERALD
COAST
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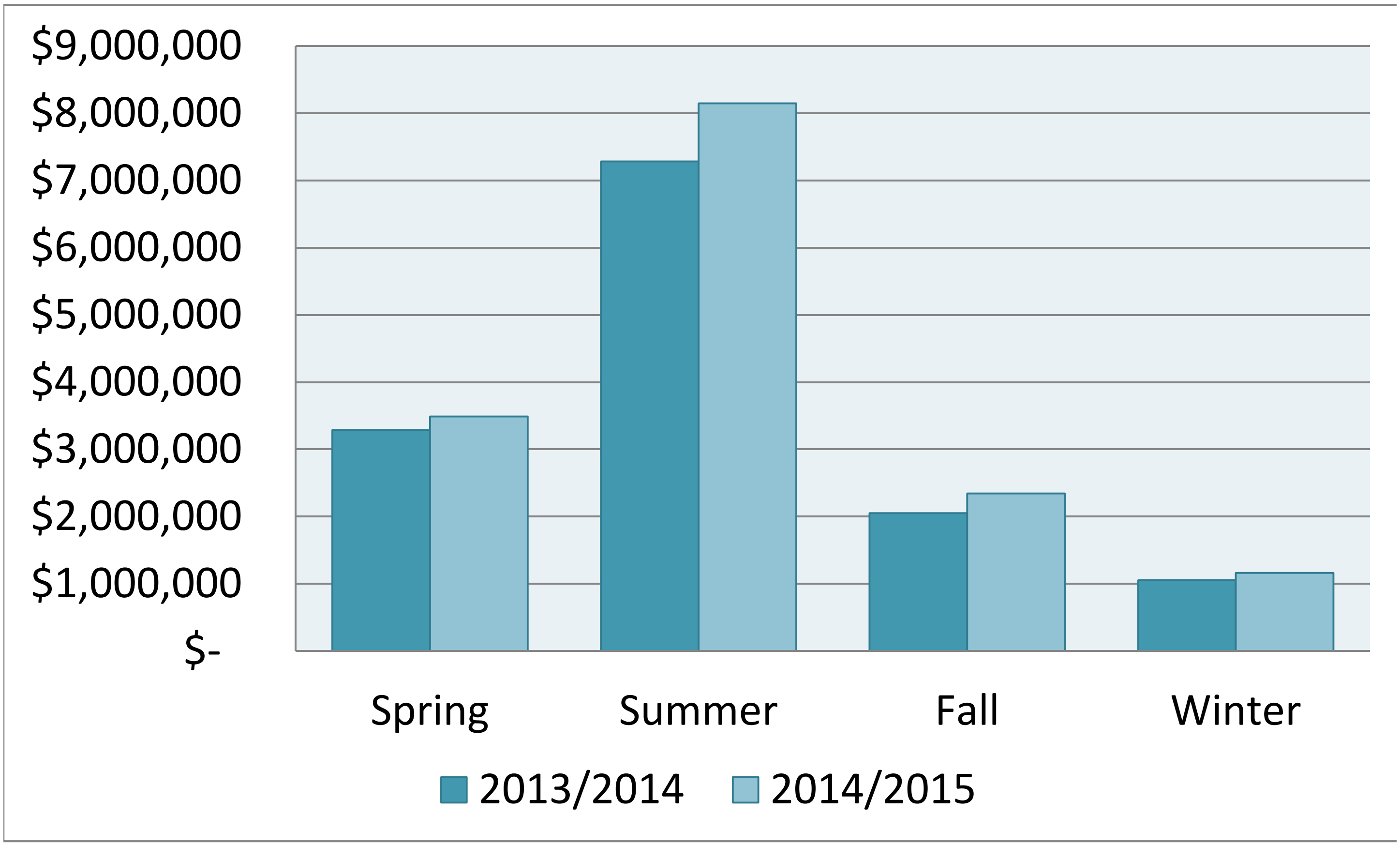
Table of Contents

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

2014 Snapshot

Actual Bed Tax Collections



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EMERALD COAST
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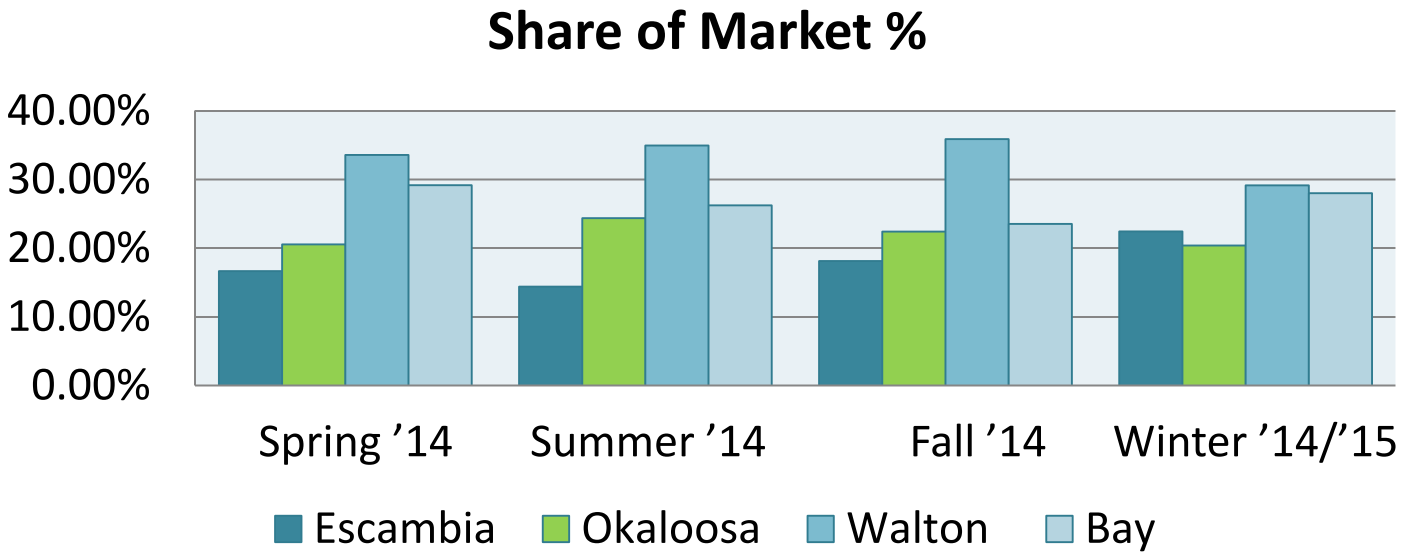
Market Share



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Objective, Strategies & Tactics

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Objectives

- Drive leisure, group and meeting visitation during the shoulder seasons
- Maintain top-of-mind awareness during peak seasons
- Leverage awareness of #EmeraldCoasting brand
- Maximize impact of media spend

Let's Go

#EMERALDCOASTING

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Strategies

- Communicate year-round messaging while focusing on driving business during the shoulder seasons
- Utilize research to motivate consumers to select Emerald Coast as their vacation destination
- Utilize festivals and special events to drive trial and repeat visitation
- Continue to embrace social media as an essential component of the communications plan

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Tactics

- Target consumers with a combination of **TRADITIONAL** and **ONLINE** marketing

- Communicate the brand through **NICHE MEDIA** including weddings, groups, meetings, signature events, Gulf-to-Table and ecotourism

- Offer bed-tax collectors **COOPERATIVE** media opportunities designed to broaden awareness and deliver qualified leads

- Collaborate with **VISIT FLORIDA** to maximize impact of media spend

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Tactics

- Deploy quarterly **CONSUMER E-NEWSLETTERS** and monthly **PARTNER E-NEWSLETTERS** to maintain top-of-mind awareness
- Position the consumer as **ONE CLICK AWAY** from our website and potential bookings
- Promote and **TRACK** special events and initiatives via **WEBSITE**

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Seasonality

	Booking Window	**Impact Period**	**Primary Audience**
Spring	January – March	Post-Spring Break – pre-Memorial Day	Couples and/or groups without children; Spring Break visitors
Summer	Mid-January – Mid-June	Memorial Day – Mid-August	Families
Snowbirds	Mid-August – January	December 2015 – March 2016	Retired adults from northern climates (including Canada)
Fall	Mid-June – Mid-October	Mid-August – Thanksgiving	Couples and/or groups without children; Fall Break visitors
2015 Christmas	Mid-August – October	Thanksgiving – New Year's	Families and/or couples

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Target Audience Profile

Demographics

- Adults
- Ages 25 – 64 (skewing women)
- Affluent active travelers

Mindset/Lifestyle

- Traveler – at least 3-night stay
- Interested in the beach, fishing, shopping, restaurants and more
- Looking for an accessible escape

Beaches Shopping Dining Nightlife

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Media Markets

- Primary target audiences will include leisure travelers within a 13-hour-drive radius of the Emerald Coast as well as meeting/group business travelers

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Emerging Markets

- Secondary emerging markets will include:

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Marketing Initiatives

Marketing Initiatives

- Conduct annual consumer **RESEARCH** to measure **ROI**
- Enhance **CONVENTION CENTER** section of **WEBSITE**
- Generate **EARNED MEDIA** through public relations
- Create **SOCIAL MEDIA AWARENESS** and engagement through community management and cross-channel campaigns
- Develop **MEDIA STRATEGY & MESSAGING** that most effectively reaches the target audience, **DRIVES VISITATION** and delivers direct leads

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Consumer Research

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Consumer Research

Conduct **CONSUMER RESEARCH** to increase efficacy of marketing efforts and determine the following:

- **BEST TARGET** during different **SEASONS**
- **ATTITUDES**, **BEHAVIORS** and **IMPLICATIONS** of messaging
- **WHERE** and **WHEN** can we best communicate with our consumer

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Website

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Website

Optimize performance of the website:

- Examine the unique user experiences occurring on each site for possible integration
- Enhance Convention Center section of site to incorporate #EmeraldCoasting campaign
- Ongoing review of Google Analytics of the sites for user trends and patterns
- Continue to update and provide new and relevant content, video, blogs and features to engage consumer interest

EMERALDCOASTING.COM

Public Relations

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General Awareness

Objectives

- Raise **AWARENESS** of the Emerald Coast
- Leverage the **NATURAL ASSETS** of the area to highlight the Emerald Coast during shoulder seasons

Strategies

- Support **SHOULDER SEASON** campaigns
- Work in collaboration with **SOCIAL MEDIA** to utilize existing media channels
- Utilize **NEWS COVERAGE** to establish the Emerald Coast as the top choice for a beach vacation destination
- Position the destination's unique offerings as a premier location for **GROUP** and **MEETING BUSINESS**
- Leverage the CVB's marketing activities to earn **LOCAL MEDIA** coverage

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National/Regional Tactics

- Host **THEMED PRESS TRIPS** for national travel journalists and bloggers

- Recommended themes:
  - Affluent traveler
  - Gulf to Table (foodies)

- Regional **OUT OF MARKET TV APPEARENCES** and **DECKSIDE MEDIA MEETINGS** to promote major events and seasonal tourism

National/Regional Tactics

- Host **INDIVIDUAL MEDIA VISITS** for writers who reach consumers from target markets interested in unique aspects of the Emerald Coast
- Develop **MONTHLY** topics to target and attract niche media:
    - **OCTOBER**: Fishing Rodeo
    - **NOVEMBER**: Shopping
    - **DECEMBER**: Snowbirds
    - **JANUARY**: Romance
    - **FEBRUARY**: Rejuvenate for Spring
    - **MARCH**: Arts appreciation
    - **APRIL**: Mother's Day getaways
    - **MAY**: National Travel & Tourism Week; Military appreciation
    - **JUNE**: Adventure travel
    - **JULY**: Eat like a local
    - **AUGUST**: Fall break
    - **SEPTEMBER**: Craft beer

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Local Tactics

- Host **NATIONAL TOURISM WEEK** industry Heart of Tourism Awards in May to generate local media exposure and appreciation among Emerald Coast citizens for its local tourism marketing efforts and the industry's economic impact

- Unveil **ANNUAL STRATEGIC MARKETNG PLAN/CAMPAIGNS**

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Local Communications Plan

- CVB to lead local initiatives

- Target Audience
  - Permanent **RESIDENTS** of Emerald Coast

- Key media outlets
  - WEAR-TV
  - WALA-TV
  - WKRG-TV
  - The Destin Log
  - Northwest Florida Daily News
  - WFTW-AM
  - WNWF-AM

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Ongoing Social Media

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Overview

Objectives

- Utilize social channels to reach current Emerald Coast visitors, future visitors and the local community
- Provide a unique, two-way communication channel to call fans to action

Strategies

- Generate awareness about the Emerald Coast as a tourist destination with unique or crowd-sourced content
- Drive consideration by educating fans about the Emerald Coast
- Encourage preference by engaging key online influencers in conversation

Channels

Network	URL	Fans/ Followers (As of 5/8/15)	Average Monthly Engaged Users
Facebook	facebook.com/FloridasEmeraldCoast	443K	58K
Twitter	twitter.com/EmeraldCoastFLA	6.3K	267
Pinterest	pinterest.com/EmeraldCoastFLA	1,000	N/A
Instagram	instagram.com/EmeraldCoastFLA	1,500	N/A

Content

Planned Content

- Created in advance of publishing
- Enables social media presence to engage a targeted audience
- Written as a calendar to be reviewed before implementation

Live Content

- Created in real time as news, trends, conversations and comments arise
- Timely and relevant
- Responses to Facebook comments, retweeting Twitter content and creating new content in response to trends

Content

Category	%	Justification
Lifestyle, Life on the Emerald Coast	40%	Leveraging past creative, this content shows the vibrant lifestyle that is a hallmark of the Emerald Coast. Text and rich media posts will allow communities to experience the beaches and lifestyle of the Emerald Coast from wherever they are.
Attractions & Amenities, Lodgings, Shops and Eateries	30%	This category encompasses tourism sights and services in the area. From lodgings and shops to activities and local eateries, this category educates fans about amenities on the Emerald Coast.
Events, Public Happenings	10%	Okaloosa County boasts year-round community events for the public to enjoy. This category syndicates local happenings and encourages the social media communities to share and take part.
News, Travel Articles & Accolades	20%	Emerald Coast's social media pages will share the most compelling news stories relevant to the area as a tourist destination. This can include write-ups from travel bloggers, contests for top travel destinations and any other local coverage relevant to travel and leisure.

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Content

- Shoulder season campaigns
  - March-May and August-October
  - Drive awareness and visitation

- Summer social media engagement
  - June-August
  - Form relationships with summer visitors to curate content to drive shoulder season visitation

- Instagram/Twitter/Pinterest growth
  - Post image updates and curate user-generated content
  - Find the right daily conversations to proactively engage in

- Influencer outreach
  - Utilize list of influencers on social media
  - Continue to develop tactics to engage and incentivize

Industry Trends

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Advertising Growth in Tourism

- The fastest growth in travel industry advertising will come from social and video platforms, according to recent Expedia Media Solutions and Phocuswright

- Social and video ad budgets have tripled from 2011 to 2014 and account for 18% of the total digital dollars spent

Expedia MediaSolutions
Global Leader in Travel Advertising

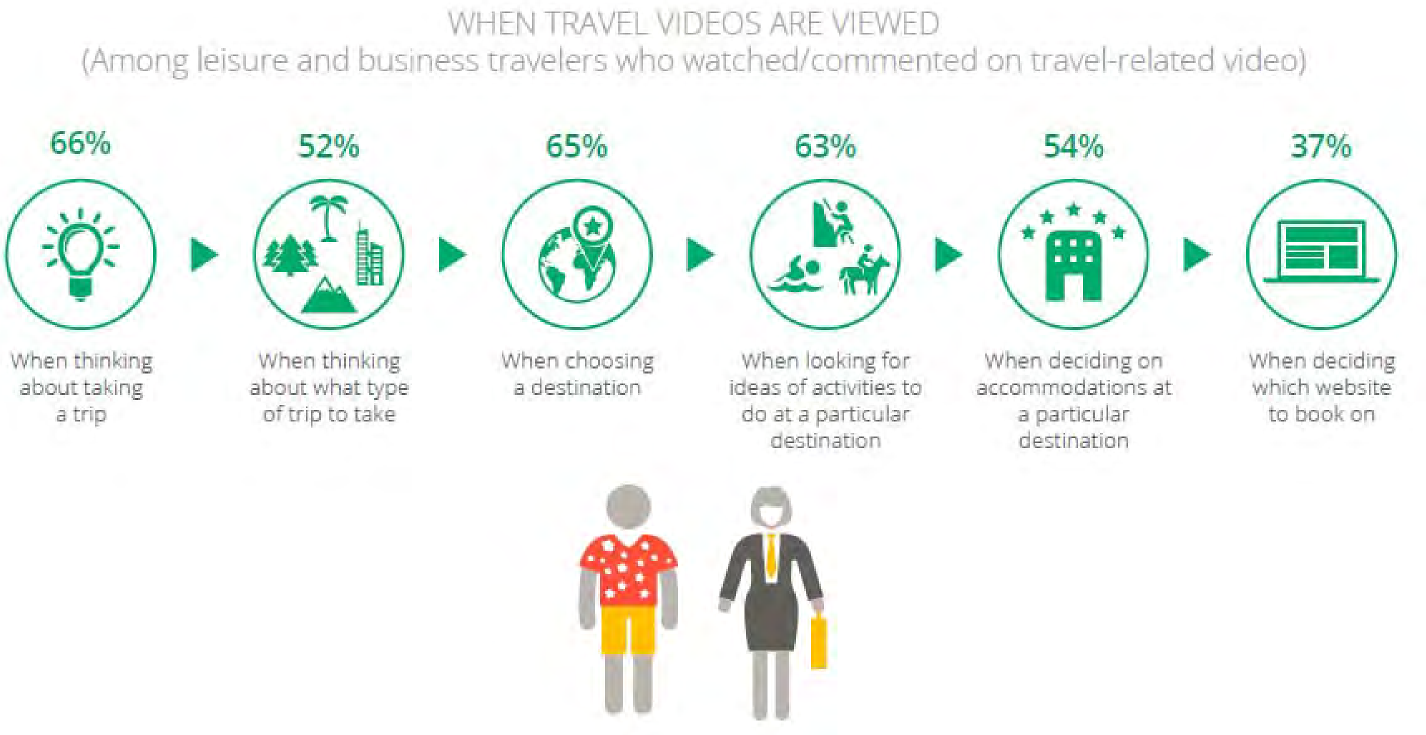
PhoCusWright®
MARKET RESEARCH • INDUSTRY INTELLIGENCE

Source: Expedia Media Solutions and Phocuswright – December 19, 2014

Video and the Travel Cycle

Used during all phases of pre-travel planning

- Inspiration
- Planning
- Booking



Source: Think with Google, "2014 Travelers Road to Decision"

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Social Usage by nearly All Adults

- 92.5% of all Internet users use at least one platform
    - 20% of time spent on desktop and 58% on mobile devices
- Consumers are the stars
    - Their currency is likes, follows, comments, pins, etc.
- News outlets regularly quote Twitter stats or air YouTube clips

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The Importance of YouTube

- 2nd largest search engine
- 2 billion video views a day, double that of prime time of top 3 networks
- Content is embedded into social, on blogs, in websites – shows up in search
    - 70% of Fortune 500 use video to educate consumers, engage them with shareable content and help increase conversion rates

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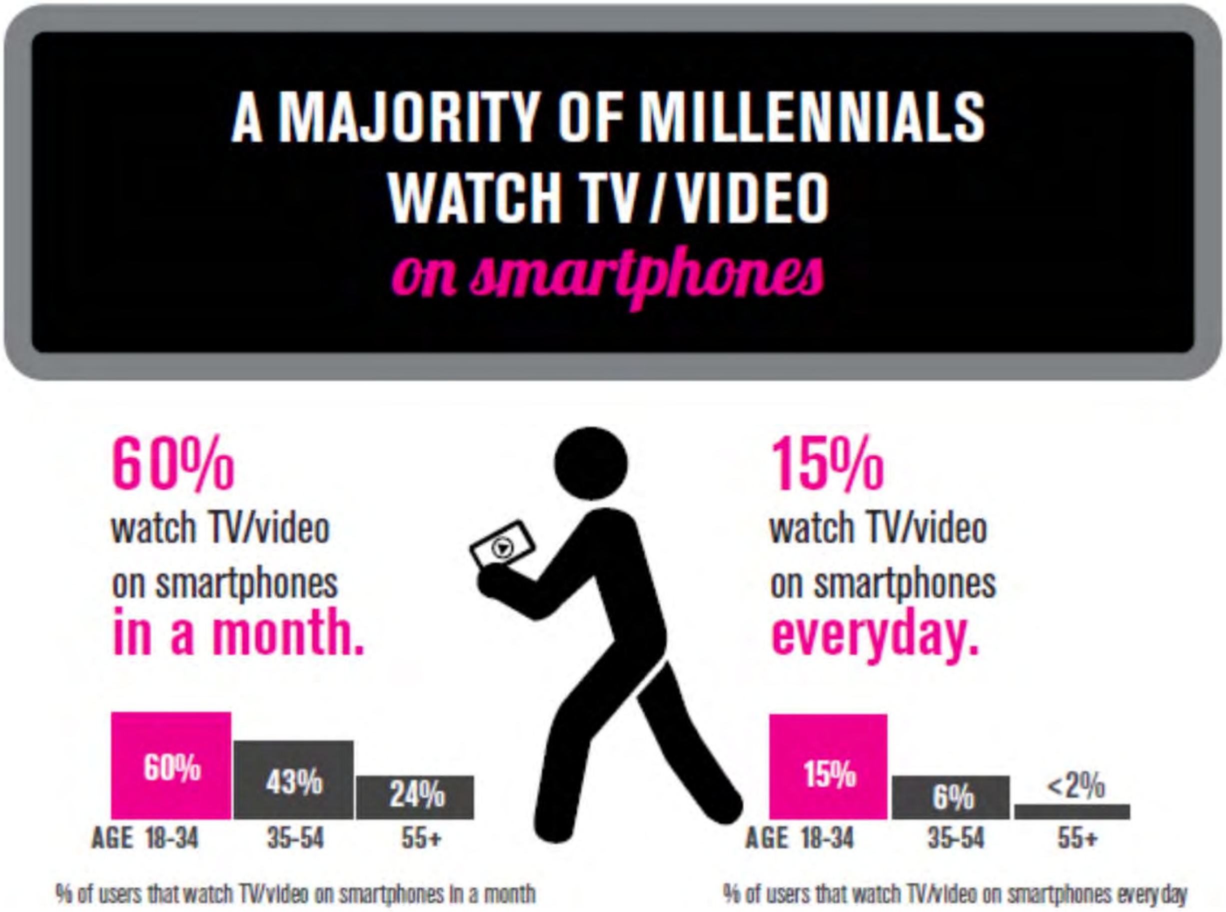
Mobile Uprise



A MAJORITY OF MILLENNIALS WATCH TV / VIDEO *on smartphones*

60% watch TV/video on smartphones **in a month.**

15% watch TV/video on smartphones **everyday.**

Sources: comScore Video Metrix® Multi-Platform, U.S., November and December 2014; comScore Media Metrix® Multi-Platform, U.S., December 2014; comScore MobiLens®, U.S., December 2014

Mobile Uprise

PBS VIEWERS spend over

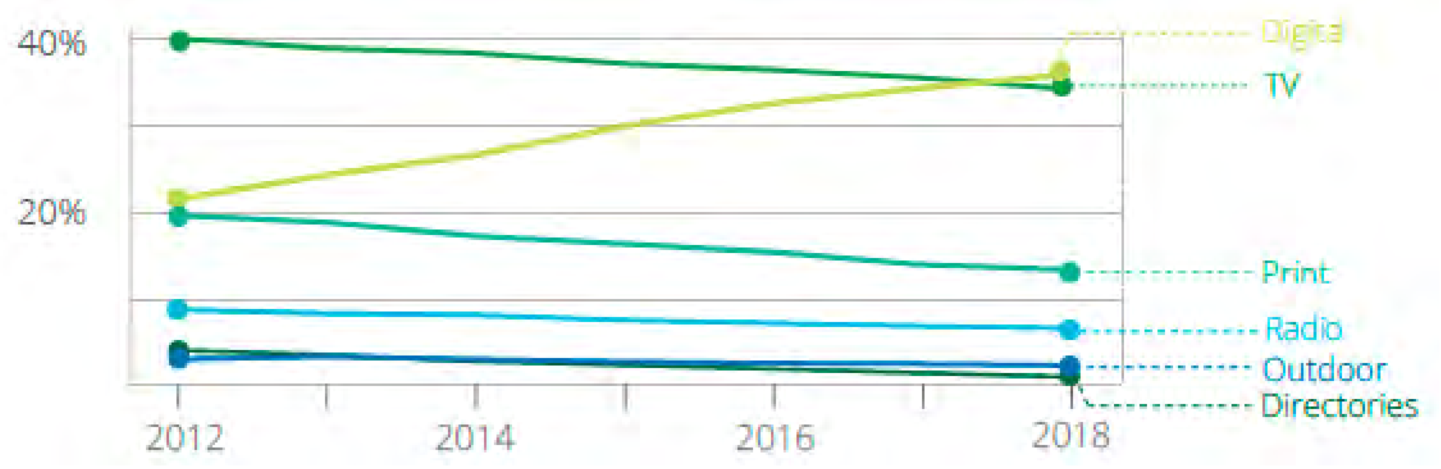
4 hours watching video per month on tablet –

that's **5X more** than PBS's average desktop viewer and nearly **2X** its average smartphone viewer.

