



Panama City Beach

2014 Visitor Profile & Economic Impact Report

Prepared for:

- *Panama City Beach Convention & Visitors Bureau*

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Purpose

To document the profile and planning preferences of those who visited Panama City Beach, Florida in Winter, 2013 or Spring/Summer/Fall, 2014 and compare their responses to survey data collected in 2012 and 2013. The survey data in this report covers the period December, 2013 through November, 2014. The annual survey captures the perceptions of Panama City Beach (PCB) as a destination, and the attractors that induce day trips, overnight visits, multiple night-stays, and repeat visitation.

Methodology

Young Strategies, Inc. (YSI) has been conducting visitor profile research for Panama City Beach since 2011. The same online survey instrument, prepared by the Young Strategies, Inc. (YSI) research team and approved by the Panama City Beach Convention & Visitors Bureau (PCBCVB), has been used over the three-year period 2011 – 2014, to capture visitor perceptions of PCB. Travel industry partners in PCB were provided unique web-links to the online visitor survey that were emailed to their visitor databases. Email recipients were invited to take a visitor survey and be entered into a chance to win one of two \$250 Visa gift cards. Surveys were also collected through the PCBCVB website and visitor inquiry database; or signed-in at PCBCVB Visitor Center ‘s guestbook.

The number of surveys completed by respondents who identified themselves as leisure visitors to Panama City Beach in Winter, 2013 or Spring/Summer/Fall, 2014 totaled 2,321. Total visitor survey collection over the three-year period 2012 – 2014 is shown below. Responses of those who identified themselves as “did not visit PCB” are also included in the report to provide reasons for not visiting and other destinations selected. Additionally, this report provides data specific to the season respondents identified as their most recent visit to Panama City Beach.

Season	2012	2013	2014
Winter (Dec – Feb)	567	400	195
Spring (Mar – May)	787	564	441
Summer (Jun - Aug)	477	761	1,236
Fall (Sep – Nov)	225	195	449
Total Season Responses	2,056	1,920	2,321



PCB Leisure Visitors Seasonal Summary

WINTER Visitor Profile Summary December, 2013 – February, 2014:

- **Household Income**
 - \$0 - \$49,000 – 22.5%
 - **\$50,000 - \$99,000 – 52.1%**
 - \$100,000 - \$149,000 – 16.9%
 - \$150,000 - \$199,000 – 6.3%
 - \$200,000 - \$249,000 – 2.1%
 - \$250,000+ – 0.0%
- **Respondent average age is 60**
- **Travel party:**
 - 88% adults only
 - 12% adults traveling with children
- **Length of Stay:**
 - Winter short-term – 5.9 nights
 - Winter long-term – 56 nights
- **Accommodations:**
 - Vacation condo/townhouse; Winter short-term – 43.4%, Winter long-term – 82.6%
 - Hotel/Motel: Winter short-term – 30.3%, Winter long-term – 1.8%
- **Average Party Spending – \$1,454**
- **Rate PCB overall at 4.4**
- **75.3% plan to visit again in the near future while 97.3% would recommend PCB to others**

n = 195



SPRING Visitor Profile Summary March – May, 2014 (Does NOT Include College Spring Break)

- **Household Income**
 - \$0 - \$49,000 – 25.4%
 - \$50,000 - \$99,000 – 42.4%
 - \$100,000 - \$149,000 – 24.5%
 - \$150,000 - \$199,000 – 5.5%
 - \$200,000 - \$249,000 – 1.7%
 - \$250,000+ – 0.6%
- **Respondent average age is 48**
- **Travel party:**
 - 61% adults only
 - 39% adults traveling with children
- **Length of Stay – 5.2 nights**
- **Accommodations:**
 - Vacation condo/townhouse – 52%
 - Hotel/Motel – 26.2%
- **Average Party Spending – \$2,227**
- **Rate PCB overall at 4.4**
- **77.4% plan to visit again in the near future while 96.2% would recommend PCB to others**

n = 441



SUMMER Visitor Profile Summary June – August, 2014:

- **Household Income**
 - \$0 - \$49,000 – 22.2%
 - \$50,000 - \$99,000 – 46.2%
 - \$100,000 - \$149,000 – 21.8%
 - \$150,000 - \$199,000 – 7.1%
 - \$200,000 - \$249,000 – 1.4%
 - \$250,000+ – 1.2%
- **Respondent average age is 43**
- **Travel party:**
 - 26% adults only
 - 74% adults traveling with children
- **Length of Stay – 5.6 nights**
- **Accommodations:**
 - Vacation condo/townhouse – 56.6%
 - Hotel/Motel – 23.2%
- **Average Party Spending – \$2,463**
- **Rate PCB overall at 4.5**
- **79.8% plan to visit again in the near future while 95.3% would recommend PCB to others**

n = 1,236



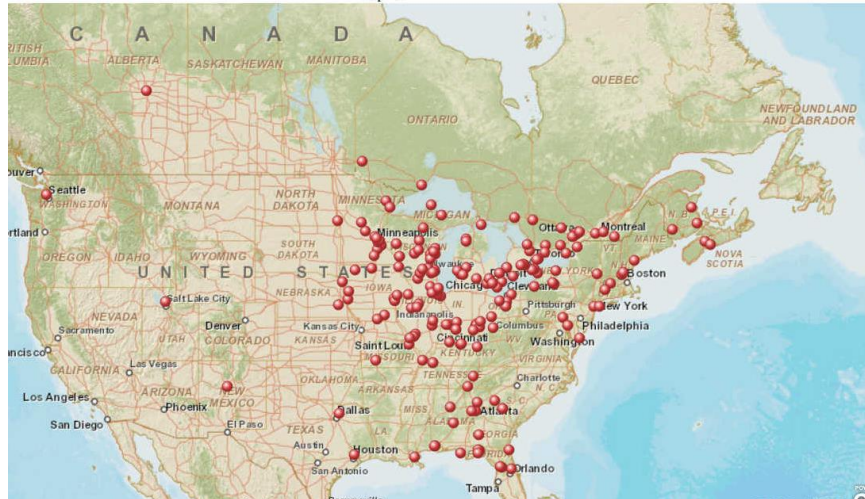
FALL Visitor Profile Summary September - November, 2014:

- **Household Income**
 - \$0 - \$49,000 – 20.6%
 - \$50,000 - \$99,000 – 47.5%
 - \$100,000 - \$149,000 – 22.0%
 - \$150,000 - \$199,000 – 5.8%
 - \$200,000 - \$249,000 – 1.2%
 - \$250,000+ – 2.9%
- **Respondent average age is 49**
- **Travel party:**
 - 64% adults only
 - 36% adults traveling with children
- **Length of Stay – 4.8 nights**
- **Accommodations:**
 - Vacation condo/townhouse – 51.8%
 - Hotel/Motel – 26.5%
- **Average Party Spending – \$1,607**
- **Rate PCB overall at 4.6**
- **89.1% plan to visit again in the near future while 99.1% would recommend PCB to others**

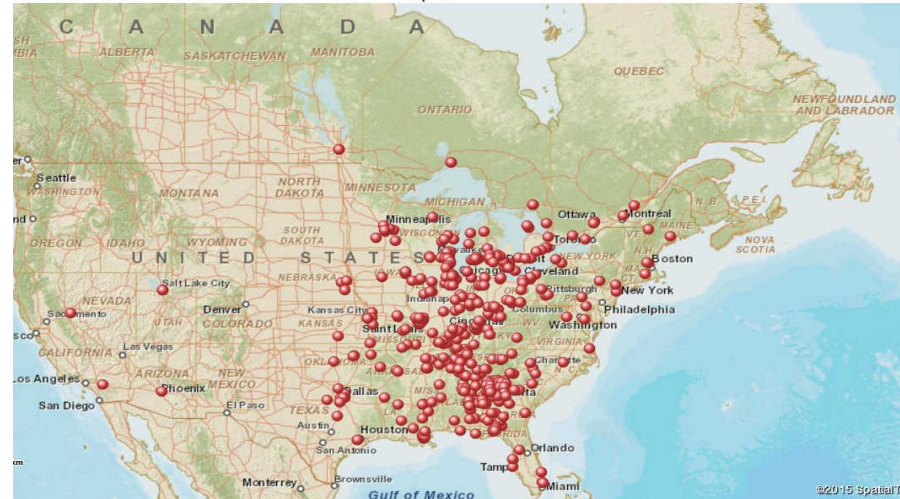
n = 449



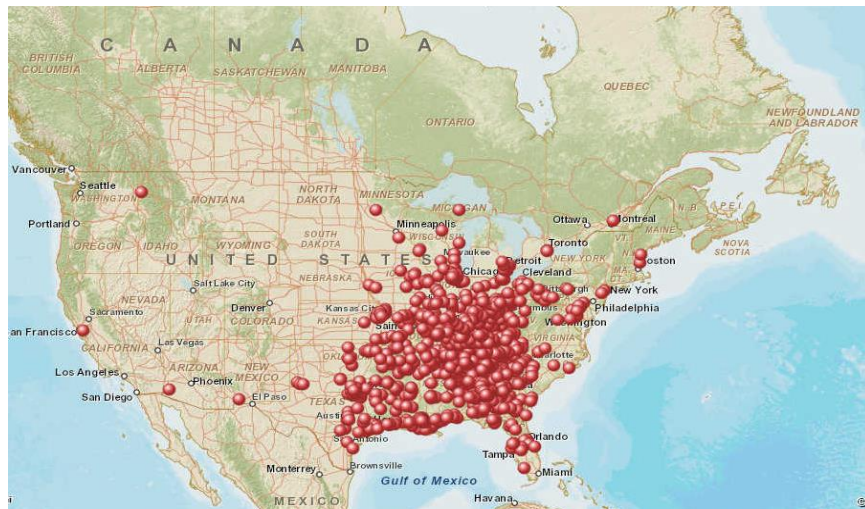
Winter 2014 Visitor Respondents Map n=146



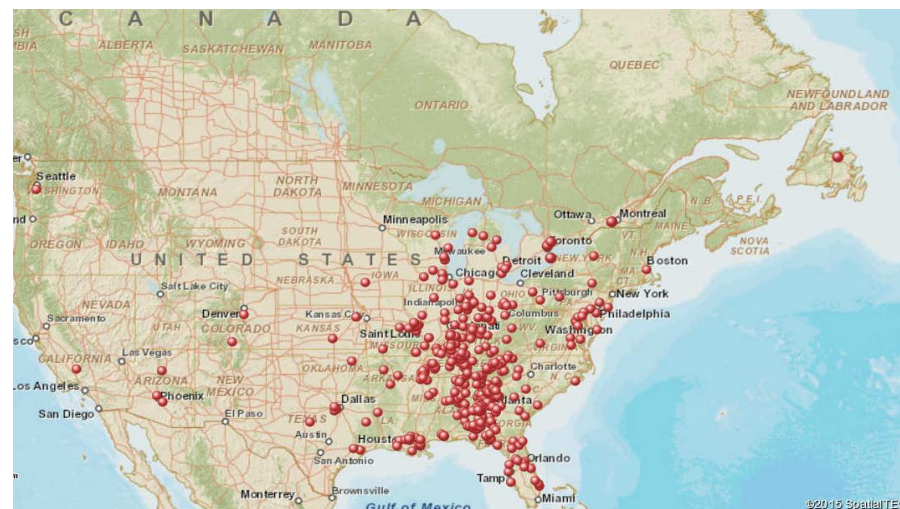
Spring 2014 Visitor Respondents Map n=411



Summer 2014 Visitor Respondents Map n=1224



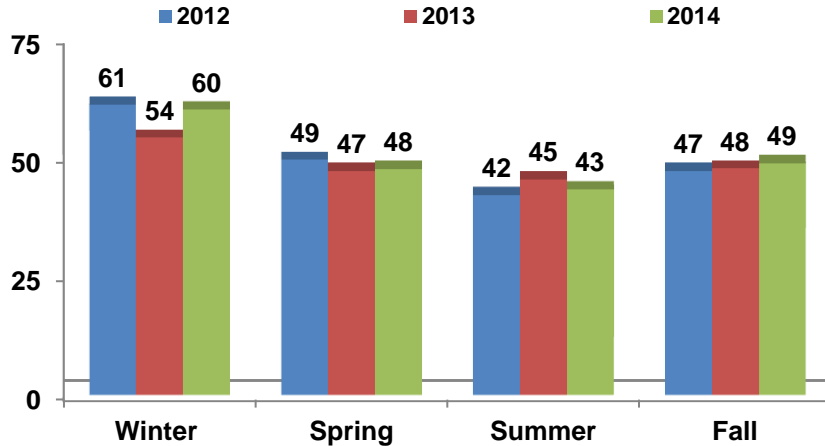
Fall 2014 Visitor Respondents Map n=444



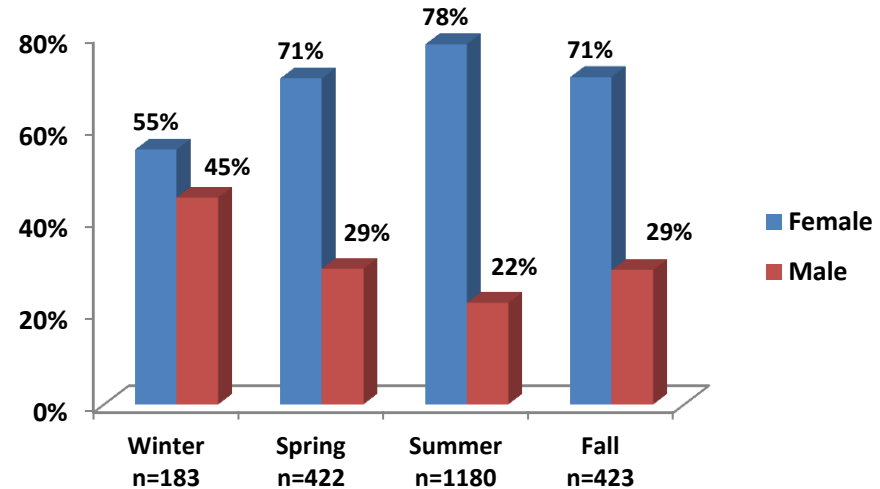


PCB Leisure Visitors Respondent Demographics

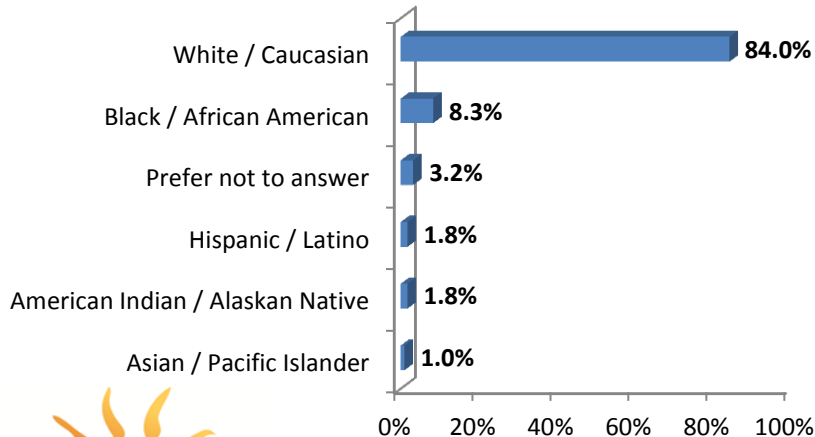
Average Age of Respondents – 3YR Comparative by Season



Gender of Respondents – 2014 by Season



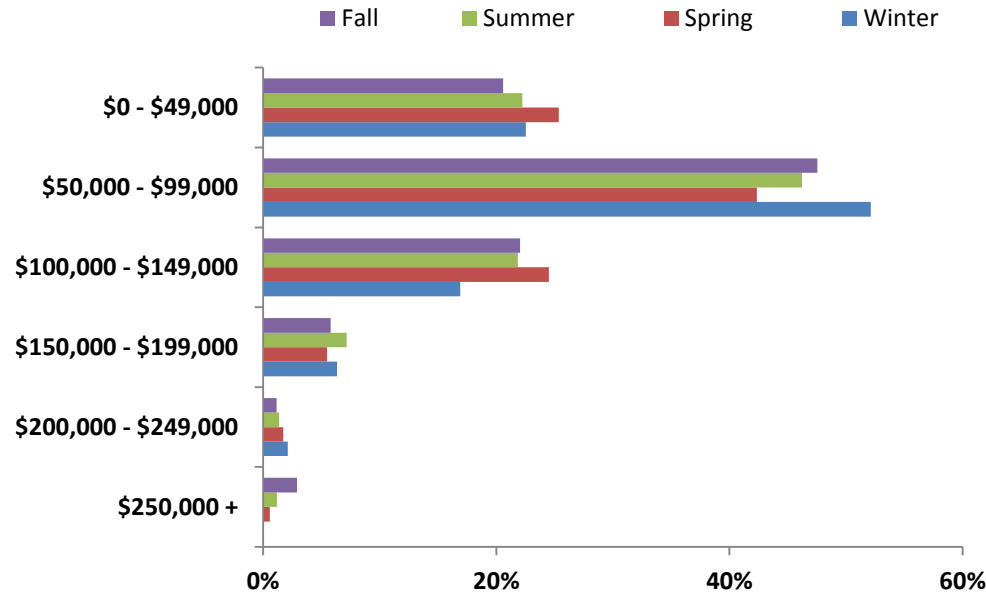
Overall Ethnicity – 2014 Respondents



The average age and gender of survey respondents is reflective of the typical travel planner for each season. Typically we see female head of household as the primary travel planner and survey respondent. This is also typical of most leisure travel research. Female head of household is most often the primary travel planner. We also see that men are more involved in winter travel planning which is reflective of the higher age and increased incidence of retirement among winter visitors.

