ESRRPC 71-05





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# THE BEACH, THE BAY AND THE CITY:
# [illegible] AT THE CROSSROADS

Escambia - Santa Rosa Regional Planning Council

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# Escambia-Santa Rosa

JUN 30 1976

REGIONAL PLANNING COUNCIL

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# ABSTRACT

| | |
|---|---|
| TITLE: | **The Beach, The Bay, and The City: Tourism at the Crossroads** |
| AUTHOR: | Milo Smith & Associates |
| SUBJECT: | Document includes the following elements:<br>1. analysis of tourist market<br>2. examination of existing tourist facilities<br>3. study of tourist behavior and attitudes<br>4. discussion of the future of tourism<br>5. proposal for major tourist-entertainment-shopping complex |
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ABSTRACT:

1. **Analysis of Tourist Market.** This element relates the local tourist market to the overall metropolitan economy and to national trends in tourism and leisure time activities. Consideration was given to the impact of the Gulf Islands National Seashore which has been programmed for development in the area by the federal government. Projections of future tourists and related space needs are included.

2. **Existing Tourist Facilities.** An existing tourist facilities and potential tourist resources were analyzed in terms of location, capacity, quality and role in the local tourist market. Improvement actions were recommended for both primary and supportive facilities.

3. **Tourist Behavior and Attitudes.** A direct survey of local vacationers was conducted to determine place of origin, method of transportation, lodging types, expenditure patterns, and local features which attracted them. The questionnaires were analyzed to establish trends, and the implications of the major findings were stated in the report.

4. **Future of Tourism.** A short summary section, it drew together the salient factors affecting the future of local tourist development into a concise overview.

5. **Major Proposal.** The Pensacola area seriously needs a major tourist attraction to help stimulate its future development in this area. Quayside Pensacola is a proposed tourist-convention-entertainment complex to fill this need.

# THE BEACH, THE BAY, AND THE CITY:

# TOURISM AT THE CROSSROADS

**PREPARED FOR**

**Escambia-Santa Rosa Regional Planning Council**
**and**
**Pensacola-Escambia County Development Commission**
**803 North Palafox Street**
**Pensacola, Florida**

**MILO SMITH + ASSOCIATES, INC.**
**Planning Consultants**
**Tampa, Florida**

**May 1971**

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## PENSACOLA AREA TOURIST MARKET

### INTRODUCTION

Tourism has been an important segment of the Florida economy for many years. Since 1933, the number of vacationers visiting the state has increased from one million to a level of 22 million last year. Florida Trend reports the 19[illegible] state income from restaurants and hotels/motels alone to be $1.7 billion, much of which came from out-of-state vacationers.

With an established trend of larger paychecks, increasing amounts of money available for family recreation, and more leisure time, the potential demands for vacation-recreation opportunities in Florida are tremendous. In fact, recreation specialists have predicted that recreation demands at the end of this decade will be from 15 to 100 times greater than at present! Florida, because of its established image as a vacation center and its abundance of natural amenities, is in a position to capture an even larger share of the national market.

Based on this outstanding statewide potential, individual areas will be fiercely competing for their portion of the overall market. This market will be divided among many places on the basis of competitive spirit, available attractions, and successful promotion. In this type of business climate, it will be necessary for the Pensacola area to assess its strengths and short comings, improve upon its existing tourist attractions while developing new ones, and aggressively promote the area through all image-building media.

"Know thyself" is important to any area planning ways to accelerate its development. The Pensacola area is no exception. By thoroughly understanding both strengths and weaknesses an improvement program can be designed. An understanding of what is already developed, what areas need remedial work, and what resources can be developed to enhance tourist attractiveness is crucial to the formulation of this tourist development program.

The beginning step in understanding local conditions contributing to successful tourist activity is an analysis of the current tourist market and the historical trends that have shaped the present. In addition, this first step must include consideration of the factors which will form the future tourism potential in the Pensacola area. Later sections of this study will include analyses of existing and potential tourist facilities, tourist habits and behavior, and a thorough discussion of tourism potentials in the region.

### STATE AND NATIONAL TRENDS

**Hotel and Motel Development**

Since the hotel and motel business in the Pensacola area is oriented toward serving the needs of tourists, it is pertinent to consider a national market when investigating the local development potential of these activities. If the national market is strong, the local area can be expected to profit, but a national weakness in the factors affecting the activity of tourism can have pronounced effects in the Pensacola area. Local hotels and motels can be generally classified as resort developments catering to persons coming to the area for vacation and recreation purposes. Statistics from the latest tourist study conducted by the State of Florida reveal that 69 percent of all families visiting the state were interested in beaches and swimming facilities, 31 percent were interested in participating in outdoor recreation activities, and that 29 percent wished to view beautiful natural scenery. (Note that these figures total more than 100 percent because each person was permitted multiple responses on these questions.) However, for those coming by automobile, a major source of transportation to the Pensacola area, 74 percent participated in beach and swimming activities, 34 percent pursued other outdoor recreation efforts, and 36 percent enjoyed seeing beautiful natural scenery. All of these responses point toward a very decided economic importance of preserving the natural environment of the region.

In terms of national trends in the hotel and motel business, the US Department of Commerce estimates that combined hotel and motel receipts will reach $8.3 billion in 1970. This is an increase of greater than six percent over the 1969 total. Within this total, motels are expected to capture the increase in receipts, while hotels will merely hold their own against a tide of transition. This shift from development of major hotels in large cities to motels in smaller urban and suburban areas is a national trend, but it is even more highly pronounced in Florida where interest is focused upon enjoying and utilizing the natural environment. Total motel receipts of $4.4 billion in 1970 will reflect an increase from the 1969 level of more than 12 percent. The overall strength of the hotel-motel industry is further illustrated by the Department of Commerce statement, "Motel receipts are increasing at a faster rate than personal consumption expenditures for all services".

Fortune Magazine recently conducted a survey of motels to determine the economic soundness of the industry. It revealed that on a national scale motels were achieving higher occupancy rates than the older hotels in the central portion of large cities. Motels were experiencing annual occupancy rates of approximately 74 percent, as opposed to the annual occupancy rates of 60 percent inside the downtown areas. Closely related to this, the US Department of Commerce has released statistics revealing an overall increase in hotel-motel occupancy from 60 to 61 percent between 1963 and 1968. Even though the occupancy rate has increased only a small amount, the average sales for occupied room increased from $9.37 per occupant-night to $11.35 per occupant-night, an increase of 21 percent over the five-year time span. The abruptness of the jump in sales coupled with a lack of an accompanying increase in occupancy rates points to increases in the rate of hotel and motel rooms. Federal government economists see no slackening of this rate within the predictable future, and they project room rates as high as $50 a day in some resort-type hotel and motel facilities. On the other hand, the national average in increase sales can be assumed as a very minimum rate of increase in the local area. With increasing incomes and leisure time, additional travel can be expected in future years. This increased tourist activity also brings about an expansion in the potential market which can be reached by hotel and motel owners in the Pensacola area.

## TABLE I
## HOTEL OCCUPANCY AND ROOM SALES

| | 1963 | 1964 | 1965 | 1966 | 1967 | 1968 |
|---|---|---|---|---|---|---|
| Average sales per occupied room ($'s) | 9.37 | 9.53 | 9.71 | 10.03 | 10.59 | 11.35 |
| Rooms occupied (percent of total) | 60 | 61 | 62 | 62 | 61 | 61 |

Source: Office of Business Economics

Government economists feel that the boom in motel receipts should easily keep abreast with overall economic growth in the nation. These improved economic conditions should bear fruit to the local economy if the major economic resource is properly utilized. As families increase their income levels they tend to travel a great deal more because of larger amounts of leisure time and discretionary income. The Commercial Lodging Market, a comprehensive study of the hotel and motel industry prepared by Michigan State University, reports that more than 75 percent of those persons who stay in motels and hotels had family incomes exceeding $10,000 per year. That is, they were from the most affluent third of the United States population. This increasing affluence is further documented by Census Bureau figures which reveal that in 1950, 1.4 percent of all employed persons earned $10,000 per year or more and that in 1967 the share of all employed persons in this income range had increased to 10 percent. The number of families having annual incomes in excess of $10,000 per year was much larger because of the numerous multiple-worker families which have come into being during the past two decades. During the same time span, median income levels (half of the families above, and half below) for employed persons increased from $1,971 to $3,459. The Census Bureau further reported that in 1967 persons over 65 years of age, mainly retirees, had a median family income of $3,928 annually. Of the families in this age classification, approximately 26 percent earned more than $7,000 per year.

The following table illustrates the changing percent of travelers staying in commercial lodgings between 1963 and 1967. In 1963, 24 percent of all travelers stayed in commercial lodgings, while the remaining 76 percent stayed in other facilities. This rate had increased to 30.9 percent of all travelers by 1967, and the outlook is an increasing share of all travelers to be staying in commercial lodging facilities in the future. This trend has been greatly reinforced by mutual agreements between chain lodging corporations and national gasoline companies in which automobile credit cards are honored by the lodging establishments.

## TABLE II
## DISTRIBUTION BY TYPE OF LODGING PERSON-NIGHTS, 1963-67

| | 1963 | | 1967 | |
|---|---|---|---|---|
| | Distribution in Millions | Distribution in Percent | Distribution in Millions | Distribution in Percent |
| Commercial | 487.0 | 24 | 487.9 | 30.9 |
| With friends & relatives | 1,031.7 | 51 | 763.0 | 48.3 |
| Own cabin, boat, trailer, etc. | 184.6 | 9 | 213.8 | 13.5 |
| Other | 319.0 | 16 | 115.2 | 7.3[1] |
| Total | 2,022.3 | 100.0 | 1,579.9 | 100.0 |

[1] Includes 0.6 percent "no answer"

Source: Bureau of the Census

Most significantly, a shift is occurring in the method of transportation utilized by vacationers. Of the traveler-nights spent in commercial lodgings during 1963, automobile travelers accounted for 82 percent, while airplanes supplied only nine percent. By 1967, the automobile traveler still supplied only 70 percent of all traveler-nights in commercial lodging, but motels which traditionally appeal to the motorist market are still maintaining the preponderant share of total person-nights spent in commercial lodging by automobile travelers. Since the primary mode of access to the Pensacola area is by private auto, this trend has extreme significance to the local situation.