Sources: comScore Video Metrix® Multi-Platform, U.S., November and December 2014; comScore Media Metrix® Multi-Platform, U.S., December 2014; comScore MobiLens®, U.S., December 2014

Multi Screens & Advertising

- Ad budgets are shifting to align with media consumption patterns
- Digital media platforms allow for performance measurement and optimization in real time



Source: Think with Google, "Evolution of TV: Reaching Audiences Across Screens

Media Strategy & Messaging

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EMERALD
COAST
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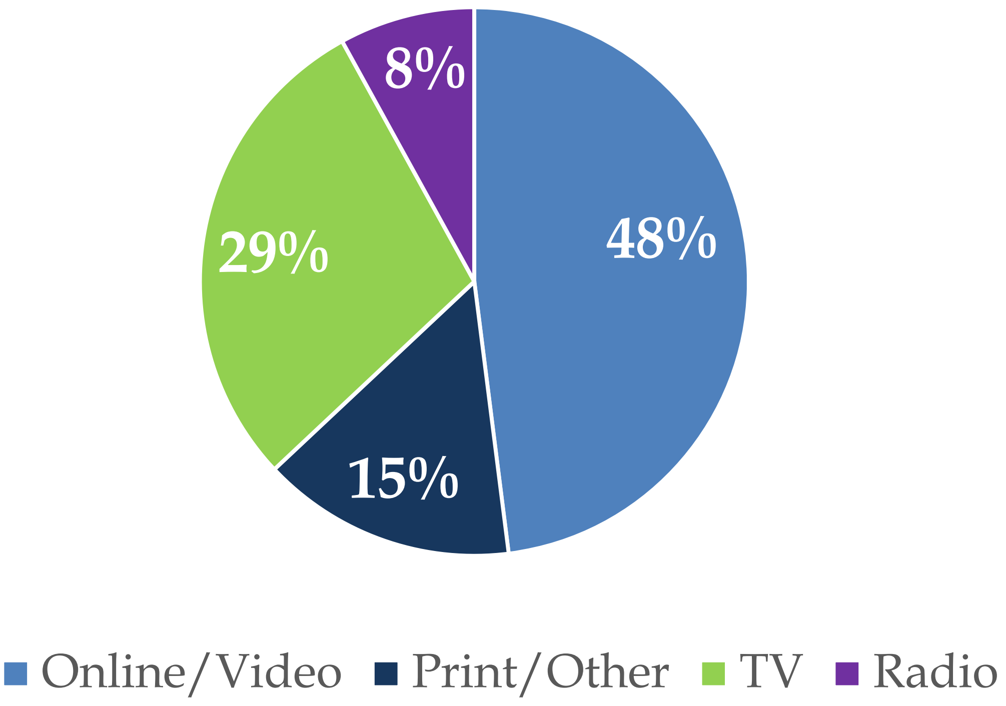
Less Print, More TV, Video & Digital Platforms



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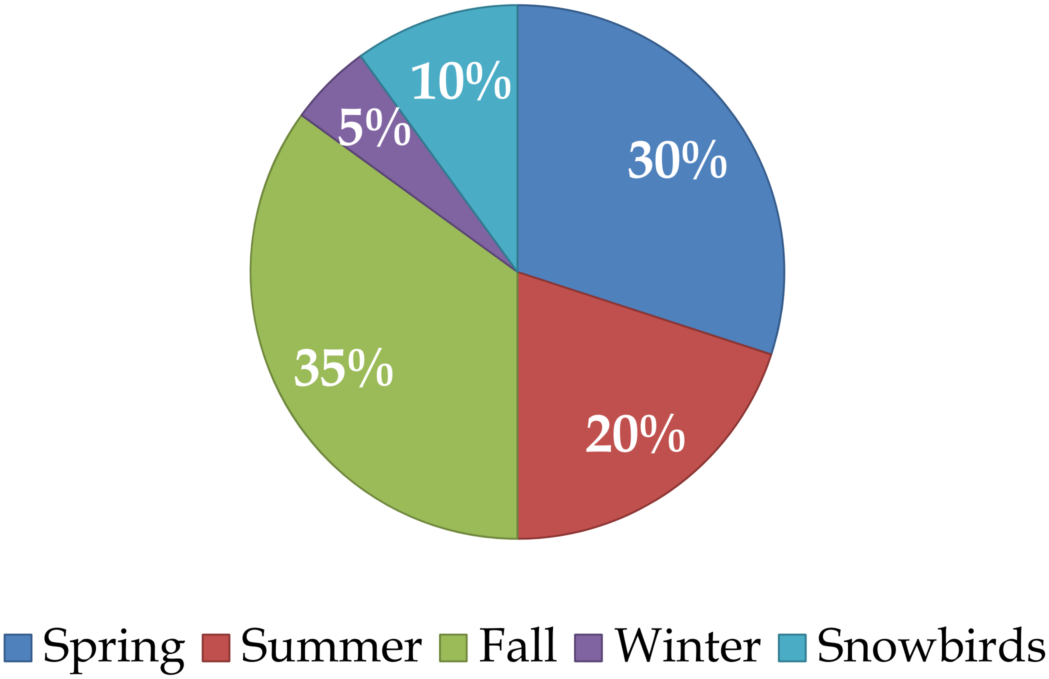
OKALOOSA ISLAND

Leisure Campaign Weighting



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Media Strategy

- Continue to build higher budget allocations in digital platforms – aligning media exposure to more closely match platforms that inform travel decisions

- Build plan to ensure more and varied video platforms

- Integration of multimedia partnerships, many with lead generation guarantees

- Ongoing placements in Visit Florida offers, both print and digital

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Target Markets & Messaging

- Marketing Segments:
  - Leisure traveler from core feeder markets with extended reach in emerging markets and Atlanta
    - Families, Couples, Retired Adults
    - Niche markets: Weddings, Military, Sports, Snowbirds, International, Recreational Fishing and Adventure/Epicurean/Eco Travel

- Group Travel, Motorcoach and Faith-based Travel

- Meetings, Conventions

Messaging
  - Continue to differentiate ourselves from our competitors through our personality: vibrant, unpretentious, inspiring and fun
  - Dedicate 20% of total media budget to target niche audiences

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Leisure & Co-Op: Media Plan

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Leisure Media Tactics by Campaign

Fall/Winter	Spring/Summer	Christmas	Snowbirds
🖥 📱	🖥 📱	🖥 📱	🖥 📱
📡	📡	📡	📡
📺	📺		
MAGAZINES	MAGAZINES	MAGAZINES	MAGAZINES

Leisure Media Highlights

- Well-rounded media plan reaching affluent, active travelers
- With flat budget, increased gross impressions by 30% to roughly 268,000,000
- Increases in video media platforms, including television
  - Variety of video content environments
- On demand media options to reach consumers when they want and how they want to consume
- Roughly 25% of expenditures dedicated to niche audience communications
- Over $240,000 in Visit Florida commitments

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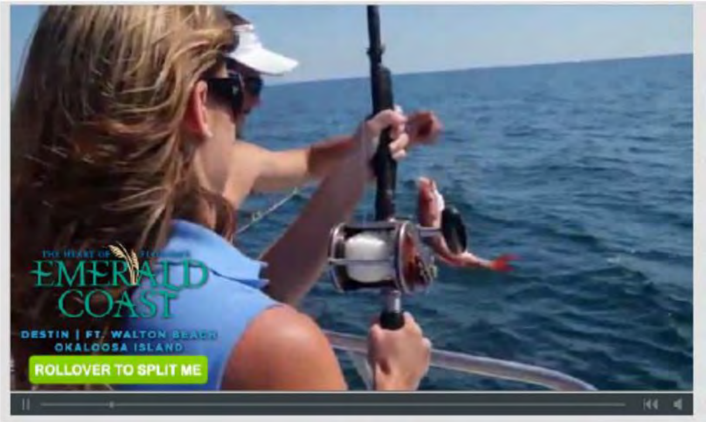
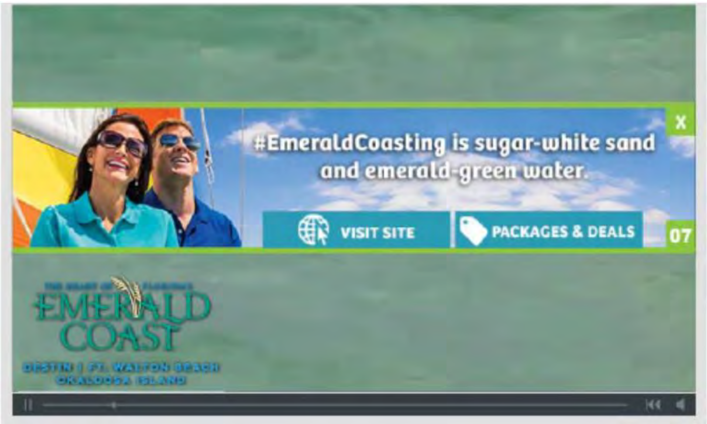
OKALOOSA ISLAND

Unique Video Units

Split Screen: Video and Call To Action




#EmeraldCoasting is sugar-white sand and emerald-green water.

http://download.yumenetworks.com/yume/creative/Emerald_Coast/CS-10161/v2/

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Travel and Fishing Enthusiast TV

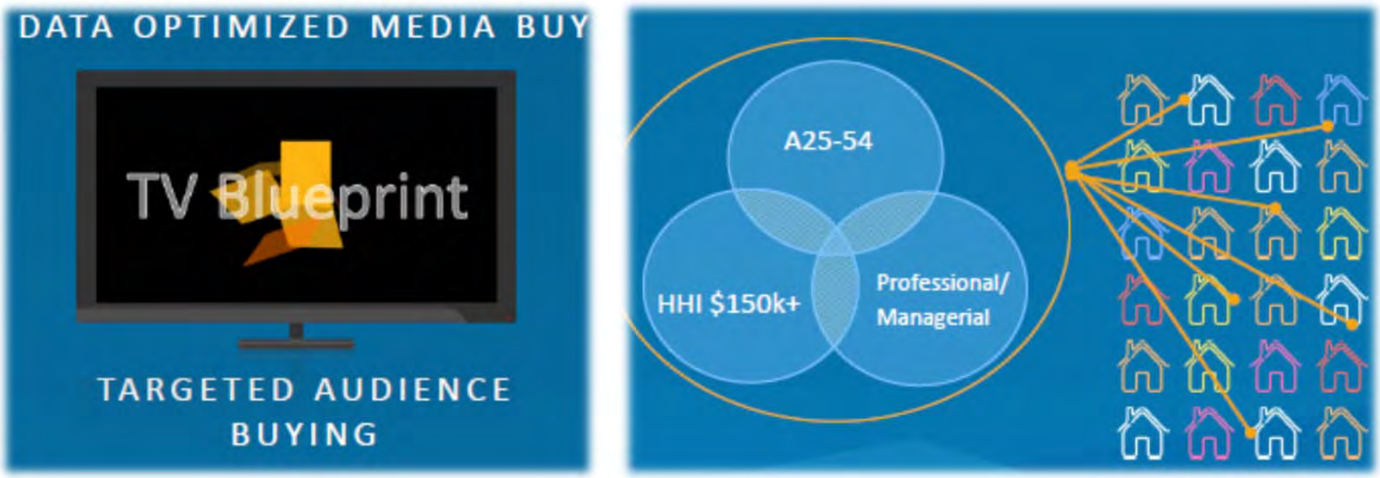
- Balance of TV
  - Travel Channel
  - Destination Network/Beach TV
  - Bill Dance TV, social media and endorsement – 3 networks and package components span full year

Advanced Audience Targeted TV

- Blueprint Addressable TV – reach only higher HHI consumers

- Geographic concentration in South/Southeast

- A25+ heavy vacationer, $100K+ HHI = 1,021,357 US HHs



at&t
U-verse

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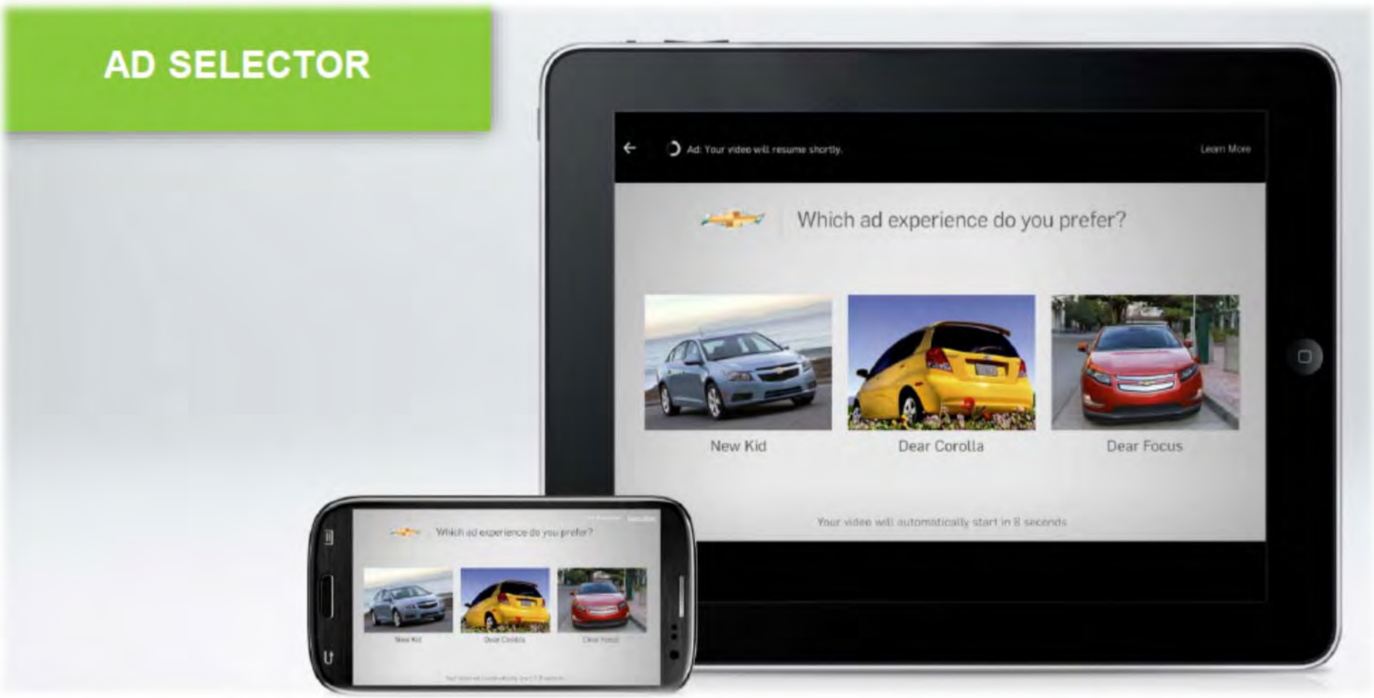
Multiscreen, On Demand TV

- TV Everywhere platform via Hulu
- Captures time-shifted and light TV viewers
- Reach higher percentage of Millennials and upper-income viewers
- Engaging ad option – viewer chooses which ad to view



AD SELECTOR

Ad: Your video will resume shortly.

Which ad experience do you prefer?

Your video will automatically start in 8 seconds

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High Profile Radio Platforms

- National Satellite Radio: News, Entertainment and Sports programming

- Geographically focused National Public Radio

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NPR On Demand

- 81,000,000 monthly downloads

- iTunes Top Rankings: “Top Ten,” “People’s Choice” and “Staff Favorites”
  - 5x ranked Best Podcast in 2014

- Only NPR product to offer host-read :30 spots
  - Wait…Wait Don’t Tell Me!
  - Fresh Air
  - Pop Culture Happy Hour

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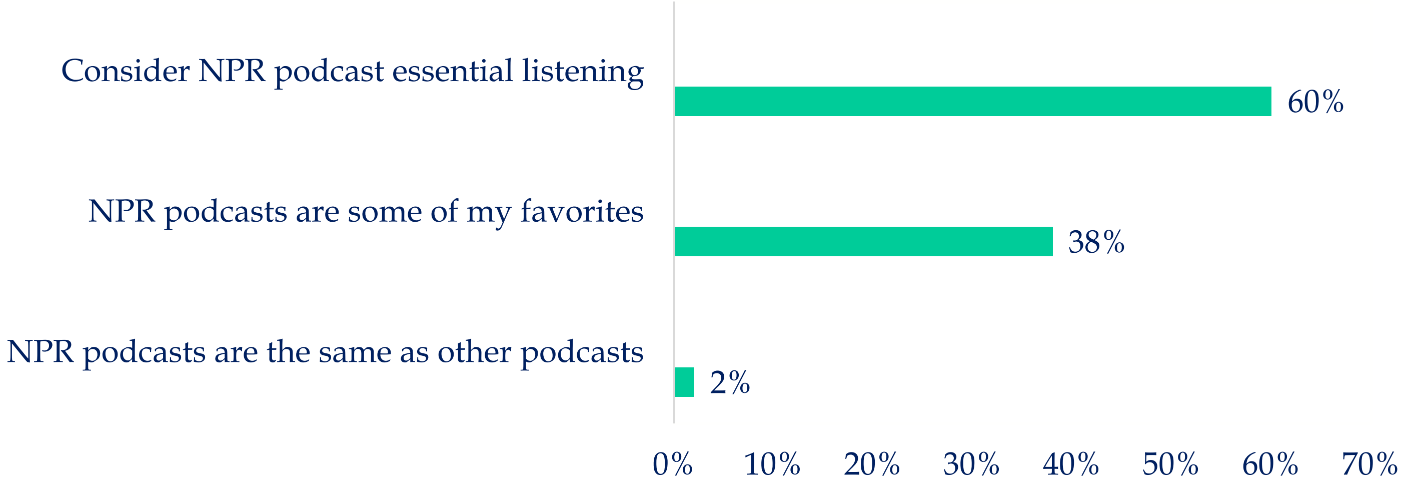
Listeners Prefer NPR Podcasts



- Time-shifting and content customization are top primary reasons for downloads
- These motivators make for a more loyal and engaged listener
- Exclusive podcast advertising opportunity drives positive brand opinion
    - 65% have brand favorability when polled

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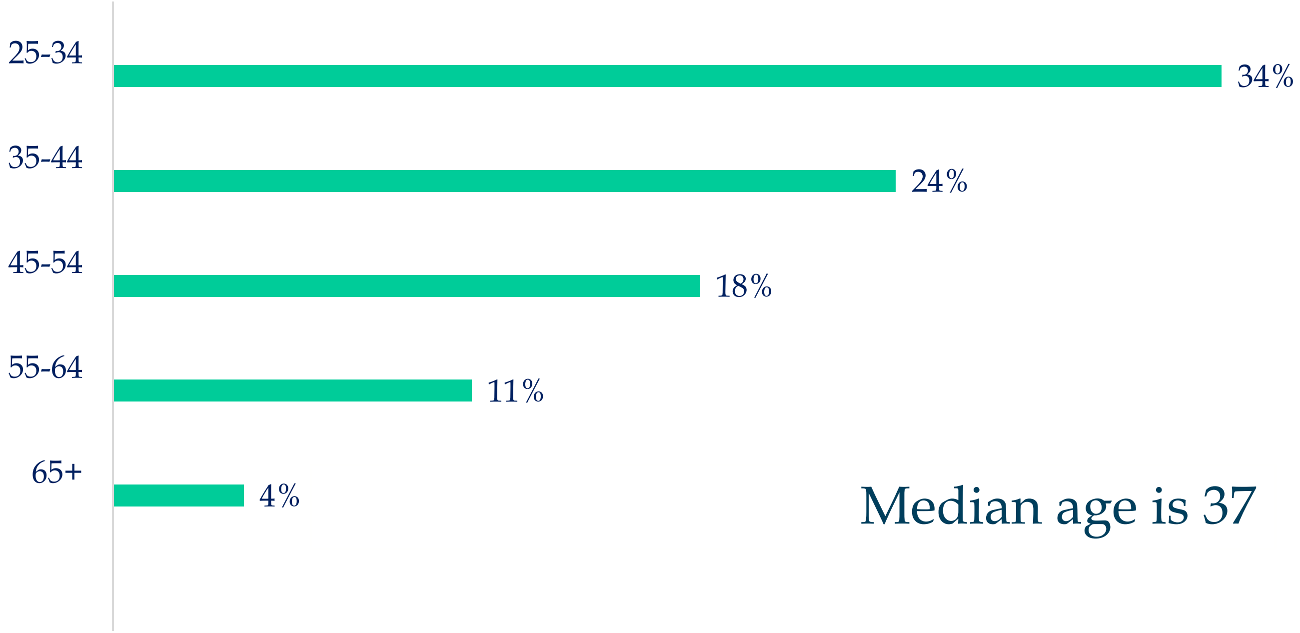
NPR Podcast Demographics



Median age is 37

- Over 40% earn $100K+ HHI
- 75%+ listen at home, in the car or on public transportation and nearly 50% at work
- High concentration of heavy usage – 71% listen daily

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More Search and Social Media

- Highest engagement rates and Lowest cost-per-engagement
- Suggests increases can be made to Search and Social Media
- Be present with advertising when consumer is actively searching:
  - YouTube is 2nd largest search engine
  - TrueView video product placements tied in to Google keywords

Google/Bing/Yahoo! Retargeting

Rationale:

- Retargeting is a proven means of bringing back non-converting visitors allowing the brand another opportunity to influence a conversion

- Retargeting purchased at a low Cost-Per-Click price structure

Highlights:

- Banners targeted to site visitors that did not take action beyond viewing the initial landing page

More Native Advertising

- Relevant and varied creative served in content-appropriate environments
- Attributes to overall higher campaign engagement rates

US Travel Campaign

How lucky is America's Luckiest Fishing Village?
Sponsored Emerald Coast Learn more

How lucky is America's Luckiest Fishing Village? Ads
www.emeraldcoastfl.com
Pretty darn lucky. Folks don't just come to Destin for the emerald-gree...

Best shopping in Florida.
Sponsored Emerald Coast Learn more

Best shopping in Florida.
www.emeraldcoastfl.com
Discover the best places to on the Eme
for retail therapy. Op...