It is interesting to note that the typical age of survey respondents 2012 – 2014 has varied little with the summer season having the youngest age.

Household Income – 2014 by Season



Response Category	Winter n=106	Spring n=235	Summer n=699	Fall n=235
\$0 - \$49,000	22.5%	25.4%	22.2%	20.6%
\$50,000 - \$99,000	52.1%	42.4%	46.2%	47.5%
\$100,000 - \$149,000	16.9%	24.5%	21.8%	22.0%
\$150,000 - \$199,000	6.3%	5.5%	7.1%	5.8%
\$200,000 - \$249,000	2.1%	1.7%	1.4%	1.2%
\$250,000 +	0.0%	0.6%	1.2%	2.9%

The household income reported by survey respondents varies by season. In every season the largest income range category was \$50k - \$100k per year. When we look at the ratio of household income over and under \$100K by season we see that at least 1/4 to 1/3 of the visitors in every season are over \$100K in annual household income. In every season, less than 1/4 of the respondents were under \$50K in household income.

Response Category	Winter n=106	Spring n=235	Summer n=699	Fall n=235
\$99,000 or less	74.6%	67.8%	68.4%	68.1%
\$100,000K or more	25.4%	32.3%	31.5%	31.9%





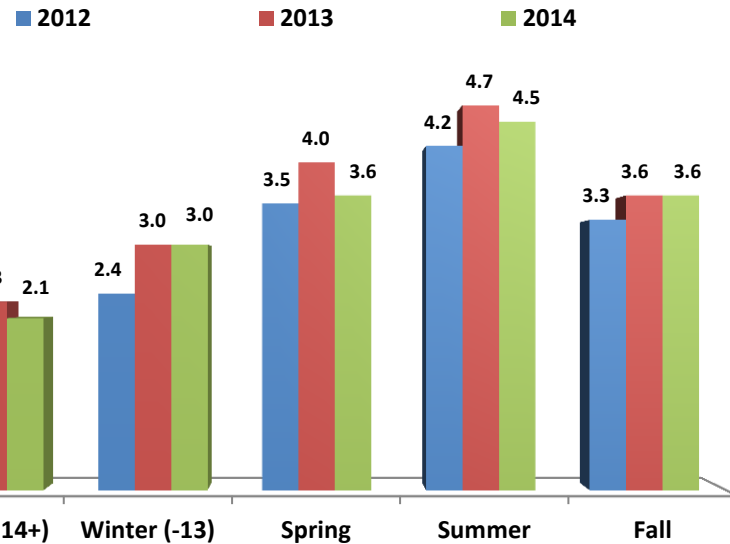
PCB Leisure Visitors Travel Party Characteristics

Travel Party Characteristics – 2014

The average travel party size remains fairly consistent in each season year after year as shown in the 3-YR comparative graph below.

However, there is a significant spike in party size during the summer season when the travel party consists primarily of families of adults traveling with children. This family vs. adults only ratio is further illustrated in the chart on the bottom right with winter highest at 88% adult-only travel parties and summer lowest at 26% adults only. Thus 74% of summer travel parties contain children.

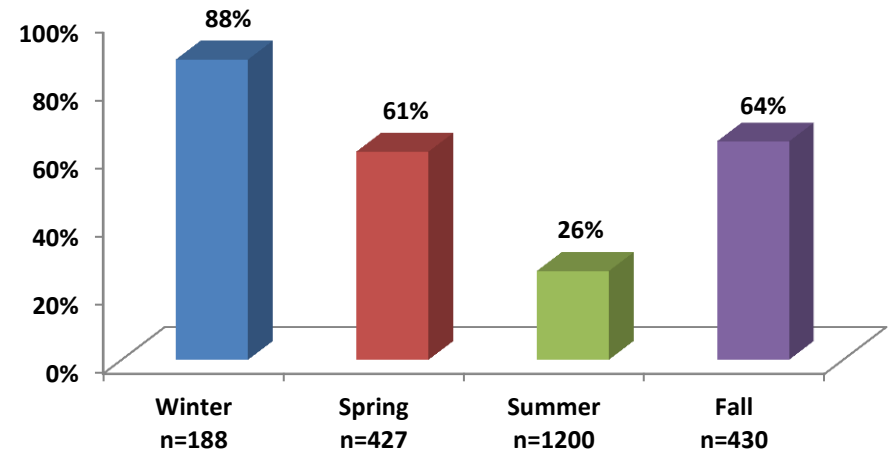
Travel Party Size



2014 Travel Party Size	Winter	Spring	Summer	Fall
Average # of people sharing accommodations	2.6	3.8	5.0	3.6
Average number of people in travel party	2.5	3.6	4.5	3.6

Adults only travel parties consistently outnumber adults traveling with children across all seasons except summer. The overwhelming majority of winter visitors including short-term and long-term consist of adults only travel parties. The school calendar limits family vacation travel and national research statistics confirm that 2/3 of all travel parties are typically adults only.

Adults Only Travel Party

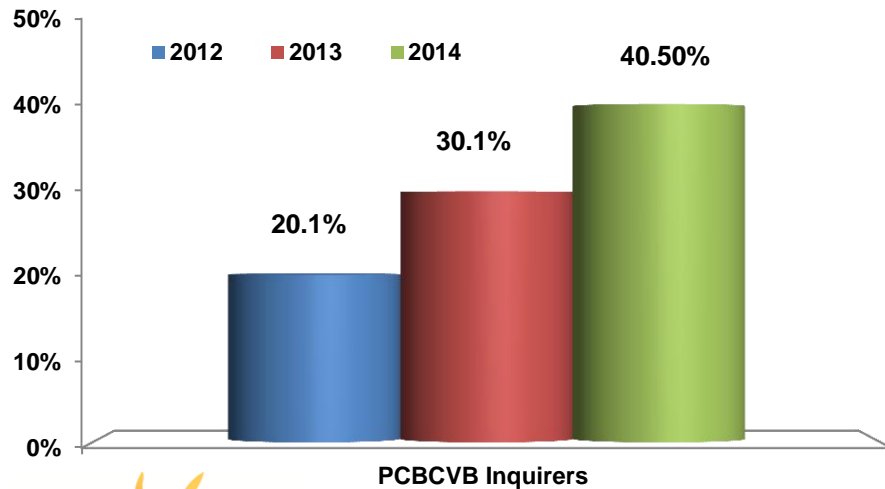


Repeat and First-Time Visits to PCB – 2014

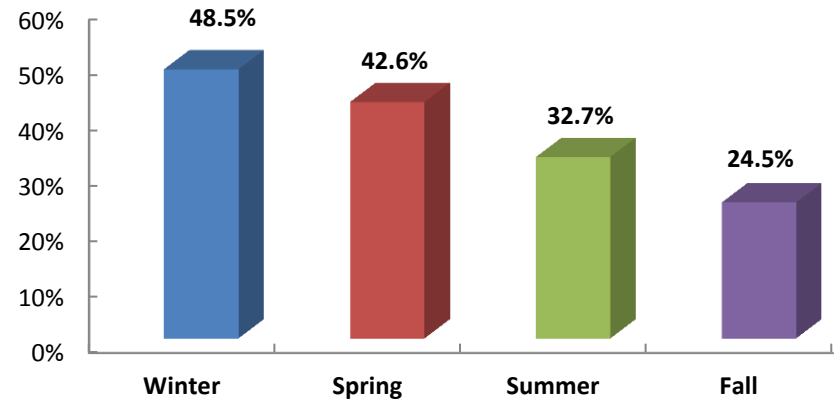
Surveys received from those who inquired to PCBCVB show a dramatic increase in first time visitation to PCB as is seen in the chart at bottom left. This is a strong indication that the PCBCVB advertising program is driving NEW demand into the destination.

Further analysis of the first time visitors indicate that they are coming from a wider geographic area indicating the PCBCVB program is reaching into new markets broadening the visitor base for the destination. First-time visitors came in all seasons of the year and repeat visitors reported an average of 9 prior visits to PCB. Therefore, PCB has a healthy ratio of repeat and first-time visitors to sustain growth in the local tourism economy.

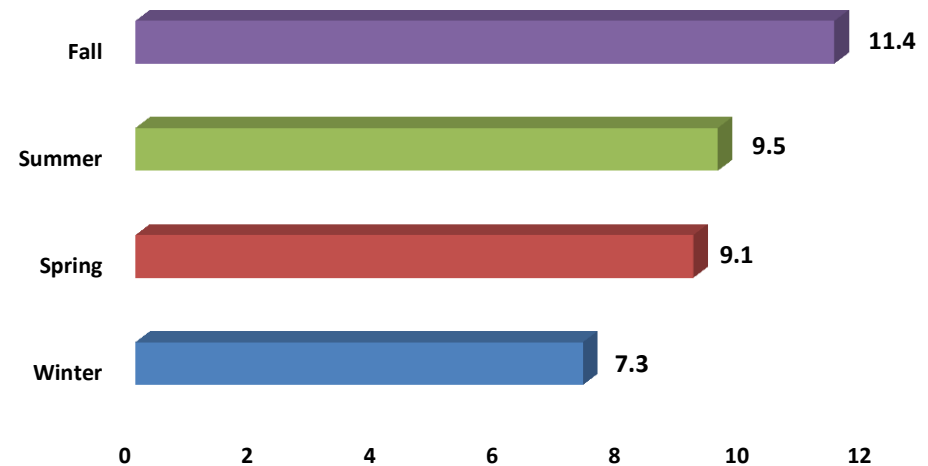
Visitors – 1st Time Visitation n=851



First time visitation to PCB

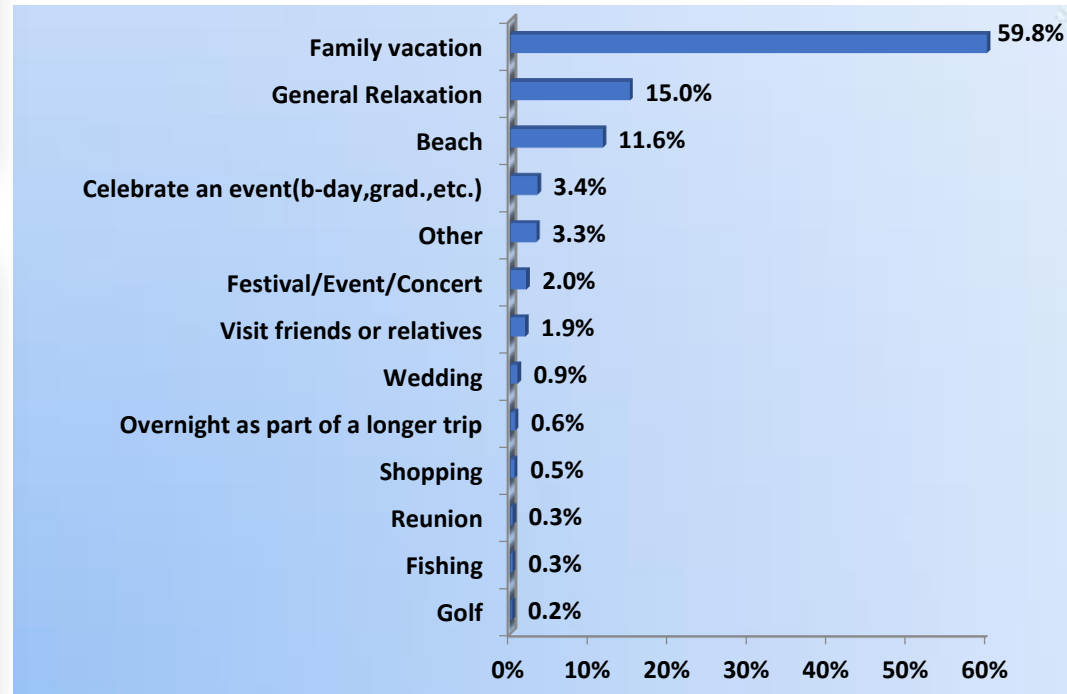


Repeat Visitation to PCB - Avg # of Times Previously Visited by Season



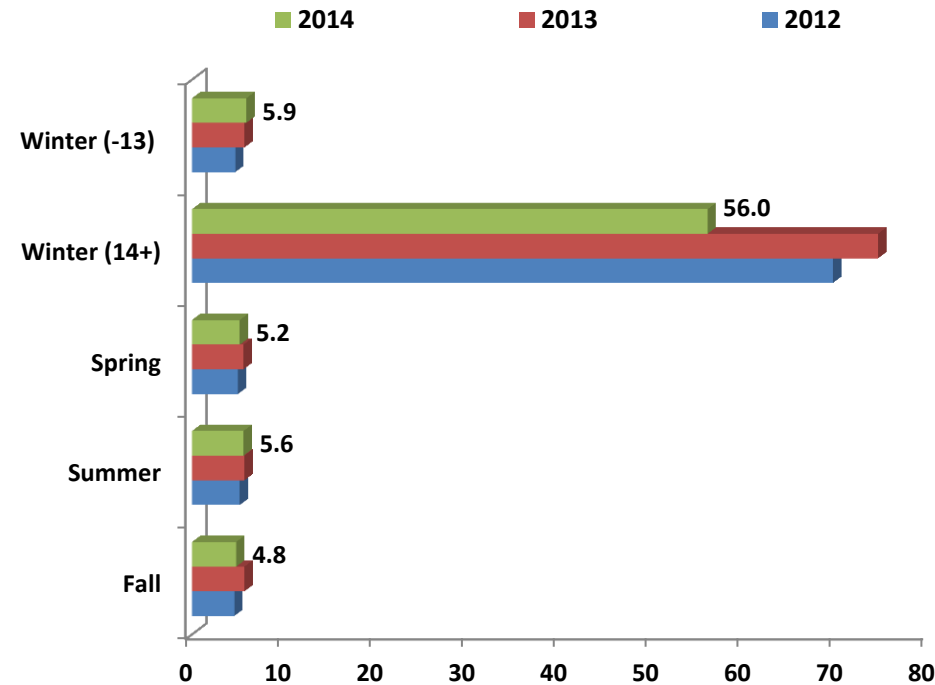
2014 Leisure Visitors to PCB

Survey respondents were asked to categorize their most recent leisure visit to PCB. 2,117 visitors responded to the online survey with nearly 60% of them indicating they visit PCB for a family vacation, 15% for general relaxation, and 11.6% for the beach. The response data herein confirms that PCB is a family destination where people come to enjoy the beach and have fun. This data supports the use of “real fun beach” as a destination brand and point of differentiation for PCB.