What is the monetary outlook for the commercial lodging industry? The national hotel industry had a total revenue of $2.5 billion in 1954, and by 1963, these revenues had increased to $4.7 billion. Growth continued to a $7.8 billion level in 1969. The beginning of this time span saw a very small portion of these total receipts being given to motels, but by 1969 the revenues collected by the motel segment of this industry had risen to a level equal to those of hotels. The future pattern indicates that motel operations will capture an increasing share of the total revenues accruing to the commercial lodging industry. Continuation of this growth by motels, if unchecked, should result in motel receipts being twice those for hotels by 1975. According to the Federal Department of Commerce, overall receipts for the commercial lodging industry should achieve a level of $11 to $12 billion by 1975. In short, the commercial lodging industry should continue to maintain a growth rate at the same pace with the economy as a whole. Thus, these national trends present a favorable picture for development of resort motel facilities in this area. The marked shift toward more resort motels and commercial lodging facilities situated outside central city areas of large urban complexes, all point toward an improved position of local commercial lodging activities. Of course, continued success and development of these business activities is closely tied to the attractiveness provided by the unspoiled natural environment.

At the state level, Florida Trend magazine completed an in-depth report of the "hospitality industry." The hospitality industry is generally viewed as the commercial lodging market. This report by the state's leading business magazine paints an optimistic picture for continued development of motel facilities in resort areas situated in waterfront locations.

> "Changing times in post World War II era created a whole new resort world in Florida. Starting in the early 1950's, construction spurted, in southeastern Florida particularly; air transportation, coupled with the unbelievable growth of auto transportation and air conditioning, transformed Florida almost completely within 20 years."

The report by Florida Trend stated that the hotel-motel industry in Florida grossed approximately $700,000,000 in 1969, making this industry one of the largest economic assets of the state. It was further reported in this study that the resources of the Florida hotel-motel industry are sufficient to provide over one-half million rooms on any given night. "That's enough rooms based on our projection to make possible accommodating the entire population of the United States over a year's period."

The Florida Trend study further points out that hotel-motel occupancy rates throughout the state average about 60 percent on an annual basis. This figure is roughly comparable to the national occupancy rate computed by the Office of

Business Economics of the United States Department of Commerce. However, it may be slightly lower than the national occupancy rates for the motel sector of the overall commercial lodging market. Notwithstanding this difference, the relatively high occupancy rate of Florida hotel and motel facilities points toward a reduction in intensity of serious seasonal fluctuations experienced in the latter part of the 40's and 50's. In fact, it is felt by many knowledgeable observers that the seasonal factor in all tourist-related activities has become less pronounced and will become an even smaller factor in future years.

The future of the entire tourist industry in Florida is also bright. From Florida Trend, "The overall visitor increase to Florida hotels-motels should be staggering by 1972." Since 1947, the number of tourists visiting Florida increased from 4.5 million to more than 20 million visitors at the present time, with an almost continuous rate of growth for each year involved. Once again, from Florida Trend: "Within the foreseeable future, the seasonal factor always haunting Florida's hotel-motel business in the past, will all but disappear. This disappearance by itself will lend stability to Florida's hotel-motel business such as it has never enjoyed before."

In terms of the type of commercial lodging facility most successful, today's emphasis is upon the resort operation. More than 40,000 new hotel and motel rooms have been added to the state's inventory since 1955, with most of these being classified as resorts catering to out-of-state tourists. The traveler has become much more sophisticated than the one visiting Florida late in the decade of the 40's. He has learned to expect high quality in construction and service and also facilities that were not even dreamed of by the wealthy winter visitor in 1950. The increasingly competitive nature of the tourist industry in the state is particularly pertinent to the local situation. Since the major amenity which attracts tourists to Florida is its clean, natural environment and the many activities related to this setting, the entire commercial lodging industry of the state is almost totally dependent upon maintaining this unspoiled environment.

Food Service Activities

US Department of Commerce economists report that $20.2 billion were spent in eating and drinkng places in 1965. They further report that the average annual percentage increase in restaurant and similar sales between 1965 and 1970 totaled 5.9 percent; however, this annual increase is expected to reach seven percent during the decade between 1965 and 1975. Significantly, the average annual percent increase in these sales were higher than that for all retail sales during both time spans. Between 1965 and 1970, total retail sales in the nation grew by 5.7 percent, and the expected annual change for the entire retail sector during the 1965-75 period is only 6.2 percent.

Since the sales in eating and drinking places include cocktail lounges, nightclubs, and hotel dining rooms as well as conventional restaurants, they constitute a reliable indicator of disposable discretionary income available for certain leisure time activities. In short, expenditures in eating and drinking places constitute a second major indicator of tourist activities.

On the state level, Census Bureau figures reveal that sales in eating and drinking places in Florida increased from $354 million in 1954 to $817 million in 1967, an increase of 131 percent. This represents an average annual increase of more than 10 percent and places the state food service industry in a significantly stronger position than the industry in the nation as a whole. During the same 1954-67 time span, the Pensacola area increased its restaurant sales by a healthy 47 percent.

**Outdoor Vacations**

Since the early fifties the American vacationer has increasingly used tents and other camping facilities for lodging during his annual trips. Florida parks, since 1965, have seen an increase of overnight visitors from 880,501 to 1,304,980. This 48 percent growth rate does not include the many other tourists staying in private campgrounds and travel trailer parks.

In terms of growth potential, the following quote from **Trends in Parks and Recreation** illustrates the importance of the camper in the national tourist market:

> The recreational vehicle industry is one of the fastest growing in the United States today. This skyrocketing surge of sales is affecting virtually every aspect of outdoor recreation. By recreational vehicles is meant almost everything on wheels in which people sleep—travel trailers, pick-up coaches, camping (tent) trailers and motorized homes.

Over one million recreational vehicles are in use at the present time. Sales of these vehicles have increased tremendously, from 15,400 in 1956 to 234,000 in 1965. The 1961-65 period was accompanied by a three-fold increase resulting in 1965 sales volume of $362 million. As incomes and leisure time continue to increase, a similar growth in this type of vacation activity can be expected. A large market for camping facilities and related tourist attractions is also part of this trend toward more outdoor vacations.

The outdoor vacationer will have a significant impact on other sectors of the tourist-related market. A market analysis conducted by the recreational vehicle industry revealed that over 60 percent of all families using recreational vehicles for vacation lodging had incomes of over $10,000 per year. This statistic contradicts the commonly held attitude that camping is closely associated with low and moderate-income families. In short, the family on an outdoor vacation represents an important portion of local tourist income.

The educational and occupational levels of outdoor vacationers also reinforce the value of these tourists in the local market. The interviews conducted in the industry survey revealed that 61 percent of those persons contacted had attended college, and 52 percent worked in white-collar occupations. Professionals, executives and managers comprised 35 percentage points of this white-collar component. Based on these statistics, it can be inferred that large numbers of camping families make up a big market potential for other local tourist attractions and for significant retail and service expenditures in the local economy.

The future of outdoor vacationers in the Florida tourist market is extremely bright. The attractiveness of the state to tourists coupled with its highly developed public park system places Florida in an unusually good position to capture an increasing share of the nation's rapidly expanding outdoor vacation market. Demands for more privately owned camping facilities will also increase, because state parks are presently overcrowded and cannot keep up with the explosive increases of campers visiting Florida from other states.

## LOCAL ECONOMIC TRENDS

A brief examination of overall economic trends will provide a valuable framework for more detailed analysis of the tourism sector. For this purpose, a quick tracing of population, employment, income, retailing, personal and professional services, and manufacturing will suffice. These six elements will illustrate the most pertinent patterns characteristic of local economic life. Later analysis will relate these overall trends to tourist activities.

The metropolitan area (Escambia and Santa Rosa Counties) population grew from a 1940 level of 90,752 to 237,995 at the time of the 1970 Census. Most of the people, then and now, live in the urbanized area in and around Pensacola. Projections prepared by the Escambia-Santa Rosa Regional Planning Council show the region's population increasing to 294,900 in 1980, 356,400 in 1990, and 424,200 in 2000. Within this very long-range view of anticipated population growth, it is important to realize that the population base is expected to increase by nearly one-fourth during the coming decade.

Regional employment levels increased from 27,385 to 61,657 workers during the two decades between 1940 and 1960. The 1970 level should exceed the 75,000 mark. If similar ratios between total population and the work force extend into future years, the employment levels for 1980 and 1990 should be at least 90,000 and 110,000, respectively. Within these overall historical growth trends; nondurable manufacture, personal and professional services, retail trade, construction, and public administration have shown the largest numerical gains. Military employment in the area has evidenced significant growth since build-ups began during World War II.

This period of population and employment growth has been accompanied by increases in individual incomes in almost every employment sector. Manufacturing, trade and services led the group. Both average family incomes and income distributions have shifted in a more favorable direction over the past two decades. Since 1951, family income has grown from $3,770 to about $8,500 at the present time, an increase of 126 percent. Over this time span reductions have taken place in the proportion of families earning less than $3,000 per year, and the share with annual incomes over $10,000 has increased significantly. Future incomes of area residents should grow in accordance with expected local and national economic expansion.

Retailing and service activities, another sector experiencing rapid growth during the past decade or so, showed combined sales growth figures from $151.3 million to $356.5 million over the 1954-67 period—a growth rate equal to 135.6 percent. Retail sales, alone, expanded from $138.3 million to 316.6 million in the period, and selected services receipts experienced a $26.9 million increase. Expected increases in population, employment, and family income should bring about additional increases in the market for retail sales and services. Furthermore, aggressive promotion of local tourism will bring in an added segment to the area's marketplace.

The manufacturing sector of the regional economy has likewise experienced rapid growth. Measured in terms of "value added by manufacture" (roughly the difference between the cost of raw materials and the manufactured product), the Pensacola region expanded its industrial output by almost 255 percent over the 1954-67 time span. The dollar value of this production was $69.2 million at the beginning of this analysis period and $245.2 million at its close. The establishment of a sizable industrial complex containing several installations of large national corporations indicates a favorable climate for further industrial growth.

In summary, all demographic and economic trends evidenced in the local area point toward stability. The regional economy has experienced a sustained, if not explosive, rate of growth over the past several decades. Serious cyclical fluctuations and other erratic patterns associated with an unstable economy have not been present. The "mix" of numerous money-making activities has provided balance to the local economic structure, and at the same time, has provided a firm base upon which to build a larger economy in the coming years. Future economic expansion is expected to continue under the influence of existing conditions and reflect the current stability in projected growth patterns.

## SEASONAL VARIATIONS

Almost all types of economic activities vary to some degree with the season of the year. Agriculture, construction, and tourism are notable examples of highly seasonal industries. Whether it is growing season, cold temperatures, or natural amenities, climate is the primary determinant of economic seasonality.