Family & Parenting Campaign

What every good parent should know
Sponsored Emerald Coast Learn more

What every good parent should know Ads
http://emeraldcoastfl.com
Family time provides kids with feelings of love, support & safety. Lear

Surefire way to bring your family closer
Sponsored Emerald Coast Learn more

Surefire way to bring your family closer Ads
http://emeraldcoastfl.com
Start a new family tradition: Go Emerald Coasting in Destin, Ft. Walton

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More Mobile

- Higher allocation of mobile impressions in digital buys
- Opportunity for higher consumer engagement rates
- Optimize placements within same ad purchase
- DMO category website source traffic is 17% average – EmeraldCoasting.com is roughly 30%

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Additional Co-Op Digital

COASTAL LIVING

Southern Living

SOUTHEAST
TOURISM SOCIETY

ATLANTA

Snowbirds

dcmilitary.com
Comprint Military Publications online

martha stewart weddings

Media Group
SportsEvents

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Affluent Magazines

- Fewer titles concentrated in higher end travel and lifestyle, epicurean publications
- Added value digital extensions including lead generation

NATIONAL GEOGRAPHIC
TRAVELER

COASTAL LIVING

GARDEN & GUN

THE LOCAL PALATE
FOOD CULTURE OF THE SOUTH

The Travel Contenders

- Top 3 pubs with highest composition of an affluent audience

- Highest reach: Condé Nast Traveler and Nat Geo Traveler

- Nat Geo Traveler
  - Top in affinity for vacation activities that Emerald Coast offers
  - More balanced audience age
  - Takes more vacations state-side
  - Active Adventurers

NATIONAL GEOGRAPHIC
TRAVELER

CONDÉ NAST
Traveler

TRAVEL+
LEISURE

Balance of Leisure / Co-Op Print

COASTAL ANGLER *Magazine*

Audubon

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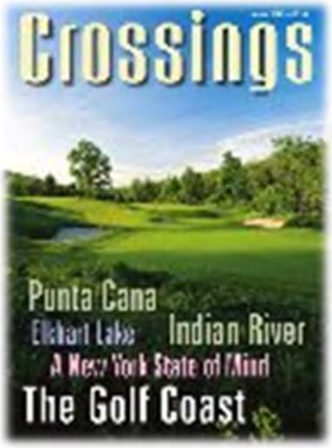
Snowbird and International Traveler Print



DiscoverAmerica.com

Multiple Visit Florida offers

Distribution by Country/ Language

• English:	53%
• UK	21%
• France	13%
• Germany	13%

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Groups:
Media Plan

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Segmentation and Media Summary

- Sports
- Military and Reunions
- Weddings
- Religious
- Association, Regional and Corporate Executives
- Group Travel/Motorcoach

- Keyword Search is integral part of plan
- Industry digitally focused media, providing up to 12-month coverage
  - Print in editorially relevant editions or annual directory
- LinkedIn, the largest professional network and number one choice for professionally relevant content (over news sites and social media)

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Publisher Partners

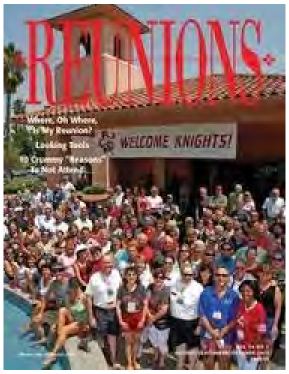
Media Group
SportsEvents

PREMIER TRAVEL MEDIA

SPORTS PLANNING GUIDE

sports DESTINATION MANAGEMENT

THE SPORTS WORLD'S EVENT MAGAZINE
SportsTravel



RFN Reunion Friendly Network

Bringing Together Volunteer Military Reunion Planners, Convention & Visitors Bureaus, Hotels and Other Reunion Vendors Since 1991

workbook Reunions

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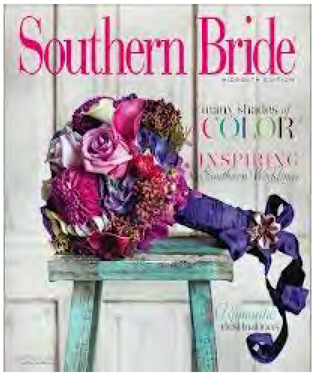
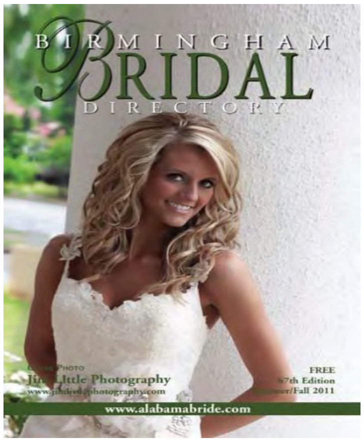
Publisher Partners





the knot

New Orleans Bride MAGAZINE

Religious TRAVEL PLANNING GUIDE

GOING ON FAITH

THE MAGAZINE FOR FAITH-BASED TRAVEL PLANNERS

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FSAE®
Florida Society of Association Executives, Inc.
BETA

ACAE Alabama Council of Association Executives

GSAE
GEORGIA SOCIETY OF ASSOCIATION EXECUTIVES

Small Market MEETINGS

Group TravelDirectory

THE GROUP TRAVEL LEADER

Red Hot Celebrations

FMA
Florida Motorcoach Association

AMA
Alabama Motorcoach Association

ABA℠
AMERICAN BUS ASSOCIATION

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- Increased spend with LinkedIn, taking communication beyond text ads
- On-site display banner advertising
- Sponsored updates, a means of delivering relevant content to target audiences

Meetings/Conventions: Media Plan

It's a Relationship Business

- Media is valuable – though, more and more, it's about cultivating and nurturing leads

- Industry-specific awareness media
  - Meeting Professional providers – inclusive of lead-generating programs
  - B2B digital platforms

- Lead generation tactics
  - Keyword Search
  - Cvent
  - LinkedIn & Facebook
  - Visit Florida meetings/events home page
  - Email marketing with Visit Florida and industry publishers

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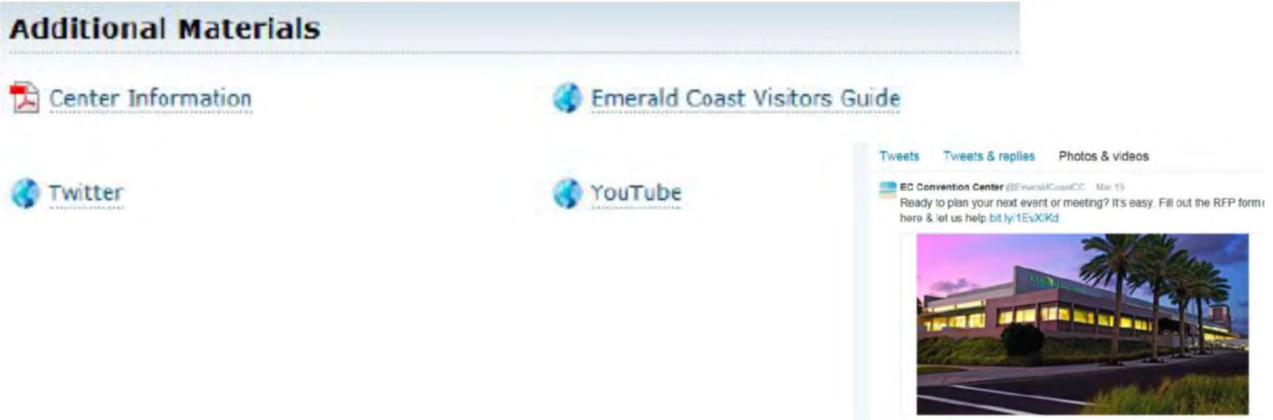
When You Can't Be There

Rely on the next best thing…

- Video marketing – there's no better storyteller
- All opportunities referenced have advertising video potential



EC Convention Center @EmeraldCoastCC · Mar 19
Ready to plan your next event or meeting? It's easy. Fill out the RFP form
here & let us help.bit.ly/1EvXIKd

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Google bing

in f

cvent

one+

MEETING PLANNER'S GUIDE TO FLORIDA

VISITFLORIDA.COM

Publisher Partners

Plan your
meetings
HELPING YOU PLAN BETTER MEETINGS AND EVENTS

Lead Generation Partners

CMCA
CHRISTIAN
MEETINGS & CONVENTIONS
ASSOCIATION

Leisure & Co-Op:
Media Rollup

Leisure Media Rollup

Vendor	Impressions	Campaign Support	Dollars
Official VF Visitor's Guide	600,000	Spring, Summer, Fall, Snowbirds	$15,956
Life's A Beach	500,000	Spring, Summer, Fall, Snowbirds	$9,925
Interfuse Media: Newspaper Inserts, Digital & Lead Generation	17,000,000	Spring, Summer	$50,000
National Geographic Traveler	1,960,000	Spring, Summer, Fall	$108,000
The Local Palate	460,000	Spring, Summer, Fall	$20,535
Audubon Magazine	827,160	Spring, Summer, Christmas	$24,100
Play Florida: Golf	425,000	Spring, Summer, Fall	$13,600
Coastal Angler	TBD	Spring, Fall	$6,000
National TV: Network Cable, AT&T U-Verse	42,000,000	Spring, Summer, Fall	$351,026
Bill Dance TV	8,475,000	Spring, Summer, Fall	$55,000
Destination Network/Beach TV	11,176,470	Spring, Summer, Fall, Snowbird	$38,000

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Leisure Media Rollup

Vendor	Impressions	Campaign Support	Dollars
Satellite Radio	23,316,000	Spring, Fall, Christmas	$38,250
NPR Radio	2,500,000	Spring, Summer, Fall, Christmas, Snowbird	$25,000
Toronto Life	89,082	Snowbird	$10,300
Crossings	150,000	Snowbird	$4,500
Dreamscapes	212,000	Snowbird	$6,940
International Travel Guide	74,925	Spring, Summer, Fall, Snowbirds	$4,775
Lamar	3,425,144	Spring	$17,000
TripAdvisor	3,100,000	Spring, Summer, Fall, Christmas	$65,000
Centro	21,000,000	Spring, Fall, Snowbird	$90,000
Yahoo!	57,000,000	Spring, Summer, Fall, Christmas, Snowbird	$135,000

Leisure Media Rollup

Vendor	Impressions	Campaign Support	Dollars
Interfuse Media	20,000,000	Spring, Summer, Fall, Snowbird	$50,000
Google Search, Bing Search and YouTube	N/A (68,000 clicks)	Spring, Summer, Fall, Christmas, Snowbird	$170,000
Facebook	N/A (25,657 clicks)	Spring, Summer, Fall, Christmas, Snowbird	$19,500
SAY Media	N/A (37,500 clicks)	Spring, Fall, Snowbird	$50,000
YuMe	5,000,000	Spring, Fall, Snowbird	$50,000
Google YouTube TrueView/Hulu	N/A (3,181clicks)	Spring, Summer, Fall, Christmas	$35,000
Discover America	TBD	Spring, Summer, Fall, Snowbird	$10,000
Boomer Aviation	TBD	Fall, Christmas	$13,500
Ad serving fee estimate		Spring, Summer, Fall, Christmas, Snowbird	$13,000
	TOTAL:		$1,499,907

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Co-Op Media Rollup

Vendor	Impressions	Campaign Support	TDT Dollars	Partner Contrib.	Total Media Cost
Coastal Living	1,407,969	Spring, Summer, Christmas	$69,000	$3,000	$72,000
Garden & Gun	2,261,000	Spring, Summer, Fall	$75,640	$3,000	$78,640
Coastal Living Digital	400,000	Spring	$8,500	$1,500	$10,000
Southern Living Digital	625,000	Fall	$38,000	$2,000	$40,000
Escape to the Southeast	250,000	Spring, Summer, Fall, Snowbirds	$1,600	$2,000	$3,600
Interfuse Media: Atlanta Heavy Up	2,000,000	Spring, Summer, Fall	$8,500	$1,500	$10,000

Note: TDT and Partner costs for each opportunity are subject to change if actual partner participation varies from estimated partner participation.

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Co-Op Media Rollup

Vendor	Impressions	Campaign Support	TDT Dollars	Partner Contrib.	Total Media Cost
Interfuse Media: Snowbirds	2,000,000	Snowbirds	$8,500	$1,500	$10,000
Martha Stewart Weddings	96,746	Spring, Summer	$11,000	$1,500	$12,500
DCMilitary Life	300,000	Spring, Summer, Fall	$8,000	$2,000	$10,000
SportEvents	39,000	Spring, Summer, Fall	$4,000	$2,000	$6,000
	TOTAL:		$232,740	$20,000	$252,740

Note: TDT and Partner costs for each opportunity are subject to change if actual partner participation varies from estimated partner participation.

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Groups:
Media Rollup

Groups Media Rollup

Vendor	Impressions	Dollars
The Knot	450,000	$8,500
Southern Bride	140,000	$5,900
Southern Weddings	1,000,000	$8,875
Birmingham Bridal Directory	72,000	$3,000
New Orleans Bride	211,400	$3,800
Sports Destination	18,500	$7,300
Sports Planning Guide	50,400	$1,295
SportsEvents	30,000	$3,000
SportsTravel	30,000	$5,370

Groups Media Rollup

Vendor	Impressions	Dollars
GSAE	32,000	$2,000
FSAE	40,000	$4,800
ACAE	425	$900
Group Travel Leader	30,000	$3,500
Group Travel Directory, Reunion Market	182,400	$2,290
Military Reunions	75,000	$1,800
Friendly Reunion Network	TBD	$999
Red Hot Celebrations	30,500	$1,245
American Bus Association	186,000	$6,000

Groups Media Rollup

Vendor	Impressions	Dollars
Florida Motorcoach	40,000	$850
Alabama Motorcoach	550	$1,850
Religious Travel Directory	48,000	$2,290
Going On Faith	60,000	$3,600
Small Market Meetings	45,000	$3,600
LinkedIn	N/A (1,417 clicks)	$5,668
Ad Serving Fees		$2,000
	TOTAL:	$90,432

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Meetings/Conventions: Media Rollup

Meetings/Conventions Media Rollup

Vendor	Impressions	Dollars
Plan Your Meetings	168,000	$5,000
Collinson Media	374,500	$38,618
Christian Meetings & Conventions Association	3,600	$1,200
Google/Bing-Yahoo! Search	N/A (3,900 clicks)	$10,000
Cvent	N/A	$11,225
LinkedIn	N/A (3,738 clicks)	$14,953
Visit Florida	156,000	$8,700
Ad Serving Fees		$2,000
		$91,696

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Chicago Takeover: Media Rollup

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Chicago Takeover Media Rollup

Vendor	Impressions	Dollars
NCM Media Networks: Movie Theaters	6,293,286	$250,000
Titan: Transit	22,788,328	$259,000
Production	n/a	$25,000
	TOTAL:	$534,000

Gulf-to-Table: Media Rollup

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Gulf to Table Media Rollup

Vendor	Impressions	Dollars
Phase II - TBD	TBD	$83,470
	TOTAL:	$83,470

Phase I of the Gulf-to-Table initiative used BP funds to develop:

- Video, digital, blog and social content
- Campaign landing page
- Photoshoot
- Digital and printed fishing guide

Phase II of the Gulf-to-Table initiatives uses TDT funds to provide media support.

Once appropriate media support has been identified, specific details will be presented to TDC & BCC for consideration and approval.

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Marketing to Assist in Airline Recruitment:

Media Rollup

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Marketing to Assist in Airline Recruitment Media Rollup

Vendor	Impressions	Dollars
TBD (2nd penny contribution)	TBD	$393,787
TBD (3rd penny contribution)	TBD	$106,213
	TOTAL:	$500,000

Once appropriate marketing support has been identified, specific details will be presented to TDC & BCC for consideration and approval.

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Measuring Success

Measuring Success

Performance will be measured by:

Ongoing Performance:

- Unique visits to the website
- Social media performance
- Bed tax revenue
- Visitation
- Visitor spending

Campaign Performance:

- Tracking and reporting online metrics (impressions, clicks, click rate, etc.)

Marketing Plan Budget

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Marketing Plan Budget

Activity	Dollars
Promotional Items & Collateral	$141,000
Local Event Promotional Activities	$5,000
Trade Show Fees	$59,225
Advertising Agency (Base Services & Travel)	$465,000
Advertising Agency (Media Planning & Purchasing)	$100,000
Website Development & Maintenance	$82,068
Public Relations (e.g. Familiarization Tours, Road Shows)	$95,000
Media Campaign (Fall/Winter, Christmas, Snowbird, Spring/Summer, Non-Seasonal/Niche)	$2,322,010
Media Campaign (Groups, Meetings/Conventions)	$210,235
Campaign Production	$200,000
Local Event Marketing Funding Applications	$169,850
Advertising (e.g. Welcome Center & Publication Listings)	$11,480
Marketing to Assist in Airline Recruitment	$500,000
Promotional Reserve	$100,000
Grand Total	**$4,460,868**

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Promotional Reserve

Promotional Reserve funds may be appropriated in accordance with County approval authority and with concurrence of the TDC Chairman.

A monthly reconciliation of the use of promotional reserve funds will be provided to the TDC and BCC for informational purposes.

Appendix

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Full Media Details

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Florida & Beach Centric

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Official Visit Florida Visitor Guide

Rationale:
- Distributed to travelers actively planning a Florida vacation; includes 5 welcome centers
- Covers beaches, outdoors, entertainment, dining, maps, regional must-see lists

Highlights:
- Circulation: 600,000
- Visit Florida FP4C – Jan 2016
- Inclusion in e-book – 10 million visits per year and listing in Visitor Guide's planning section

Emerald Coast Convention & Visitors Bureau
www.emeraldcoastfl.com
1540 Miracle Strip Pkwy. S.E., Fort Walton Beach, 850-651-7131.

See ad on page 51. Reader Response 31

Investment & Return:
- Cost: $15,956
- Impressions: 600,000 minimum

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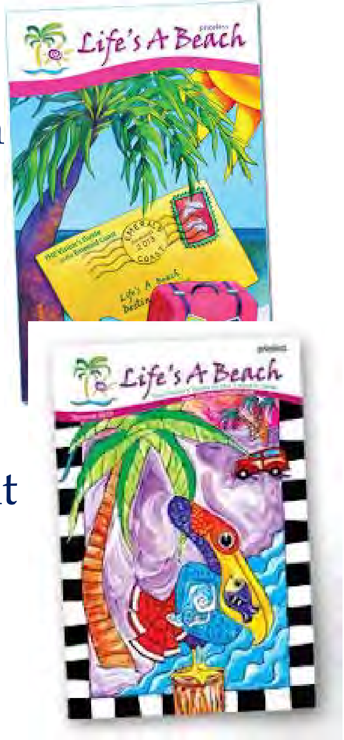
Life’s A Beach

Rationale:

- Distributed at trade shows in U.S. and Canada to meeting planners, in welcome centers, on military bases and among travel agents; has retail distribution on Emerald Coast and is an in-room vacation guide



Highlights:

- 500,000 circulation
- FP4C: Full year exposure
- Visitors Guide to the Emerald Coast (print and digital)
- Articles, maps, locations, landmarks

Investment & Return:

- Cost: $9,925
- Impressions: 500,000 minimum

Television

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National Cable

Rationale:

- Strong brand awareness-generating tactic
- Target audience is a heavy cable viewer

Highlights:

- Travel Channel partnership provides :15 & :30 spots along with added-value vignettes
- AT&T U-Verse targets heavy travelers earning $100K+ by usage of third-party and set-top data
  - Extends campaign reach beyond previous 2-network buys

Investment & Return:

- Cost: $351,026
- Impressions: 42,000,000 minimum

Bill Dance Sponsorship: TV+

Rationale:

- No. 1 fishing authority on TV
- Airs on three cable networks: NBC Sports, Outdoor Channel and newly added Destination America

Highlights:

- Television segments filmed and featuring the Emerald Coast
- Full year national television exposure
- 26x Facebook "fishing conditions" updates
- Billdanceoutdoors.com banner ads
- Bill Dance YouTube – Emerald Coast episodes
- Bill Dance personal endorsement and usage

Investment & Return:

- Cost: $55,000
- Impressions: 8,475,000

Destination Network TV

Rationale:

- Audience is relaxed and receptive, and looking for new experiences
- Key markets: Atlanta, New Orleans, Gulf Coast of FL/AL, Grand Strand of SC, Low Country and Florida Keys

Highlights:

- Visitor information network throughout SE hotel rooms and condos, serving resort and cultural destinations
- Commercial spots and specially produced Emerald Coast segments
- Schedule supporting all key booking windows

Investment & Return:

- Cost: $38,000
- Impressions: 11,176,470

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OKALOOSA ISLAND

Radio

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Satellite Radio

Rationale:

- Strong radio option for target audience
- Provides coverage in key markets and beyond – national reach

Highlights:

- Four channels per week
- 800+ :30 spots
- Provides coverage in Spring, Fall and Christmas booking windows – 17 weeks

Investment & Return:

- Cost: $38,250
- Impressions: 23,316,000 minimum

NPR Podcasts

Rationale:

- Affluent platform, reaching key target audience segments
- High brand affinity when sponsoring public broadcasting

Highlights:

- Only NPR product offering which allows :30 commercials
- Host-read creative gives endorsement-like feel
- Provides coverage in Spring, Fall, Christmas and U.S. Snowbird booking windows

Investment & Return:

- Cost: $25,000
- Impressions: 2,500,000 minimum

Multimedia & Lead Generation

Interfuse Media

Rationale:

- Multimedia platform offering print and digital
- Guaranteed online impressions
- Strong lead generation partner

Highlights:

- FP4C Visit Florida: OOS Newspaper Insert – Mid Feb 2016
- FP4C Visit Florida: ABV Newspaper Insert – Mid Apr 2016
- 16,000,000 digital impressions
- 8,000 leads
- 1,000,000 print impressions

Investment & Return:

- Cost: $50,000
- Impressions: 17,000,000 minimum

National Geographic Traveler

Rationale:

- Highest-paid subs in travel category
- Balanced audience with highest composition of Millennials
- Highest domestic travel vs. category

Highlights:

- Circulation: 340,000 east of MS
- FP4C: Apr Family Travel, Jun/Jul VF Great Outdoors and Aug/Sep Adventure Travel
- Event sponsorship in 2 cities: DC, Chicago or Atlanta – for Photography seminar: images, collateral, e-blasts, signage and promo message
- VF added-value includes FP advertorial, lead generation and bonus QP ad unit

Investment & Return:

- Cost: $108,000
- Impressions: 1,960,000 minimum

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The Local Palate

Rationale:

- Affluent and growing publication, nominated for James Beard Award for visual story-telling
- Top subscribing states are majority of Emerald Coast feeder markets
- Highlights travel from a culinary, historical and cultural perspective, targeted to average HHI of $150K+

THE LOCAL PALATE
FOOD CULTURE OF THE SOUTH

Highlights:

- Circulation: 120,000+ nationally
- FP4C: Mar Travel South, Apr Southern Fusion, Jun/Jul Seafood
- Homepage digital impressions as added-value opportunities

Investment & Return:

- Emerald Coast cost: $20,535
- Impressions: 460,000 minimum

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Coastal Angler

Rationale:

- Creation of partnership for annual Destin Cobia Tournament
- Introducing/solidifying charter captain & chef/restaurant relationships
- Distribution in multiple Emerald Coast feeder markets

Highlights:

- Multimedia package opportunities being negotiated
- Beyond traditional advertising, provides social media content marketing

Investment & Return:

- Cost: $6,000
- Impressions: TBD

Audubon

Audubon

Rationale:
- Opportunity to promote to eco-tourism traveler segment
- Culturally curious, affluent nature-based readers and publication with Visit Florida exposure

Highlights:
- Circulation: 413,580 nationally
- HP4C: Visit Florida Nov/Dec & Mar/Apr issues
- Advertorial
- Directory Listing
- Lead Generation

Investment & Return:
- Cost: $24,100
- Impressions: 827,160 minimum

Play Florida: Golf

FLORIDA GOLF MARKETING ALLIANCE

Rationale:

- Florida's official Golf Guide
- Distributed by request to qualified vacationers and at top consumer gol shows
- Distributed at welcome centers
- Strong lead generation partner

Highlights:

- FP4C print ad and advertorial feature
- Digital edition emailed to 85,000 opt-in golfers
- Inclusion in post golf show emails with links back to website

Investment & Return:

- Cost: $13,600
- Impressions: 425,000 minimum

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Boomer Aviation

Rationale:

- Largest aerial banner advertising company in the Southeast
- Provides supplemental market support for key feeder markets

BOOMER AVIATION

Highlights:

- SEC Football & Nascar coverage (AL, AR, TN, FL)
- Nine (9) fly-overs of high attendance events

Investment & Return:

- Cost: $13,500
- Impressions: TBD

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Digital Leisure

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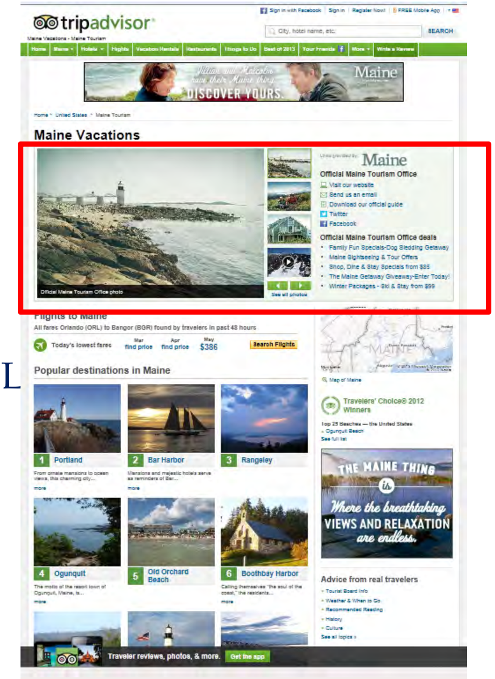
TripAdvisor

Rationale:

- Premier destination/travel research and review site
- Ads reach travelers when they are in booking-consideration mode
- 161 index, 13% reach against general Emerald Coast target

Highlights:

- Travel Sponsorship
    - Banner impression ownership across Destin/Ft. Walton travel hub
    - Module allows for direct click to ECFL site, social sites, etc.
    - Competitive market targeting
- Florida state sponsorship, allowing for banner rotation across Florida destination pages



Investment & Return:

- Cost: $65,000
- Impressions: 3,100,000+ and Projected Site Engagements: 125K

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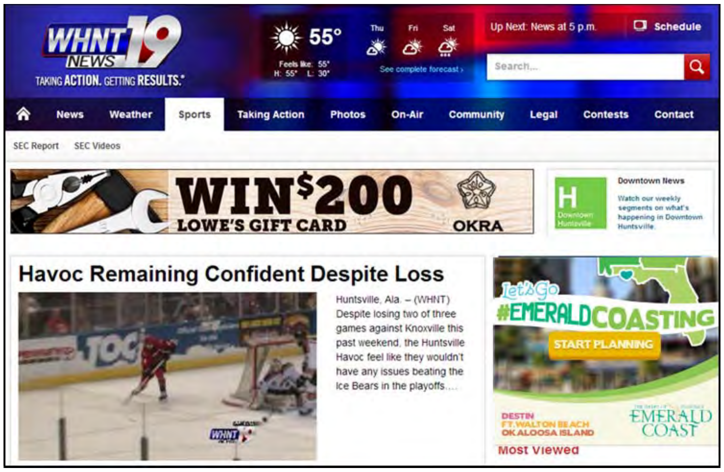
Centro

Rationale:

- Historical site-side conversion driver
- Reaches 61% of general Emerald Coast traveler, 112 index

Highlights:

- Behavioral and geo-targeted banners network of sites
- Focus on Spring, Fall and Snowbird seasons



Watch our weekly segments on what's happening in Downtown Huntsville.

Havoc Remaining Confident Despite Loss

Huntsville, Ala. – (WHNT) Despite losing two of three games against Knoxville this past weekend, the Huntsville Havoc feel like they wouldn't have any issues beating the Ice Bears in the playoffs....

Investment & Return:

- Cost: $90,000
- Impressions: 21,000,000+ and Projected Site Engagements: 35,000+

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Yahoo!