Average Length of Stay

The average length of stay 2012 - 2014 is consistent in each of the four seasons. As expected, winter long-term visitors (14+ nights) length-of-stay is significantly longer than any other season. There was a slight decline in length of stay reported in 2014 which is attributed to sampling variance and not an indicator of shorter length of stay. Summer stays tend to be slightly longer than Spring and Fall with a 6-7 night stay reported most frequently. n=2,322



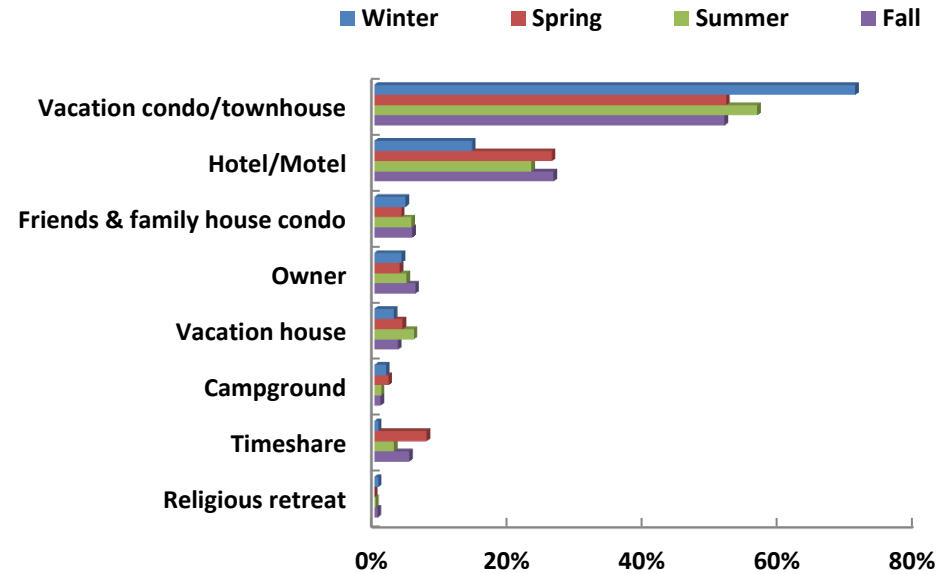
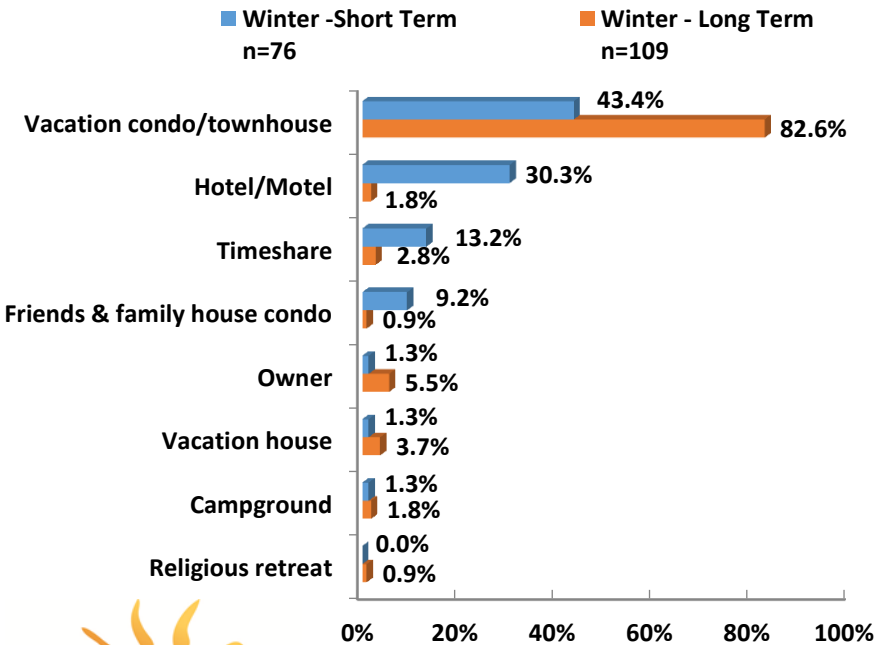


PCB Leisure Visitors Accommodations

Type of Accommodations

Respondents were asked to categorize the type of place they stayed in while in PCB. The majority of survey respondents for all seasons indicate they stayed in a vacation condo/townhouse, most often followed by stays in a hotel/motel. Hotel/motel rental was reported highest in spring and fall.

Long-term winter visitors shown in graph below were twice as likely to stay in a vacation condo/townhouse (82.6%) than winter short-term visitors (43.4%). Additionally, only 13% more of the winter short-term visitors stay in a vacation condo/townhouse than a hotel/motel.

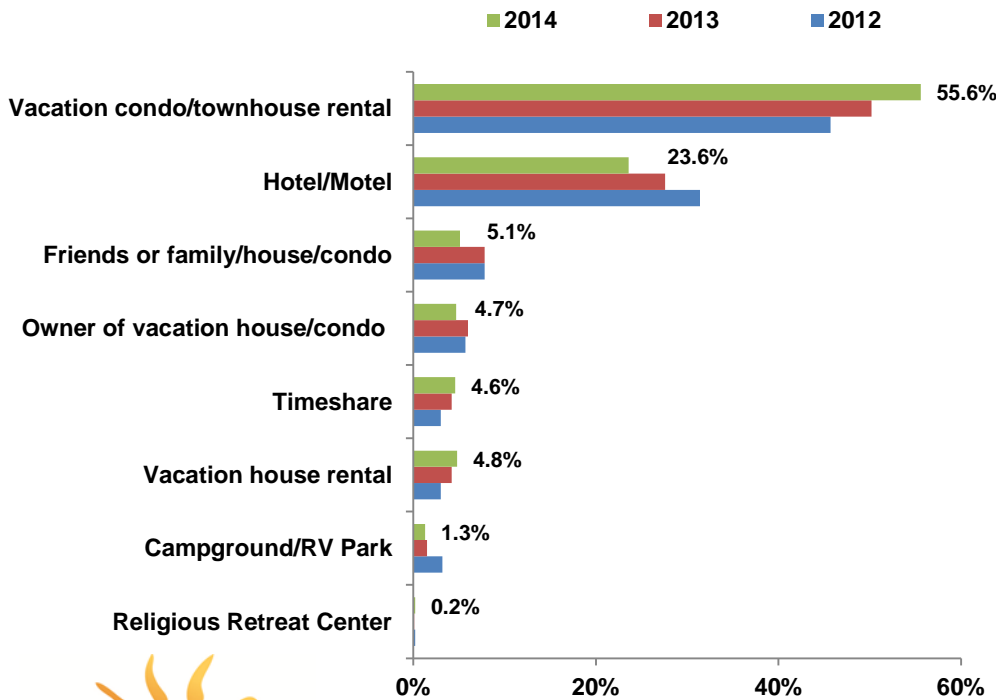


Response Category	Winter n=173	Spring n=427	Summer n=1198	Fall n=427
Vacation condo/townhouse	71.1%	52.0%	56.6%	51.8%
Hotel/Motel	14.5%	26.2%	23.2%	26.5%
Friends & family house condo	4.6%	4.0%	5.5%	5.6%
Owner	4.0%	3.7%	4.8%	6.1%
Vacation house	2.9%	4.2%	5.8%	3.5%
Campground	1.7%	2.1%	1.0%	0.9%
Religious retreat	0.6%	0.0%	0.2%	0.5%

Type of Accommodations – 3-YR Comparative

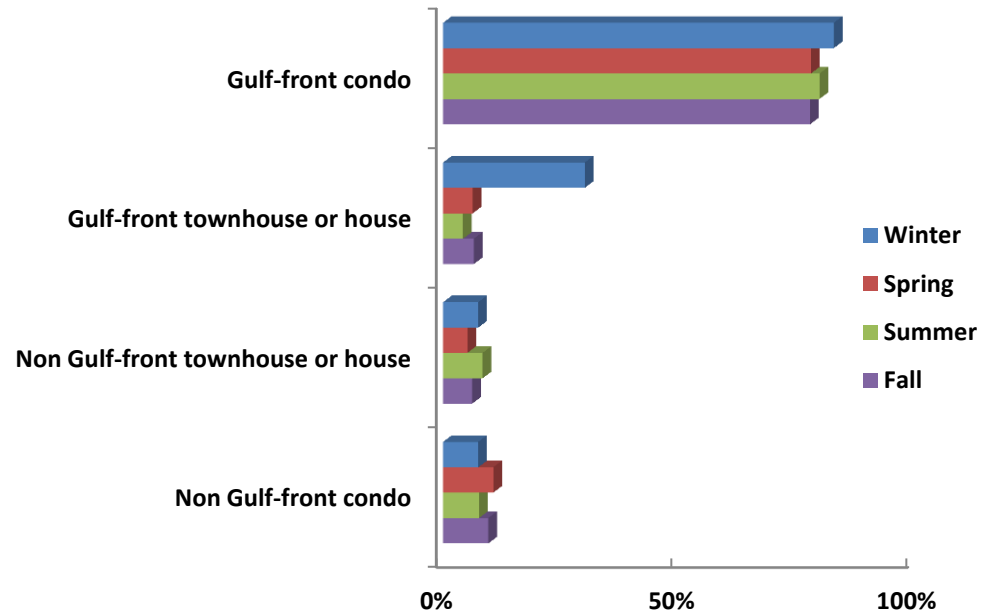
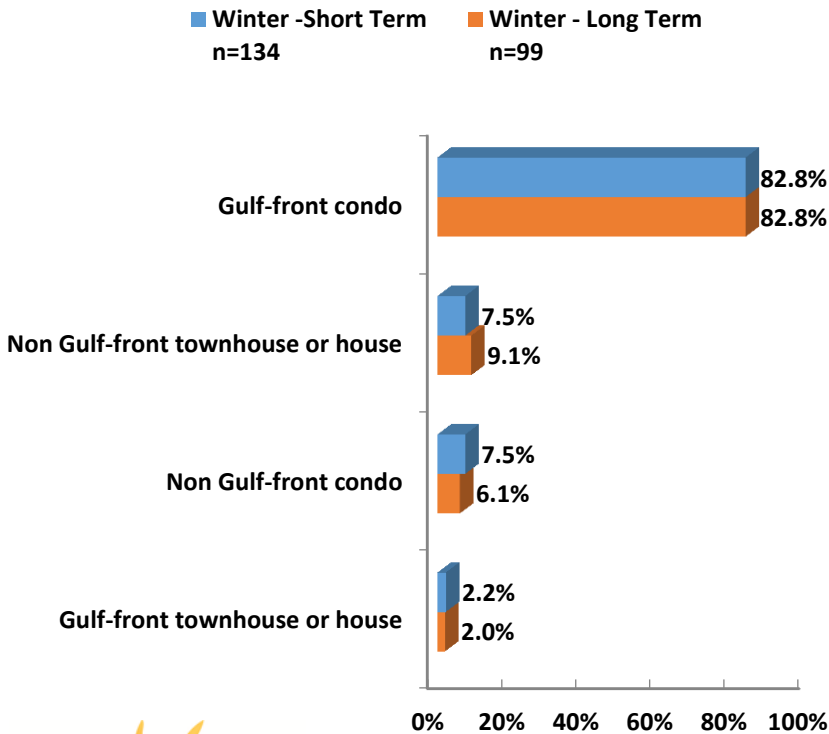
The most popular accommodation types visitors specify consistently over a three year period are vacation condo/townhouse followed by hotel/motel. However, survey respondents indicate in all three years they were twice as likely to stay in a vacation condo/townhouse as a hotel/motel. This information is consistent with the inventory ratio in PCB where there are three times as many rental units as hotel rooms.

Accommodation type response averages for the prior three years are shown in the chart below.



Type of Vacation Rental Property Accommodations – 2014

The majority of respondents indicated they stayed in gulf-front accommodations across all four seasons. In addition, there is no distinction between short-term and long-term winter visitors that stay in gulf-front condos. The data indicates the vast majority of survey respondents want a Gulf view when they come to PCB.

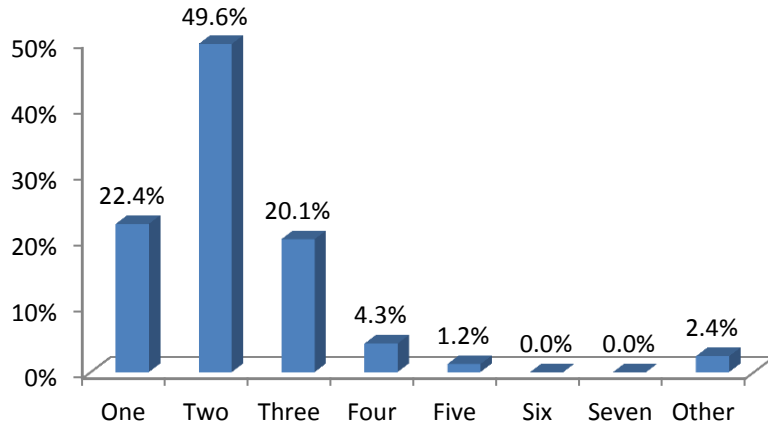


Response Category	Winter n=134	Spring n=254	Summer n=802	Fall n=261
Gulf-front condo	82.8%	77.95%	79.8%	77.8%
Gulf-front townhouse or house	30.0%	6.30%	4.2%	6.5%
Non Gulf-front condo	7.5%	10.63%	7.6%	9.6%
Non Gulf-front townhouse or house	7.5%	5.12%	8.4%	6.1%

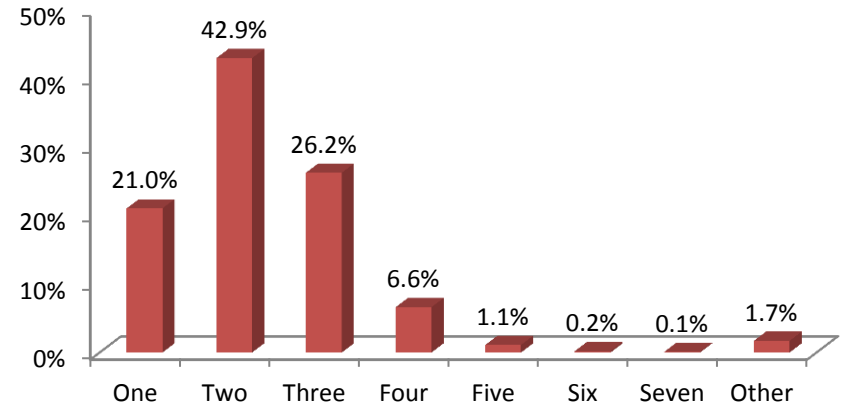
Number of Bedrooms in Vacation Rental Unit - 2014

Survey respondents reported staying in two bedroom condominiums most often which matches up to the inventory in PCB.