Seasonal fluctuations are most clearly illustrated by the amounts of goods and services produced and by the numbers of employees in the work force for short periods of time. Both of these indicators were examined in the local economy, and both revealed a business peak occurring in the third business quarter (July, August, September) of each year. The entire state, on the other hand, experienced its peak season for tourist-related employment during the first quarter (January, February, March) of each year.

In terms of the degree of fluctuation, the seasonal variation for the state is much greater than that of the Pensacola area. Local movements throughout the year vary by 11.8 index points, and statwide fluctuations reach an average magnitude of 16.8 index points between highest and lowest levels of business activity. An index of 100.0 represents the yearly average.

Seasonal variations in retailing extend from a first quarter minimum index of 94.6 to a 106.1 maximum in the third quarter. This, with the other two quarters registering sales indexes of more than 99.0, represents a stable pattern of retail sales throughout the year. There is an approximate variation of ten percent in retail sales during the year.

The presence of smaller local seasonal variations is a further indication of greater economic stability based upon a broader mix of business and industrial activities. Wider variations, such as those resulting from an over-dependence on a single seasonal activity, imply a form of econmic weakness which can detract from long-term growth potentials. An over-dependence on tourism can result in such a situation. However, a balanced economy coupled with appropriate natural amenities can receive a notable stimulus by developing existing tourist potentials.

This is exactly the situation in the Pensacola area. The existing economy is very stable and shows only a small amount of seasonal variation. The region has a history of sustained economic growth and also possesses a viable tourist sector. It is important that local public officials, development groups, and private businessmen rise to meet this challenge. Tourist facilities of a first-class type coupled with expanded promotional activities geared to reaching a greater segment of the American tourist market can significantly increase the size of the local tourist industry without adversely affecting overall economic stability.

## RETAILING AND SERVICES

Many activities in the retailing and services sectors are markedly affected by the level of tourism in the Pensacola area. Expenditures in commercial lodging, personal services establishments, eating and drinking places, gas stations, etc., are highly subject to tourist influences. Other retail and service activities are not directly affected by the expenditures of tourists, but the added income occurring to employees of tourist-related establishments contribute to expansion of the market for these other goods and services in the community. If tourism continues to grow in the Pensacola area, it will provide a positive contribution to overall economic development. If not, a significant force in general business expansion will be eliminated.

Since 1954, retail sales in the metropolitan area have undergone a striking growth from $138.3 million to over $325 million annually. Income from service enterprises has more than tripled since the mid-fifties. The 1954-67 business volume grew from $13.0 million to $37.2 million per year. This growth rate would place present volumes well over the $40 million-per-year mark. The continued population increases expected by the Regional Planning Council will bring about additional expenditures for goods and services as a natural occurrence, but increased tourist visits can accelerate this commercial volume to even higher levels.

All retail commodity groups experienced expansion of sales volumes during the 1954-67 time span, with overall sales increasing by 129 percent. The two primary sectors most strongly influenced by expenditures by outsiders, (gas stations and food service establishments), experienced a 120 percent growth rate. These growth rates do not accurately reflect the entire "tourism effect" throughout the total retail economy, because it is not possible to determine the aggregate impact of tourist expenditures on the retail sector from existing statistics.

If the present rate of retail expansion continues, the metropolitan area can expect a yearly retail sales volume of over $600 million by 1980. Increased tourist activity could inflate this total by an appreciable amount.

Service activities closely related to tourism increased their yearly sales volume from $4.8 million to $10.5 million (118 percent) between 1954 and 1967. Commercial lodging activities comprise the largest portion of these service expenditures. In 1954, $1.9 million was spent in local hotel and motels, but this had almost tripled to $5.3 million by 1967. Recreation services another important tourist-related item, also has undergone remarkable growth over the past decade. Income to this area increased from $1.5 million to $3.6 million in the 1954-67 period.

Since $52.7 million expenditures can be tabulated for activities catering primarily to the tourist market, a total impact of a much greater magnitude can be assumed. In

## TABLE III

## RETAIL SALES TRENDS: PENSACOLA AREA*

| | 1954 | | 1958 | | 1963 | | 1967 | |
|---|---|---|---|---|---|---|---|---|
| COMMODITY GROUP | SMSA | E. C. | SMSA | E. C. | SMSA | E. C. | SMSA | E. C. |
| Building Material, Hardware, etc. | 7,200 | 6,668 | 10,756 | 9,267 | 11,059 | 8,425 | 18,088 | 15,914 |
| General Merchandise | 12,036 | 11,893 | 22,126 | 21,518 | 29,343 | 27,964 | 48,087 | 46,431 |
| Food Stores | 36,092 | 32,987 | 46,583 | 40,940 | 65,385 | 48,323 | 68,406 | 60,323 |
| Automotive | 30,633 | 29,048 | 48,909 | 45,050 | 59,758 | 54,837 | 72,975 | 69,190 |
| Gas Stations | 8,893 | 7,852 | 12,758 | 11,428 | 18,426 | 15,471 | 24,211 | 20,608 |
| Apparel | 10,182 | 9,766 | 12,704 | 11,950 | 11,044 | 10,472 | 14,498 | 14,037 |
| Home Furnishings Group | 8,235 | 7,637 | 12,456 | 11,711 | 14,825 | 13,512 | 15,817 | 13,899 |
| Eating & Drinking Places | 10,266 | 9,424 | 9,718 | 9,193 | 12,518 | 11,651 | 18,002 | 16,796 |
| Drug & Proprietary Stores | 4,050 | 3,852 | 7,311 | 6,672 | 10,147 | 9,013 | 11,400 | 10,420 |
| Other Retail | 10,705 | 10,122 | 14,762 | 14,130 | 19,377 | 18,282 | 25,116 | 22,569 |
| Total | 138,292 | 129,249 | 198,082 | 181,859 | 241,882 | 217,950 | 316,600 | 290,187 |

*Sales in $000 E. C.: Escambia County

Source: US Census of Business SMSA: Metropolitan Area

## TABLE IV

## SELECTED SERVICES RECEIPTS: PENSACOLA AREA*

| | 1954 | | 1958 | | 1963 | | 1967 | |
|---|---|---|---|---|---|---|---|---|
| KIND OF BUSINESS | SMSA | E. C. | SMSA | E. C. | SMSA | E. C. | SMSA | E. C. |
| Commercial Lodging | N.A. | 1,850 | 2,451 | 2,191 | 3,765 | 3,578 | 5,278 | 4,357 |
| Personal Services | 4,615 | 4,386 | 6,086 | 5,587 | 8,227 | 7,574 | 10,871 | 10,015 |
| Business Services | N.A. | 870 | 1,777 | 1,752 | 4,858 | 4,790 | 7,870 | 7,683 |
| Automotive Services | 1,437 | 1,383 | 3,748 | 3,382 | 4,379 | 4,033 | 8,006 | 7,561 |
| Miscellaneous Repair Services | N.A. | 995 | 1,426 | 1,398 | 2,508 | 2,420 | 2,627 | 2,508 |
| Motion Pictures | N.A. | 1,438 | 1,276 | 1,201 | 1,192 | (D) | 1,594 | (D) |
| Recreation Services | N.A. | 1,523 | 1,728 | 1,639 | 2,496 | (D) | 3,817 | (D) |
| Total | 12,966 | 12,445 | 18,490 | 17,150 | 27,426 | 25,904 | 39,863 | 37,209 |

*Receipts in $000 (D) Withheld to Avoid Disclosure

Source: US Census of Business N. A. Not Available

## TABLE V

## TOURIST-RELATED EMPLOYMENT TRENDS: PENSACOLA AREA

| | 1954 | | 1958 | | 1963 | | 1967 | |
|---|---|---|---|---|---|---|---|---|
| KIND OF BUSINESS | SMSA | E. C. | SMSA | E. C. | SMSA | E. C. | SMSA | E. C. |
| Eating & Drinking Places | (D) | 951 | 1,144 | 1,095 | 1,566 | 1,441 | 2,165 | 1,986 |
| Commercial Lodging | (D) | 363 | 444 | 402 | 487 | 461 | 588 | 499 |
| Personal Services | (D) | 1,116 | 1,373 | 1,261 | 1,632 | 1,498 | 1,569 | 1,433 |
| Motion Pictures | (D) | 140 | 123 | 107 | 117 | (D) | (D) | (D) |
| Recreation Services | (D) | 114 | 272 | 252 | 218 | (D) | 315 | 233 |

Source: Census of Business

fact, the local estimate of a $55 million tourist industry is very conservative. Economic trends taking place over the past several years have probably pushed local income from tourism to a level greater than $70 million per year.

Total retail employment increased from 6,318 to 11,279 (78.5 percent) between 1954 and 1967. The share of retail workers in activities heavily devoted to serving the tourist market expanded from 1,647 to 3,148 during this time span. Also, these tourist-oriented retail employees constituted a greater percentage (26% constrasted with 28%) of all retail workers at the end of this analysis period. These increases in numbers and proportions indicate a growing local emphasis on the types of retail activities geared to serving customers with characteristics typical of vacationers.

Overall service employment, even though a much smaller number than retail workers, experienced a more rapid rate of increase during the 1954-67 period. This group expanded from 2,191 to 4,137, a factor of 88.8 percent, over the 13-year interval. Tourist-oriented service employment increased by 58 percent.

The greater increases in tourist-related retailing activities is indicative of the type of tourist industry found in the Pensacola area. Visitors participate more in outdoor recreation than in activities related to night life and other "urban" types. Therefore, most of the income presently accruing to the local economy is in the form of retail sales. The future, on the other hand, can present an entirely different picture. Increased availability of tourist attractions in the area can increase the expenditure for numerous kinds of amusement services. Methods for accomplishing expansion in this direction will be discussed later.

In summary, retail and service activities in general have been experiencing a healthy rate of growth over the past four Business Censuses conducted by the federal government. Even though retail and service expenditures closely associated with the vacation trade have not grown at a rate as rapid as that for the sector as a whole, they have increased by a respectable amount. The potential for substantially increasing tourist expenditures by the end of the next half-decade is good. Success will be based on the quality and quantity of attractive tourist facilities provided in the area and on the degree of effective exposure the area can achieve in other parts of the nation. Although the Pensacola area has a good supply of basic recreation resources, vacationers must be attracted to the unique qualities of the region and must be provided with high-quality facilities providing good recreation opportunities. If these pre-conditions are met, a greater number of visitors can be attracted to Pensacola, and their impact on retail and service activities will be felt accordingly.