Rationale:

- Historical site-side conversion driver
- 113 index, 100% reach against general Emerald Coast target

Sample of Sites in Yahoo! Network

Y! FINANCE
omg!
Y! MAIL
Y! SPORTS
Y! Shine
Aol Advertising.
Microsoft Advertising

Highlights:

- Travel Channel rotation across relevant content
- Behavioral and demo-targeted banners, refined for each campaig
- Travel search retargeting
- Tablet banners
- Increased native content advertising

Investment & Return:

- Cost: $135,000
- Impressions: 57,000,000+ and Projected Site Engagements: 226,000+

Interfuse Media

Rationale:

- Trading desk platform that allows for real-time impression bidding and optimization
- Opportunity to scale across travel sites that reach the target audience segments

Highlights:

- Data-driven placements driven by actionable insights
- Display advertising across multiple platforms: desktop and mobile
- Optimization to best converting sites, size, platforms and placements

Investment & Return:

- Cost: $50,000
- Impressions: 20,000,000+ and Projected Site Engagements: 36,000

Interfuse Media

Sample Sites:

Programmatic Process:

Google & Bing Search

Rationale:

- Drives travel researchers directly to EmeraldCoasting.com, with opportunity to scale
- CPC pricing and built-in option to auto-optimize to keywords driving the highest volume of conversions
- 83% of the general Emerald Coast target utilizes Google search; 46% utilizes Bing

Highlights:

- Geo-targeted text ads related to keyword categories:
  - Brand – "Destin," "Destin Vacations," "Ft. Walton Beach rentals"
  - Competitive – "Pensacola," "Panama City Hotels"
  - General Travel – "vacation ideas," "getaway destinations"
  - Campaign-specific Travel – "family summer vacation," "spring getaway ideas," "snowbird offers"
- Ads targeted for search and content keywords
- Includes re-messaging placements as well

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Google Retargeting

Rationale:

- Re-messaging is a proven means of bringing back non-converting visitors, allowing the brand another opportunity to influence a conversion
- Google offers re-messaging at a low CPC price structure
- Banners run across Google Display Network, reaching 98% of Emerald Coast general target

Highlights:

- Banners targeted to site visitors that did not take action beyond viewing the initial landing page

Investment & Return:

- Cost: $170,000
- Projected Site Engagements: 68,000

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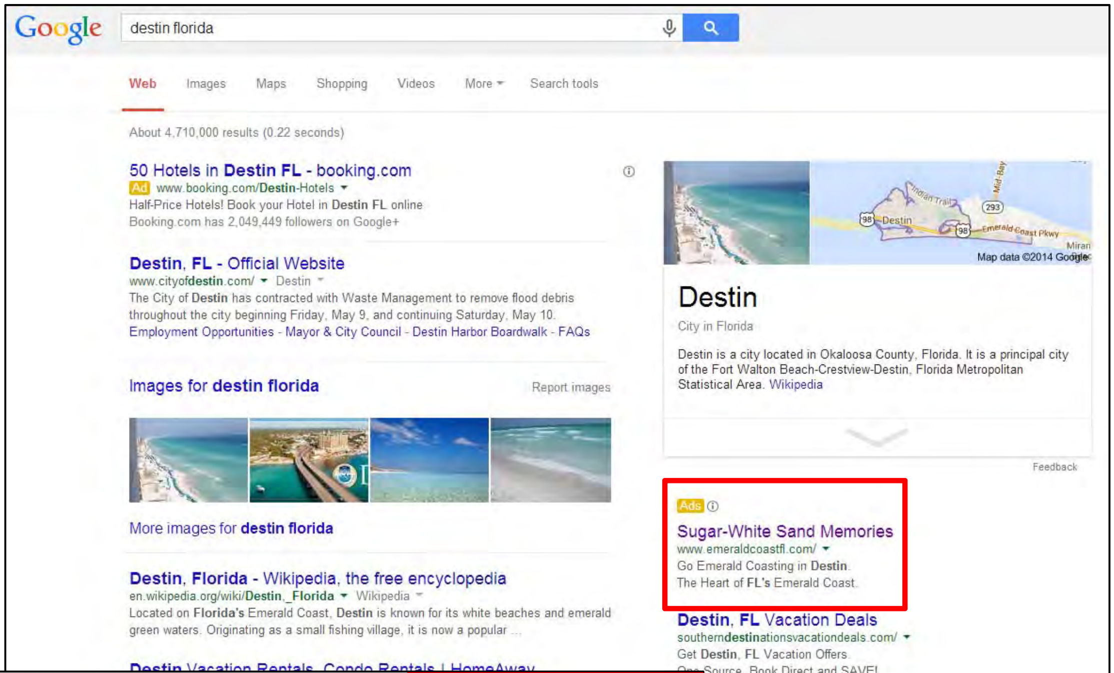
Google Search/Retargeting & Bing Search



About 4,710,000 results (0.22 seconds)

50 Hotels in Destin FL - booking.com
Ad www.booking.com/Destin-Hotels
Half-Price Hotels! Book your Hotel in Destin FL online
Booking.com has 2,049,449 followers on Google+

Destin, FL - Official Website
www.cityofdestin.com/ · Destin
The City of Destin has contracted with Waste Management to remove flood debris throughout the city beginning Friday, May 9, and continuing Saturday, May 10.
Employment Opportunities - Mayor & City Council - Destin Harbor Boardwalk - FAQs

Images for destin florida Report images

More images for destin florida

Destin, Florida - Wikipedia, the free encyclopedia
en.wikipedia.org/wiki/Destin,_Florida · Wikipedia
Located on Florida's Emerald Coast, Destin is known for its white beaches and emerald green waters. Originating as a small fishing village, it is now a popular ...

Destin Vacation Rentals, Condo Rentals | HomeAway

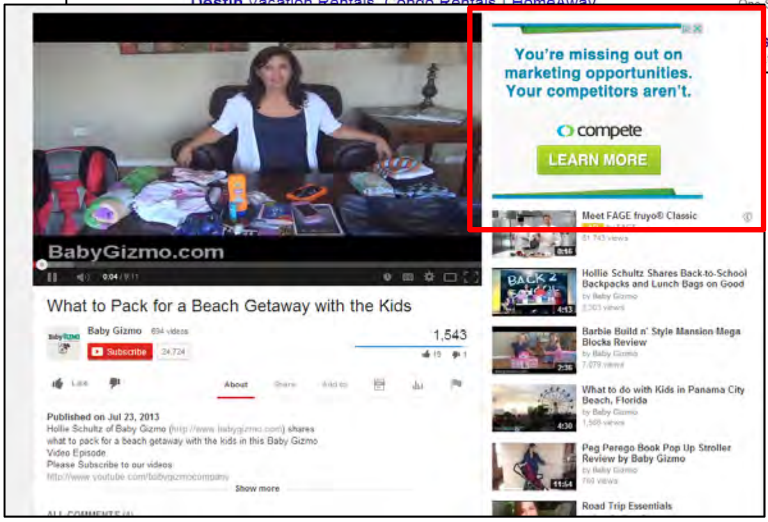
Destin
City in Florida
Destin is a city located in Okaloosa County, Florida. It is a principal city of the Fort Walton Beach-Crestview-Destin, Florida Metropolitan Statistical Area. Wikipedia

Feedback

Ads
Sugar-White Sand Memories
www.emeraldcoastfl.com/
Go Emerald Coasting in Destin.
The Heart of FL's Emerald Coast.

Destin, FL Vacation Deals
southerndestinationsvacationdeals.com/
Get Destin, FL Vacation Offers.
One-Source. Book Direct and SAVE!

stin Florida
tripadvisor.com/



What to Pack for a Beach Getaway with the Kids

Baby Gizmo 694 videos

Published on Jul 23, 2013
Hollie Schultz of Baby Gizmo (http://www.babygizmo.com) shares what to pack for a beach getaway with the kids in this Baby Gizmo Video Episode
Please Subscribe to our videos
http://www.youtube.com/babygizmocompany

Meet FAGE fruyo® Classic
Hollie Schultz Shares Back-to-School Backpacks and Lunch Bags on Good
Barbie Build n' Style Mansion Mega Blocks Review
What to do with Kids in Panama City Beach, Florida
Peg Perego Book Pop Up Stroller Review by Baby Gizmo
Road Trip Essentials

Banner on YouTube.com

Samples of Sites in Google Display Network

Blogger Shopping Gmail YouTube

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Video: Google & Hulu

Rationale:

- Increase allocation of media dollars across a variety of platforms
  - YouTube has tremendous reach against target
  - Hulu is an on-demand TV solution

Highlights:

- Video ads targeted to Spring, Summer, Fall, Holiday and Snowbirds
- Optimize between placements for best results

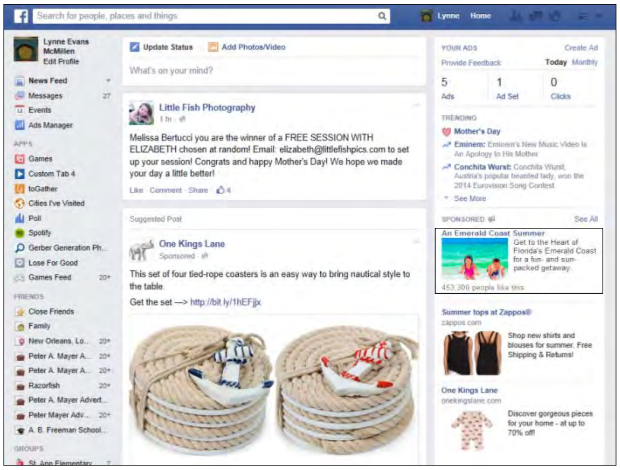
Investment & Return:

- Cost: $35,000
- Impressions: and Projected Site Engagements: TBD

Facebook

Rationale:

- Facebook's third-party data partnerships allow us to layer in a wide variety of targeting options, creating opportunities to customize for each campaign
- CPC pricing minimizes risk of wasted impressions
- Historically efficient site traffic driver



Little Fish Photography

Melissa Bertucci you are the winner of a FREE SESSION WITH ELIZABETH chosen at random! Email: elizabeth@littlefishpics.com to set up your session! Congrats and happy Mother's Day! We hope we made your day a little better!

Suggested Post

One Kings Lane

Sponsored

This set of four tied-rope coasters is an easy way to bring nautical style to the table.

Get the set —> http://bit.ly/1hEFjjx

Mother's Day

Eminem: Eminem's New Music Video Is An Apology to His Mother

Conchita Wurst: Conchita Wurst, Austria's popular bearded lady, won the 2014 Eurovision Song Contest

An Emerald Coast Summer

Get to the Heart of Florida's Emerald Coast for a fun- and sun-packed getaway.

453,300 people like this

Summer tops at Zappos®

zappos.com

Shop new shirts and blouses for summer. Free Shipping & Returns!

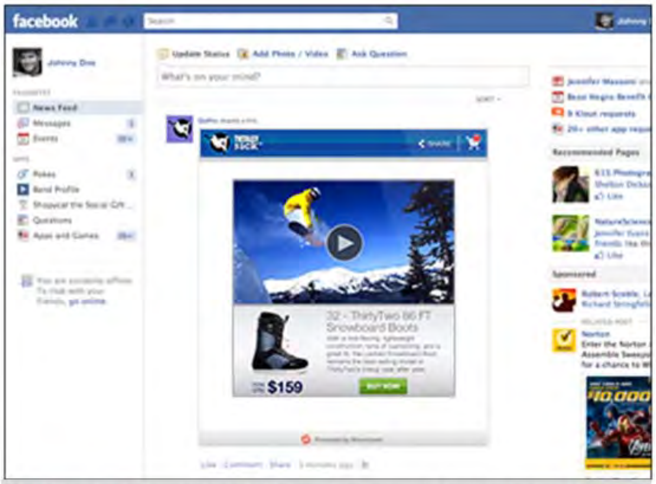
One Kings Lane

onekingslane.com

Discover gorgeous pieces for your home - all up to 70% off!

Highlights:

- Tile ads, news feed and video ads targeted to Spring, Summer, Fall, Holiday and Snowbirds



Moontoast delivers rich media ad units in users' Facebook newsfeeds

Investment & Return:

- Cost: $19,500 and Projected Site Engagements: 25,657

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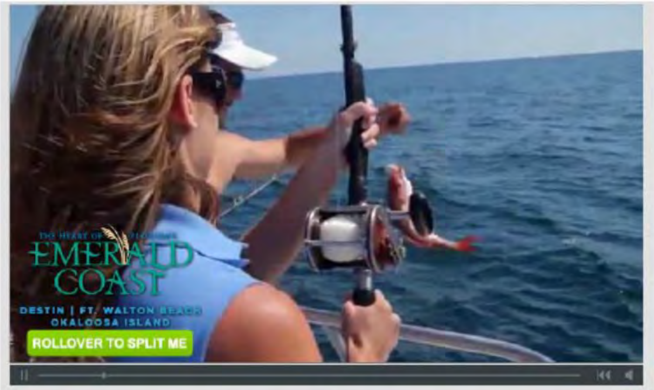
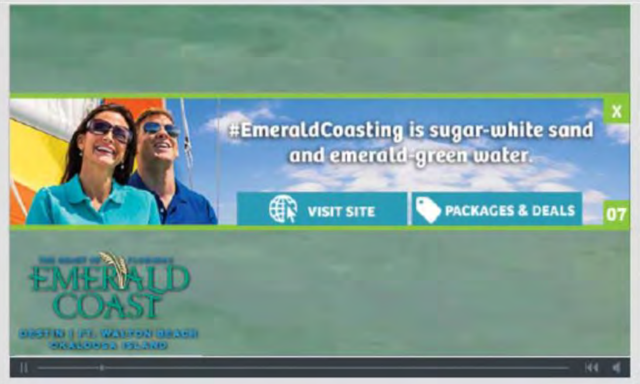
YuMe

Rationale:

- Engaging opt-in video product
- Interactive bar invites viewer to craft their course of knowledge





Highlights:

- Video ads targeted to Spring, Summer, Fall, Holiday and Snowbirds
- Video provides two different Call-to-Action opportunities

Investment & Return:

- Cost: $50,000
- Impressions: 5,000,000+ and Projected Site Engagements: 10,000

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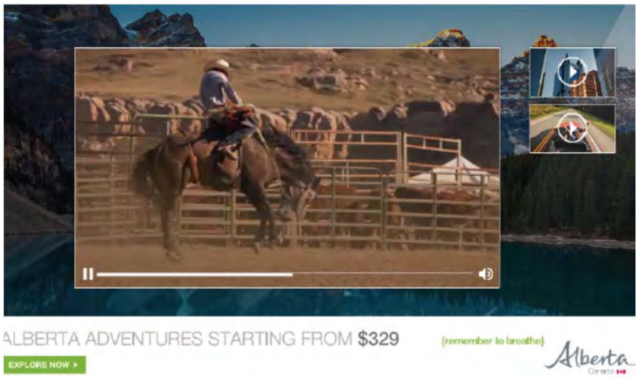
SAY Media

Rationale:

- Engaging opt-in video product
- CPE pricing minimizes risk of wasted impressions
- Only pay when qualified prospect voluntarily engages



Highlights:

- Video ads targeted to Spring, Summer, Fall, Holiday and Snowbirds
- Video provides opportunity to click to site

Investment & Return:

- Cost: $50,000 and Projected Site Engagements: 37,500

Lamar Digital Outdoor

Rationale:

- International Cherry Blossom Festival draws regionally and internationally
- Recognized as a Top 20 event in the South

International Cherry Blossom FESTIVAL

Highlights:

- Nearly 3-week long festivities draw 700,000 attendees
- Heavily attended by Atlanta residents
- Canvass downtown Macon area with 6 digital outdoor boards

Macon, Georgia's International CHERRY BLOSSOM FESTIVAL

Event is held
Mid-March through
April

Investment & Return:

- Cost: $17,000
- Impressions: 3,425,144

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Ad Serving Fees

Rationale:

- Delivers ads, along with digital code, to online publishers
- Ensures proper ads are run by publisher for learnings

Sizmek

Highlights:

- Helps verify ad impressions (purchase vs served)
- Informs learnings regarding site visitation and specific site engagements

Investment & Return:

- Cost: $17,000

Integrated Marketing: Leisure Co-Op Media Plan

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Coastal Living Print

Rationale:
- Active travelers, especially to Florida – beach, boating, cultural events and outdoor activities
- 1/3 of circulation within driving distance of Emerald Coast

Highlights:
- Circulation: 469,323 (east of the MS)
- FP4C: Visit Florida Feb and Apr 2016
  - Bonus advertorial, RRC and leads, mini co-op in Mar and May 2016 issues, online edition with links, e-newsletters
- FP4C in Sep Fall Escape issue

Investment & Return:
- Emerald Coast cost: $69,000
- Total cost: $72,000
- Cost per partner: $500 per insertion
- Impressions: 1,407,969 minimum

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Assumes two partners per insertion
for a total of six buy-in

Coastal Living Digital

Rationale:

- Complements print buy

Highlights:

- Banner rotation throughout CoastalLiving.com with emphasis on Travel Channel
- ROS ad units 300x250, 728x90
- Two months flighting
  - Feb and Mar 2016

Investment & Return:

- Emerald Coast cost: $8,500
- Total cost: $10,000
- Cost per partner: $500
- Impressions: 800,000 total (400,000 for Emerald Coast)

Assumes three-partner buy-in

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Garden & Gun Print

Rationale:

- Affluent and growing publication, voted hottest lifestyle mag in 2014
- Strong Southern market affinity by discriminating travelers

GARDEN & GUN

Highlights:

- Circulation: 350,000 nationally
- FP4C: Visit Florida Apr/May, Jun/Jul Great Southern Towns & Aug/Sep Food Issue
- FP advertorial, e-newsletter, “Live the Life” custom content/image gallery and 100,000 digital impressions as added-value opportunities

Investment & Return:

- Emerald Coast cost: $75,640
- Total cost: $78,640
- Cost per partner: $500 per insertion
- Impressions: 2,261,000 minimum

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Assumes two partners per insertion for a total of six buy-in

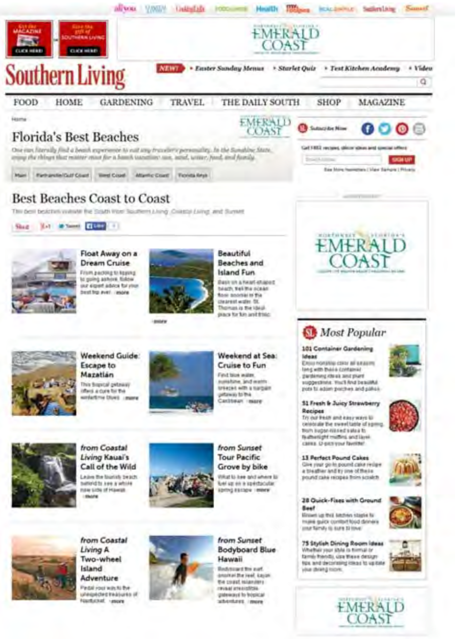
Southern Living Digital

Rationale:

- Relevant beach content alignment

Highlights:

- 100% SOV of Florida's Best Beaches editorial package – Oct and Nov 2015
- Homepage roadblocks
- ROS media
- E-newsletter sponsorships



Florida's Best Beaches

Best Beaches Coast to Coast

Float Away on a Dream Cruise

Beautiful Beaches and Island Fun

Weekend Guide: Escape to Mazatlán

Weekend at Sea: Cruise to Fun

from Coastal Living Kauai's Call of the Wild

from Sunset Tour Pacific Grove by bike

from Coastal Living A Two-wheel Island Adventure

from Sunset Bodyboard Blue Hawaii

101 Container Gardening Ideas

51 Fresh & Juicy Strawberry Recipes

13 Perfect Pound Cakes

28 Quick-Fixes with Ground Beef

75 Stylish Dining Room Ideas

Investment & Return:

- Emerald Coast cost: $38,000
- Total cost: $40,000
- Cost per partner: $500
- Impressions: Est. 625,000 total (312,500 for Emerald Coast)

Assumes four-partner buy-in

Escape to the Southeast Digital

Rationale:

- Southeast Tourism Society multimedia components
- Provides online annual coverage to 12-state region

SOUTHEAST
TOURISM SOCIETY

Highlights:

- 3,000-word web content with 3 sub-pages, 12 photos/hyperlinks, content video page
- Unlimited calendar event page
- E-newsletter spotlight
- Facebook and Twitter links

Investment & Return:

- Emerald Coast cost: $1,600
- Total cost: $3,600
- Cost per partner: $500
- Impressions: 250,000 minimum

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Assumes four-partner buy-in

Interfuse Media: Atlanta Heavy-Up

Rationale:

- Trading desk platform that allows for real-time impression bidding and optimization
- Opportunity to scale across travel sites that reach the target audience segments

Highlights:

- Data-driven placements driven by actionable insights
- Display advertising across multiple platforms: desktop and mobile
- Optimization to best converting sites, size, platforms and placements

Investment & Return:

- Emerald Coast cost: $8,500
- Total cost: $10,000
- Cost per partner: $500
- Impressions: 4,000,000
    - CVB @ 50%
    - Partners @ 50%

Assumes three-partner buy-in

Groups:
Weddings Media Plan

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The Knot

Rationale:

- A leading wedding/bridal media vendor in print and online

Highlights:

- 12-month package includes:
    - Wedding Venues Storefront
    - Wedding Venues Featured Vendor
    - U.S. Honeymoon and Travel Preferred Position and Storefront
    - FP4C Wedding Venues – Spring/Summer
    - Local Print Profile – Spring/Summer
    - Lead Generation

Investment & Return:

- Cost: $8,500
- Impressions: 450,000

Southern Bride

Rationale:

- Multiplatform weddings/bridal resource: print, website, blog, app, Facebook, Twitter, Pinterest and Instagram
- Sold in retail outlets and available in advertisers' locations, upscale spas, hotels and bridal shows throughout the South

Highlights:

- HP4C: Winter/Spring and Summer/Fall
  - Mid Dec and Mid Jun
- 12-month banner advertising

Investment & Return:

- Cost: $5,900
- Impressions: 140,000 minimum

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Southern Weddings

Rationale:

- Annual keepsake publication distributed nationally
- Majority of readers are Southerners

Highlights:

- FP4C: Fall 2016 – print, online plus tablet
- 12-month online banner advertising
- 12-month “Southwest seal of approval”
    - Portfolio gallery and contact information
    - Directory listing and state-specific destination wedding resource

Investment & Return:

- Cost: $8,875
- Impressions: 1,000,000 minimum

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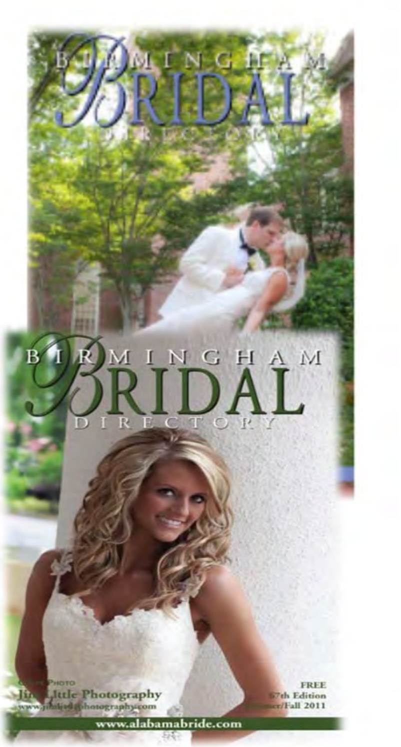
Birmingham Bridal Directory

Rationale:

- Highest-circulation directory in the market
- Direct link from online version to website
- Leads shared 6x per year – up to 1,500 per report
- Direct mailed and in retail



Highlights:

- Circulation: 24,000
- FP4C: Spring, Summer/Fall, Winter
- Summer/Fall distributed at Southern Bridal Show (August)

Investment & Return:

- Cost: $3,000
- Impressions: 72,000 minimum

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New Orleans Bride

Rationale:

- One of the top destination wedding feeder markets
- Magazine is direct mailed and available at select retail outlets throughout market and at bridal registries at top retailers

Highlights:

- Circulation: 30,000
- HP4C: Winter & Summer editions
- E-newsletter, directory listing on wedding website, promotion on social media deployments
- Purchase of ad package ensures presence at 2 hosted bridal events

Investment & Return:

- Cost: $3,800
- Impressions: 211,400 minimum

Integrated Marketing:

Weddings
Co-Op Media Plan

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Martha Stewart Weddings


all the dazzling details from "TODAY" THROWS A MARTHA STEWART WEDDING

MARTHA STEWART weddings

THE EVENT OF THE SEASON

plus incredible cakes, dresses, bouquets, favors, and more

Rationale:

- Leading publication in the weddings category
- High-income readers with median HHI of $110,000
- Visit Florida edition offers substantial savings on regional edition

Highlights:

- Circulation: 48,373
- FP4C: Spring 2016 edition
- Visit Florida placement also provides for an in-book and online reader service listing

Investment & Return:

- Emerald Coast Cost: $11,000
- Total cost: $12,500
- Cost per partner: $500
- Impressions: 96,746 minimum

THE HEART OF FLORIDA'S EMERALD COAST

DESTIN | FT. WALTON BEACH
OKALOOSA ISLAND

Assumes three-partner buy-in

Groups:

Military Plan – Leisure, Reunion

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OKALOOSA ISLAND

Military Reunions

Rationale:

- Reaches diverse types of reunions: family, military, class
- Conversion of print to digital
  - Publication, effective end of May 2015, is going 100% digital
- Budget affords full-year coverage

REUNIONS MAGAZINE

Reunion planning starts here.