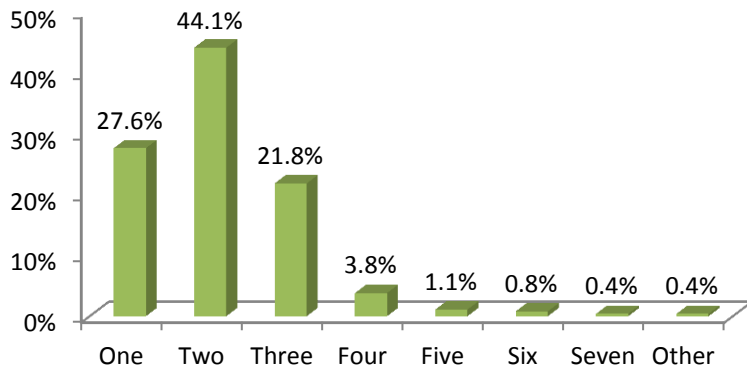
Winter 2014 Visitor Respondents Map



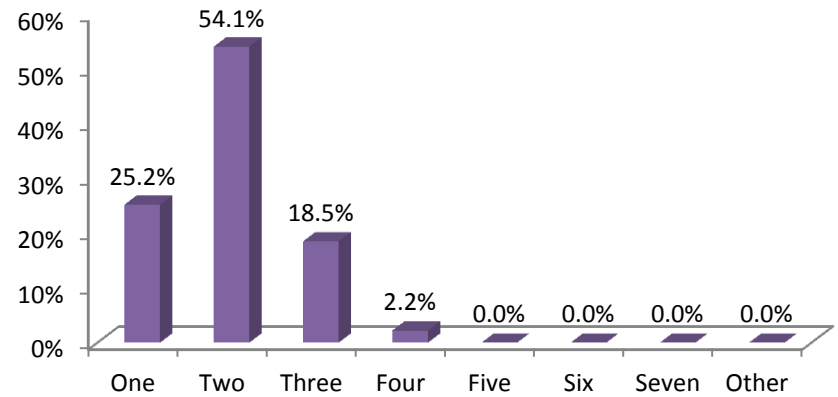
Spring 2014 Visitor Respondents Map



Summer 2014 Visitor Respondents Map



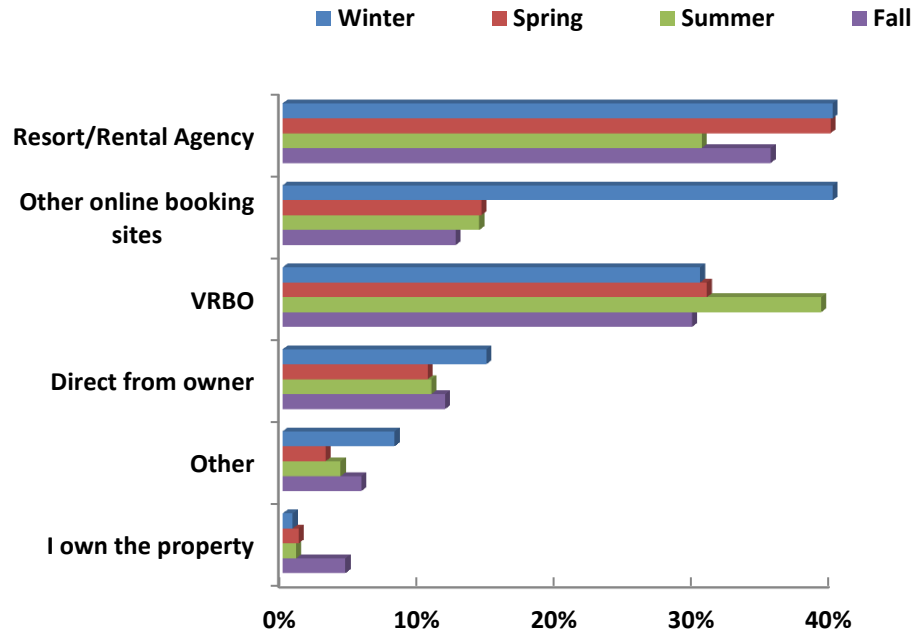
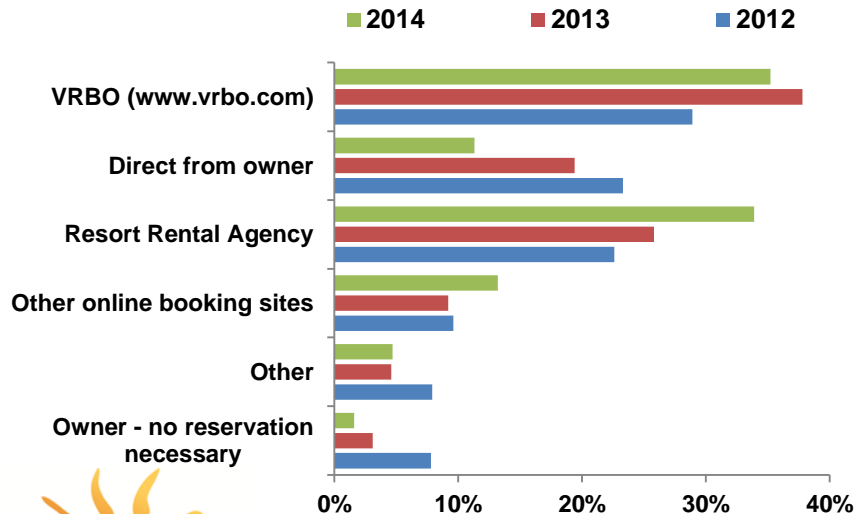
Fall 2014 Visitor Respondents Map



Vacation Rental Reservations – 2014 & 3-YR Comparative

Survey respondents were asked how they reserved their vacation rental. As seen in the chart and table to the right, respondents in all four seasons indicated the two top rental reservation methods were with a resort/rental agency or VRBO. This data is consistent in rank order with slight variances in response over the prior three years. The exception was the winter visitor indicating they used a resort/rental agency and other online booking sites equally followed by VRBO. Winter visitors have the highest incidence of repeat visitation and thus have established a pattern that is repeated annually.

The 3-Year comparative chart below shows the top three booking sources used to reserve the vacation rental are VRBO, a resort rental agency and direct from owners across multi years. However, the booking trend demonstrates a pattern of vacation rental reservations increasingly made through VRBO.



Response Category	Winter n=135	Spring n=256	Summer n=804	Fall n=262
Other online booking sites	40.0%	14.5%	14.3%	12.6%
Resort/Rental Agency	40.0%	39.8%	30.5%	35.5%
VRBO	30.4%	30.9%	39.2%	29.8%
Direct from owner	14.8%	10.5%	10.8%	11.8%
Other	8.1%	3.1%	4.2%	5.7%
I own the property	0.7%	1.2%	1.0%	4.6%

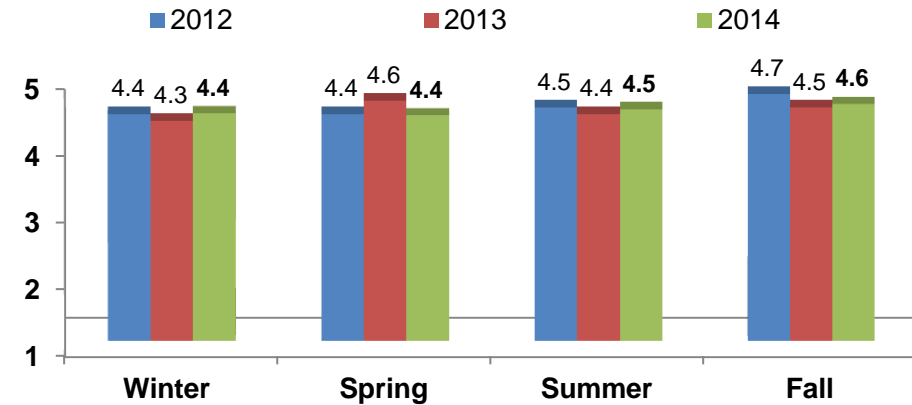


PCB Leisure Visitors Satisfaction Ratings

Overall PCB Visitor Satisfaction Ratings – 3-YR Comparative by Season

Respondents consistently report a high overall visitor satisfaction rating for Panama City Beach for all seasons year after year.

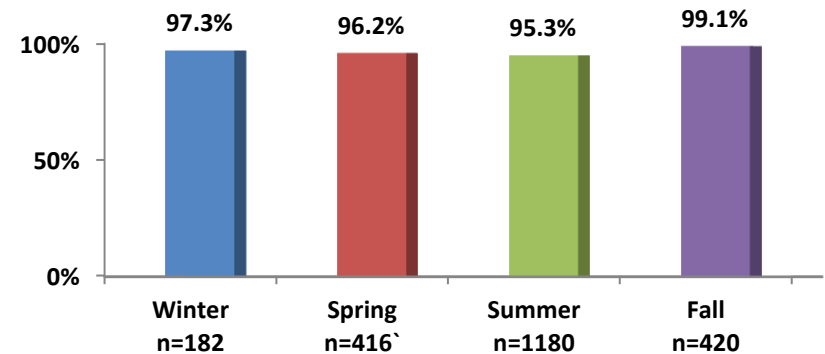
2014 OVERALL VISITOR RATING = 4.47
Consistently high satisfaction on a five point scale.



Recommending PCB to Others

When 2014 respondents were asked if they would recommend PCB to others, they consistently report they will recommend PCB as a vacation destination across all seasons; the highest recommendation coming from Fall visitors.

Would Recommend



PCB 2014 Visitor Amenities Rating

Survey respondents' ratings of a list of PCB amenities remain consistently high with only slight variances noted by season. Respondents were asked to rate the following amenities on a five-point scale where 1 is low, 3 is average and 5 is excellent. Average ratings over 4.0 are desired which is the case for most of the amenities in PCB. Ratings of 4.3 or higher are noted in bold while ratings below 4.0 are noted in red font and should be singled out as opportunities for improvement. Traffic is consistently identified as an issue except in the winter months with visitation is lowest.

Response Category	ALL	Winter	Spring	Summer	Fall
Quality of beaches	4.59	4.73	4.58	4.53	4.70
Range of choices for dining out	4.43	4.36	4.33	4.46	4.49
Attractiveness/landscaping of the destination	4.39	4.23	4.34	4.40	4.47
Quality of your accommodations	4.36	4.31	4.36	4.34	4.42
Variety of shopping & merchandise	4.36	4.36	4.23	4.38	4.46
Quality of dining out	4.35	4.26	4.27	4.36	4.42
Overall appeal of the attractions in the area	4.34	4.16	4.26	4.37	4.42
Ease of finding visitor information	4.28	4.20	4.23	4.29	4.34
Signage and wayfinding	4.25	4.19	4.19	4.26	4.32
Variety of children's activities	4.22	4.07	4.03	4.26	4.28
Lodging value you received for the price paid	4.21	4.30	4.26	4.15	4.28
Level of service / employee training	4.17	4.21	4.15	4.13	4.29
Night life	4.15	3.95	4.04	4.19	4.25
Ease of traffic	3.63	4.14	3.62	3.47	3.87



PCB Message Testing

Each year the visitor profile survey contains some questions to test advertising messages and/or content to provide insight for the marketing efforts of PCBCVB. The 2014 visitor profile survey asked respondents to indicate their level of agreement with five different messages related to their primary motivations for visiting Panama City Beach. The 4-point scale for rating each phrase included 1 = totally disagree and 4 = totally agree. Therefore the higher the rating the higher the agreement with the statement.

The data herein confirms the current PCBCVB marketing and brand message “Real Fun Beach” is accurate and on point as the statement “a fun time with family / friends” followed by “a beautiful white sand beach” rated highest in agreement among survey respondents.

I WENT TO PCB FOR:	ALL n=	Winter n=	Spring n=	Summer n=	Fall n=
A fun time with family / friends	3.90	3.81	3.90	3.91	3.92
A beautiful white sand beach	3.88	3.94	3.87	3.86	3.92
A fun time with kids	3.76	2.74	3.64	3.85	3.74
A quiet/serene beach	3.43	3.74	3.37	3.35	3.61
An activity filled beach	3.26	2.53	3.22	3.37	3.24

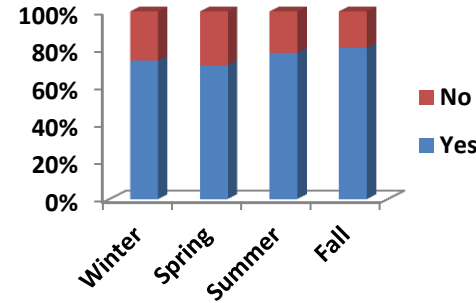


PCB Popularity

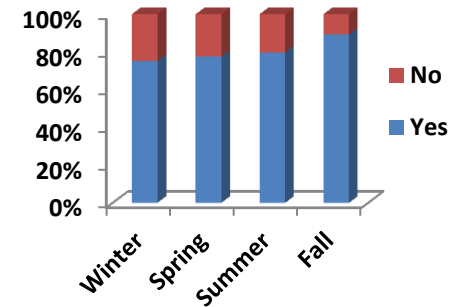
The majority of survey respondents identify PCB as their favorite beach destination (see chart on right) and have incredibly high intent to return (see chart on far right).

However, it must be noted that 73% of survey respondents have visited other beaches indicating the need for PCBCVB to continue aggressive marketing to keep them coming back. The charts below identify the Florida beaches that have been visited by survey respondents indicating these as your competitive set. PCBCVB must continue aggressive marketing to repeat and first-time visitors as the confirms they will go elsewhere if you don't remind them to come to PCB.

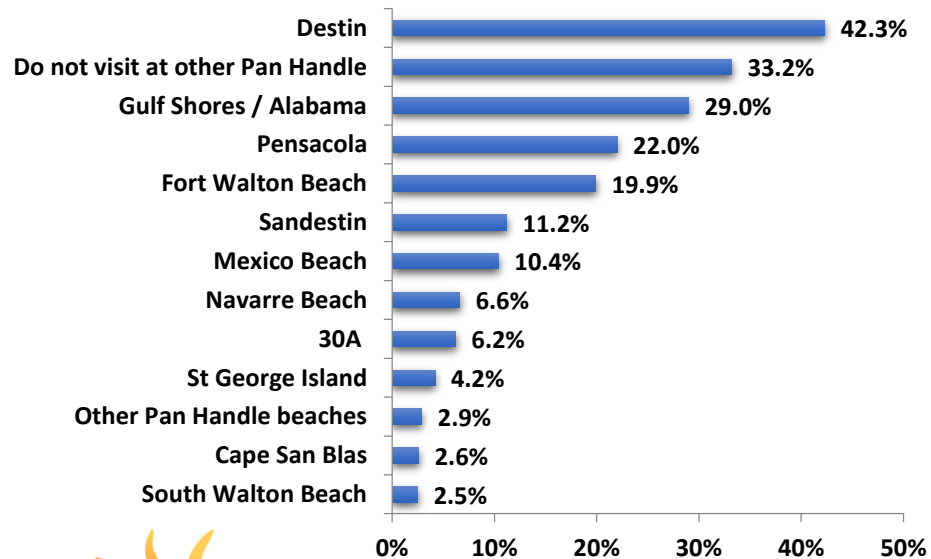
Is Panama City Beach your favorite beach?