## GROWTH OF THE HOSPITALITY INDUSTRY

The numerous businesses concerned primarily with serving the needs of tourists are frequently called the "hospitality industry." It includes many retail and service establishments, but the primary types are hotels-motels, restaurants, commercial centers providing recreation services, camping area, etc. In many communities conventions are important enough to warrant special treatment in an analysis of the tourist economy. If conventions are not yet a significant element, it is pertinent to explore ways of increasing the income coming into the area from these events. Likewise, outdoor vacations (camping, trailering, etc.) make up an important force in current and potential tourist business. The growth of recreational vehicle ownership and the relatively high incomes of outdoor vacationers provide an expanding market for the hospitality industry.

The breadth of the hospitality industry is an important factor in considering the overall impact of tourism on the area economy. Increasing opportunities for Americans to leave their homes and visit other areas are at the base of this rapidly growing market potential. Areas such as the Pensacola region are in a prime position to capture an increasing share of this larger tourist dollar.

**Hotels/Motels**

The number of hotel and motel rooms in the Pensacola area have increased at a rate faster than any metropolitan area in the state over the past decade. Even though other metropolitan centers have gained larger numbers of units, the higher percentage increase reported in the local area is indicative of the basic strength of its hotel-motel market. An average of three percent more rooms have been available in the Pensacola area each year of the past ten-year period.

The local ten-year expansion rate of 30.0 percent has greatly outstripped the 7.7 percent figure for all Florida metropolitan complexes and the statewide level of 9.8 percent. Of the total 624-room increase within the two-county region, 81 percent took place in Escambia County.

**TABLE VI**

**PERCENT INCREASE, MOTEL ROOMS: 1960–69**

| | |
|---|---|
| Pensacola | 30.0% |
| Ft. Lauderdale | 24.3% |
| Jacksonville | 0.7% |
| Miami | 2.7% |
| Orlando | 11.0% |
| Tallahassee | 12.1% |
| Tampa | 10.4% |
| West Palm Beach | 7.5% |
| All SMSA's | 7.7% |
| Florida | 9.8% |

Source: Computed from Florida Hotel and Restaurant Commission figures.

Both counties in the metropolitan area have shown steady growth rates over the 1960-69 period. Although Escambia County has received most of the increase and continues to maintain its dominant position in the area's commercial lodging business, Santa Rosa County has increased its strength by a measurable degree. In 1960, Santa Rosa County motels accounted for 13.9 percent of the total units in the Pensacola region. This share had risen to 15.0 percent by 1969, and the trend can easily continue because numerous waterfront sites in Santa Rosa County are located in close proximity to the Pensacola urban area and its other vacation attractions.

## TABLE VII

### GROWTH OF COMMERCIAL LODGING UNITS

| Year | Escambia | Santa Rosa | Total |
|---|---|---|---|
| 1960 | 1,792 | 289 | 2,081 |
| 1961 | 1,807 | 267 | 2,074 |
| 1962 | 1,812 | 307 | 2,119 |
| 1963 | 1,815 | 310 | 2,125 |
| 1964 | 1,866 | 299 | 2,165 |
| 1965 | 1,917 | 339 | 2,256 |
| 1966 | 1,907 | 339 | 2,246 |
| 1967 | 2,046 | 425 | 2,471 |
| 1968 | 2,318 | 440 | 2,758 |
| 1969 | 2,298 | 407 | 2,705 |

Source: Florida Hotel and Restaurant Commission

Overall revenues by hotels-motels in the Pensacola Metropolitan Area increased from $3.5 million to $4.8 million (37.2%) during the five-year period between the last two Business Censuses. This is a healthy growth factor, in spite of its being lower than those for Florida as a whole and the combined metropolitan areas. Commercial lodging revenues expanded by 54.5 percent on a statewide basis, and the combined growth rate for metropolitan areas was 46.6 percent.

Another important factor which must be considered in an analysis of the hotel-motel market is the annual revenue generated per available room. Total revenues are influenced by the number of rooms available, but revenue-per-room provides a good index of profitability. Unit-return data permit analysis of comparable data from many areas, regardless of size or total revenues.

Income per lodging unit increased by 47 percent for the entire state during the 1963-67 time span, and the aggregate metropolitan area growth rate was a slightly lower 42.9 percent from the standpoint of dollar values, the average annual revenue per hotel-motel room in Florida increased from $2,002 to $2,942. Per-room incomes in the larger urban a... were generally higher, with the average for all metropolitan complexes expanding from $2,220 to $3,172 over the analysis period.

Even though the Pensacola area is undergoing substantial growth of its commercial lodging business, the rate of income growth has not been equal to that for all other metropolitan areas or the state as a whole. Growth rates for the state and combined metropolitan areas were 54.5 percent and 46.6 percent, respectively, while the increase factor for the Pensacola Metropolitan Area was 37.2 percent. The local growth rate is by no means depressive; it compares favorably with the rate experienced by the entire country during the same half-decade.

Income from commercial lodging activities can be expected to continue its expansion in future years. The past five years has shown an acceleration in the rate of hotel-motel expansion. A growth rate of four percent annually for the 1965-69 time span is significantly higher than the three-percent rate exhibited for the full period of the sixties. In addition, 72 percent of the entire 1960-69 increase took place during the latter half of the decade.

Annual income per hotel-motel room reflects the rapid growth rates of the past several years. Since 1963, an average commercial unit in the Pensacola area has increased its annual income by 29 percent. Much of this growth has occurred since the 1967 Business Census. Between 1963 and 1967, the expansion rate was only 18 percent, but the next two years registered an increase of 11 percent.

### TABLE VIII

#### ANNUAL REVENUES PER HOTEL-MOTEL ROOM

| DATE | ANNUAL REVENUE |
|---|---|
| 1963[1] | $1,654/room |
| 1967[1] | $1,952/room |
| 1969[2] | $2,128/room |

1) Based on data from Census Bureau and Florida Hotel and Restaurant Commission

2) Estimate by Milo Smith + Associates

Based upon these trends of revenue per hotel-motel room, the 1969 income to commercial lodging establishments can be estimated at $5.8 million in the metropolitan area. Calculations utilizing the figures presented in Table IX, below, reveal a post-1967 increase of 19.3 percent. This further reinforces the most recent trends of accelerated growth in the commercial lodging sector.

### TABLE IX

#### ANNUAL MOTEL/HOTEL SALES: PENSACOLA AREA

| Date | Per Room | ($000's) Total |
|---|---|---|
| 1960 | $1,431 | $2,978 |
| 1961 | 1,505 | 3,121 |
| 1962 | 1,579 | 3,346 |
| 1963 | 1,654 | 3,515 |
| 1964 | 1,688 | 3,655 |
| 1965 | 1,776 | 4,007 |
| 1966 | 1,864 | 4,187 |
| 1967 | 1,952 | 4,824 |
| 1968 | 2,040 | 5,626 |
| 1969 | 2,128 | 5,756 |

Source: All data except that for 1963 and 1967 estimated by Milo Smith + Associates.

The expected increases in the national tourist market will exert a positive influence on local hotel-motel expansion. As growing numbers of Americans take longer and more frequent holidays, the need for transient lodging facilities will expand accordingly in vacation centers. This is a challenge which must be met in the local area. If proper hotel-motel facilities are not available, many vacationers cannot be expected to visit the Pensacola area.

**Restaurants/Other Food Service Establishments**

Another important sector of the hospitality industry, eating and drinking places receive a great deal of their annual income during the primary tourist season. Food service is likely to be the most important of those activities primarily involved with serving vacationers. The estimated 1969 dollar volume of restaurants and related businesses in the Pensacola area was slightly over $18 million—more than three times the volume of hotels and motels. Since 1960, annual sales in eating and drinking places have increased by 146 percent.

If sales continue to expand by this phenomenal rate (nearly 15 percent yearly), the next decade will be accompanied by a staggering amount. The highest probability is that local food service growth rates will decline slightly during the next several years to a level approximating those of the entire state. At present, eating and drinking establishment sales for Florida are expanding about nine percent annually. This rate should, however, increase somewhat in future years to meet the demands generated by larger salaries, more discretionary income, and greater numbers of tourists visiting the state.

## TABLE X

### RESTAURANT SALES: PENSACOLA AREA

| Date | Per Seat | ($000's) Total |
|---|---|---|
| 1960 | 418 | $ 8,303 |
| 1961 | 482 | 9,885 |
| 1962 | 546 | 11,138 |
| 1963 | 610 | 12,514 |
| 1964 | 674 | 13,580 |
| 1965 | 706 | 14,207 |
| 1966 | 775 | 15,220 |
| 1967 | 866 | 17,988 |
| 1968 | 957 | 20,714 |
| 1969 | 1,048 | 20,385 |

Sources: 1963 and 1967 figures from Census of Business and Hotel and Restaurant Commission data. Other estimates by Milo Smith + Associates.

As with annual income per hotel-motel room, the yearly sales per restaurant seat provides an indication of how profitably businesses are operating. Pensacola establishments experienced the highest growth rate of any major urban area in the state in terms of this factor. In 1963, the Pensacola metropolitan area had the lowest rate of sales per seat of any metropolitan complex in the state. But, the 1967 level was fifth in a field of eight metropolises. During this period, per-seat sales in the local area expanded by 42.0 percent while the aggregate metropolitan area growth equaled only 32.8 percent and the state as a whole measured an even lower 31.9 percent.

## TABLE XI

### COMPARATIVE RESTAURANT SALES PER SEAT

| Area | 1963 | 1967 | % Change |
|---|---|---|---|
| Pensacola | $610 | $ 866 | 42.0 |
| Ft. Lauderdale | 678 | 834 | 23.0 |
| Jacksonville | 857 | 1,043 | 21.7 |
| Miami | 753 | 1,058 | 40.5 |
| Orlando | 700 | 975 | 39.3 |
| Tallahassee | 715 | 726 | 1.5 |
| Tampa-St. Pete. | 800 | 1,112 | 39.0 |
| West Palm Beach | 518 | 706 | 36.3 |
| All Metropolitan Areas | 732 | 972 | 32.8 |
| Florida | 665 | 877 | 31.9 |

Source: Computed from data published by Census Bureau and Hotel and Restaurant Commission

Based on these recent trends, it is estimated that per-seat restaurant sales increased to $957 by the close of 1969. This would imply a total sales volume of $18.6 million. Furthermore, the 5.25 percent annual growth rate experienced in the recent past is one that can be reasonably maintained in coming years.