Highlights:

- 12-months online banner advertising – Group Travel Directory

Investment & Return:

- Cost: $1,800
- Impressions: 75,000 minimum

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The Reunion Friendly Network

Bringing Together Volunteer Military Reunion Planners, Convention & Visitors Bureaus, Hotels and Other Reunion Vendors Since 1991

Rationale:

- Connecting reunion planners with the hospitality industry for over 20 years
- Full year exposure from website and multiple member benefits

Highlights:

- Website Listing with a hyperlink, 150-word message, up to 8 photographs
- Unlimited changes to website listing 150-word message
- Member listing in all Reunion Friendly Network magazine issues
- Complimentary ad and listing in annual directory (March distribution)
- Complimentary for one Reunion Friendly Network magazine ad
- Unlimited Promotion Listings on Special Promotions Page of RFN website
- Link/Promotion in 30 issues of "SALUTE," the weekly online newsletter

Investment & Return:

- Cost: $999
- Impressions: TBD

Integrated Marketing:

Military
Co-Op Media Plan

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DC Military Family Life Digital

Rationale:

- Over one-third of all officers live in D.C. area
- Military are accustomed to travel, and book family getaways when they have leave

dcmilitary.com
Comprint Military Publications online

Highlights:

- Full year online banner advertising package

Investment & Return:

- Emerald Coast cost: $8,000
- Total cost: $10,000
- Cost per partner: $500
- Impressions: 600,000 minimum

Assumes four-partner buy-in

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Groups:
Sports Plan

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OKALOOSA ISLAND

Sports Destination Management

Rationale:

- Editorial focuses on event location strategies and management
- Governing bodies – site selectors and logistics managers
- Highest-circulation publication within sports category

sports
DESTINATION MANAGEMENT

Highlights:

- FP4C Destination Spotlight – includes two pages of advertorial with photos (3 pages) – Mar/Apr 2016
- Includes 500 reprints for distribution

Investment & Return:

- Cost: $7,300
- Impressions: 18,500 minimum

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Sports Planning Guide

Rationale:

- Part of Premier Travel Media – network of over 130,000 planners
- Integrated print and digital products and site profile summaries

Highlights:

- Sports market site inspection: site profile with multiple images, links back to Emerald Coast site
- 12-month profile presence

Investment & Return:

- Cost: $1,295
- Impressions: 50,400 minimum

Sports Planner Digital

Rationale:

- Ensures coverage against entire sports planning industry
- Provides 24/7 ongoing coverage
  - SportsEvents
  - SportsTravel

Highlights:

- 12-month span of online banner advertising
  - Divided between both websites
  - Qualifies for SportsEvents lead-generation program

Investment & Return:

- Cost: $8,370
- Impressions: 60,000 minimum

Integrated Marketing:

Sports
Co-Op Media Plan

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SportsEvents Digital

Rationale:

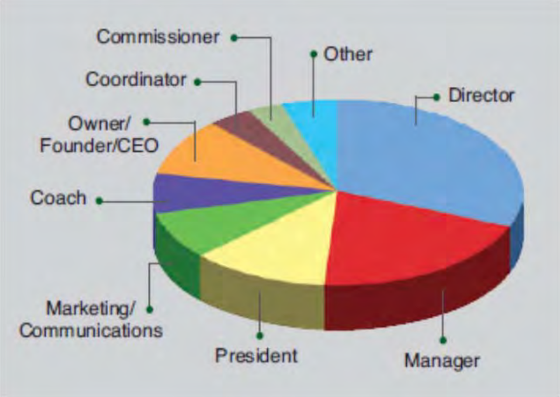
- Editorial focuses on event location strategies and management
- Audience of key decision-makers for sport conferences and events

Highlights:

- 12-month online package

Investment and Return:

- Emerald Coast cost: $4,000
- Total cost: $6,000
- Cost per partner: $500
- Impressions: 78,000 minimum



Assumes four-partner buy-in

Groups:

Canadian & International Media Plan

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Snowbird Target Geography

Toronto Life

Rationale:

- Canada’s No. 1 city magazine
- Readers are 70% more likely to have traveled to Florida in the past three years
- With pass-along readership, reaches 133,000 adults earning $150,000+ HHI

Highlights:

- Circulation: 89,082
- FP4C Visit Florida: Escape to the South – Dec 2016, on sale date in mid-November 2015
- Available both in print and online

Investment & Return:

- Cost: $10,300
- Impressions: 89,082 minimum

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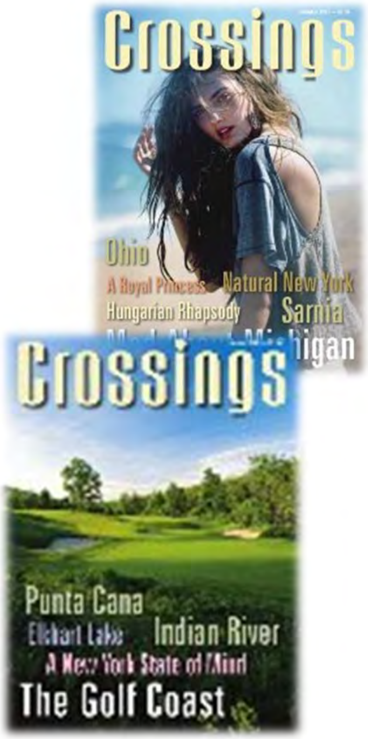
Crossings

Rationale:

- Canadian pub for cross-border explorers
- Distribution in seven Ontario daily newspapers, Windsor CVB, Windsor International Airport, travel information centers across Ontario and travel agents
- Distribution in Ontario and Michigan



Highlights:

- Circulation: 150,000
- FP4C Visit Florida: Fall/Winter – Mid Oct 2015
- Florida editorial and guaranteed Emerald Coast-specific content

Investment & Return:

- Cost: $4,500
- Impressions: 150,000 minimum

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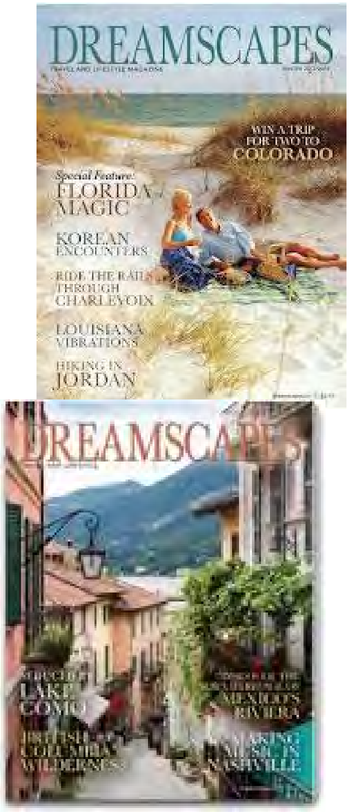
Dreamscapes

Rationale:

- Inserted in *The Globe and Mail* and available to frequent travelers through Air Canada Maple Leaf Lounges
- Distribution: Ontario, British Columbia, Alberta, Manitoba and Quebec
- Audited circulation



Highlights:

- Circulation: 106,000
- 2/3P4C: Visit Florida- Winter
- 2/3P4C: Visit Florida- Winter/Spring
  - Spotlight on Florida in all issues
  - Ad investments guarantee Emerald Coast editorial coverage

Investment & Return:

- Cost: $6,940
- Impressions: 212,000 minimum

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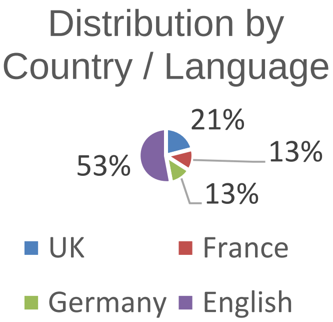
International Travel Guide

Rationale:

- Visit Florida fulfillment piece, available in print and online
- Distributed in 17 markets, including entire U.K.
- Three language editions: English, French and German

Highlights:

- HP4C: Jan 2016 – full year exposure
- Distributed at trade and consumer travel shows
- Digital edition includes live website and video links


Distribution by Country / Language

Investment & Return:

- Cost: $4,775
- Impressions: 74,925 minimum

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Discover America

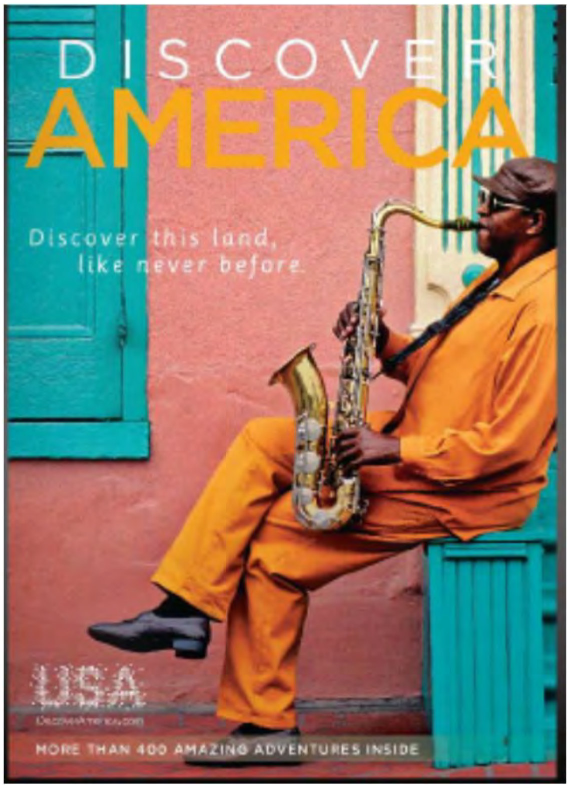
Rationale:
- Brand USA international opportunity
- Multiple countries and languages for coverage and distribution

Highlights:
- FP4C ad unit

Investment & Return:
- Cost: $10,000
- Impressions: TBD

USA

DiscoverAmerica.com



Integrated Marketing:
Canadian Co-Op Media Plan

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Interfuse Media: Snowbird Digital

Rationale:

- Trading desk platform that allows for real-time impression bidding and optimization
- Opportunity to scale across travel sites that reach the target audience segments

Highlights:

- Data-driven placements driven by actionable insights
- Display advertising across multiple platforms: desktop and mobile
- Optimization to best converting sites, sizes, platforms and placements

Investment & Return:

- Emerald Coast cost: $8,500
- Total cost: $10,000
- Cost per partner: $500
- Impressions: 4,000,000
    - CVB @ 50%
    - Partners @ 50%

Assumes three-partner buy-in

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Groups:

Meeting Planner Targeted Digital Media

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LinkedIn

Rationale:

- Reaches meeting planners when they are networking, seeking out professional information, and, in general, in the career/work-mindset and bought on CPC
- Broadens reach to specific job titles that are not specifically "Meeting Planners" and are Human Resources & Administrative related

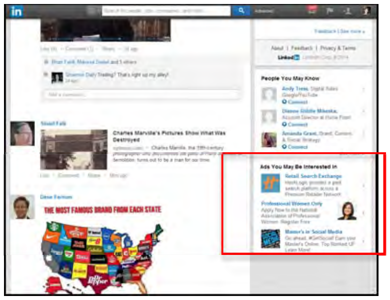

Image + Text Ads

Would you like ABC INC to follow up with you on LinkedIn?

☑ Allow ABC Inc to see your email address

Lead Gen Overlay

Highlights:

- Image and text ads and now also display and sponsored updates

Investment & Return:

- Cost: $5,668
- Estimated clicks: 1,417

Meetings/Conventions: Media Plan

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Trade:
Lead Generation

Cvent

Rationale:

- Premier hub for meeting planners, serving as a portal for global destination and accommodation information

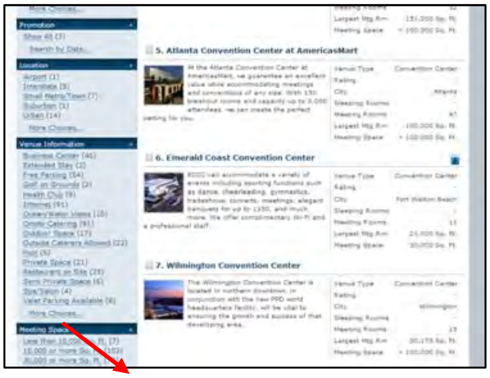
Highlights:

- 3-Diamond listing, with opportunity to refresh content and images
- Upgraded package provides more content, including Twitter link, virtual tour and more prominent display in FL region

Investment & Return:

- Cost: $11,225

Convention Center listed under Supplier Network, driving to Diamond Listing



5. Atlanta Convention Center at AmericasMart

6. Emerald Coast Convention Center

7. Wilmington Convention Center

Emerald Coast Convention Center

Key Highlights

Venue Type	Convention Center
Brand	Independent
Distance From Airport	10 Miles
Year Built	2003
Number of Meeting Rooms	11
Meeting Room Space	30,000 Sq. Ft.

Description

The Emerald Coast Convention Center boasts over 35,000 square feet of flexible, free expanse, column free meeting and exhibit space featuring cutting edge equipment, exquisite catering services, and an experienced staff committed to outstanding customer service.

Additional Materials

Center Information
Emerald Coast Visitors Guide
Twitter
YouTube

Amenities

Location

1250 Miracle Strip Pkwy SE
Fort Walton Beach, Florida
32548
USA Map Venue

Meeting Space

Meeting Room Space	30,000 Sq. Ft.
Number of Meeting Rooms	11
Largest Meeting Room	21,000 Sq. Ft.
Second Largest Meeting Room	16,000 Sq. Ft.

Parking

Free Parking	Yes

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LinkedIn

Rationale:

- Reaches meeting planners when they are networking, seeking out professional information, and, in general, in the career/work-mindset and bought on CPC
- Complements Cvent buy, reaching 48% of the Cvent audience

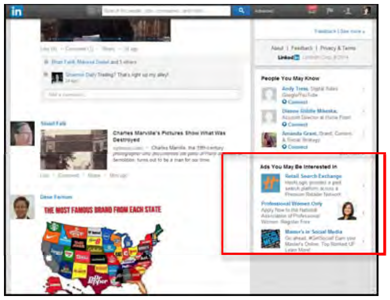

Image + Text Ads

Highlights:

- Image and text ads and now also display and sponsored updates targeted to:
  - Meeting planners, based on job title
  - Meeting groups/association members (PCMA, Global Meetings, MPI, etc.)

Would you like ABC INC to follow up with you on LinkedIn?

☑ Allow ABC Inc to see your email address

Lead Gen Overlay

Investment & Return:

- Cost: $14,953
- Estimated clicks: 3,738

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Google & Bing-Yahoo Search

Rationale:

- Reaches planners across multiple specialties as they actively seek out information related to market, venue, etc.
- Places Emerald Coast Convention Center front and center to a qualified audience

Highlights:

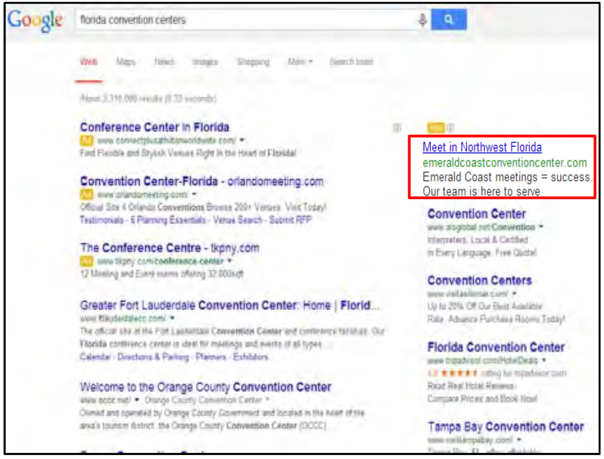
- Text ads targeted to relevant keywords across general meeting planning and branded terms
  - Focus the budget on branded terms based on initial FY14 performance (sample terms: Destin conference center, convention center Destin Florida)
- Recommend opening targeting to national audience
  - CPC price structure minimizes waste
  - Enabling Google's conversion-focused optimization tool further minimizes waste

Investment & Return:

- Cost: $10,000
  - Majority of budget to be allocated to Google based on general usage
- Estimated Clicks: 3,900

Google & Bing-Yahoo Search

Sample Google Search Result



florida convention centers

Conference Center in Florida

Find Flexible and Stylish Venues Right in the Heart of Florida!

Convention Center-Florida - orlandomeeting.com

www.orlandomeeting.com/

Official Site 4 Orlando Conventions Browse 200+ Venues. Visit Today!

Testimonials - 6 Planning Essentials - Venue Search - Submit RFP

The Conference Centre - tkpny.com

www.tkpny.com/conference-center

12 Meeting and Event rooms offering 32,000sqft

Greater Fort Lauderdale **Convention Center**: Home | **Florid**...

The official site of the Fort Lauderdale **Convention Center** and conference facilities. Our **Florida** conference center is ideal for meetings and events of all types ...

Calendar - Directions & Parking - Planners - Exhibitors

Welcome to the Orange County **Convention Center**

www.occc.net/ - Orange County Convention Center

Owned and operated by Orange County Government and located in the heart of the area's tourism district, the Orange County **Convention Center** (OCCC)

Meet in Northwest Florida

emeraldcoastconventioncenter.com

Emerald Coast meetings = success.

Our team is here to serve

Convention Center

Interpreters, Local & Certified

in Every Language. Free Quote!

Convention Centers

Up to 20% Off Our Best Available

Rate. Advance Purchase Rooms Today!

Florida Convention Center

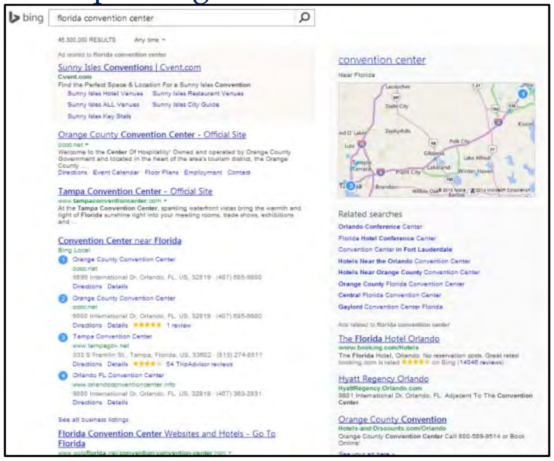
www.tripadvisor.com/HotelDeals

Read Real Hotel Reviews

Compare Prices and Book Now!

Tampa Bay Convention Center

Sample Bing-Yahoo Search Result



florida convention center

46,300,000 RESULTS Any time

Ad related to florida convention center

Sunny Isles Conventions | Cvent.com

Cvent.com

Find the Perfect Space & Location For a Sunny Isles **Convention**

Sunny Isles Hotel Venues Sunny Isles Restaurant Venues

Sunny Isles ALL Venues Sunny Isles City Guide

Sunny Isles Key Stats

Orange County Convention Center - Official Site

occc.net

Welcome to the **Center** Of Hospitality! Owned and operated by Orange County Government and located in the heart of the area's tourism district, the Orange County ...

Directions Event Calendar Floor Plans Employment Contact

Tampa Convention Center - Official Site

www.**tampaconventioncenter**.com

At the **Tampa Convention Center**, sparkling waterfront vistas bring the warmth and light of **Florida** sunshine right into your meeting rooms, trade shows, exhibitions and ...

Convention Center near Florida

Bing Local

1 Orange County Convention Center

occc.net

9899 International Dr, Orlando, FL, US, 32819 · (407) 685-9800

Directions Details

2 Orange County Convention Center

occc.net

9800 International Dr, Orlando, FL, US, 32819 · (407) 685-9800

Directions Details ★★★★★ 1 review

3 Tampa Convention Center

www.tampagov.net

333 S Franklin St., Tampa, Florida, US, 33602 · (813) 274-8511

Directions Details ★★★★ 54 TripAdvisor reviews

4 Orlando FL Convention Center

www.orlandoconventioncenter.info

9800 International Dr, Orlando, FL, US, 32819 · (407) 363-2831

Directions Details

See all business listings

Florida Convention Center Websites and Hotels - Go To Florida

convention center

Near Florida

Related searches

Orlando Conference Center

Florida Hotel Conference Center

Convention Center **in Fort Lauderdale**

Hotels Near the Orlando Convention Center

Hotels Near Orange County Convention Center

Orange County Florida Convention Center

Central Florida Convention Center

Gaylord Convention Center Florida

Ads related to florida convention center

The Florida Hotel Orlando

www.booking.com/Hotels

The **Florida** Hotel, Orlando. No reservation costs. Great rates! booking.com is rated ★★★★★ on Bing (14046 reviews)

Hyatt Regency Orlando

HyattRegency.Orlando.com

9801 International Dr, Orlando, FL. Adjacent To The **Convention Center**

Orange County Convention

Hotels-and-Discounts.com/Orlando

Orange County **Convention Center** Call 800-589-9514 or Book Online!

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Corporate/Association/ Government Plan

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OKALOOSA ISLAND

Plan Your Meetings

Rationale:

- Reaches multiple types of planners: Corporate, Association, SMERF, Incentive Travel
- Lead generation

Plan your meetings

HELPING YOU PLAN BETTER MEETINGS AND EVENTS

Highlights:

- Lead generation white paper sponsorship
- 3x weekly deals & highlights plus 1x PYM live events OR 2x weekly deals & highlights plus 2x live events
- Custom email blast to 30,000 opt-ins
- Destination Guide editorial and online ads
  - Includes splash page and top banner ad along with link
- Customizable online business directory ad
- Lead generation calling – 80 hours

Investment & Return:

- Cost: $5,000
- Impressions: 168,000 minimum

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Collinson Media

Rationale:

- Comprehensive meeting planner platform (Corporate, Association, Religious and Sports planners)
- Strong lead generation partner
    - Discounts on marketplace events ($700 off each event)

Highlights:

- 2 HP4C in each publication: Connect, Collaborate, Rejuvenate with 4 HP of matching editorial
- 3x insider series video sponsorship: includes pre-roll video, interview, e-blast, SM pushes
- HP4C Meeting Planners Guide to FL and HP4C Connect Sports Facilities Guide
- 90 guaranteed leads

Investment & Return:

- Cost: $38,618
- Impressions: 374,500 minimum

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Small Market Meetings

Rationale:
- Part of industry-recognized The Group Travel Leader family of publications/websites
- 11,000 planners: association, corporate, government, nonprofit, medical, religious and educational meetings

Small Market MEETINGS

Highlights:
- 9-month online banner advertising

Investment:
- Cost: $3,600
- Impressions: 45,000 minimum

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Society of Association Executives

Rationale:

- Direct access to meeting planner associations in top meeting destination regions
- Planners' reliance continues to grow on 24/7 Internet access – one click away from destination/site planning details

FSAE®
Florida Society of Association Executives, Inc.
BETA

Highlights:

- Ongoing advertising:
  - Florida
  - Alabama
  - Georgia – NOTE: Very limited inventory and must be reserved immediately

ACAE Alabama Council of Association Executives

GSAE
GEORGIA SOCIETY OF ASSOCIATION EXECUTIVES

Investment & Return:

- Cost: $7,700
- Impressions: TBD

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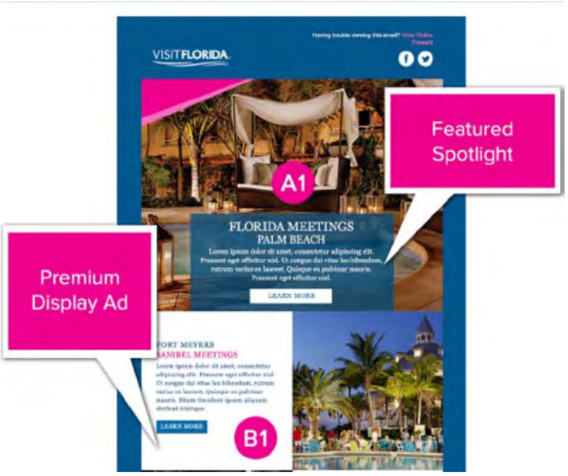
Visit Florida

VISITFLORIDA.COM

Rationale:

- Direct access to Florida meeting planners through e-blasts and Meetings/Events home page exposure



Highlights:

- 2x e-blasts to 60,000 opt-in Florida meeting planners
- January – September presence on visitflorida.com Meetings/Events landing page

FLORIDA MEETINGS
VISITFLORIDA.COM

Investment & Return:

- Cost: $8,700
- Impressions: 156,000 minimum

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Group Travel Plan

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OKALOOSA ISLAND

Group Travel Leader

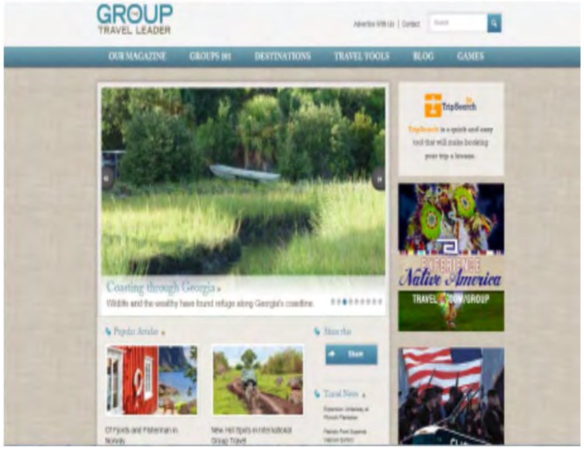
Rationale:

- Industry-recognized The Group Travel Leader family of publications/websites
- 20,000 travel buyers and industry professionals

THE GROUP TRAVEL LEADER

Highlights:

- 10-month online banner advertising



Investment & Return:

- Cost: $3,500
- Impressions: 30,000 minimum

Group Travel Directory

Rationale:

- Part of Premier Travel Media – network of over 130,000 planners
- Integrated print and digital products and site profile summaries

Highlights:

- 12-months online banner advertising – Group Travel Directory
- Reunions Market Site InSpection: Site profile with multiple images and links back to Emerald Coast site

Investment & Return:

- Cost: $2,290
- Impressions: 182,400 minimum

Bus Tours / Motor Coach Plan

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OKALOOSA ISLAND

American Bus Association

Rationale:

- Tour and motorcoach planners and operators association
- Polled preference for obtaining destination advertising information: 64% went to website based on advertising

Highlights:

- Largest customer segments: mature adults (A65+), student groups and adult groups 45-54 years of age
- 15,500 average unique visitors per month
- 12-month online banner advertising

Investment & Return:

- Cost: $6,000
- Impressions: 186,000 minimum

ABA SERVES AN INDUSTRY THAT MOVES NEARLY 3/4 OF A BILLION PASSENGERS ANNUALLY, **ALL OF WHOM NEED PLACES TO EAT, SLEEP, AND BE ENTERTAINED.**

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FL and AL Motorcoach Associations

Rationale:

- Direct access to top feeder market group travel associations
- Members are responsible for planning and operations
- Florida: recently re-organized and is managed by ABA

Highlights:

- Florida: 12-month banner advertising in FMA Bus Bulletin and online travel directory
- Alabama: FP4C in annual directory and QP4C in spring newsletter

Investment & Return:

- Cost: $2,700
- Impressions: 40,550 minimum

Red Hot Celebrations

Rationale:

- The travel trade’s event connection
- Mission is to be a one-stop shop for tour operators looking to add value to their itineraries by including special events
- Database, e-newsletter and website platforms

Highlights:

- DMO package includes listing of up to three events as part of Red Hot Celebrations’ website and planner e-blast
- 2x customized, geo-targeted e-newsletters – 100% SOV
- 12 months of online banner advertising at no charge

Investment & Return:

- Cost: $1,245
- Impressions: 30,500 minimum

Religious Groups Plan

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OKALOOSA ISLAND

Christian Meetings & Conventions Association

CMCA
CHRISTIAN
MEETINGS & CONVENTIONS
ASSOCIATION

Rationale:

- Official newsletter of the Christian Meetings and Conventions Association

Highlights:

- Circulation: 1,200
- HP4C in each quarterly issue within FY
    - winter (January), spring (April), summer (August)

Investment & Return:

- Cost: $1,200
- Impressions: 3,600 minimum

Religious Travel Directory

Rationale:

- Part of Premier Travel Media – network of over 130,000 planners
- Integrated print and digital products and site profile summaries

PTM PREMIER TRAVELMEDIA

Highlights:

- 12-month online banner advertising
- Religious site inspection: site profile with multiple images, links back to Emerald Coast site

Religious TRAVEL PLANNING GUIDE

Investment & Return:

- Cost: $2,290
- Impressions: 48,000 minimum

THE HEART OF FLORIDA'S
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OKALOOSA ISLAND

Going On Faith

Rationale:

- Part of industry-recognized The Group Travel Leader family of publications/websites
- Strong voice of faith-based travel
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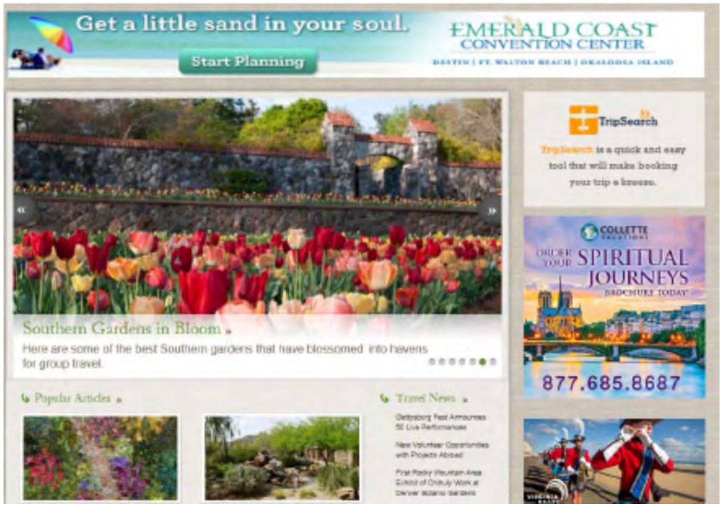

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THE HEART OF FLORIDA'S

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Chicago Takeover

THE HEART OF FLORIDA'S EMERALD COAST

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Chicago Takeover

- Ability to target affluent neighborhoods exclusively
  - Affluent consumers index at 211 for having attended the movies 2-3x/month in the past 90 days
  - Represents 16% of persons earning $150,000+ HHI who have traveled to the beach in the past 12 months

- Schedules complement TV / Cable plans:
  - Nearly 60% of TV viewing is Monday – Thursday
  - Approximately 75% of theatre attendance is Friday – Sunday when consumers are relaxed and most receptive to entertainment/travel messaging
  - Advertising support by airlines, Visit Florida, DMOs

Chicago Takeover

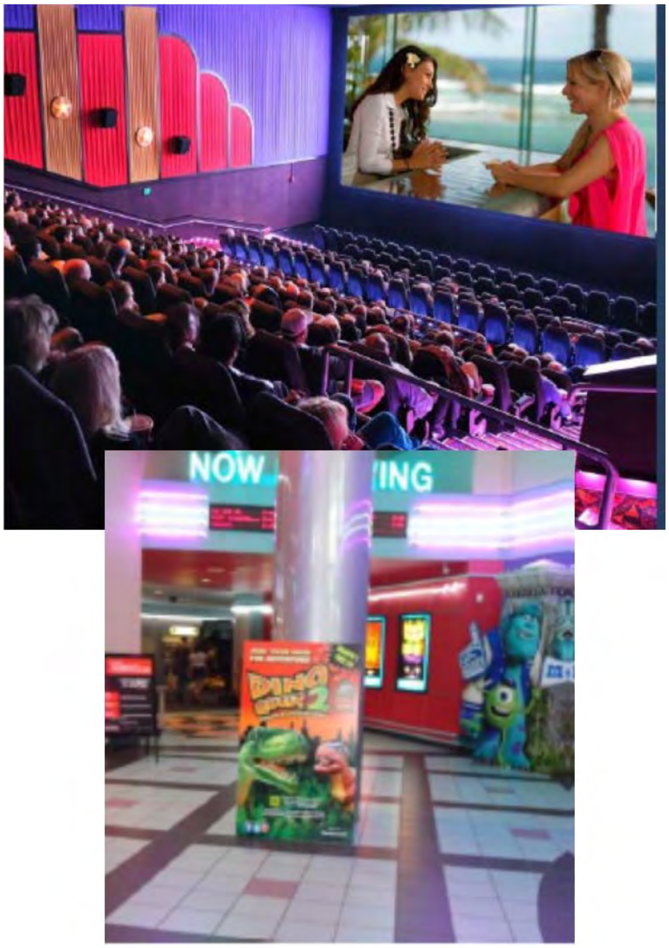
- Chicago is a city with multiple transit lines
  - Nearly as many affluent citizens drive themselves to work as take public/shared transportation
    - 16% drive, 16% take train, 18% carpool & 10% take the subway
  - Despite mode of transportation, nearly 100% are exposed to place-based transit media weekdays & weekends
  - The exterior signage provides a larger than life creative opportunity

- State Street, Grand Avenue & LaSalle Street station locations
  - Near stores, boutiques, shopping district, Lake Michigan, The Magnificent Mile, office buildings

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

Chicago Takeover – Movie Theaters

- :30 second On-Screen
- :30 second Lobby Plasma Screens
- Life-size Lobby Standees
- Mobile & Online Pre-Roll :15 and :30 second
- Pre/Post Research Study
- 2 months of activity



- 153,552 :30 second spots
- 457 targeted neighborhood movie screens
- 6,293,286 minimum Gross Impressions
- Cost: $250,000

THE HEART OF FLORIDA'S EMERALD COAST
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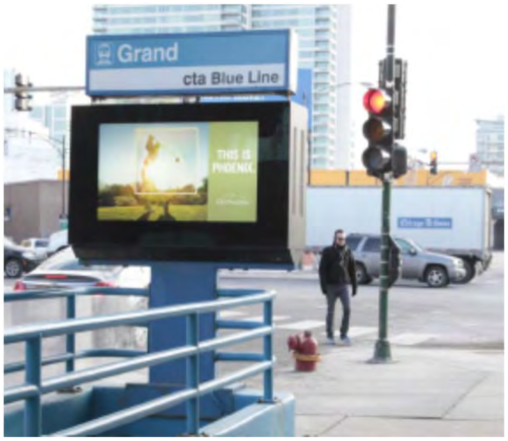
OKALOOSA ISLAND

Chicago Takeover - Transit

- Head House Panel:
  86″ H x 385″ W

- Thirty (30) Digital Panels at street level, airing video 960 plays per day each screen

- 2 months of activity



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

Chicago Takeover - Transit

- In addition to the Head House displays & Urban Panels (base plan):

  - A second Head House as in base plan
  - Twenty (20) Train Display Panels
    - Super Rail Kings
    - Reaches commuters, pedestrians & motorists
    - Size & scale leaves a lasting impression
  - 2 months of activity

- 101,121,132 minimum Gross Impressions
- Cost: $259,000

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

Emerald Coast Visitor Profile Survey

Summer Quarterly Report: June - August 2014

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PROJECT TEAM

Matt Schwalb, M.A., M.S.A.

Amy Webber, M.A.

Angela Sanders, B.S.

Taylor Dalton, M.A.

Mitchell Overton

Yayza Muniz-Sutton

Mercedes Queen

James Simpson

Allee Millsap

PRIMARY CONTACT

Brice F. Harris, Ph.D.
Director, Strategic Initiatives
Office of Economic Development
& Engagement
University of West Florida
220 West Garden Street, Suite 303
Pensacola, Florida 32502
850-439-5400
bharris@uwf.edu

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.

Table of Contents

List of Tables

List of Figures

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

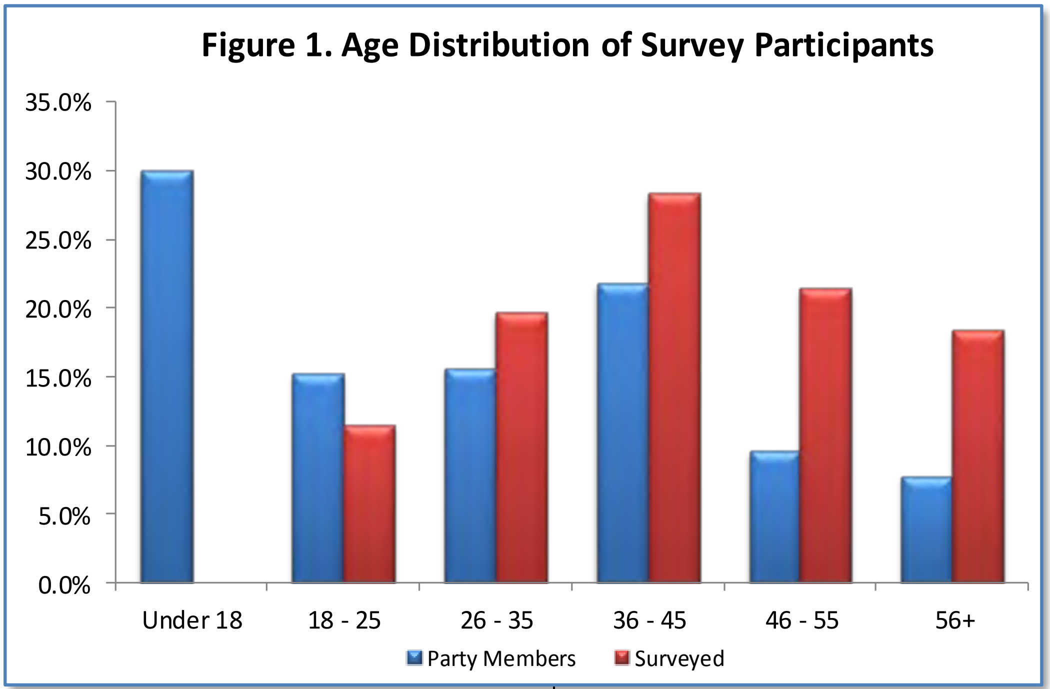
Throughout the summer quarter of 2014, the Haas Center has administered intercept surveys that collected details about unique visits to the Emerald Coast. Survey professionals spent sixteen hours a week throughout the quarter conducting interviews. Several aspects of data collection were randomized, 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.

Figure 1. Age Distribution of Survey Participants

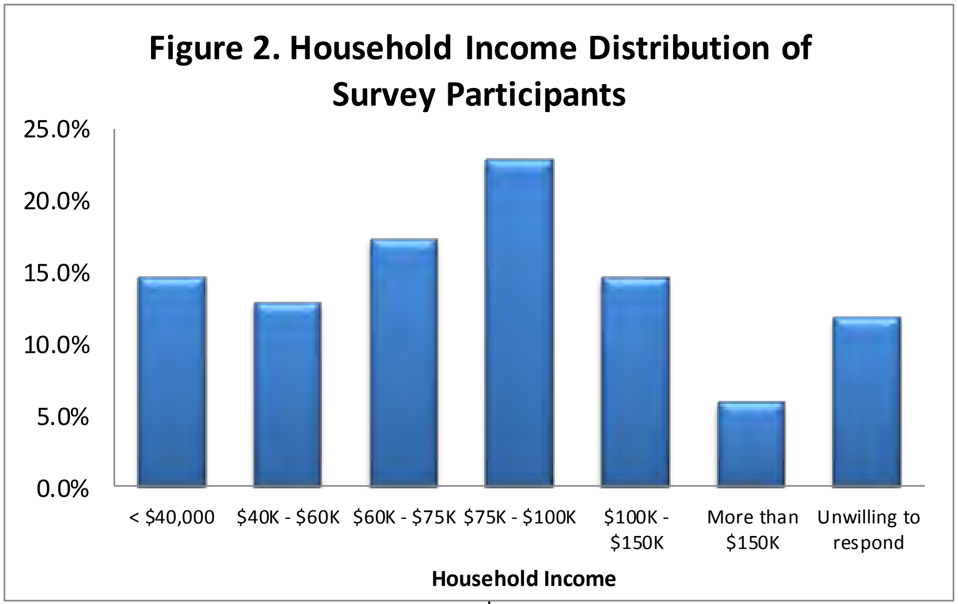


Age. The survey captures several demographic elements used to measure the type of visitors traveling to the Emerald Coast. Figure 1 presents the age distribution of survey respondents, as well as that of members of their party. As can be seen, the distribution of surveyed individuals is fairly normal. 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.

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,

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%

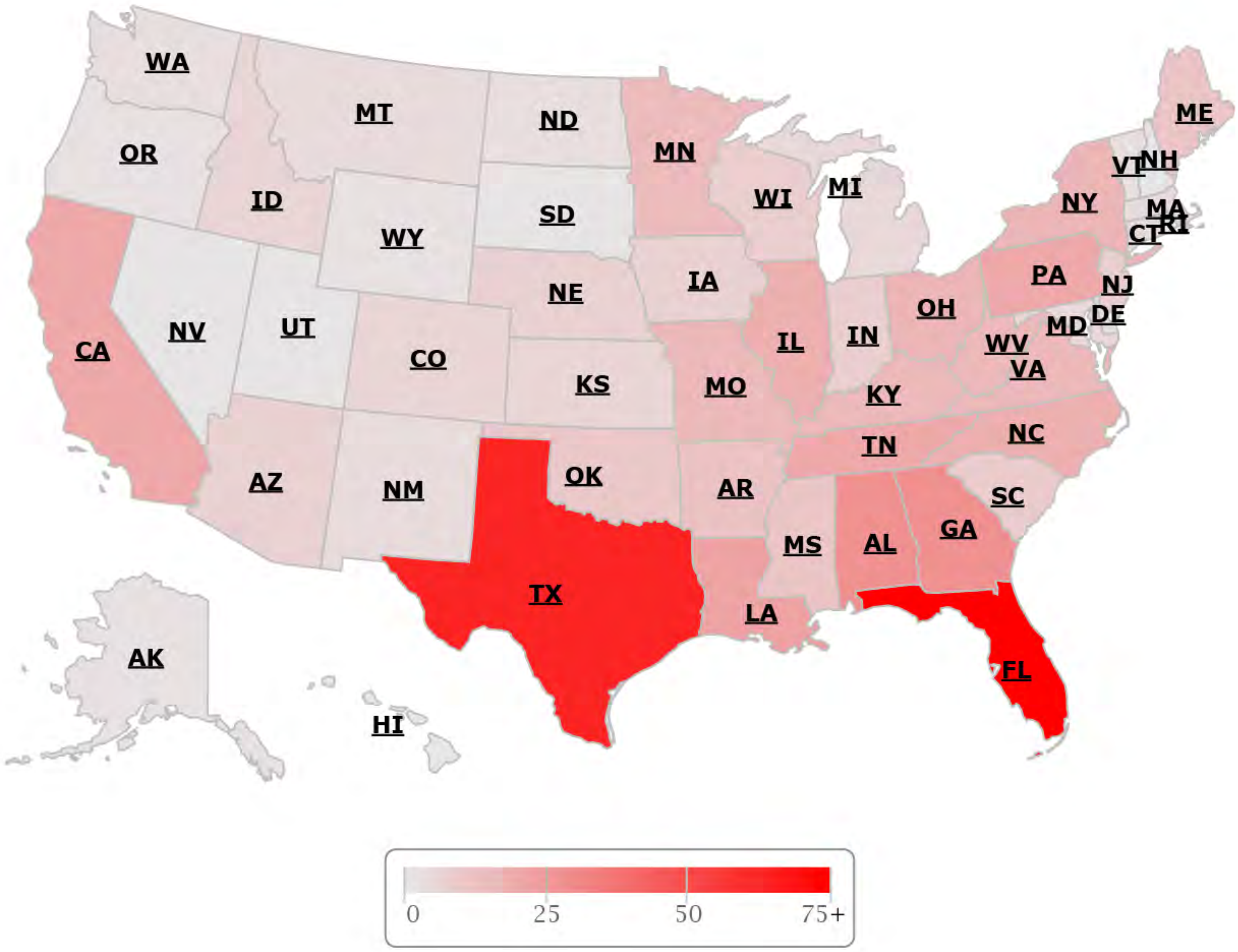


Figure 3. Distribution of Visitors by State

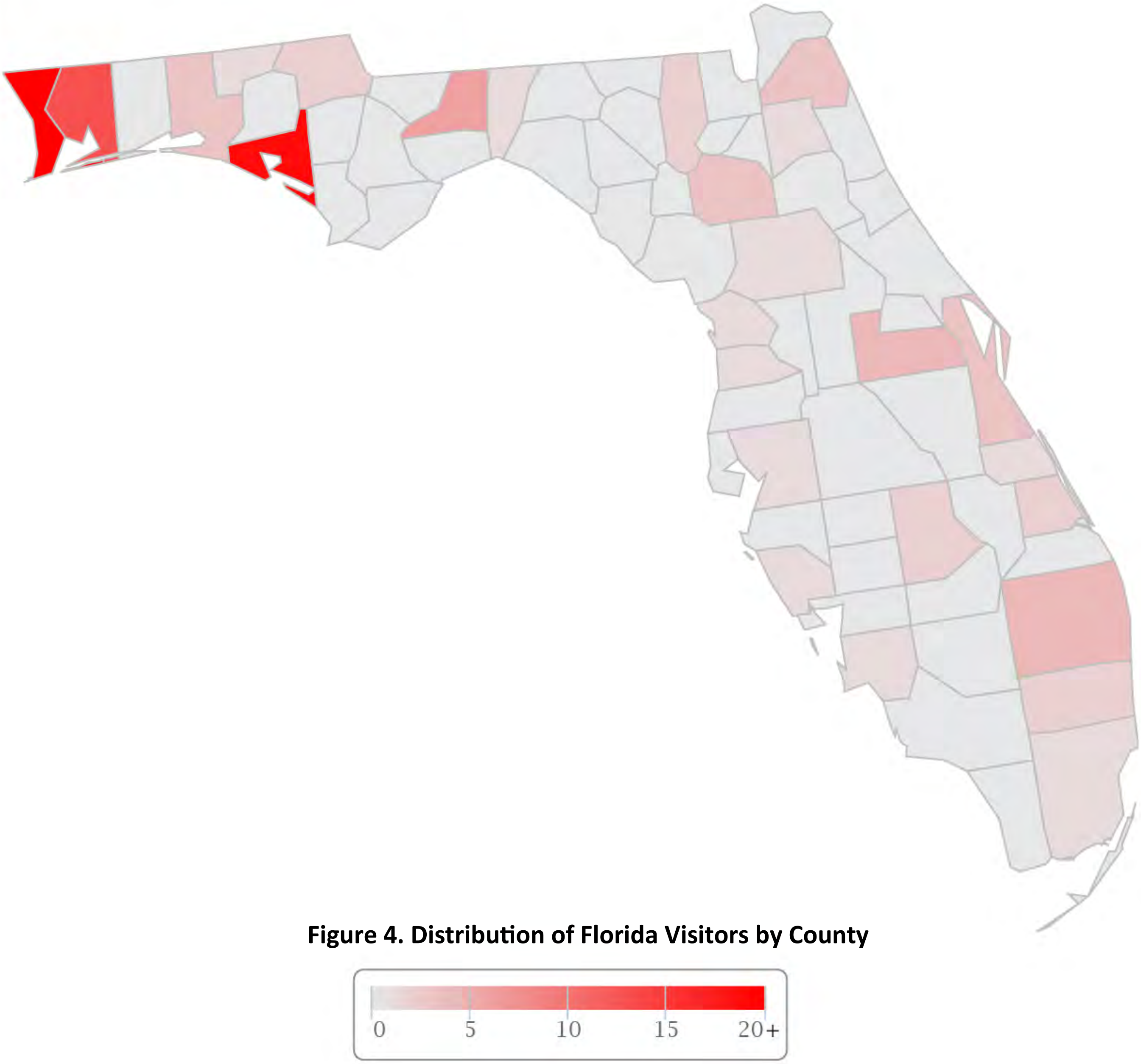


Figure 4. Distribution of Florida Visitors by County

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.

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%

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 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.

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

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%

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

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[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

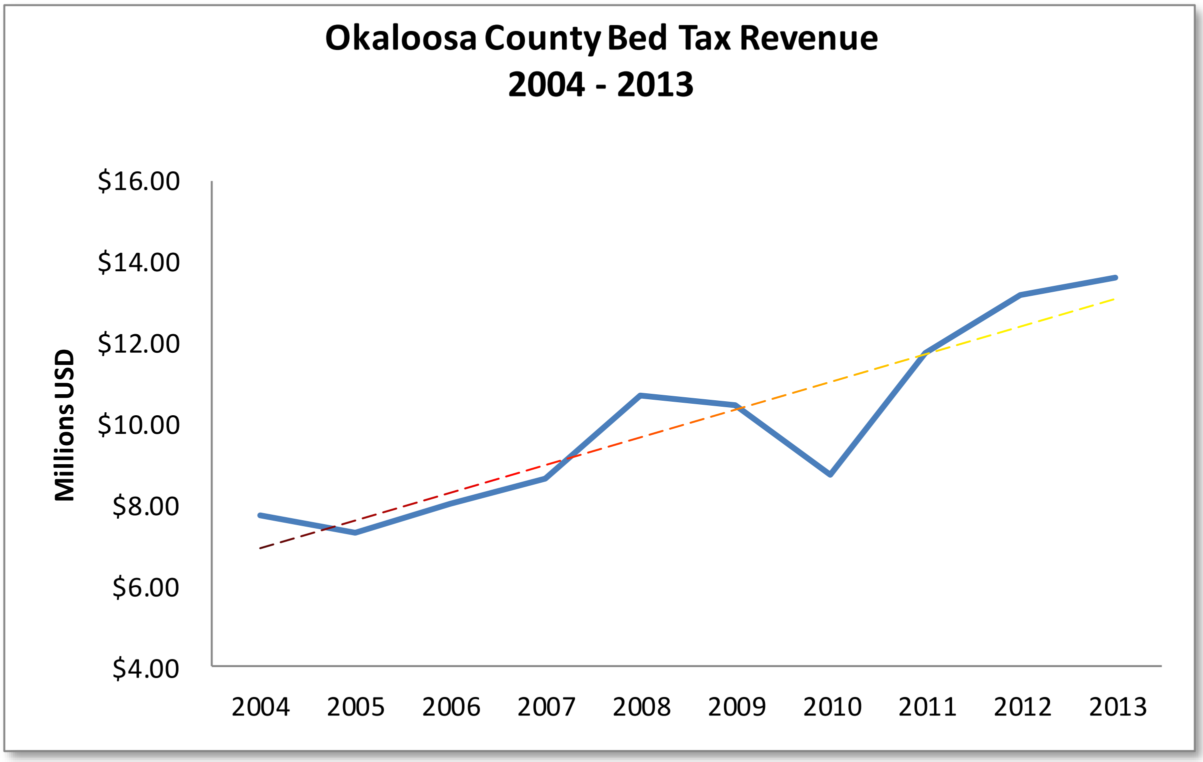
---

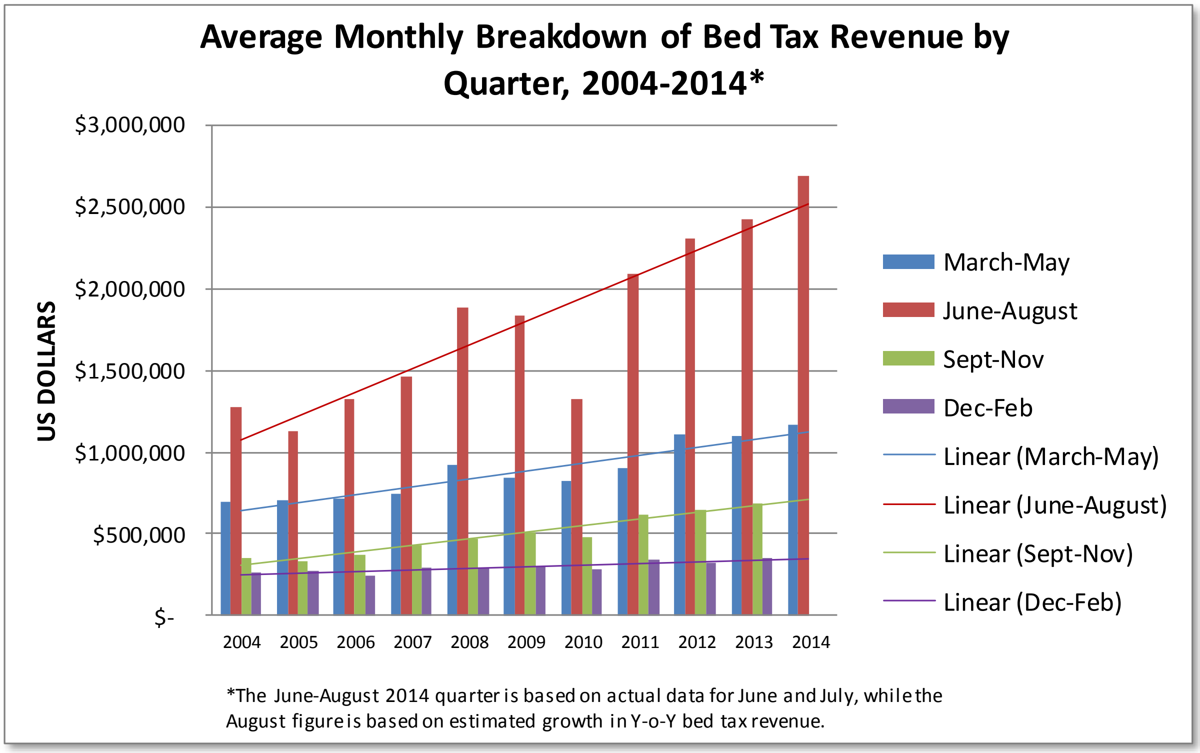
4. Please note that the figures reported by survey participants are estimates and may vary from hose reported by accommodation establishments.