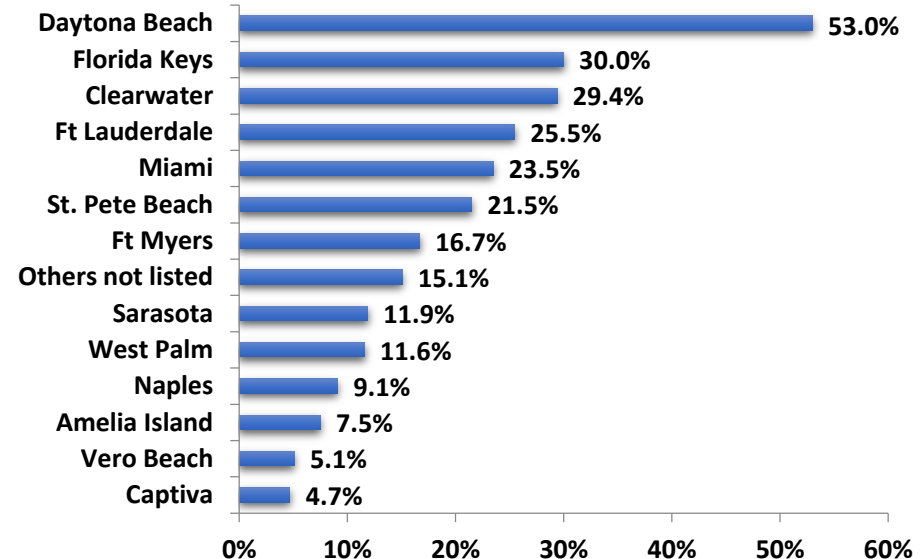
Intent to return



Other Panhandle Beaches Visited n=2114



Other Florida Beaches Visited n=1518





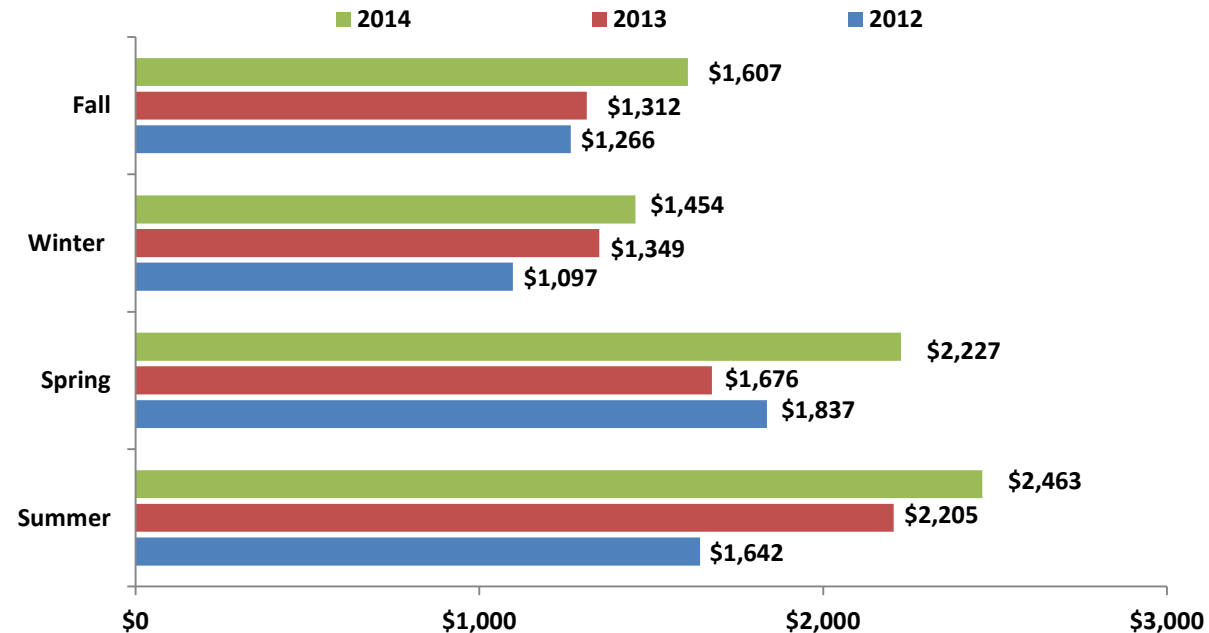
PCB Leisure Visitors Spending Data

Total 2014 Spending per Party by Season

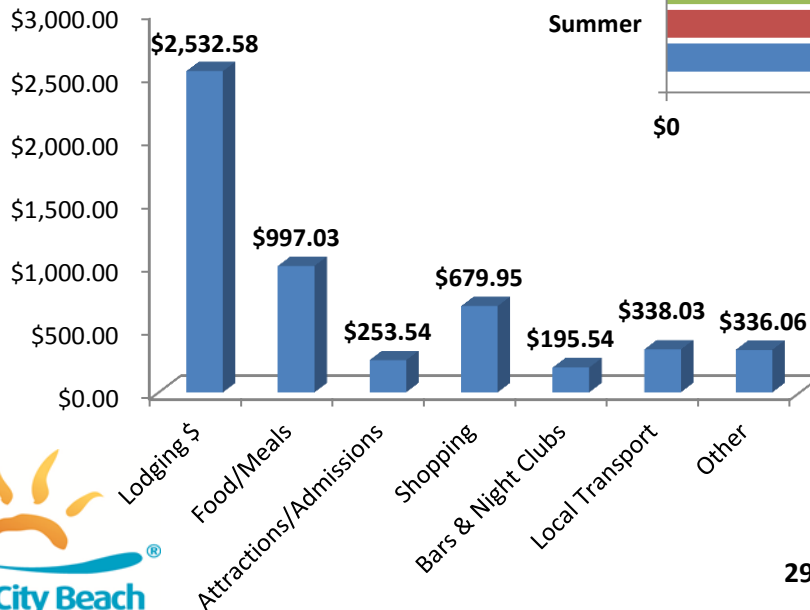
Total spending per party increased in 2014 as reported by respondents for all four seasons in PCB. The chart on the right compares average spending per travel party by season over the last three years. The chart at the bottom reveals the winter season typical party spending in 2014 and is followed on the next page by the seasonal spending charts for the four seasons.

The rank order of travel party spending by season is Summer (\$2,463), Spring (\$2,227), Fall (\$1,607) and winter (\$1,454 – short term only). Winter long term travel parties spend the least per day but stay the longest and have the highest overall spending per party.

Total Spending per Party 3-Year Trend n=2159



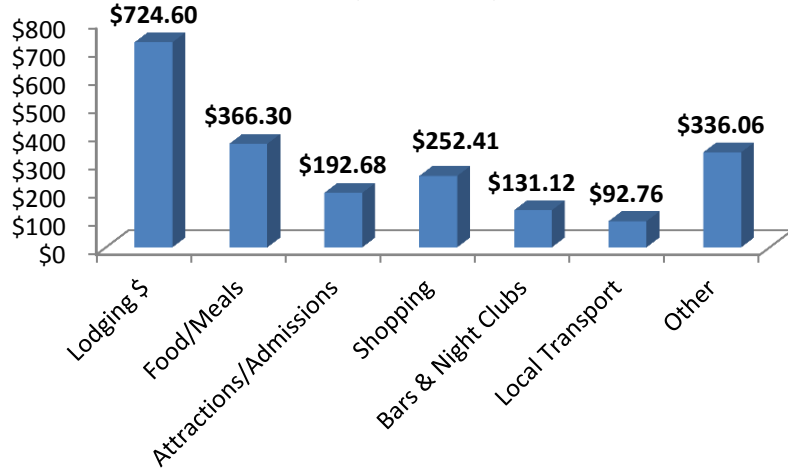
Winter (long term) 2014



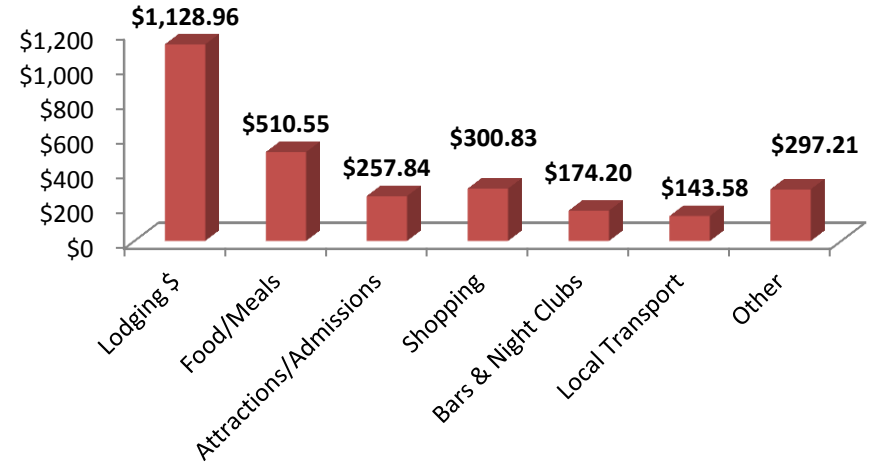
As expected, long-term winter respondents reported spending significantly more for lodging (\$2,532) with an average stay of 56 nights. The charts on the next page show the spending in each of the four seasons. Summer and Spring have the longest length of stays (excluding winter long-term) and pay higher rates for lodging than Fall and Winter short-term stays.

Total 2014 Spending per Party by Season

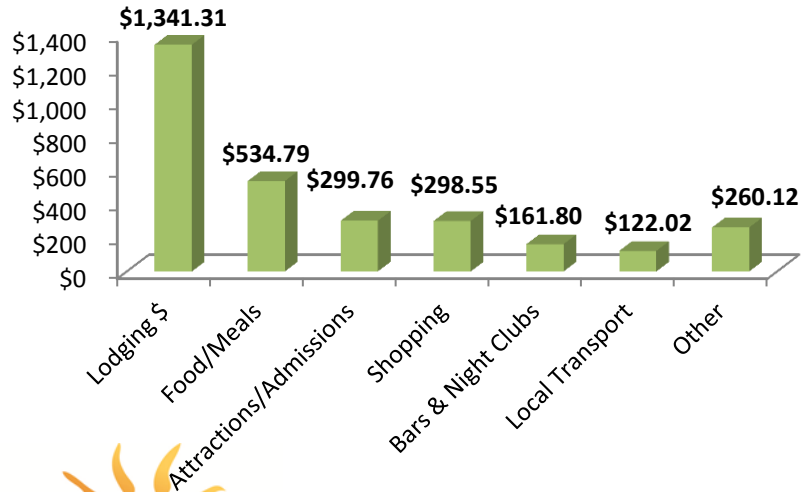
Winter (short term) 2014



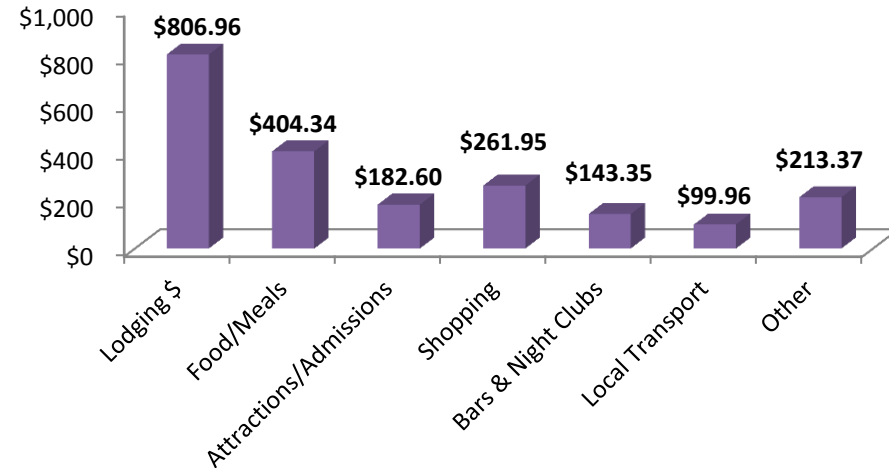
Spring 2014



Summer 2014



Fall 2014



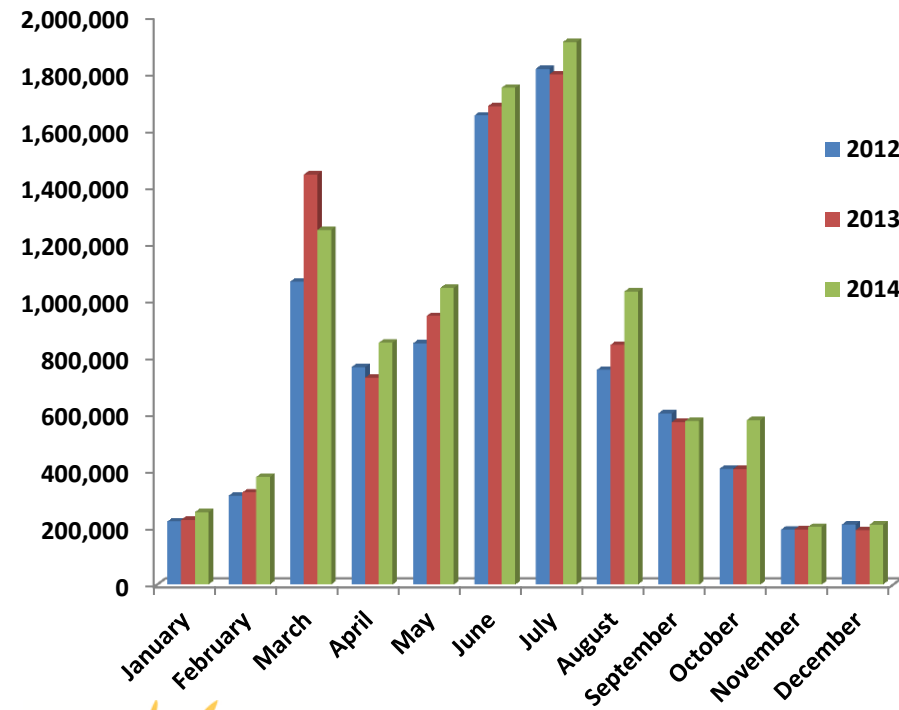


PCB Leisure Visitors Economic Impact

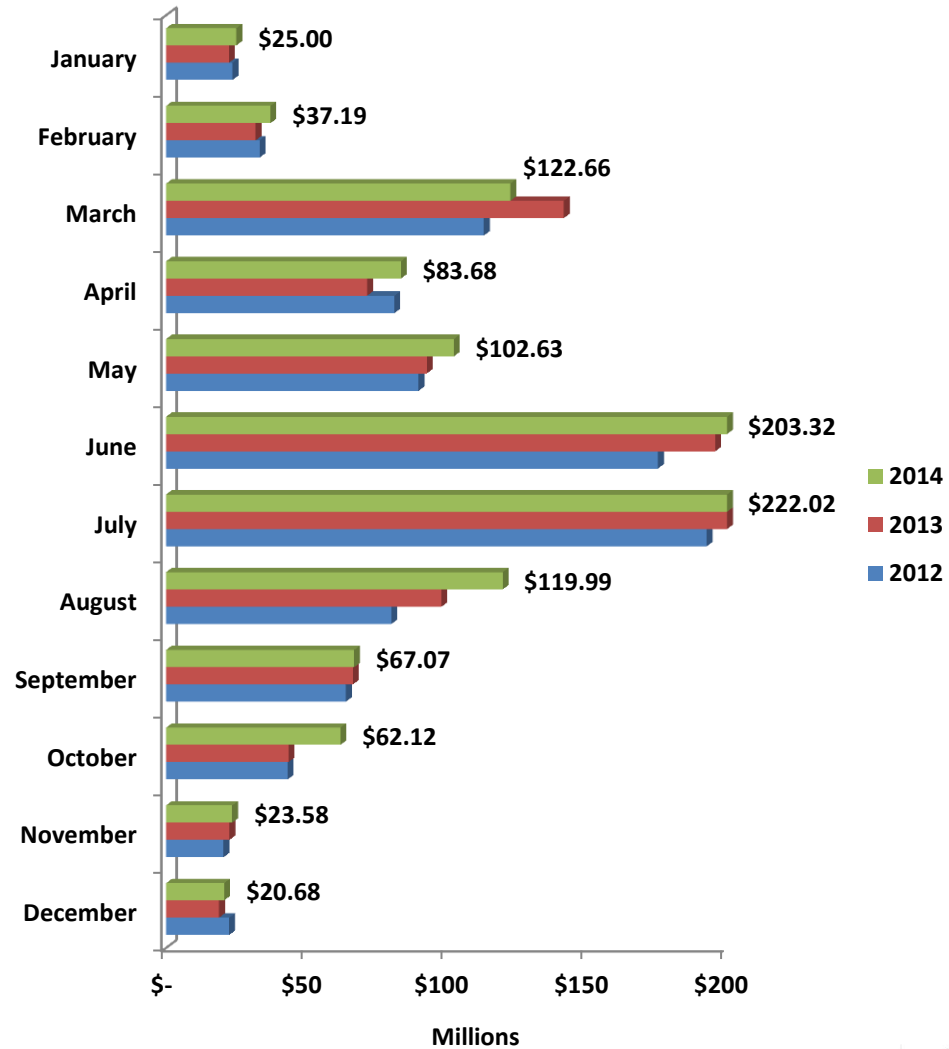
2012 – 2014 Person Nights and Total Monthly Spending

YSI developed an economic impact model to calculate the number of visitors and total spending to PCB based on the data provided in visitor surveys (party size, spending, length of stay, size and type of accommodations occupied) and data provided by the Bay County Tax Office (inventory of accommodations by room count, revenue from accommodations by room count). The data herein shows that visitors to PCB and total spending have increased year over year.