## TABLE XII

### SEATING CAPACITY—RESTAURANTS

| Year | Escambia | Santa Rosa | Total |
|---|---|---|---|
| 1960 | 17,815 | 2,049 | 19,864 |
| 1961 | 18,562 | 1,946 | 20,508 |
| 1962 | 18,328 | 2,071 | 20,399 |
| 1963 | 18,344 | 2,171 | 20,515 |
| 1964 | 18,037 | 2,112 | 20,149 |
| 1965 | 17,800 | 2,323 | 20,123 |
| 1966 | 17,454 | 2,185 | 19,639 |
| 1967 | 18,186 | 2,585 | 20,771 |
| 1968 | 19,310 | 2,335 | 21,645 |
| 1969 | 19,451 | —* | 19,451 |

Source: Florida Hotel and Restaurant Commission
*not reported

### Outdoor Vacations

All indicators point toward increased importance of camping and other outdoor vacations in the Pensacola area. In fact, the natural amenities of the region are a strong factor in attracting visitors. Beaches, scenic beauty, and fishing and hunting resources are all primary tourist resources. The conservation and wise use of these resources will have a major economic impact on the area in coming years. On the other hand, a despoiled natural environment will reduce local attractiveness to future tourists and consequently reduce the amount of income brought into the region by vacationers.

Since 1965, the number of overnight campers staying at Ft. Pickens State Park has increased from 88,173 to 151,214. The growth between 1968 and 1969, alone, was slightly more than 25,000 visitors. This five-year period also saw the proportion of campers increase from 24 percent of total attendance to 46 percent in 1969.

## TABLE XIII

### ATTENDANCE TRENDS: FORT PICKENS STATE PARK

| Date | Overnight Visitors | Total Attendance |
|---|---|---|
| 1965 | 88,173 | 367,704 |
| 1966 | 98,978 | 414,853 |
| 1967 | 113,001 | 316,273 |
| 1968 | 125,955 | 336,421 |
| 1969 | 151,214 | 330,283 |

Source: Department of Natural Resources

During the course of this study, sample interviews were conducted in each of the camping areas in the region. These interviews revealed that most campers visited the Pensacola area for approximately one week. However, the length of stay varied from one day to more than a month. Actually, the average length of stay in local camp grounds was 8.62 days. By applying a typical daily budget derived from the on-site interviews and the 1968 Tourist Study prepared by the State Department of Commerce, it is estimated that each camper spends $99.04 per stay in the Pensacola area. The total "person-nights" (a family of four staying one night = four person-nights) and estimated camper expenditures since 1965 are presented below in Table XIV.

## TABLE XIV

### IMPACT OF CAMPING ON LOCAL ECONOMY

| Date | Person-Nights | Estimated Expenditures |
|---|---|---|
| 1965 | 760,051 | $ 8.73 million |
| 1966 | 853,190 | $ 9.80 million |
| 1967 | 974,069 | $11.19 million |
| 1968 | 1,085,732 | $12.48 million |
| 1969 | 1,303,465 | $14.98 million |
| Totals | 4,976,507 | $57.18 million |

Source: Estimates by Milo Smith + Associates

Current length-of-stay characteristics exhibit a wide range of times. Even though the arithmetic average is 8.62 days, campers' visits vary in duration from one day to more than three months. However, the largest proportion of campers stay in the Pensacola area from four to seven days.

## TABLE XV

### LENGTH-OF-STAY CHARACTERISTICS: CAMPERS

| Length-of-Stay | Percent Total |
|---|---|
| 1-3 days | 22.2 |
| 4-7 days | 57.1 |
| 8-14 days | 12.7 |
| 15-30 days | 3.2 |
| 30+ days | 4.8 |

Source: Survey research by Milo Smith + Associates and Escambia-Santa Rosa Regional Planning Council.

Each camping family is estimated to spend a minimum of $11.49 per person for daily necessities and recreation. Since survey research conducted in the Pensacola area revealed an average of 4.44 persons per camping family, the typical group vacationing in the local area spends slightly more than $50.00 per day during their visit. The typical camper's budget for a day is divided in the following manner.

## TABLE XVI

### CAMPER'S DAILY BUDGET

| Item | Expenditure/Person |
|---|---|
| Camp Site | $ 0.86 |
| Gasoline | 1.42 |
| Groceries | 2.11 |
| Restaurants, etc. | 1.07 |
| Amusements | 2.79 |
| Souvenirs | 1.45 |
| Services | 0.45 |
| Miscellaneous | 1.34 |
| Total | $11.49 |

Source: Adapted from overall tourist expenditure patterns (1968 Tourist Study by Department of Commerce), according to survey research data gathered by Milo Smith + Associates and Escambia-Santa Rosa Regional Planning Council.

Other aspects of outdoor vacations are not as easily portrayed as those dealing with camping. For instance, it is impossible to accurately determine the number of boat rentals by tourists or the number of boats brought into the area by vacationers. This leaves a large gap in the examination of total tourist expenditures, because saltwater fishing constitutes an important tourist attraction. A survey by Dodson, Craddock and Born, an advertising firm, pin-pointed fishing as the second most important tourist attraction in the area, beaches ranked first. Therefore, it can be inferred that the total impact on the regional economy is sizeable. Discussions with experienced boatmen and fishermen reveal that each day of saltwater fishing by a pair of anglers in a boat generates approximately $20.00 in expenditures directly related to the fishing trip. This sum does not include any money spent for lodging, food and drink, transportation, or related tourist expenses.

Even though it is not possible to accurately identify the volume of tourist expenditures for saltwater fishing, a study conducted by the Pensacola-Escambia Development Commission indicates that approximately 13,000 fishing boats are launched annually from saltwater boat ramps. This figure does not include party boat charters or daily outboard boat rentals. Even so, the 13,000 launchings generate about $260,000 expenditures directly related to fishing trips. The shares which can be allocated to tourists and to local residents cannot be determined. However, the incompatible picture does add further depth to an understanding of the area tourist economy and reinforce the importance of outdoor vacations to the Pensacola area.

Freshwater fishing and hunting, though significant, do not have the economic importance of the saltwater activities. Last year, 1,009 nonresident fishing licenses and 134 nonresident hunting licenses were sold in the two-county area. The Florida Game and Freshwater Fish Commission estimates that each purchaser of a fishing license will spend 9.5 days in the field during the year and make an expenditure of $8.37 per day. His hunting counterpart will pursue his hobby 8.5 days per year with daily expenses of $10.82. The combined total of hunting and freshwater fishing expenditures by nonresidents in the Pensacola area is over $90,000. This sum is not nearly as large as the totals for other aspects of the tourist trade, but it is important to consider hunting and freshwater angling in an examination of outdoor vacations and their potential in the region.

**Conventions**

Conventions are becoming an increasingly important factor in the Florida tourist economy. The same factors influencing the growth of the vacation market are also having a positive effect on the convention market. In addition, American businesses, social-fraternal groups, and professional organizations are making national and regional meetings annual events. Cities that attract large numbers of conventioners also attract many outside dollars into their local economy.

Because local convention bureaus frequently refuse to release information regarding their annual numbers of delegates, it is impossible to construct trends either for the state as a whole or for all of the metropolitan areas. Enough figures are available, however, to cite some examples of convention impact on local economies. The Miami-Miami Beach complex, apparently the largest convention center in the state, more than doubled its convention business between 1958 and 1969. In 1958, slightly more than 163,000 convention delegates spent $26.1 million; this had increased to a 1969 level of 368,000 and $56.9 million. Jacksonville saw a 1960-69 increase from 46,497 visitors to 109,485 conventioners. Expenditure levels during this time span grew from $4.9 million to $10.9 million. Clearwater hosted 50,000 delegates in 1969, and they brought approximately $5.5 million into the community. Sarasota, a city primarily known for its affluent retirees, experienced convention growth from 25,000 ($2.8 million expenditure) in 1966 to 33,000 ($3.6 million expenditure) in 1970. Tallahassee is a final example of convention growth in Florida. In 1967, Tallahassee attracted almost 54,000 delegates to organized meetings. These delegates spent $5.6 million. By mid-1970 approximately 59,000 conventioners had visited the capital city. The total dollar value of expenditures by these visitors had reached $7.9 million during the first half of this year.

Although an incomplete picture, these examples clearly illustrate the tremendous growth potential of convention business in Florida communities. All indicators point toward a continued upward trend—especially in areas that can also provide high quality recreational and entertainment opportunities to the delegates.

Local convention records do not permit long-term analysis such as that presented for other areas in the state. However, the period extending from mid-1969 through the first six months of 1970 registered a total of 14,377 convention visitors in the Pensacola area, spending approximately $1.75 million during their stay in the community. Bookings through the middle of 1971 indicate that an additional 27,198 convention delegates can be expected. Based upon discussions with convention bureau personnel throughout the state, it can be anticipated that these visitors will spend an average of $105 per person over the term of the meeting. This amounts to a total expected expenditure of $2.9 million.

Like other types of tourist income, convention dollars are important growth capital. This revenue comes into the region from other areas of the country and can be considered an "income" to the overall metropolitan economy. Its coming from outside the local market area actually increases the demand for goods and services beyond that possessed by the resident population. This "imported" income effectively expands the regional market area beyond the confines established by local purchasing power.

A lack of historical data makes it impossible to describe the future convention potential in a quantitative manner; however, local growth potential will be largely based on the actions of local businessmen and civic leaders. If adequate initiative and leadership is forthcoming, the Pensacola area can profit significantly from a booming national travel market. The rapidly growing convention business is a logical outgrowth of national trends in business, professional, and social organizations. Higher incomes, more available time, greater organizational complexity, and the increasing need to communicate are several of the many underlying factors influencing convention growth. But a significant amount of this rapidly expanding market cannot be captured if local community leaders do not exhibit the aggressive promotional tactics necessary to attract groups to the Pensacola area.

In concert with a strongly backed promotional program, the metropolitan area must provide an ample inventory of high-quality facilities. Conventions cannot be attracted to the area unless meeting places, lodging accommodations, dining establishments, amusement facilities, etc. exist to meet the numerous needs of convention delegates. In most communities that attract large numbers of conventions, the primary convention center is located in the heart of the urban area with many of the support activities in close proximity. Motor hotels, restaurants, nightclubs, retail stores, and service establishments are within a short distance of the actual convention center. Convention bureau personnel in all parts of Florida contend that it is important to provide a comprehensive package of facilities and services to the delegates. This is not to say that a convention center has to be situated in a downtown area, rather it is to point out that the present-day conventioner expects more than a meeting space. He is looking for a center upon which all pertinent activities—meeting, lodging, dining, shopping, and amusements—focuses.