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.

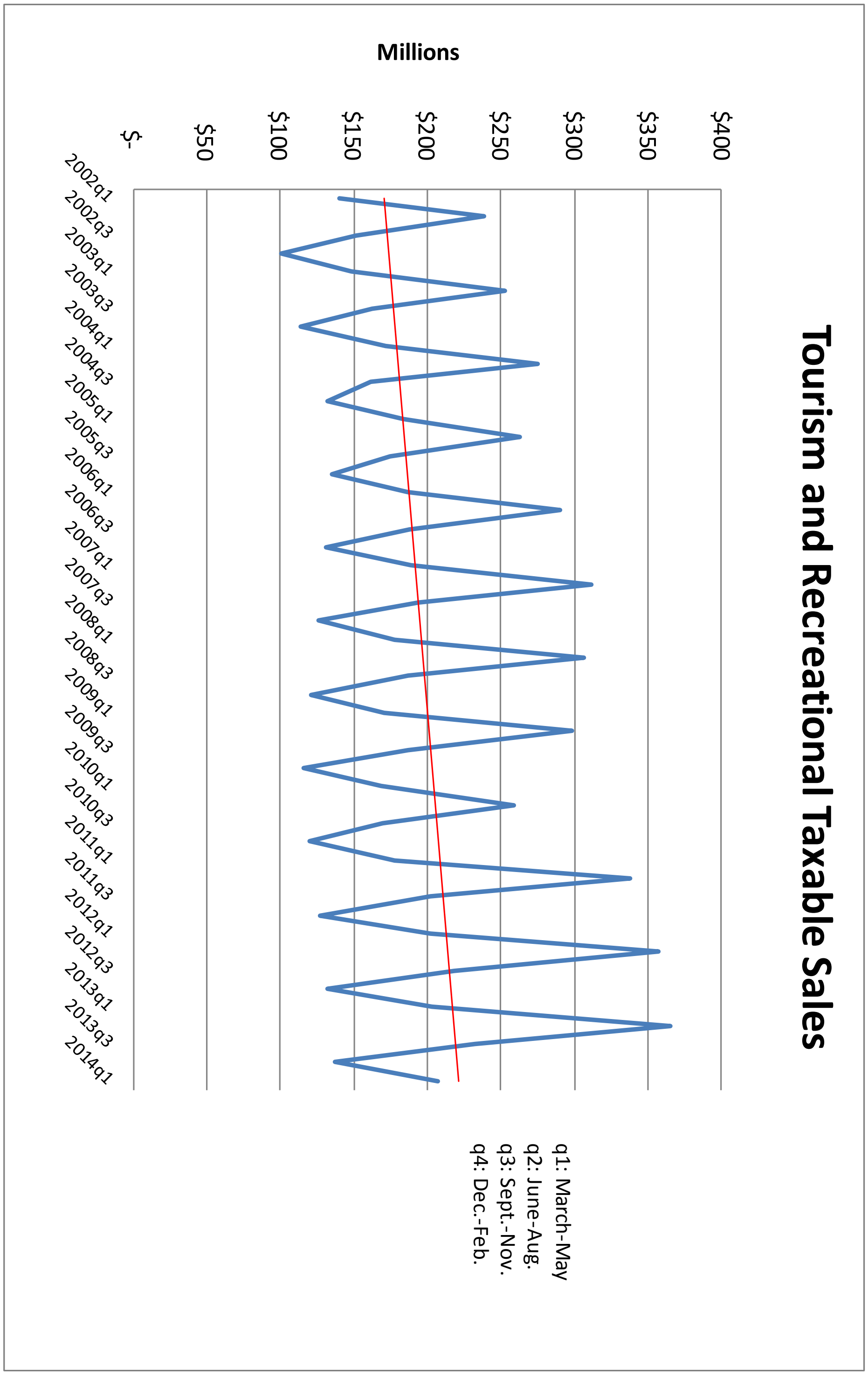
Appendix A: Okaloosa County Bed Tax Summaries 2004-Present





*The June-August 2014 quarter is based on actual data for June and July, while the August 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

Emerald Coast Visitor Profile Survey

Spring Quarterly Report: March - May, 2014

HAAS CENTER

Peter Mayer Advertising

Ellen Kempner - Vice President Account Director

Haas Center

Brice Harris— Interim Director

Project Team

Aaron Schmerbeck, MS
Matt Schwalb, MA, MSA
Amy Webber, MA
Angela Sanders
Mitchell Overton
Bronwen Gerber
Yayza Muniz-Sutton
Mercedes Queen
Taylor Dalton

Primary Contact

Brice F. Harris, Ph.D.
Associate Director
Office of Economic Development
& Engagement
University of West Florida
220 West Garden Street, Suite 303
Pensacola, Florida 32502
850-439-5400
bharris@uwf.edu

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.

Table of Contents

List of Tables

List of Figures

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.

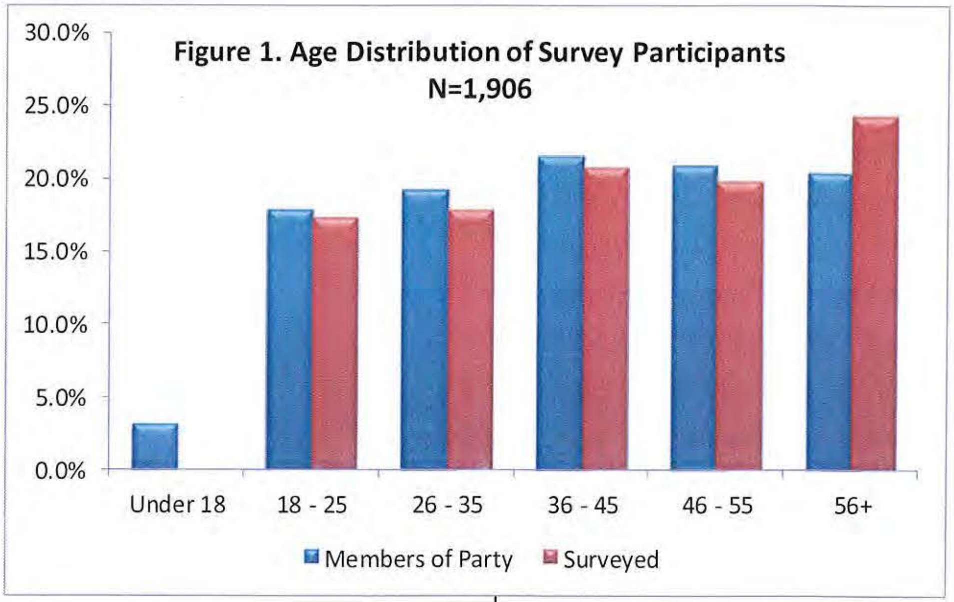


Figure 1. Age Distribution of Survey Participants
N=1,906

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.

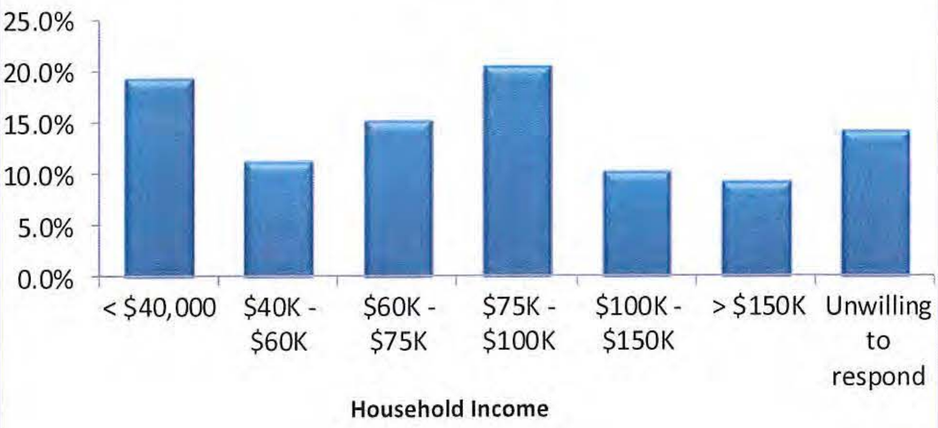
Party Size. Another component measured is the party size of each respondent. As the data in Table 2 indicate, more than half of all participants were traveling either by themselves or only with one other person. In fact, just over 90% of all parties surveyed were traveling with less than six members. 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.

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

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

Figure 2. Household Income Distribution of Survey Participants



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.

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%

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.

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

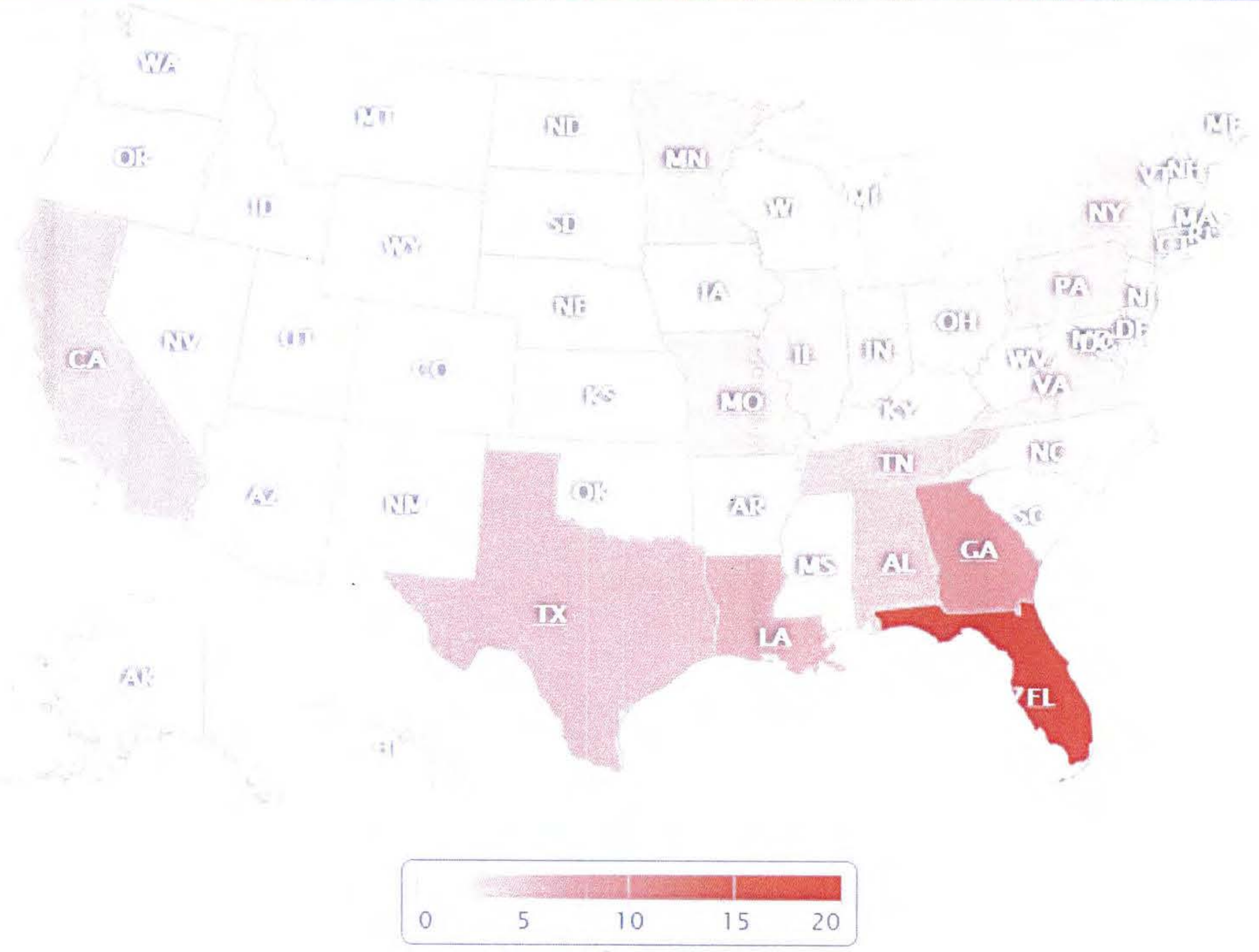


Figure 3. Distribution of Visitors by State

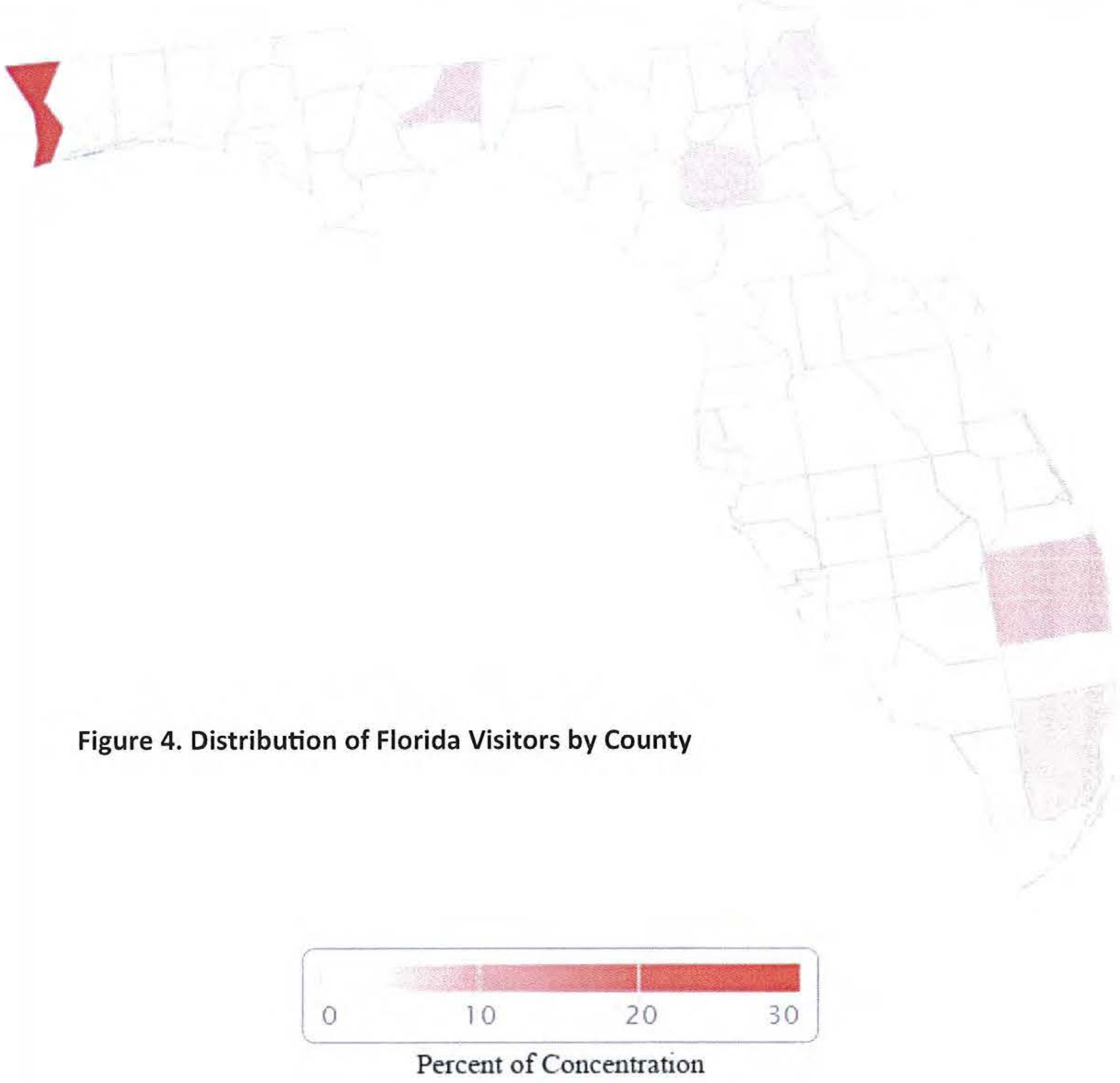


Figure 4. Distribution of Florida Visitors by County

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

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[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

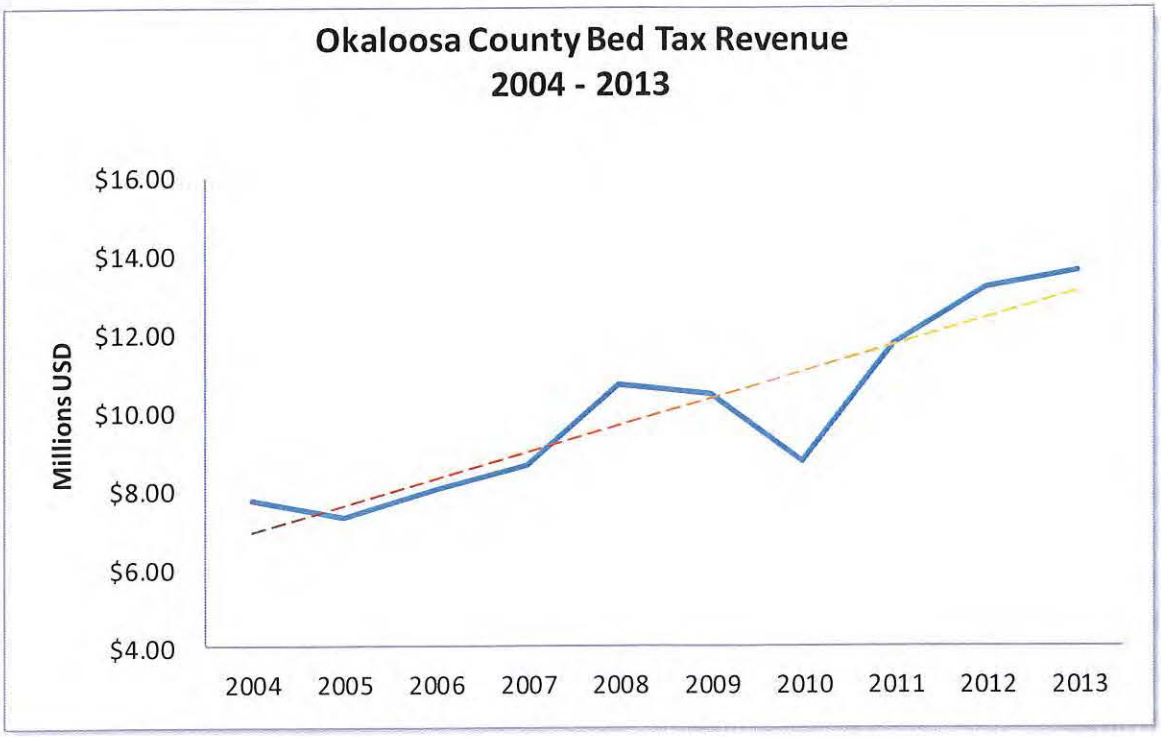
Type	Per-Person, Per-Night Expenditures	Number of Unique Visitors	Total Direct Spending
Condo	$82.99	73,130	$6,069,131
Hotel	$104.95	101,315	$10,632,623

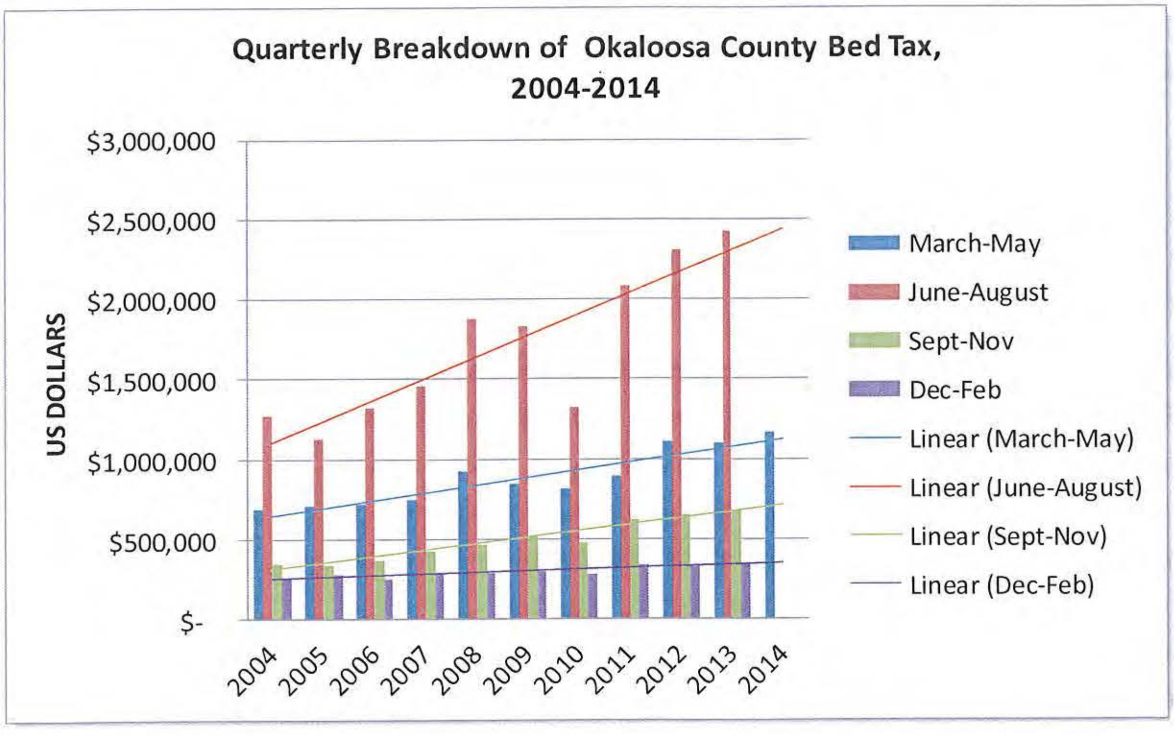
Conclusion

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.