PCB Visitor Person Nights 2012 – 2014 n=2311



PCB Monthly Visitor Spending 2012 – 2014



2012 – 2014 Visitor Spending Calculation (Those who stayed in paid/taxed overnight lodging)

The following calculation of total overnight spending is based on an economic impact model developed by YSI to calculate spending based on the data provided in visitor surveys (party size, spending, length of stay, size and type of accommodations occupied) and data provided by the Bay County Tax Office (inventory of accommodations by room count, revenue from accommodations by room count).

The table below reveals actual tourist development tax revenue and total lodging revenue as reported by the Bay County Tax Office. YSI then calculated the spending, days/nights, travel parties and occupancy using the Tax Office data by unit size and online visitor survey response data. The calculations reveal growth in occupancy (4.3%), travel parties & visitor days/nights (6.5%) and overall travel party spending (9.1%).

Total Annual Visitor Spending *Based on visitors who stayed in taxed Overnight Lodging*

	2012	2013	2014	VAR.
Tourist Development Tax Revenue	\$14,674,649	\$15,832,629	\$17,003,107	7.4%
Total Taxed Lodging Revenue	\$293,492,971	\$316,652,587	\$340,062,140	7.4%
Total Visitor Spending (from taxed lodging)	\$940,682,598	\$1,014,912,137	\$1,106,945,863	9.1%
Average Daily Spending Per Person	\$106.09	\$108.31	\$109.19	0.8%
Visitor Days/Nights	8,866,857	9,370,464	9,981,933	6.5%
Visitor Travel Parties	2,216,714	2,342,616	2,495,483	6.5%
Overall Annual Occupancy	38.5%	39.5%	41.2%	4.3%



2012 – 2014 Visitor Spending Calculation (Rental property Owners & Friends who did not pay for overnight lodging)

The following calculation of total overnight spending of rental unit Owners, Family & Friends is based on an economic impact model developed by YSI to calculate spending based on the data provided in visitor surveys (party size, spending, length of stay, size and type of accommodations occupied) and data provided by the Bay County Tax Office (inventory of accommodations by room count).

The table below reveals total rental unit inventory as reported to the Bay County Tax Office. Using survey responses from owners, family and friends YSI calculated the spending, days/nights, travel parties and occupancy using the online survey response data. The calculations assume no growth in occupancy, travel parties & visitor days/nights as none was seen in the survey response data. The surveys indicate that owners have a set pattern of visitation and increased occupancy by paid rental visitors as well as tax code limits somewhat constrain owners ability to use their units more often. The surveys indicated a slight increase in owners overall travel party spending.



Total Annual Owner/Family/Friends Spending Based on owners & friends/family who did NOT PAY for overnight lodging

	2012	2013	2014
Condo / Home / Townhome Inventory (est.)	16,150	16,150	16,150
Total Annual Inventory (condo, home townhome X 365)	5,894,750	5,894,750	5,894,750
Estimated Occupancy Rate (owners, friends, family)	6.75%	6.75%	6.75%
Typical Travel Party Size (owners, friends, family)	5	5	5
Visitor Days/Nights	1,994,525	1,996,948	1,996,948
Average Daily Spending Per Person (2012/2013 Visitor profile)	\$58.11	\$60.70	\$61.91
Total 2012 Spending by Owners, Family & Friends (est.)	\$115,901,848	\$121,214,713	\$123,631,020

2012 – 2014 Visitor Spending Calculation

The following calculation of total visitor spending is based upon overnight spending of those who paid for overnight lodging/rentals and the rental unit Owners, Family & Friends reported spending.

The table below provides estimated spending by season for paid and non-paid lodging in the PCB rental unit inventory. YSI makes this calculation based on visitor survey data and Bay County Tax Office reports for taxed overnight lodging in PCB. The final spending estimates reveal an increase of 8% in total visitor spending in 2014 compared to 2013.



2014 Estimated Total Visitor Spending in Panama City Beach

	Non-Taxed Lodging (owner/friend use)	Taxed Lodging
Winter	\$17,847,260	\$84,167,003
Spring	\$27,645,756	\$313,785,505
Summer	\$56,891,266	\$553,841,640
Fall	\$21,246,738	\$155,151,174
Total	\$123,631,020	\$1,106,945,863
Grand Total 2014 Visitor Spending estimate	<u>\$1,230,576,883</u>	

*Total visitor spending increased 8%

Young Strategies, Inc. (YSI) is a research and planning firm focusing on destination marketing organizations and travel destinations. The three principal members of this project team have conducted research and strategic planning with over 100 DMOs in twenty-six states. YSI's approach is to custom tailor each research study to the specific needs of the destination. The final report will be an easy to read document that presents the customer-focused data with recommendations for action. YSI is a small boutique firm that develops a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, rural tourism development and convention center management.

***Berkeley W. Young, President - Young Strategies
Project Team Leader***

20 years of travel/tourism marketing and management experience including destination marketing and hotel management. Young's experience includes serving as the Executive Director of a start-up convention and visitors bureau and chamber of commerce in which he oversaw the creation and success of a research-based tourism marketing program for a rural county in the mountains of North Carolina. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by Interstate Hotels Corporation. Young joined Randall Travel Marketing in 1998 as Vice President conducting research for DMOs throughout the United States. He opened Young Strategies in November 2004 focusing on strategic planning and research for destination marketing organizations.

***Amy Stevens, Vice President - Young Strategies
Lodging Market Analysis, Research Coordination***

15 years of travel, tourism and marketing experience. As Vice President/Research Director, Stevens is responsible for writing surveys, conducting research, analyzing data and writing reports for Young Strategies. Stevens worked with Randall Travel Marketing prior to working for Young Strategies. Stevens also worked with Navigant International, the second largest travel management company in the United States, and was responsible for sales, business travel accounts, training and development and conflict resolution. She handled written and multi-media presentations and developed marketing materials and programs to increase both leisure and corporate business travel.

***Larry Gustke, PhD - Destination Analytics
Oversight of Research Process and Validation***

Over 30 years' experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Dr. Gustke has conducted research in over 30 U.S. states and internationally. Dr. Gustke has also conducted extensive research among outdoor dramas in North America. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience. He received his Ph.D. from Texas A&M, and is considered one of the most accomplished tourism researchers in the field today. Dr. Gustke is active in the Travel and Tourism Research Association (TTRA), and in many other academic and professional networks related to tourism research. Dr. Gustke is a founding partner of Destination Analytics.

Alexa Gifford – Young Strategies

Online Survey Supervision, Data Tabulation and Analysis

25 years of marketing and management experience including destination marketing and facility management. Gifford's experience most recently includes serving as the Executive Director of a start-up wine and culinary center in which she oversaw the creation and success of educational programs that developed partnerships with producers, vendors, farmers, winery owners and educational institutions across New York State. Prior to that Gifford was president of a 14-county regional tourism association in the Finger Lakes region of New York. While at this association, Gifford successfully lead the development and implementation of research based marketing and sales programs for this diversified vacation destination. Alexa's role on the team is to work closely with constituents within the destination to collect data, monitor research return rates and data accuracy as well as assisting in the compilation of final report data. Gifford lives with her family in Penn Yan, New York.

Winter 2014 Visitor Respondents

State/city											
WISCONSIN – 15.9%		ILLINOIS (cont.)		OHIO(cont.)		IOWA(cont.)		KENTUCKY – 3.4%		MASSACHUSETTS– 0.7%	
Holmen	2	Glen Carbon	1	Chillicothe	1	Washington	1	Benton	2	Granby	1
Nekoosa	2	Hamel	1	Cincinnati	1	Wayland	1	Louisville	2	MARYLAND – 0.7%	
Appleton	1	Hampshire	1	Columbus	1	Woodbine	1	Lexington	1	Joppa	1
Brillion	1	Maryville	1	Hamilton	2	FLORIDA – 4.8%		MISSOURI – 3.4%		MAINE – 0.7%	
Brookfield	1	Mattoon	1	Middletown	2	Ocala	2	Festus	1	Windham	1
Eau Claire	1	OSWEGO	1	Morrow	1	Tallahassee	2	Kirksville	1	NORTH DAKOTA – 0.7%	
Green Bay	1	Peoria	1	New London	1	Crawfordville	1	Linneus	1	Wahpeton	1
Kaukauna	1	Tinley Park	1	Wadsworth	1	Orange City	1	Nixa	1	NEBRASKA – 0.7%	
Menomonee Falls	1	Tuscola	1	MINNESOTA – 7.6%		Panama City Beach	1	St. Louis	1	Lincoln	1
Monroe	1	MICHIGAN – 10.3%		Anoka	1	NEW YORK – 4.8%		ALABAMA – 2.8%		NEW MEXICO – 0.7%	
Neenah	1	Jenison	2	Cushing	1	Bethpage	1	Birmingham	1	Albuquerque	1
North Prairie	1	Bloomfield Hills	1	Duluth	1	Canisteo	1	Mobile	1	PENNSYLVANIA – 0.7%	
Oregon	1	Calumet	1	Gilbert	1	Hornell	1	Prattville	1	York	1
Plover	1	Canton	1	Hastings	1	Jamestown	1	Prichard	1	UTAH – 0.7%	
Sherwood	1	Detour Village	1	Maplewood	1	Mechanicville	1	NEW HAMPSHIRE – 1.4%		Layton	1
Sun Prairie	1	Eastport	1	Minneapolis	1	New York	1	Manchester	1	WASHINGTON – 0.7%	
Three Lakes	1	Kentwood	1	Northfield	1	Ogdensburg	1	Merrimack	1	Kingston	1
Van Dyne	1	Kewadin	1	Saint Joseph	1	GEORGIA – 4.1%		TENNESSEE – 1.4%			
Watertown	1	Marquette	1	St Paul	1	Martinez	2	Hixson	1		
Waukesha	1	Mason	1	Waseca	1	Atlanta	1	Rockwood	1		
Wausau	1	Nunica	1	IOWA – 6.9%		Elberton	1	TEXAS – 1.4%			
ILLINOIS – 10.3 %		Petoskey	1	Bettendorf	1	Fayetteville	1	Kingwood	1		
Cairo	1	Trufant	1	Council Bluffs	1	Newnan	1	McKinney	1		
Chicago	1	Westland	1	Forest City	1	INDIANA – 4.1%		CONNECTICUT – 0.7%			
Chillicothe	1	OHIO – 9.0%		Lansing	1	Nashville	2	New Hartford	1		
Coal City	1	Apple Creek	1	Lone Tree	1	Brazil	1	DELAWARE – 0.7%			
Downers Grove	1	Beavercreek	1	Sergeant Bluff	1	Cloverdale	1	Millsboro	1		
Fairview	1	Chesterland	1	Spencer	1	Indianapolis	1	LOUISIANA – 0.7%			
						Saint Anthony	1	Violet	1		

Spring 2014 Visitor Respondents

State/city																
GEORGIA – 19.1%		GEORGIA (cont.)		TENNESSEE (cont.)		INDIANA – 7.1%		MICHIGAN(cont.)		ALABAMA(cont.)		OHIO(cont.)		KENTUCKY – 5.9 %		
Atlanta	6	Eatonton	1	Afton	1	Indianapolis	5	DeWitt	1	Hanceville	1	Pickerington	1	Louisville	4	
Decatur	3	Fayetteville	1	Bartlett	1	Columbia City	2	Eastpointe	1	Homewood	1	Springboro	1	Calvert City	2	
McDonough	3	Forsyth	1	Chapmansboro	1	Fort Wayne	2	Frankfort	1	Huntsville	1	Strongsville	1	Bremen	1	
Powder Springs	3	Hiram	1	Clarksville	1	Anderson	1	Grand Rapids	1	Jacksonville	1	Toledo	1	Corydon	1	
Acworth	2	Jefferson	1	Cleveland	1	Angola	1	Holland	1	Madison	1	West Carrollton	1	Fordsville	1	
Albany	2	Kennesaw	1	Mt. Juliet	2	Atlanta	1	Kalkaska	1	Millbrook	1	Wilmington	1	Fort wright	1	
Braselton	2	LaGrange	1	Columbia	1	Brazil	1	Livonia	1	Mt. Olive	1	Winchester	1	Glasgow	1	
Byron	2	Lawrenceville	1	Cordova	1	Covington	1	Macomb	1	Opelika	1	Wooster	1	Kevil	1	
Cartersville	2	Leesburg	1	Cross plains	1	Evansville	1	Montrose	1	Opp	1	WISCONSIN – 6.1%	Kuttawa	1		
Columbus	2	Lithonia	1	Cwood	1	Ferdinand	1	Mount Morris	1	Phenix City	1	Waukesha	3	Lagrange	1	
Cumming	2	Loganville	1	Gallatin	1	Fishers	1	Mt Pleasant	1	Talladega	1	Kenosha	2	Lancaster	1	
Gainesville	2	Luthersville	1	Gates	1	Frankfort	1	New Lothrop	1	Trussville	1	Oconomowoc	2	Morganfield	1	
Lithia Springs	2	Marietta	1	Goodlettsville	1	Gary	1	Pontiac	1	Valhermoso Spr.	1	Cross Plains	1	Owensboro	1	
Newnan	2	Martinez	1	Goodspring	1	Hanover	1	Rosebush	1	Valley	1	Depere	1	Phyllis	1	
Snellville	2	Meansville	1	Hermitage	1	Jeffersonville	1	Scottville	1	OHIO – 6.1%	Green Bay	1	Shepherdsville	1		
Watkinsville	2	Milledgeville	1	Jasper	1	Lafayette	1	St. Johns	1	Fairfield	2	Greenfield	1	Smithland	1	
Allenhurst	1	Monroe	1	Joelton	1	Newburgh	1	Troy	1	Zanesville	2	Kaukauna	1	Trenton	1	
Alpharetta	1	Moultrie	1	Lavergne	1	Osceola	1	Waterford	1	Andover	1	Lisbon	1	Versailles	1	
Blakely	1	Norcross	1	Lenoir city	1	Richland	1	Williamston	1	Bethel	1	Menasha	1	West Pad	1	
Camilla	1	Peachtree city	1	Lyles	1	Shirley	1	ALABAMA – 6.6%	Camden	1	Mequon	1	Wilder	1		
Canton	1	Quitman	1	Manchester	1	Terre Haute	1	Enterprise	2	Centerville	1	Oak Creek	1			
Chickamauga	1	Stone mountain	1	Mcdonald	1	Tipton	1	Montgomery	2	Chardon	1	Oshkosh	1			
Colbert	1	Thomasville	1	Memphis	1	West Lafayette	1	Titus	2	Cincinnati	1	Port Washington	1			
Colquitt	1	Thomson	1	Murfreesboro	1	MICHIGAN – 6.8%	Grandville	2	Alexander City	1	Columbus	1	Racine	1		
Commerce	1	Tifton	1	Nunnely	1	Hudsonville	2	Athens	1	Dublin	1	Rhineland	1			
Dacula	1	Tyrone	1	Parsons	1	St. Joseph	2	Atmore	1	Hamilton	1	River Falls	1			
Dallas	1	TENNESSEE – 8.6%	Pinson	1	Seymour	1	Ada	1	Auburn	1	Lakewood	1	Sullivan	1		
Dawson	1	Antioch	2			Clarkston	1	Fort Payne	1	Maumee	1	Two Rivers	1			
Dublin	1	Hendersonville	2			Comstock Park	1	Grady	1	Middletown	1	Verona	1			
		Sevierville	2							Painesville	1	West Bend	1			