It can be concluded that the Pensacola area has the opportunity to increase its share of the rapidly expanding national convention market. However, this larger share of the overall market will not automatically accrue to the metropolitan area. The field is competitive, and the local competitive spirit must be backed by a solid program of recruitment and a good inventory of quality convention and tourist facilities. If these conditions are met, the convention business and the tourist trade will complement one another. Visitors drawn to the Pensacola area for either of these purposes will be enticed to return for the other.

## TOURISM GROWTH POTENTIALS

As a preface to projection of local growth potentials, it should be remembered that the United States enjoys the largest yearly tourist income of any nation in the world, $2.0 billion of which comes from foreign visitors to the country. Most Americans travel in their own country, and they utilize all modes of transportation. But the private automobile is by far the most popular. They stay at motels, motor inns and tourist courts rather than hotels; many travel by trailers or other types of mobile homes, and some sleep in tents. American vacationers also tend to eat in informal restaurants or at fastfood stands rather than formal, high-priced restaurants. Increasing leisure time, discretionary incomes and mobility are all contributing to a national travel boom that should continue throughout the next decade. This vacation trend and outlook is well summarized in an article, "Tourism: A Durable Boom," published in a recent issue of **Financial World:**

> If you were looking for one word to describe the biggest change in the way Americans have been living since the end of World War II, that word would be tourism, still a relative newcomer to the English language. What it means, of course, is traveling for pleasure. And while that might be an oversimplified definition, the spectacular growth of the public's wanderlust has resulted in an estimated annual outlay of $39 billion in hard currency, $37 billion of it the good, old-fashioned American variety.
>
> Last year, for example, Americans spent an estimated $32 billion on one form of travel or another in their own country and only $5 billion on travel in foreign countries, despite the current rage for exploring everything but the wonders of one's own native land.
>
> Chief beneficiaries of this proclivity for disposing of disposable income are hotels, motels and restaurants, and those industries have experienced remarkable growth during the past two decades, especially the past five years. Others that have benefited, obviously, are transportation services, principally the major airlines but also the supplemental carriers, charter-plane services, bus lines and automobile rental companies; credit-card and travelers'-check services; a variety of tourist and travel management services, and producers of apparel, luggage, and photographic equipment and supplies.

The following local projections include the most important aspects of future tourist development in the Pensacola area. Even though it is not possible to make completely accurate projections for an entire decade, the ranges presented in this section represent reasonable expectations for the metropolitan area. They are intentionally modest if not conservative.

Achievement of these growth levels does, however, rest upon active leadership by local officials in providing ample tourist facilities and an effective promotional program. Future development of the region's tourist potential is a form of economic planning:

objectives must be established, an implementation process must be outlined, and an action—program must be initiated. By carrying through with these three phases, more income can be brought into the region, thereby expanding the local market and improving economic conditions.

Since local tourist information has been maintained for such short periods of time, it is not possible to prepare reasonable projections of some factors from local sources only. In these cases the more stable and longer-term trends exhibited by larger areas were used to gauge local growth prospects. Localized data have been used for primary projection bases wherever possible, and local factors have been used for comparison purposes in all other cases.

As general background, it is anticipated that future tourist development in the metropolitan region will not diverge significantly from past patterns. The growth in coming years should strengthen the tourist sector of the overall regional economy, while expansion in other market sectors provides a uniform growth characterized by a high degree of stability. A firm foundation for this outlook is provided by projected expansion of urban development in the region and by increased accessibility resulting from construction of Interstate 10. Interstate 10 will eventually connect Jacksonville with Los Angeles by a high-speed expressway. At present, I-10 is complete from San Antonio to New Orleans and from Mobile to Crestview. Connections from Crestview to Jacksonville are via US 90 and US 27.

A recent issue of **Florida Trend** magazine cited officials of the Florida Department of Transportation as forecasting I-10 to be "one of great in-migration routes of the future." The large number of visitors entering the state from the Southwest and Far West will spur development all along the major travel corridor. Even the effects of Walt Disney World will be felt along the I-10 corridor, according to the DOT officials interviewed by **Florida Trend**. Vacationers attracted to Disney World from the Southwest will enter Florida on I-10 and provide the Pensacola area with an even larger transient market for local tourist attractions.

Departing from general background information and the far-reaching effects of Disney World, the metropolitan area can expect a substantial increase in vacation visitors during the next decade. Although the number of tourists visiting Pensacola declined steadily over the 1965-68 period, last year registered a 33 percent increase over the 1968 low point. Two points should be made about this trend: (1) it appears to be a temporary fluctuation brought about by general inflation and reduction of discretionary buying power, and (2) the annual growth rate seen in this latest up-turn cannot be maintained. Therefore, future tourist expectations are based upon a reasonable assumption that the local area can attract visitors at an increasing rate equal to that demonstrated by the state over the past decade. The statewide annual growth rate was computed for the entire 10-year time frame and for the 1965-69 period. Since tourism grew at a slightly faster rate during the latter half-decade, it is possible to establish a moderate range of future expectations.

The high series is based upon the statewide average annual increase rate of 8.7 percent which was experienced during the latter half of sixties' decade. The low series, on the other hand, is extrapolated from the longer-term annual growth rate—8.3 percent per year. Use of these two series permits a measure of flexibility in the variation of approximately five percent.

## TABLE XVII

### FUTURE NUMBERS OF TOURISTS: PENSACOLA METROPOLITAN AREA

| | High Series | | | Low Series | | |
|---|---|---|---|---|---|---|
| Date | Other Lodging | Hotels/ Motels | Totals | Other Lodging | Hotels/ Motels | Totals |
| 1970 | 146,710 | 158,924 | 305,634 | 146,164 | 158,345 | 304,509 |
| 1975 | 210,521 | 228,064 | 438,585 | 206,822 | 224,058 | 430,230 |
| 1980 | 302,097 | 327,272 | 629,369 | 292,654 | 317,041 | 609,695 |

Source: Projections by Milo Smith + Associates

In terms of general rationality, an average growth factor of 8.5 percent each year is a reasonable expectation. A recent issue of Business Week contained this this statement: "The travel industry has been chalking up 15 percent to 20 percent annual increases in business for a decade." Florida communities have been attracting a large share of this business, and it is anticipated that they can capture an even larger portion of the market in coming years.

These increased in tourist numbers are naturally bringing about parallel expansions of expenditures. Not only is the total volume of tourist sales growing, the expenditure per vacationer has been increasing by 2.32 percent per year since the mid-1960's, according to figures published by the Florida Department of Commerce. Compared with national inflationary rates which have been exceeding four percent annually in recent times, the increase rate for tourist expenditures can be considered conservative and likely to maintain at least this level throughout the next decade.

## TABLE XVIII

### PROJECTED EXPENDITURES PER TOURIST

| Date | In Hotel/Motel | In Other Lodging |
|---|---|---|
| 1968 | $275 | $232 |
| 1970 | 288 | 243 |
| 1975 | 321 | 271 |
| 1980 | 358 | 302 |

Source: Projections by Milo Smith + Associates

Table XVIII contains two separate sets of expenditure projections because only 52 percent of the state's vacationers stay in commercial lodging establishments. Since the remainder do not, their average expenses must be reduced by an appropriate factor to compensate for an absence in this area. The reduction was by 15.7 percent, the portion reported by the state's Department of Commerce to be spent on lodging.

By treating these two types of vacationers as statistically different groups, total tourist expenditures in the metropolitan area are more accurately projected. The information contained in Table XIX is presented by "lodging group" for this purpose. Expenditures detailed in this table are aggregates and do not illustrate any breakdown of money spent for actual goods and services.

## TABLE XIX

### FUTURE TOURIST EXPENDITURES ($000's)

| | High Series | | | Low Series | | |
|---|---|---|---|---|---|---|
| Date | Other Lodging | Hotels/ Motels | Totals | Other Lodging | Hotels/ Motels | Totals |
| 1970 | 35,651 | 45,770 | 81,421 | 35,518 | 45,603 | 81,121 |
| 1975 | 57,051 | 73,209 | 130,260 | 56,049 | 71,923 | 127,972 |
| 1980 | 91,233 | 117,163 | 208,396 | 88,382 | 113,501 | 201,883 |

Source: Projections by Milo Smith + Associates

Separation of future visitors into two groups defined by type of lodging accommodations permits calculation of realistic demands for commercial lodging establishments during the next ten years. It is evident that nearly half of the expected tourists will use lodging types other than hotels-motels; therefore, using the combined total of all projected vacationers would result in a grossly inflated demand for hotel-motel rooms.

Two important elements must be considered in determining future commercial lodging needs. The first of these is the amount of money available for this purpose from incoming tourists. It was assumed that the same proportion of total expenses would hold relatively constant during the next decade. Second, the amount of annual income required for profitable hotel-motel operation must be determined. This will permit projection of the number of units that can be supported by the available tourist dollars. The projected annual revenues per hotel-motel room in the Pensacola area are based upon recent trends indicating an increase of 5.5 percent each year. This is in line with the national growth rate which has been approximately four percent annually. Florida, being an important tourist state, has registered higher revenues per room and more rapid rates of expansion than the remainder of the United States.

## TABLE XX

### PROJECTED ANNUAL REVENUE PER HOTEL-MOTEL ROOM

| Date | Annual Revenue |
|---|---|
| 1969 | $2,128 |
| 1970 | 2,245 |
| 1975 | 2,862 |
| 1980 | 3,649 |

Source: Projections by Milo Smith + Associates

Table XXI, following, contains projections of tourist expenditures for commercial lodging accommodations and of the number of hotel-motel units these sums will support. Two series of projections are presented, each based upon the appropriate series of tourist projections.

## TABLE XXI

### PROJECTED HOTEL/MOTEL ROOMS

| Date | Lodging ($000's) Expenditures High | Lodging ($000's) Expenditures Low | Number of Units High | Number of Units Low |
|---|---|---|---|---|
| 1970 | 7,186 | 7,160 | 3,200 | 3,189 |
| 1975 | 11,493 | 11,292 | 4,016 | 3,945 |
| 1980 | 18,395 | 17,8[illegible]0 | 5,041 | 4,884 |

Source: Projections by Milo Smith + Associates

Restaurant sales are another major portion of the tourist market. Food and drink purchases in restaurants, nightclubs, and taverns make up the largest share of tourists' outlay. And since most vacationers do not have the opportunity to prepare their own meals, it is understandable that they will have an important impact on the business volume of local eating and drinking establishments. Similarly, the recreational aspect of tourism has a striking effect on amusement services. Amusement constitute the second largest share of Florida tourist expenditures. The business potential of each of these market elements is portrayed in the following table.