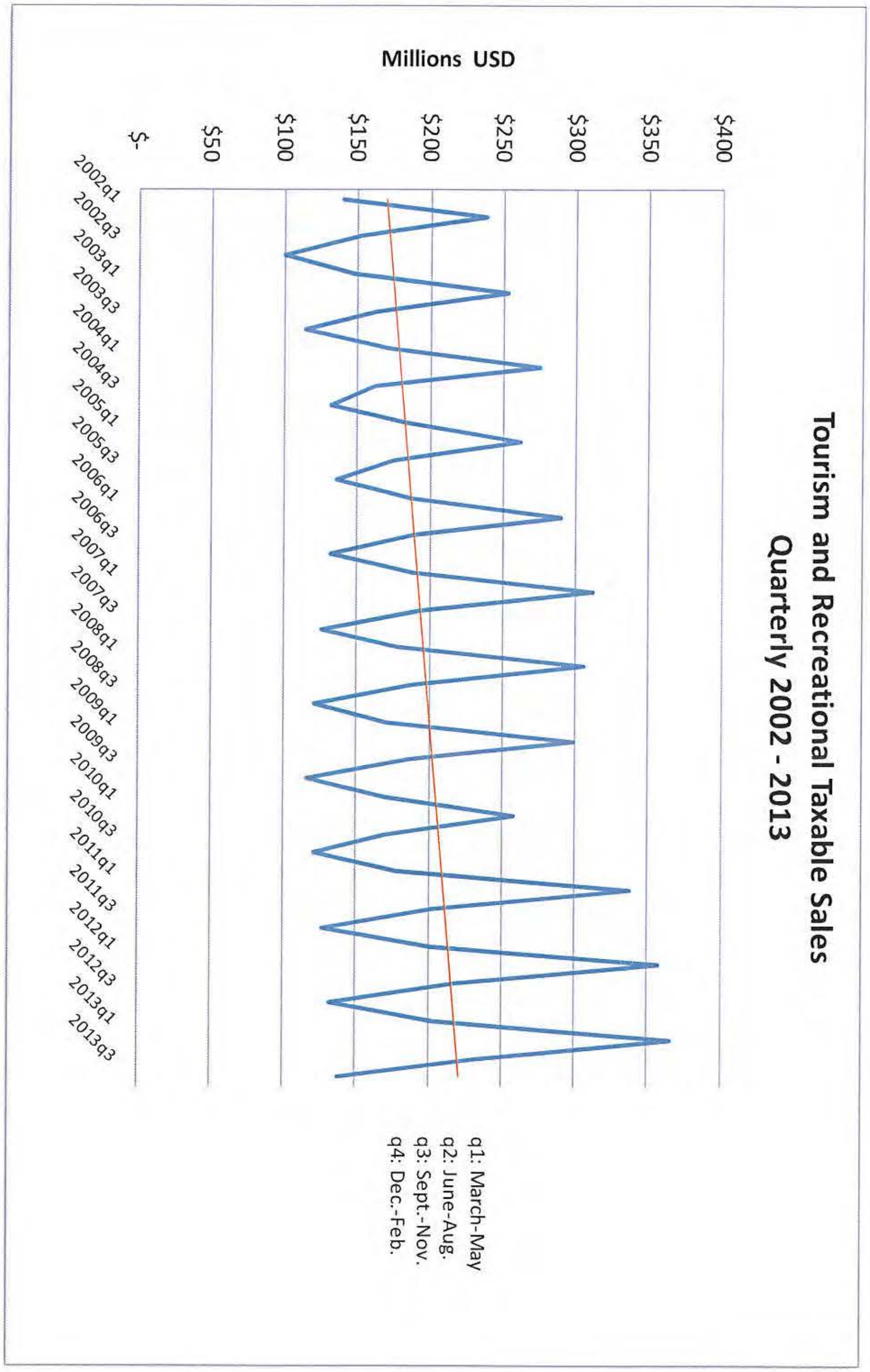
During this quarter, the Haas Center surveyed 638 visitors. The average party had 2.9 guests, stayed in a hotel or condo, traveled by car to the area and planned to stay for a week or less. Many of these visitors were from the Southeast, and nearly a fifth were from other parts of Florida. Approximately 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

Fall Quarterly Report: September-November 2014

HAAS CENTER
INNOVATIVE RESEARCH ◆ INTELLIGENT SOLUTIONS
A Center of the University of West Florida

PETER MAYER ADVERTISING

Ellen Kempner - Vice President Account Director

HAAS CENTER

Brice Harris, Ph.D.— Co-Director

Phyllis Pooley, J.D. — Co-Director

PROJECT TEAM

Amy Webber, M.A.

Taylor Dalton, M.A.

Bronwen Gerber

James Simpson

PRIMARY CONTACT

Brice F. Harris, Ph.D.
Director, Strategic Initiatives
Office of Economic Development
& Engagement
University of West Florida
220 West Garden Street, Suite 303
Pensacola, Florida 32502
850-439-5400
bharris@uwf.edu

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.

Table of Contents

List of Tables

List of Figures

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

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%

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.

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.

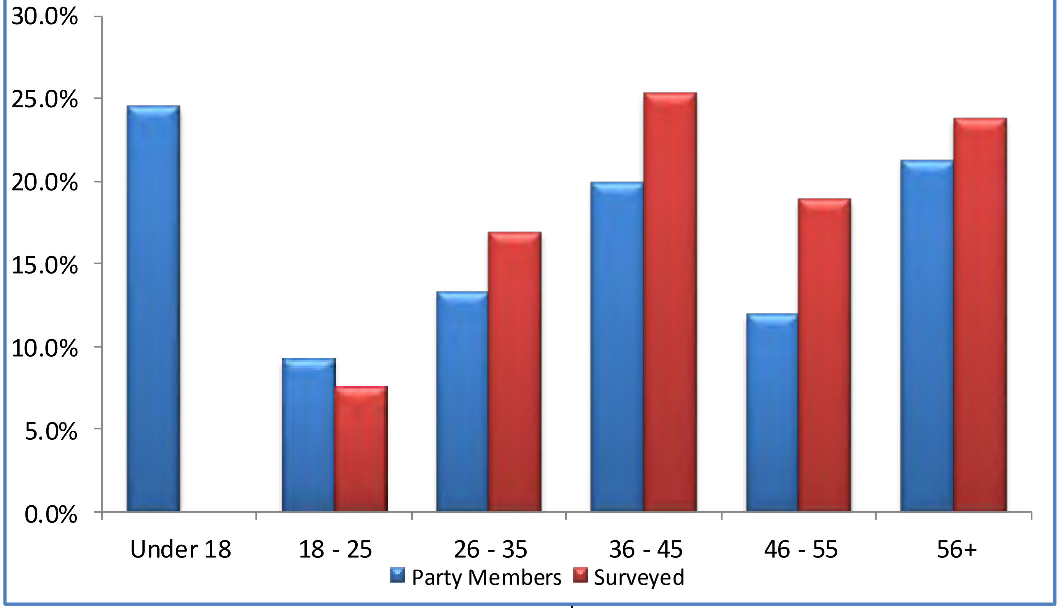
This study utilizes intercept survey techniques to obtain tourist demographics, lodging and transportation habits, spending patterns and overall satisfaction. In order to ultimately calculate the economic impact, the survey focuses on in-area spending patterns. This report does not attempt to quantify 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.

Figure 1. Age Distribution of Survey Participants



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.

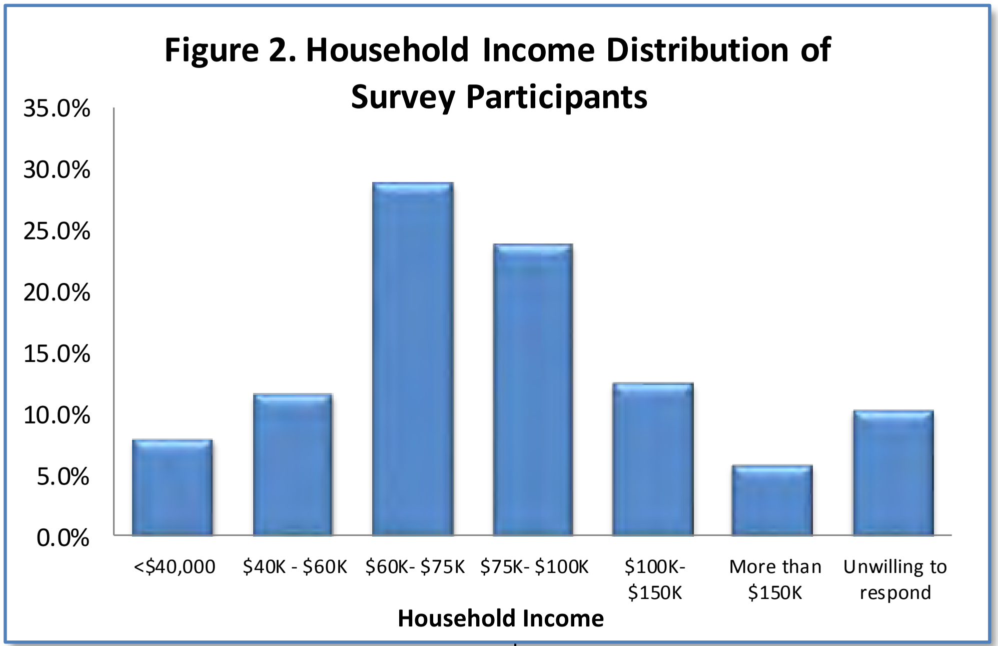
Age. The survey captures several demographic elements used to measure the type of visitors traveling to the Emerald Coast. Figure 1 presents the age distribution of survey respondents, as well as that of members of their party. As can be seen, the distribution of surveyed individuals is fairly normal. 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.

Figure 2. Household Income Distribution of Survey Participants



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

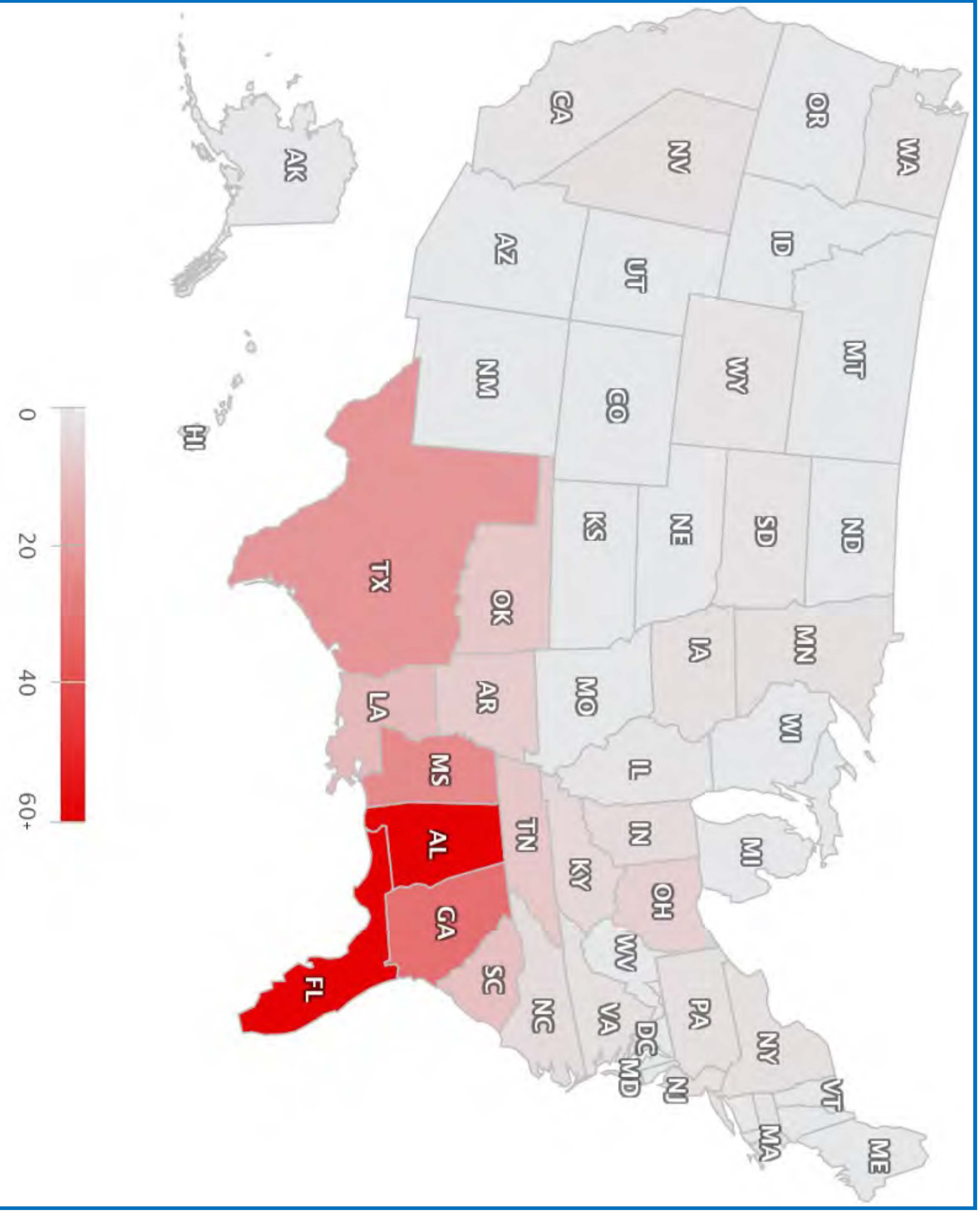


Figure 3. Distribution of Visitors by State

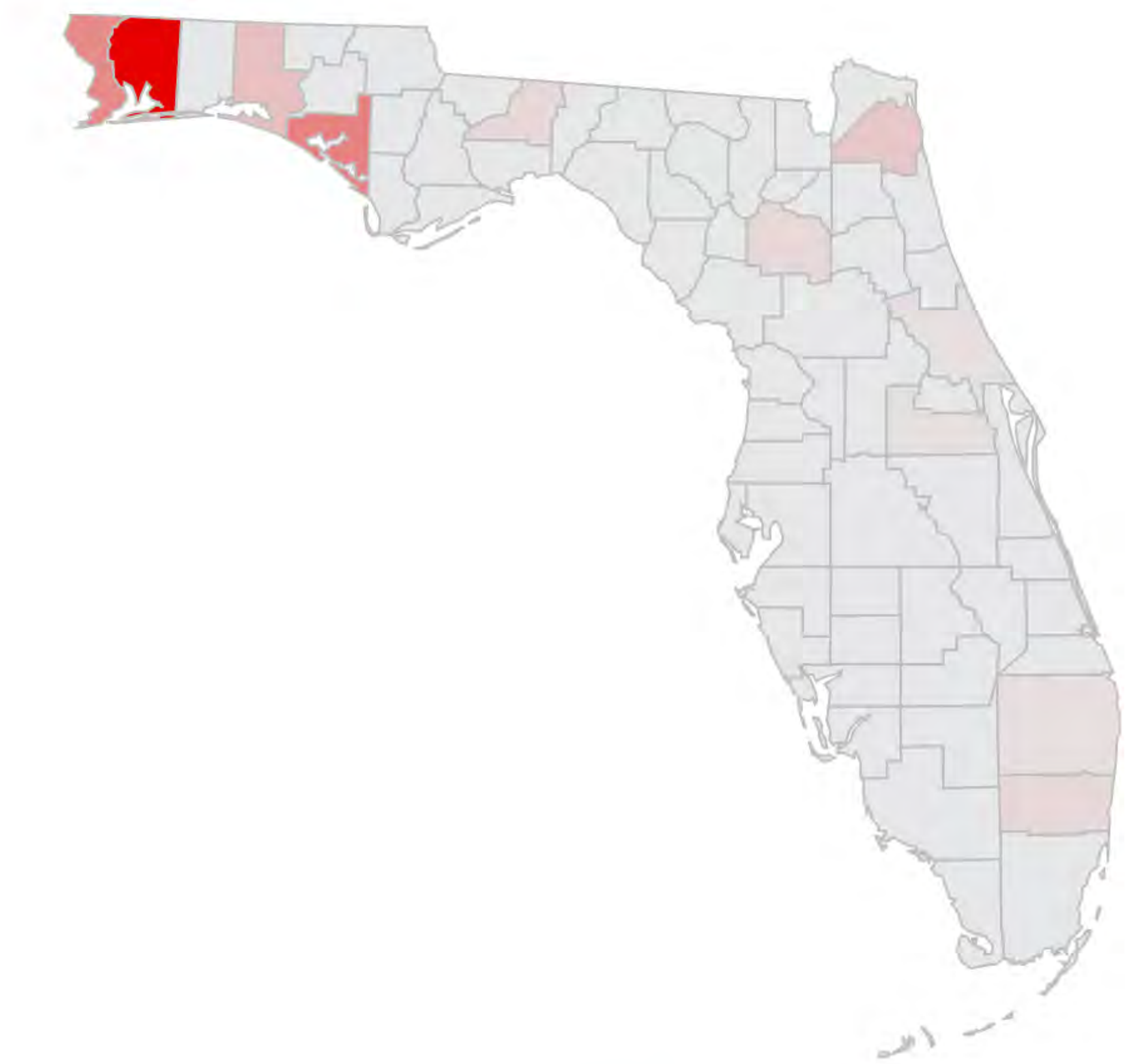


Figure 4. Distribution of Florida Visitors by County

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.

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%

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 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

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.

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

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[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.

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%

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 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%

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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

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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.

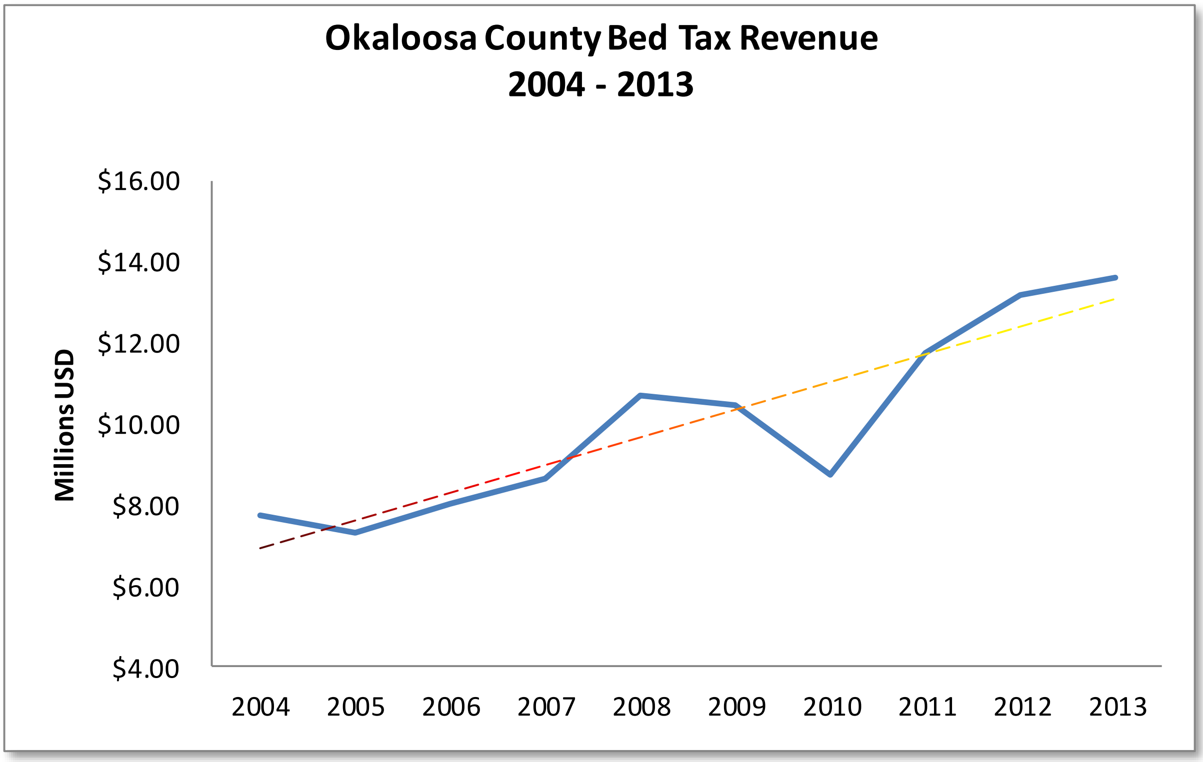
Conclusion

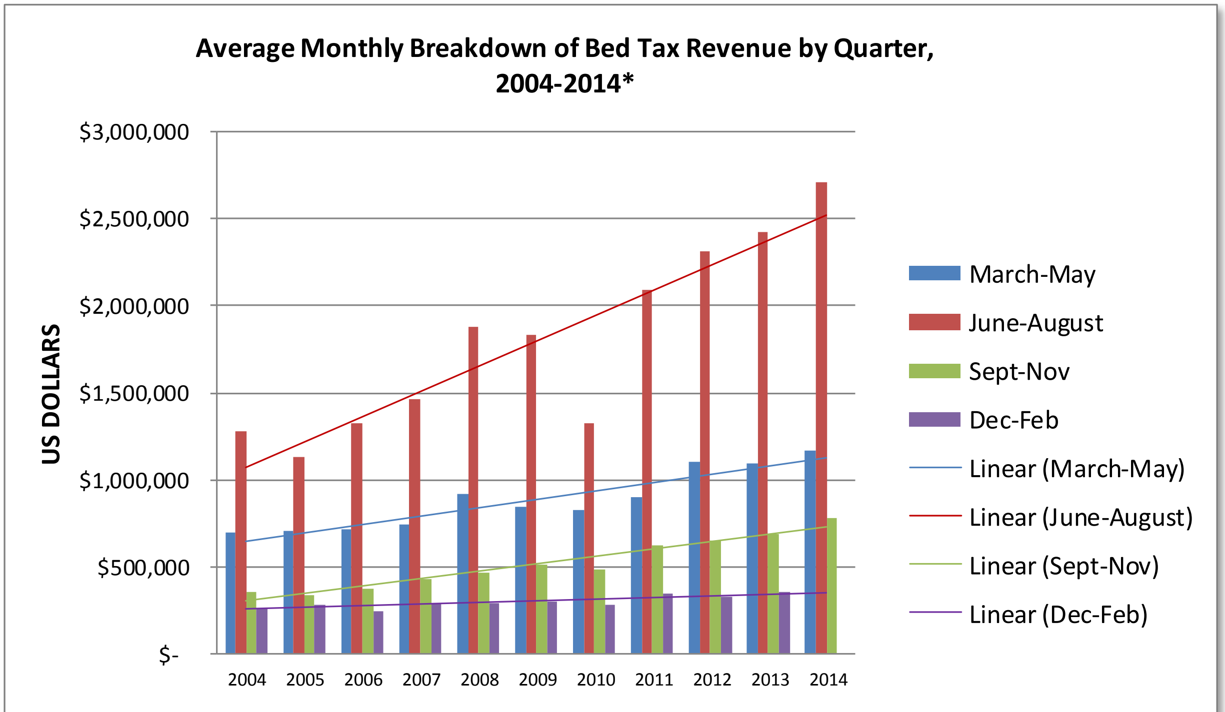
Based on the survey data collected during the fall quarter 2014, it is estimated that more than 241,365 visitors traveled to the Emerald Coast during this period. Those visitors staying in either a condo or a hotel/ motel are estimated to have spent nearly $30 million on accommodations, food, entertainment 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.

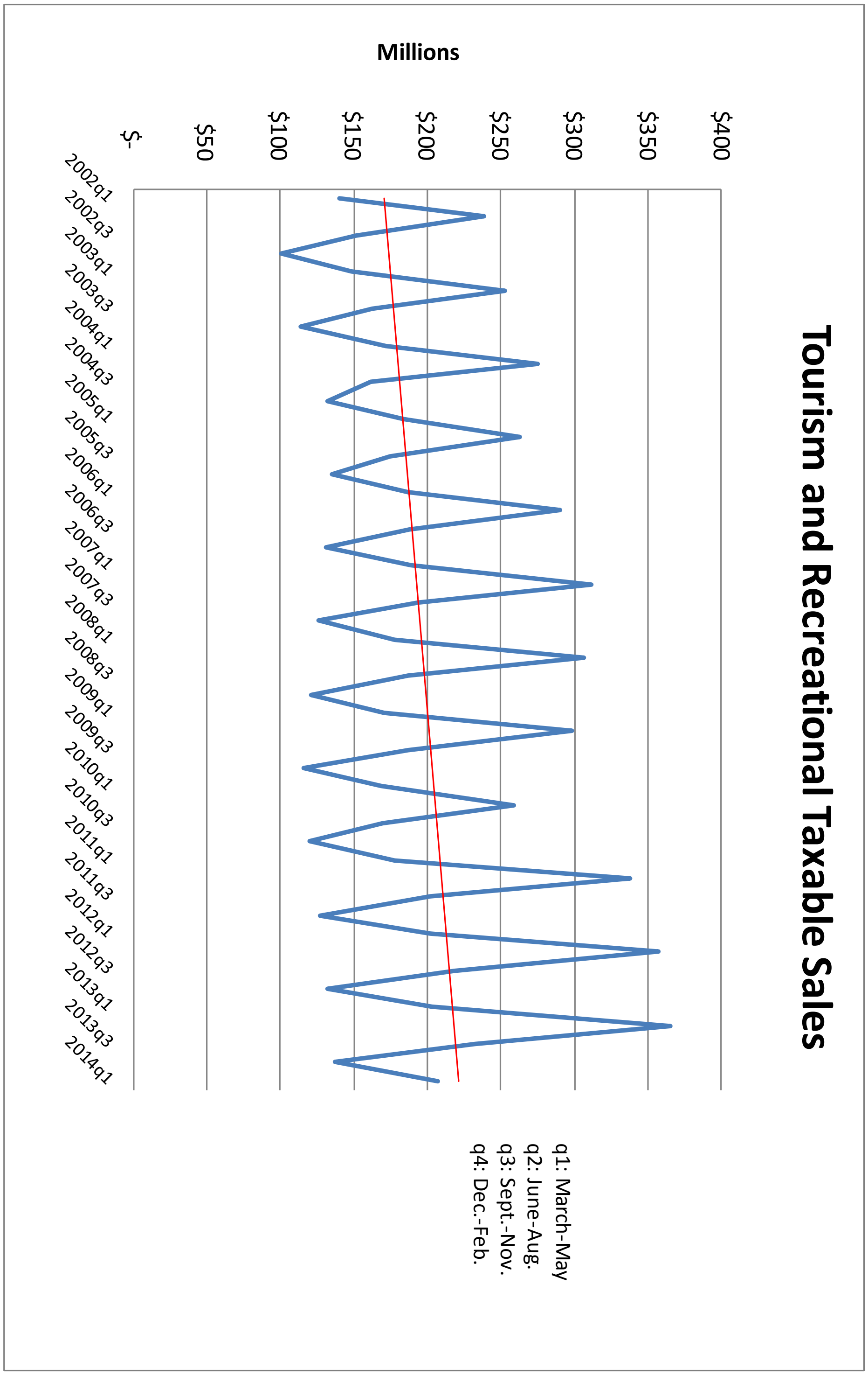
Appendix A: Okaloosa County Bed Tax Summaries 2004-Present





*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.