Spring 2014 Visitor Respondents

State/city													
ILLINOIS – 5.4%		MISSOURI – 4.6%		TEXAS – 3.2%		LOUISIANA – 2.4%		ARKANSAS – 1.2%		MARYLAND – 0.7%			
Chicago	3	Adrian	1	Stafford	2	Belle chase	1	Conway	1	Dunkirk	1		
Washington	2	Ballwin	1	Arlington	1	Lacombe	1	Gosnell	1	Joke	1		
Antioch	1	Birch Tree	1	carrollton	1	Marksville	1	Paris	1	White Hall	1		
Canton	1	Chesterfield	1	Dallas	1	Marrero	1	Sherwood	1	NORTH CAROLINA – 0.7%	ARIZONA – 0.2%		
Coal city	1	Columbia	2	Frisco	1	Metairie	1	Siloam Springs	1	Charlotte	1		
Granite city	1	Ellsinore	1	Gainesville	1	New Orleans	2	IOWA – 1.2%	Clayton	1	COLORADO – 0.2%		
Johnsburg	1	Ferguson	1	Garland	1	Shongaloo	1	Marion	2	Maiden	1		
Kankakee	1	imperial	1	Irving	1	Watson	1	Ankeny, IA	1	NEW YORK – 0.7%	MASSACHUSETTS – 0.2%		
Kildeer	1	Joplin	1	Mckinney	1	West Monroe	1	Ely	1	Holland	1		
Matteson	1	Lees summit	1	Mineral Wells	1	MISSISSIPPI – 1.7%	Muscatine	1	New York	1	MAINE – 0.2%		
Moline	1	Liberty	1	Richardason	1	Jayess	1	PENNSYLVANIA – 1.2%	Pomona	1	NEVADA – 0.2%		
Momence	1	O'Fallon	1	Waco	1	Madison	1	Pittsburgh	2	OKLAHOMA – 0.7%	RHODE ISLAND – 0.2%		
Murphysboro	1	Rolla	1	FLORIDA – 2.9%	Tallahassee	4	Magee	1	Edmond	1	Mapleville	1	
Naperville	1	Saint Charles	1	Bradenton	1	Okolona	1	Ellwood City	1	Tulsa	2		
Neoga	1	St. James	1	Gulf breeze	1	Ridgeland	1	Harrisburg	1	Jefferson Twp.	1	NEBRASKA – 0.5%	
Peoria	1	St. Louis	2	Lauderdale by sea	1	Shuqualak	1	SOUTH CAROLINA – 1.0%	Columbia	1	FREMONT	1	
Port Byron	1	West Plains	1	Margate	1	Vicksburg	1	Columbia	1	Easley	1	Lincoln	1
Princeton	1			Palm harbor	1	MINNESOTA – 1.5%	Bloomington	1	Lancaster	1	NEW HAMPSHIRE – 0.5%		
Wood River	1			Panama city	1	Burnsville	1	Six Mile	1	Nashua	1	UTAH – 0.5%	
				Stuart	1	Maple grove	1	KANSAS – 0.7%	Olathe	2	Salt Lake City	2	
				Wildwood	1	Rochester	1	Derby	1	VIRGINIA – 0.5%	Chesapeake	1	
						Saint Peter	1			Lake Frederick			
						Woodbury	1						

Summer 2014 Visitor Respondents

State/city															
<u>GEORGIA – 16.7%</u>	Dalton	2	Carrollton	1	Leesburg	1	Trion	1	Millbrook	2	Gordo	1	Red Bay	1	
Atlanta	7	Doerun	2	Cave spring	1	Leslie	1	Tunnel hill	1	Odenville	2	Greensboro	1	Reform	1
Columbus	6	Eatonton	2	Cedartown	1	Lithonia	1	Villa Rica	1	Oxford	2	Guntersville	1	Roanoke	1
Newnan	6	Ellenwood	2	Centerville	1	Locust grove	1	Waycross	1	Phenix City	2	Haleyville	1	Scottsboro	1
Douglasville	5	Jasper	2	Chatsworth	1	Lyerly	1	Winston	1	Pike Road	2	Hartselle	1	Selma	1
Midland	4	Manchester	2	Clarkesville	1	Madison	1	<u>ALABAMA – 12.9%</u>	Pinson	2	Hazel Green	1	Sheffield	1	
Ringgold	4	Marietta	2	Claxton	1	McDonough	1	Birmingham	8	Pleasant Grove	2	Headland	1	Springville	1
Rome	4	Milledgeville	2	Cleveland	1	Menlo	1	Montgomery	5	Riverside	2	Helena	1	Sterrett	1
Cartersville	3	Norcross	2	Cochran	1	Monroe	1	Decatur	4	smiths	2	Hokes Bluff	1	Stevenson	1
Conyers	3	Powder springs	2	Cornelia	1	Monticello	1	Huntsville	4	Sylacauga	2	Hoover	1	Toney	1
Cumming	3	Royston	2	Dahlonega	1	Oxford	1	Florence	3	Talladega	2	Horton	1	Trussville	1
Decatur	3	Snellville	2	Douglas	1	Perry	1	Gadsden	3	Alabaster	1	Hueytown	1	Trussvillee	1
Eastman	3	Suwanee	2	Dublin	1	Pine mtn.	1	Jasper	3	Auburn	1	Killen	1	Tuscaloosa	1
Hampton	3	Warner robins	2	Dunwoody	1	Preston	1	Leeds	3	axis	1	Kimberly	1	Tuscumbia	1
Kennesaw	3	Williamson	2	East point	1	Rex	1	Oneonta	3	Bham	1	Lafayette	1	Wadley	1
Lagrange	3	Woodbury	2	Epworth	1	Rockmart	1	Opelika	3	BOAZ	1	Lanett	1	Wedowee	1
Lawrenceville	3	Woodstock	2	Evans	1	Roswell	1	Prattville	3	Chelsea	1	Leighton	1	<u>TENNESSEE – 12.4%</u>	
Loganville	3	Adairsville	1	Fayetteville	1	Savannah	1	Warrior	3	Cleveland	1	Lowndesboro	1	Nashville	13
Macon	3	Aristarchus	1	Flowery branch	1	Scottdale	1	Wetumpka	3	Cordova	1	Loxley	1	Memphis	10
Stone Mountain	3	Athens	1	Forest park	1	Senoia	1	Athens	2	Cottdonale	1	Luverne	1	Murfreesboro	7
Acworth	2	Auburn	1	Forsyth	1	Silver creek	1	Calera	2	Crossville	1	Lynn	1	Chattanooga	5
Albany	2	Baxley	1	Ft Oglethorpe	1	Smyrna	1	Dothan	2	Dora	1	McCall	1	Goodlettsville	4
Alpharetta	2	Blackshear	1	Ft. Benning	1	Social circle	1	Enterprise	2	Elmore	1	Mobile	1	Bartlett	3
Augusta	2	Blairsville	1	Grantville	1	St. Marys	1	Fairfield	2	Epes	1	Mt. Olive	1	Clarksville	3
Ball ground	2	Bonaire	1	Grayson	1	Stone Mtn.	1	Fayette	2	Falkville	1	Northport	1	Greenbrier	3
Bogart	2	Boneville	1	Griffin	1	Summerville	1	Geneva	2	Floral	1	Owens Cross Rds.	1	Jackson	3
Byron	2	Box springs	1	Hiram	1	Sylvester	1	Graham	2	Fort Payne	1	Pell City	1	Knoxville	3
Chickamauga	2	Bremen	1	Hogansville	1	Tallapoosa	1	Harvest	2	Fultondale	1	Phil Campbell	1	Lebanon	3
Covington	2	Buford	1	Jackson	1	Thomaston	1	Heflin	2	Gardendale	1	Pine Hill	1	Springfield	3
Dallas	2	Butler	1	Jefferson	1	Tifton	1	Madison	2	Glencoe	1	Ranburne	1	Athens	2

Summer 2014 Visitor Respondents

State/city		State/city		State/city		State/city		State/city		State/city					
TENNESSEE(cont.)		TENNESSEE(cont.)		TENNESSEE(cont.)		KENTUCKY(cont.)		KENTUCKY(cont.)		KENTUCKY(cont.)		MISSOURI(cont.)		MISSOURI(cont.)	
Collierville	2	Eads	1	Newport	1	Frankfort	3	Greensburg	1	Shepherdsville	1	Boonville	1	Wentzville	1
Corryton	2	East Ridge	1	Oak Ridge	1	Bowling Green	2	Greenville	1	Somerset	1	Carthage	1	Winfield	1
Dayton	2	Elizabethton	1	Old hickory	1	Central city	2	Henderson	1	Tompkinsville	1	Columbia	1	Wright city	1
Fayetteville	2	Elkton	1	Oliver Springs	1	Corbin	2	Irvine	1	White plains	1	Crystal city	1	TEXAS- 6.4%	
Kingsport	2	Englewood	1	Ooltewah	1	Franklin	2	Jamestown	1	Williamstown	1	Desloge	1	Houston	7
Medina	2	Franklin	1	Parrottsville	1	Glasgow	2	Kirksey	1	Wilmore	1	Everton	1	Arlington	4
Pleasant View	2	Gainesboro	1	Parsons	1	Manchester	2	Langley	1	Windsor	1	Festus	1	Fort worth	3
Shelbyville	2	Gallatin	1	Pelham	1	Monticello	2	Lawrenceburg	1	MISSOURI- 6.9%	Fredericktown	1	Dallas	3	
Smyrna	2	Gatlinburg	1	Pikeville	1	Paducah	2	Lebanon	1	St. Louis	9	Gainesville	1	Wichita Falls	2
Sparta	2	Greenbriar	1	Pleasantville	1	Paint Lick	2	Lewisport	1	Cape Girardeau	3	Henley	1	Tomball	2
Tulahoma	2	Hendersonville	1	Portland	1	Scottsville	2	London	1	Imperial	3	Jackson	1	Texarkana	2
Antioch	1	Hixson	1	Pulaski	1	Alexandria	1	Magnolia	1	Jefferson city	3	Kearney	1	Spring	2
Ardmore	1	Johnson City	1	Ridgely	1	Alvaton	1	Marion	1	Kansas city	3	Ladonia	1	Katy	2
Ashland City	1	Kingston Springs	1	Rutledge	1	Bedford	1	Mayfield	1	Ofallon	3	Lagrange	1	Garland	2
Bartlett, TN.	1	Kodak	1	Savannah	1	Bulan	1	Maysville	1	Springfield	3	Leadington	1	Ennis	2
Bradford	1	La Vergne	1	Sewanee	1	Burlington	1	Mckee	1	Ballwin	2	Marshfield	1	Willow park	1
Calhoun	1	Lavergne	1	Signal Mountain	1	Cadiz	1	Means	1	Farmington	2	O'fallon	1	Tyler	1
Charleston	1	Luttrell	1	Soddy Daisy	1	Campbellsville	1	Mt. Washinton	1	Fenton	2	Ozark	1	Tuleta	1
Charlotte	1	Madison	1	Spring Hill	1	Catlettsburg	1	Murray	1	Florissant	2	Parkville	1	The Woodlands	1
Chattanooga	1	Madisonville	1	Talbott	1	Cecilia	1	Olmstead	1	Independence	2	Pilot knob	1	Taft	1
Cleveland	1	Martin	1	Unicoi	1	Dawson Springs	1	Owensboro	1	Joplin	2	Poplar bluff	1	Sherman	1
Columbia	1	MARYVILLE	1	Wartrace	1	East bernstadt	1	Paris	1	Maryland heights	2	Potosi	1	San Antonio	1
Cookeville	1	Maynardville	1	Wildersville	1	Elizabethtown	1	Pikeville	1	Pevely	2	Rocky mount	1	Sachse	1
Cordova	1	McMinnville	1	Woodlawn	1	Erlanger	1	Richmond	1	Saint Charles	2	Saint louis	1	Royse City	1
Crossville	1	Monteagle	1	KENTUCKY - 8.0%	E-town	1	Rochester	1	Troy	2	Sedalia	1	Round Rock	1	
Dover	1	Moscow	1	Louisville	14	Fort Thomas	1	Salvisa	1	Union	2	Strafford	1	Ropesville	1
Dyersburg	1	Mount Juliet	1	Lexington	5	Fort Wright	1	Sebree	1	Ashland	1	Waynesville	1	Riesel	1
		Munford	1	Owensboro	4	Georgetown	1	Shelbyville	1	Blue springs	1	Wemtzville	1	Richmond	1

Summer 2014 Visitor Respondents

State/city															
TEXAS(cont.)	TEXAS(cont.)	Hillsboro	1	OHIO(cont.)	ILLINOIS(cont.)	ILLINOIS(cont.)	INDIANA(cont.)	LOUISIANA(cont.)							
Plano	1	Burleson	1	Ironton	1	West Milton	1	Gurnee	1	Smithton	1	Frankfort	1	Berwick	2
Orange	1	Brenham	1	Kent	1	Xenia	1	Hardin	1	Springfield	1	Franklin	1	Choudrant	2
North Richland	1	Beaumont	1	Lagrange	1	Zanesville	1	Harrisburg	1	Staunton	1	Jamestown	1	Denham springs	2
New Braunfels	1	Azle	1	Maineville	1	ILLINOIS – 5.6%		Herrin	1	Stonefort	1	Jasper	1	Gonzales	2
Nederland	1	Allen	1	Mantua	1	Granite city	4	Highland	1	Troy	1	Jeffersonville	1	New Orleans	2
Lufkin	1	OHIO – 5.7		Marion	1	Chicago	2	Hinsdale	1	Tuscola	1	Kokomo	1	Pride	2
Lubbock	1	Cincinnati	4	Marysville	1	East Peoria	2	Huntley	1	West Point	1	Laketon	1	Thibodaux	2
Longview	1	Columbus	4	Mason	1	Homer Glen	2	Ingleside	1	Wolf Lake	1	Madison	1	Zachary	2
Lewisville	1	Hamilton	3	Maumee	1	Marion	2	Lakewood	1	Woodridge	1	Martinsville	1	Addis	1
Levelland	1	Pataskala	3	Miamisburg	1	Albion	1	Lockport	1	INDIANA – 4.5%		Medora	1	Anacoco	1
La Porte	1	Dayton	2	Midland	1	Alton	1	Louisville	1	Indianapolis	4	Mooreville	1	Baker	1
Kingwood	1	Harrison	2	Millbury	1	Andalusia	1	Machesney Park	1	New Albany	4	Nashville	1	Bastrop	1
Jacksonville	1	Middletown	2	Monroe	1	Belleville	1	Mackinaw	1	Muncie	3	New castle	1	Baton rouge	1
Irving	1	Springboro	2	Mount Vernon	1	Brighton	1	Medinah	1	Avon	2	Newburgh	1	Broussard	1
Humble	1	Amelia	1	New Albany	1	Centralia	1	Milan	1	Columbus	2	Noblesville	1	Eunice	1
Holly lake ranch	1	Batavia	1	New Lebanon	1	Champaign	1	Mongtomery	1	Evansville	2	Orleans	1	Gloster	1
Hallettsville	1	Blanchester	1	New Richmond	1	Charleston	1	Mount Vernon	1	Tell City	2	Paoli	1	Gretna	1
Greenville	1	Brunswick	1	Newark	1	Coal Valley	1	Muddy	1	Amderson	1	Rockport	1	Houma	1
Georgetown	1	Carroll	1	Orrville	1	Cobden	1	Murphysboro	1	Austin	1	Salem	1	Jefferson	1
Ft hood	1	Centerville	1	Piqua	1	Concord	1	Naperville	1	Bedford	1	Schererville	1	Jennings	1
Flower mound	1	Circleville	1	Portsmouth	1	Dixon	1	Nashville	1	Bloomington	1	Seymour	1	Jonesville	1
East Bernard	1	Cleveland	1	Reynoldsburg	1	Du Quoin	1	New Berlin	1	Cedar Lake	1	Valparaiso	1	Lafayette	1
Detroit	1	Defiance	1	Saint Paris	1	Dunlap	1	Oak Lawn	1	Charlestown	1	W Terre Haute	1	Marrero	1
Denton	1	Doylestown	1	South point	1	East Dundee	1	Orion	1	Crawfordsville	1	Washington	1	Maurepas	1
Decatur	1	Eaton	1	Springfield	1	Elk Grove Village	1	Oswego	1	Ellettsville	1	West Lafayette	1	Metairie	1
Coppell	1	Englewoo	1	Tipp city	1	Flora	1	Romeoville	1	English	1	LOUISIANA – 3.8%		Monroe	1
College station	1	Fairborn	1	Toledo	1	Forsyth	1	Salem	1	Fishers	1	Sulphur	3	Natchitoches	1
Cedar park	1	Grove city	1	Washington c h	1	Galatia	1	Sherman	1	Fort Wayne	1	Baton rouge	2	New Iberia	1
Cedar hill	1	Groveport	1												