## TABLE XXII

### PROJECTED RESTAURANT AND AMUSEMENT EXPENDITURES ($000's)

| Date | Restaurants High | Restaurants Low | Amusements High | Amusements Low |
|---|---|---|---|---|
| 1970 | 14,949 | 14,894 | 12,897 | 12,850 |
| 1975 | 23,916 | 23,496 | 20,633 | 20,271 |
| 1980 | 38,262 | 37,066 | 33,010 | 31,978 |

Source: Projections by Milo Smith + Associates

Application of yearly sales per restaurant seat to these projected sales volumes will provide an estimate of how much new restaurant space will be needed. Granted, drive-in and take-out food service establishments will cut into the total market to some degree, but projection of the number of seating units will indicate the scale of needed expansion. The last half-decade has shown a sales-per-seat expansion of 4.8 percent each year. It is realistic to assume that this growth factor will continue into the next decade. If so, the yearly income per restaurant seat for each five-year interval between 1970 and 1980 will be $1,098, $1,361 and $1,688, respectively.

## TABLE XXIII

### PROJECTED RESTAURANT SEATS: PENSACOLA AREA

| Date | Seats High | Seats Low |
|---|---|---|
| 1970 | 13,615 | 13,565 |
| 1975 | 17,572 | 17,263 |
| 1980 | 22,667 | 21,958 |

Source: Projections by Milo Smith + Associates

## TABLE XXIV

### PROJECTION OF OTHER TOURIST EXPENDITURES ($000's)

| | High | | | Low | | |
|---|---|---|---|---|---|---|
| Type of Expenditure | 1970 | 1975 | 1980 | 1970 | 1975 | 1980 |
| Automotive | 7,214 | 11,541 | 18,464 | 7,187 | 11,338 | 17,887 |
| Clothing | 9,469 | 15,149 | 24,236 | 9,434 | 14,883 | 23,479 |
| Souvenirs, etc. | 6,701 | 10,720 | 17,151 | 6,676 | 10,532 | 16,615 |
| Drugs & Cosmetics | 4,152 | 6,643 | 10,628 | 4,137 | 6,527 | 10,296 |
| Services | 2,060 | 3,296 | 5,272 | 2,052 | 3,238 | 5,108 |
| Groceries | 10,971 | 15,631 | 25,008 | 9,735 | 15,357 | 24,226 |
| Totals | 40,567 | 62,980 | 100,759 | 39,221 | 61,875 | 97,611 |

Source: Projections by Milo Smith + Associates

## TABLE XXV

### PROJECTION OF RETAIL SPACE DEMANDS* GENERATED BY FUTURE TOURISTS

| | High | | | Low | | |
|---|---|---|---|---|---|---|
| Type of Business | 1970 | 1975 | 1980 | 1970 | 1975 | 1980 |
| Automotive | 96.2 | 153.9 | 246.2 | 95.8 | 151.2 | 238.5 |
| Clothing | 145.7 | 233.1 | 372.9 | 145.1 | 229.0 | 361.2 |
| Souvenirs, etc. | 134.0 | 214.4 | 343.0 | 133.5 | 210.6 | 332.3 |
| Drugs & Cosmetics | 55.4 | 88.6 | 141.7 | 55.2 | 87.0 | 137.3 |
| Groceries | 73.1 | 104.2 | 166.7 | 64.9 | 102.4 | 161.5 |
| Totals | 504.4 | 794.2 | 1,270.5 | 494.5 | 780.2 | 1,230.8 |

*Expressed in 000's of square feet
Source: Projections by Milo Smith + Associates

These seats represent the full potential demand which will be created by future tourists. Allowances also must be made for the demand created by the resident population.

Tourists make numerous other purchases too. The most important of these are summarized in the following table, with the dollar volume of sales computed at the same proportions existing today. These sales figures are subsequently translated into retail space needs in Table XXV. The space needs were tabulated by applying typical sales-per-square foot rates to the projected tourist demand, and they represent the maximum potential that could be added to the regional economy if the objective of approximately 630,000 tourists per year is attained by 1980.

Earlier in this chapter the importance of camping and other types of outdoor vacations was discussed in brief. That discussion revealed that an average camper will stay in the Pensacola area between eight and nine days while spending approximately $99. Since 1965, the rapid increase in the numbers of campers patronizing Fort Pickens State Park has expanded the economic impact of this type of vacationer from $8.73 million to $14.98 million per year. This is a conservative estimate, because it does not include the families staying at the private campgrounds in the region.

The future impact of outdoor vacationers in the Pensacola area is no less astounding. If the statewide growth factor evidenced over the past decade (9.6% yearly) is locally maintained in coming years, more than 360,000 campers will be visiting the metropolitan area by 1980. This growth rate is somewhat lower the 14.3%/year figure characteristic of the local area during the past half-decade.

## TABLE XXVI

### PROJECTED IMPACT OF OUTDOOR VACATIONERS

| Date | Number | Expenditures* |
|---|---|---|
| 1970 | 165,730 | $16,407 |
| 1975 | 245,280 | 24,283 |
| 1980 | 363,014 | 35,938 |

*$000's

Source: Projections by Milo Smith + Associates

**Projections in Perspective**

The projections contained in this market analysis are not meant to be absolute forecasts of what will inevitably take place. Rather, they are reasonable guide lines for what can occur if certain conditions and assumptions hold true. They are, in essence, a statement of future conditions that will accompany expansion of the Pensacola area tourist economy at a rate comparable to overall tourism increases in Florida.

Matching statewide tourist growth is a good and realistic objective for the local area. There are many resources in the region which provide the basis for improving the present level of tourist business. Local initiative and leadership can bring about development and promotion of them. The future, then, requires an action-program which will not only promote local tourist-attractions and entice vacationers into the Pensacola area but will also provide for the facilities necessary to accommodate the influx of 630,000 visitors each year by the end of this decade. This is both a challenge and a responsibility that must be met by local business, civic, and governmental leaders. The outcome is an improved economic level for everyone in the area.

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## EXISTING TOURIST FACILITIES IN THE PENSACOLA AREA

### GENERAL OVERVIEW

**Tourist Industry and Available Facilities.** For an area to have a viable tourist economy, two types of man-made facilities are needed in conjunction with the natural attractions provided by geography and climate. These are the facilities needed to accommodate the influx of visitors from other areas and the major attractions required to publicize the locality throughout a large market area. In short, natural amenities without appropriate service facilities can support only a limited number of tourists which bring only a small amount of money into the area. Major attractions that will provide significant publicity for the local area throughout larger regions and the nation are generally commercial establishments which include advertising budgets geared to informing consumers and attracting a major portion of the available vacation market. While accomplishing their own profit objectives, major attractions also help publicize the area in which they are located and bring added income to other merchants within the locality. Unless the area has an established image as a major tourist-recreational center, an attraction of major proportions is almost required to stimulate continued development of the local tourist economy. Orlando is an excellent case in point. Prior to the announcement and development of Walt Disney World, this area was not considered among the major tourist centers within the state. However, establishment of a tourist attraction with national drawing power is stimulating development of added tourist and entertainment facilities in the general area.

Without support facilities, however, no area can adequately compete in the tourist marketplace. Even a major facility would fail if sufficient hotel/motel and food service facilities were not developed to provide for the other vacation needs of visitors. Although a major tourist attraction would naturally bring about development of numerous support facilities geared to capturing a portion of the expected market potential, it is also important to have an initial base of tourist service enterprises sufficient to attract a major tourist development into the area. This is not quite a "chicken and egg" situation, because the existence of a sound inventory of quality restaurant and commercial lodging establishments is a strong, positive factor in any decision to locate a major tourist attraction within a given area.

The quality of both primary and support facilities is an important element in development of a viable tourist economy. Substandard facilities can actually inhibit development of tourism, especially when an area must compete with other locations in Florida which have national and international images as entertainment centers. If the facilities in a secondary tourist center, such as the Pensacola area, are overpriced, the development of this economic sector will be arrested because vacationers will by-pass the area to patronize the major centers in central and southern Florida.

A dynamic tourist economy also must be based on a reasonably wide number of options available to the vacationer. These options must include a sufficient variability in price ranges and in entertainment opportunities available to the visitor. Even though an area may specialize in a certain type of recreational activity such as the historic area in St. Augustine, the night life in Miami Beach, and the fishing opportunities in Key West; opportunities for other recreational activities must be provided for visitors when they are not participating in the prime recreational theme of the area. Similarly, price options must be available to vacationers in order to capture a broader spectrum of tourists from the South and the nation. It is necessary to have a full complement of restaurant and commercial lodging facilities ranging from those with moderate price structures to those catering to the affluent and luxury markets.

Finally, all man-made tourist attractions should reinforce rather than detract from the natural drawing power of the locality. This is especially important in the Pensacola area where the natural environment and scenic values are a basic part of its attractiveness to vacationers. Tourist enterprises which create significant amounts of visual blight and deterioration of the natural environment will actually undermine this attractiveness and detract from tourist development in the Pensacola area. On the other hand, properly designed, attractive tourist facilities can do a great deal to enhance the natural conditions existing in the area and reinforce its basic power to draw vacation visitors from outside areas.

**Local Tourist Base and the Market Region.** In order to improve the foundation for tourism in Pensacola or any other area, a high degree of access is needed to bring vacationers into the locality. This access must take the forms of high-quality highway facilities, air transportation opportunities, and bus connections with other major cities. However, the automobile is the primary method of transportation for those tourists visiting all parts of Florida. This area of the Gulf Coast is well served by the travel corridors of Interstate 65 and Interstate 75, but a better link between I-65 and the Pensacola area is needed to provide a more direct route from the existing expressway facility to the locality. By completing this link, access to Atlanta and the I-75 corridor is also established. These two north-south movement corridors serve a large portion of the nation's Midwest. Added access to the Pensacola area is furnished by the corridor of Interstate 10. Reports of Florida DOT officials and the business analysts of Florida Trend Magazine are optimistic that visitors will be attracted to the Disney World development from as far West as San Antonio, Texas. These tourists from the Southwest will use Interstate 10 as their main access route to Florida and pass through the Pensacola Metropolitan Area.

Since the Pensacola area is potentially served by a good system of interstate highways extending into the Midwest and Southwest, it is important that national visibility of the local area be expanded by an accelerated advertising program oriented toward these regions. A properly executed promotional program designed to create an image for the area can bring about many benefits. For example, the "See Rock City" bumper strip campaign became a household phrase throughout the nation and generated much interest in the area. A promotional and image-building campaign of this magnitude should include close coordination between the expenditures of both public agencies and private businesses to get the most return for each dollar spent. The important factor, however, is to concentrate the effort in the Midwest and Southwest to reach the most people having the best access to the Pensacola area.