Summer 2014 Visitor Respondents

State/city								
LOUISIANA(cont.)		ARKANSAS(cont.)	MISSISSIPPI(cont.)	NORTH CAROLINA	OKLAHOMA(cont.)	SOUTH CAROLINA	WISCONSIN- 0.6%	MASSACHUSETTS -
Pearl river	1	Pea Ridge	1	(cont.)	Sallisaw	(cont.)	Milwaukee	0.1%
Pollock	1	Pocahontas	1	Murphy	Sand Springs	Liberty	Antigo	Amesbury
Port Allen	1	Russellville	1	Reidsville	Yukon	Simpsonville	La Crosse	1
Scott	1	Searcy	1	Robbinsville	PENNSYLVANIA-	IOWA - 0.9%	Stoughton	MAINE- 0.1%
Shongaloo	1	Taylor	1	Shelby	1.1%	Cedar Rapids	Two Rivers	1
West Monroe	1	Texarkana	1	Sylva	Belle Vernon	Ottumwa	Waubeka	NEW JERSEY- 0.1%
ARKANSAS- 3.3%		Trumann	1	Waxhaw	Bellefonte	Bettendorf	1	Middlesex
Little Rock	4	West Fork	1	Winston Salem	Canonsburg	Columbus Junction	1	NEW MEXICO - 0.1%
Hot Springs	3	West Helena	1	Zionville	Cecil	Conrad	1	Deming
Charleston	2	MISSISSIPPI - 2.0%	Crawfordville	1	Cheswick	Council Bluffs	1	
Crossett	2	Olive branch	3	Gainesville	1	Davenport	1	
Dewitt	2	Columbus	2	Hudson	1	Marengo	1	
Maumelle	2	Southaven	2	Lake city	1	Red Oak	1	MINNESOTA- 0.2%
North Little Rock	2	Bay saint louis	1	Lake Mary	1	MARYLAND- 0.7%	Bluffton	1
Ashdown	1	Brandon	1	Midway	1	Catonsville	1	Brownsville
Benton	1	Glen	1	Naples	1	Cheltenham	1	Farmington
Berryville	1	Greenwood	1	Orlando	1	Damascus	1	WEST VIRGINIA -
Bismarck	1	Gulfpot	1	Satellite beach	1	Forest Hill	1	0.2%
Blytheville	1	Hernando	1	Spring hill	1	MARYLAND	Cross Lanes	1
Cabot	1	Holly springs	1	Zellwood	1	Glen Arm	1	Duck
Calico	1	Jackson	1	NORTH CAROLINA-	Wellsville	Greenbelt	1	Parkersburg
Green Forest	1	Lucedale	1	1.3%	OKLAHOMA - 1.1%	Upper Marlboro	1	CALIFORNIA - 0.2%
Heber Springs	1	Madison	1	Waynesville	2	White Hall	1	Asdf
Jonesboro	1	Meridian	1	Weaverville	2	MICHIGAN- 0.7%	Canton	2
Magazine	1	Morton	1	Cherryville	1	Allen Park	1	WASHINGTON, DC -
Magnolia	1	Ocean springs	1	Clyde	1	Clinton Township	1	0.2%
Marion	1	Pearl	1	Fayetteville	1	Grand Blanc	1	Arizona- 0.1%
Omaha	1	Picayune	1	Jacksonville	1	Madison Heights	1	IDAHO - 0.1%
				Oklaoma City	1	Negaunee	1	Coeurdalene
				Owasso	1	White Lake	1	
				Purcell	1			



Fall 2014 Visitor Respondents

State/city		State/city		State/city		State/city		State/city		State/city			
GEORGIA – 24.9%		GEORGIA(cont.)		GEORGIA(cont.)		ALABAMA (cont.)		ALABAMA (cont.)		TENNESSEE (cont.)		KENTUCKY(cont.)	
Atlanta	4	Cairo	1	Pooler	1	Opelika	2	Pelham	1	Covington	1	Barbourville	1
Dallas	4	Carrollton	1	Rex	1	Ozark	2	Salem	1	Estill Springs	1	Bowling Green	1
Marietta	4	Columbus	1	Riverdale	1	Prattville	2	Sardis	1	Goodlettsville	1	Central City	1
Woodstock	3	Conyers	1	Rossville	1	Alabaster	1	Semmes	1	Greeneville	1	Dawson Springs	1
Acworth	2	Cornelia	1	Rutledge	1	Ashford	1	Springville	1	Hermitage	1	Eddyville	1
Albany	2	Dalton	1	Sandy Springs	1	Ashville	1	Sumiton	1	Johnson City	1	Elizabethtown	1
Americus	2	Evans	1	Sautee-nacoochee	1	Athens	1	Sylacauga	1	Lebanon	1	Frankfort	1
Buford	2	Fayetteville	1	Smyrna	1	Bessemer	1	Trussville	1	Madison	1	Franklin	1
Calhoun	2	Flowery Branch	1	Snellville	1	Calera	1	Weogufka	1	Madisonville	1	Hardinsburg	1
Cartersville	2	Fortson	1	Statesboro	1	Columbia	1	TENNESSEE – 11.9%		Maryville	1	Henderson	1
Covington	2	Gordon	1	Stockbridge	1	Elba	1	Murfreesboro	3	Memphis	1	Hickory	1
Cumming	2	Griffin	1	Summerville	1	Eufaula	1	Clarksville	2	Millington	1	Jamestown	1
Douglasville	2	Hampton	1	Suwanee	1	Gordo	1	Dickson	2	Morristown	1	Kentucky	1
Duluth	2	Hiram	1	Thomaston	1	Grant	1	Jackson	2	Mount Juliet	1	Lawrenceburg	1
Fort Gaines	2	Hogansville	1	Tucker	1	Harvest	1	Knoxville	2	Mt Juliet	1	Lexington	1
Lagrange	2	Hoschton	1	Tyrone	1	Hoover	1	Sweetwater	2	Mt. Carmel	1	Madisonville	1
Lawrenceville	2	Jasper	1	Warner Robins	1	Hueytown	1	White House	2	Munford	1	Mayfield	1
Leesburg	2	Jonesboro	1	West Point	1	Jasper	1	Adamsville	1	Nashville	1	Murray	1
Moultrie	2	Lithonia	1	Williamson	1	Locust Fork	1	Antioch	1	Newport	1	Nortonville	1
Newnan	2	Locust Grove	1	Winder	1	Luverne	1	Arlington	1	Old Hickory	1	Owensboro	1
Powder Springs	2	Loganville	1	ALABAMA – 15.8%		Madison	1	Atoka	1	Ooltewah	1	Prestonsburg	1
Roswell	2	Lumpkin	1	Mobile	5	Mccalla	1	Baxter	1	Sevierville	1	Shephersville	1
Villa Rica	2	Luthersville	1	Dothan	4	Millbrook	1	Belvidere	1	Springfield	1	Somerset	1
Auburn	1	Madison	1	Enterprise	4	Montevallo	1	Bradyville	1	Trenton	1	Williamsburg	1
Ball Ground	1	Mcdonough	1	Huntsville	3	Mount Olive	1	Castalian Springs	1	Westmoreland	1		
Blakely	1	Moreland	1	Montgomery	3	New Brockton	1	Centerville	1	KENTUCKY – 7.6%			
Bowdon	1	Morrow	1	Phoenix City	3	Newton	1	Chattanooga	1	Louisville	4		
Bremen	1	Musella	1	Auburn	2	Northport	1	Christiana	1	Shepherdsville	3		
Bridgeboro	1	Perry	1	Birmingham	2	Notasulga	1	Cleveland	1	Paducah	2		
		Pine Mountain	1	Cullman	2								

Fall 2014 Visitor Respondents

State/city			State/city			State/city			State/city			State/city			State/city																																			
<u>FLORIDA – 5.9%</u>			<u>MISSOURI – 3.9%</u>			<u>ILLINOIS – 2.3%</u>			<u>MARYLAND – 1.1%</u>			<u>WISCONSIN – 0.9%</u>			<u>NEW JERSEY – 0.5%</u>																																			
Tallahassee	5	Charlestown	1	Poplar Bluff	2	Murphysboro	2	Baltimore	1	Milwaukee	2	Forked River	1	Bradenton	1	Crown Point	1	St. Louis	2	Bloomington	1	Bel Air	1	Bear Creek	1	Seabrook	1																							
Chipley	1	Elkhart	1	Arnold	1	Carlinville	1	Berlin	1	Sheboygan	1	<u>CALIFORNIA – 0.2%</u>	Clearwater	1	Greencastle	1	Ballwin	1	Hoffman Estates	1	Columbia	1	<u>ARKANSAS – 0.7%</u>	Bakersfield	1	Gainesville	1	Jeffersonville	1	Barnhart	1	Plainfield	1	Waldorf	1	Beebe	1	<u>DELAWARE – 0.2%</u>	Newark	1										
Glen Saint Mary	1	Lafayette	1	Chaffee	1	Rockford	1	<u>MISSISSIPPI – 1.1%</u>	Bellefontaine	1	Dover	1	<u>IOWA – 0.2%</u>	Green Cove Springs	1	Milan	1	Crystal City	1	Sterling	1	Hernando	1	<u>ARIZONA – 0.7%</u>	Adair	1	Havana	1	Richmond	1	Eureka	1	Westfield	1	Holly Springs	1	Benton	1	Flagstaff	1	<u>NEW YORK – 0.2%</u>									
Jacksonville	1	Rockport	1	Linn	1	Willow Hill	1	Houston	1	Queen Creek	1	<u>OKLAHOMA – 0.2%</u>	Kissimmee	1	Washington	1	Ozark	1	<u>MICHIGAN – 1.8%</u>	Detroit	1	Olive Branch	1	Tulsa	1	Leesburg	1	Wheaton	1	Saint Louis	1	Harrison Twp	1	Houston	1	Glendale	1	Rome	1	Melbourne	1	Yorktown	1	Saint Peters	1	Higgins Lake	1	<u>NORTH CAROLINA – 0.9%</u>	<u>SOUTH CAROLINA – 0.7%</u>	<u>WASHINGTON – 0.2%</u>
Orlando	1	<u>LOUISIANA – 3.9%</u>	St. Charles	1	Linwood	1	Bostic	1	Boiling Springs	1	Federal Way	1	Perry	1	New Orleans	3	Union	1	Dillsboro	1	Irmo	1	<u>WEST VIRGINIA – 0.2%</u>	Port St. Lucie	1	Baton Rouge	2	Wildwood	1	Rockwood	1	Southfield	1	Emerald Isle	1	Summerville	1	Huntington	1											
Quincy	1	Bossier City	1	<u>OHIO – 2.7%</u>	Cincinnati	3	Waynesville	1	<u>COLORADO – 0.5%</u>	Riviera Beach	1	Breaux Bridge	1	Bethel	1	Traverse City	1	<u>PENNSYLVANIA – 0.9%</u>	Sanford	1	Altoona	1	Dunmore	1	Castle Rock	1	<u>WASHINGTON, DC – 0.5%</u>	Spring Hill	1	Denham Springs	1	Chillicothe	1	Arlington	1	Pittsburgh	1	Trevoze	1	<u>KANSAS – 0.5%</u>										
Tequesta	1	Erath	1	Cridersville	1	<u>TEXAS – 1.6%</u>	Burleson	1	<u>VIRGINIA – 0.9%</u>	The Villages	1	Gretna	1	Heath	1	Fort Worth	1	Houston	1	Hilliard	1	Ashland	1	Colonial Heights	1	Roanoke	1	<u>MASSACHUSETTS – 0.5%</u>	Venice	1	Hammond	1	Hilliard	1	Houston	1	Nacogdoches	1	Wichita	1										
<u>INDIANA – 5.7%</u>	Indianapolis	5	Lafayette	1	Miamisburg	1	Nassau Bay	1	Ashland	1	Ozawkie	1	<u>WASHINGTON, DC – 0.5%</u>	Indianapolis	5	Lafayette	1	New Waterford	1	Colonial Heights	1	Wichita	1	<u>MASSACHUSETTS – 0.5%</u>	Evansville	3	Mandeville	1	Reynoldsburg	1	Santa Anna	1	Roanoke	1	Urbanna	1	Boston	1	Milford	1										
Alexandria	1	Prairieville	1	River Ridge	1					Boston	1		Amboy	1	River Ridge	1					Milford	1	Anderson	1																										
Bloomington	1												Bloomington	1																																				

2014 International Visitor Respondents

Winter

ONTARIO – 75.5%		QUEBEC – 10%	
Ottawa	4	Gatineau	2
Guelph	3	L ' Ile-bizard	1
Grand Bend	2	Magog	1
Windsor	2	NEW BRUNSWICK – 6.1%	
Arden	1	Harvey York Co	1
Barrie	1	Miramichi	1
Buckhorn	1	Moncton	1
Chatham	1	NOVA SCOTIA – 4.1%	
Clarence-rockland	1	Beaver Bank	1
Ennismore	1	Falmouth	1
Greater Sudbury	1	ALBERTA – 2.0%	
Grimsby	1	Edmonton	1
Kenora	1	INDIA – 2.0%	
Kingston	1	Nawanshahr	1
Leamington	1		
North Bay	1		
Orleans	1		
Penetanguishene	1		
Peterborough	1		
Pickering	1		
Port Dover	1		
Sarnia	1		
St. Thomas	1		
St.Catharines	1		
Stevensville	1		
Thunder Bay	1		
Waterloo	1		
Westmeath	1		
Wheatley	1		
Whitby	1		

Spring

ONTARIO – 82.1%	
Windsor	3
Miller Lake	2
Camlachie	1
Ottawa	1
Strathroy	1
Brampton	1
London	1
Baden	1
Barrie	1
Fort Erie	1
Fowler	1
Georgetown	1
Gorham	1
Guelph	1
Hastings	1
Kingston	1
Seguin	1
Sudbury	1
Wheatley	1
QUEBEC – 10.7%	
Gatineau	1
Trois-Rivieres	1
Montréal	1
MANITOBA – 7.4%	
Winnipeg	2

Summer

CANADA– 33.3%	
Toronto	2
Repentigny	1
BELGIUM – 22.2%	
Antwerp	1
Zulte	1
BRAZIL– 11.1%	
Jaguaré	1
ENGLAND – 11.1%	
Hexham	1
GERMANY – 11.1%	
Frankfurt/Main	1
UNITED KINGDOM – 11.1%	
Broughton Astley	1

Fall

CANADA– 75.0%	
Lewisporte	1
Niagara Falls	1
Port Dover	1
Richmond Hill	1
Uxbridge	1
Vaudreuil	1
SWEDEN – 12.5%	
Gothenburg	1
UNITED KINGDOM – 12.5%	
Swansea	1