To help stimulate this expansion of the local tourist market area beyond the Southeastern United States, closer ties must be established with national organizations, especially those which might patronize the Pensacola area for convention activities. Delegates to conventions are more frequently accompanied by their wives and families than ever before, and often the stay in the area will be extended for purely vacation purposes. Furthermore, if the stay is pleasurable the family may return for later vacations in the area. The long-term benefits of convention activities, as can easily be seen, are much greater than the income derived directly from the convention stay.

**General Evaluation of Local Facilities.** Although the area possesses a reasonably good inventory of the supportive facilities necessary for a viable tourist economy, the Pensacola area is decidedly hampered by the lack of a major tourist attraction such as the numerous enterprises located in central and southern Florida. Development of such an attraction in the local area would provide a sizable magnet to reinforce the basic natural appeal of the beaches and scenic beauty. Also lacking are a clearly defined tourist commercial center such as the French Quarter in New Orleans and an adequate amount of convention facilities geared to attracting large conclaves of business, civic, and professional societies. Existing convention facilities in local hotels and motels and the municipal auditorium are not adequate to successfully compete in today's convention market.

The consensus of convention bureau officials throughout the state is that a successful convention center complex must be developed within the central core area of the city and be surrounded by a large number of support facilities for use by visitors when daily convention activities are not in process. These support facilities must include an adequate number of restaurants, sufficient lodging units to house the convention delegates, evening entertainment establishments, shopping opportunities for the wives and families of convention delegates, and recreational opportunities for both convention visitors and their families. These requirements almost dictate a downtown location for any successful convention center.

A recent survey of tourist attitudes and preferences revealed that Pensacola Beach is presently the most important drawing card in the area. Similarly, scenery and natural beauty ranked a second-place position. Maintenance of this aesthetic and environmental quality is critical when considering either of these two economically significant tourist resources. If a high quality is not maintained throughout the area, these resources will lose their appeal to visitors, and the primary tourist base will be adversely affected. The beaches and shoreline areas must be developed in a manner which will not only permit continued attraction of vacationers but will also maintain the natural quality which is so important in drawing tourists to the Pensacola area.

The historic character of Pensacola and its heritage from the many cultures and national groups which occupied the area form an important tourist resource which has not yet been adequately utilized. The historic district situated to the east of the central business district is a good effort, and it can play an increasingly important role in future tourist development. But this area must be accompanied by a major tourist attraction with a wider scope of public appeal before its potential can be achieved.

Since the Pensacola area attracts large groups of families and unmarried young adults, it can serve not only as a final destination for vacationers, but also as a "base of operations" for excursions throughout the area. This key position can be vitally important in the development of expanded tourist enterprises and in attracting greater numbers of visitors to the locality. Pensacola could logically serve as a home base for trips into Alabama, Mississippi, and other portions of the Florida "Miracle Strip."

## DETAILED ANALYSIS OF TOURIST FACILITIES

**Primary Facilities.** Primary tourist attractions are defined as those which vacationers will either come directly to the area to see or stop while passing through the area to either patronize or participate in. As stated earlier, the Pensacola area lacks a major primary tourist facility to rival the drawing power of such nationally known Florida attractions such as Disney World, Silver Springs, Cypress Gardens, Busch Gardens, etc. Furthermore, the area itself lacks a widespread image of entertainment and recreation such as the one possessed by either Daytona Beach or Miami Beach. In order to overcome this latter deficiency, the development of a major primary tourist facility is mandatory.

Pensacola Beach is the major attraction according to a survey of tourist preferences and attitudes conducted in this analysis. In terms of physical characteristics, the Pensacola beaches are beautiful features which need to be preserved for numerous physical, economic, and aesthetic reasons. They are, in fact, one of the best examples of sand dune development in the United States. However, the utilization of Pensacola beaches could be significantly improved upon to maintain a higher quality and perpetuate their enjoyment in the coming years. A very important local program to improve the drawing power of the local beach areas is to restrict the extent and type of land development along the beach front. Additonal regulations over aesthetic quality in landscaping schemes and commercial areas could go far in elevating the image of the local shoreline area while making it possible to attrack more tourists into the region. Part of these aesthetic controls can be oriented toward keeping the beach in a better condition by improving maintenance operations which would remove trash, litter, and other elements of refuse left by visitors.

A concerted effort should be directed toward providing more appropriate facilities for visitors; these should include added shelters and cabanas of a pleasing design harmonious with the surrounding areas, picnic grills, frequent restroom facilities, and other trappings needed for successful beach recreation activities. In addition, delineated parking and overlook areas should be provided along the beaches to reduce the need for parking cars alongside the road on the shoulder. Vehicle control on beaches and sand dunes is needed at the present time, and the need will become even greater in coming years as more people frequent the beaches in the Pensacola area.

In conclusion, the beach areas offer a tremendous potential for expanded tourist attraction in future years, but the present level and method of utilization is not competitive with other areas of the state. Poor development quality, lack of aesthetic controls, substandard maintenance, and lack of necessary recreational facilities on the beach all contribute to the presently noncompetitive position of Pensacola Beach with respect to other beaches in the "Miracle Strip" and in other Florida coastal areas. Future development of tourism facilities in the coastal areas should be geared to providing more creature comforts and more recreational opportunities without achieving the highly charged, carnival-like atmosphere found in other beach areas. The important objective is to provide high quality and naturalness while also providing an adequate amount of recreational opportunities and creature comforts to satisfy the needs of an expanding number of annual visitors.

**Seville Square.** Seville Square is the embodiment of the rich historical heritage of the Pensacola area. Pensacola was in fact the first white settlement in North America, inhabited by a group of 1,500 soldiers, farmers and missionaries in the middle of 1559.

A large storm devastated the area and the settlement was abandoned in 1561. A second settlement, destroyed by French soldiers, was established in 1719, and a third was erected in the present historic area of Pensacola in 1723. This site marked the construction of a wooden defense structure called Fort San Miguel. Successive control by British, American, and Confederate governments stimulated growth of the settlement and mark the beginning of present-day Pensacola. A capsule history of Seville Square is nicely stated in a brochure published by the Pensacola Historical Restoration and Preservation Commission:

> The British took over in 1763 and built a stockade, and Seville Square was a cleared area outside its east walls. After the Spaniards returned in 1781, the stockade deteriorated although the block house and guard house remained until the 1820's. As the area within the old stockade developed, the cleared area on the east became known as Seville Square. Since that time, the old square has seen many changes of fortune. Savage Creek Indians paraded here in 1813 waving the still damp scalps of 250 men, women and children slaughtered in the nearby Fort Mims Massacre. In 1814, General Andrew Jackson had a skirmish with the Spanish here. Later, Union Soldiers rode their horses across it and finally, in the 1870's, it became the social center of a city riding high on the great lumber boom.

Because of its crucial position in the city and in history, Seville Square has become the focal point of historical preservation and restoration in the Pensacola area. It is presently small in scope, but the well executed effort provides a clearer insight into the architectural and social history of the Pensacola area throughout its many transitions since the 18th Century. Seville Square marks the beginning of a fine restoration effort which has the potential of becoming one of the best in the United States. A wise decision has been made to include private residences and commercial activities as well as exhibition houses within this district. This approach precludes the area's from becoming a large scale museum and helps it maintain its place as an active sector of the community.

Although twenty-two different structures are noted on the driving and walking tours, the area around Seville Square is still inadequate as a major tourist attraction with enough drawing power to bring a large number of visitors to Pensacola. At present, there are just a few shops and exhibition buildings open to the public; even the museum housed in Old Christ Church is closed due to a lack of funds. Again, the scenic and historic significance of the Seville Square is great, but the breadth of interest is not sufficient to attract a large number of vacationers who will remain in the area and spend substantial sums of money.

This is not to minimize the potential economic importance of the historic area, though. It is merely to suggest that the economic potential of the historic preservation area alone is not sufficient to carry the burden of tourist development in the area. In the future, however, the historic area can be an important "anchor" in development of a major tourist complex in downtown Pensacola. It offers a fine opportunity to attract development of another tourist attraction which would be in character with the historical nature of the area yet cater to a broader spectrum of vacation demands. In fact, the area south of Plaza deFerdinand and along south Palafox Street (including the Baylen Street Wharf property) is a prime location for a significant tourist-convention-entertainment complex which would not only reinforce the economic potential of the historic area but also improve the economic vitality of downtown Pensacola.

In sum, the historic preservation area surrounding Seville Square is a fine effort of which the community should be proud, but it is also quiet and not readily accessible to visitors. It alone will not be able to pull many vacationers off Interstate 10 on their way to Disney World and other Florida resort areas. Seville Square and the surrounding historic district must be supported by a significant commercial venture which will have a broader appeal to tourists.

**Fort Pickens State Park.** Fort Pickens, located on Santa Rosa Island, was one of the few federal bastions in the South which did not fall to Confederate forces during the Civil War. It controlled the eastern side of the pass into Pensacola Bay while Fort Barrancas controlled the western side. In addition to the ruins of the old fort and the coastal batteries constructed in the late 19th Century, the park also includes numerous swimming opportunities and beach areas which are patronized by local residents and tourists alike. Among its numerous recreational facilities are a large number of camping facilities which are very popular with vacationing families. In fact, numerous families camp in Fort Pickens State Park while vacationing in the Pensacola area.

Although this State Park is not a commercial venture, it can remain an important factor in bringing visitors into the area. Its historic significance, scenic beauty, and many recreational opportunities make the park a significant tourist attraction. Furthermore, the State of Florida assists in providing some advertising for the Pensacola area through its effort to publicize the State Park System.

**Naval Aviation Museum.** The United States Navy has a long history in Pensacola. In 1825, President John Quincy Adams established a Navy yard in Pensacola to take advantage of the large natural harbor. Captured by the Confederates in 1861, the Navy yard was destroyed upon their withdrawal after the fall of New Orleans in 1862. The facility was rebuilt after the Civil War and finally closed in 1911. But the establishment of Naval aviation brought about the conversion of the site to a Naval Air Station in 1914. World Wars I and II firmly established the importance of NAS Pensacola in the American defense system, and it is now firmly established as the "Home of Naval Aviation."

The US Naval Aviation Museum traces the utilization of air power by this nation's naval forces from its inception in 1911 to the present participation of the Navy in the United States' space program. The museum has models and photographs portraying the beginnings of naval aviation, its expansion during World War I, the advances occurring in long distance aircraft, lighter than air craft, aviation engines, and aviation ordinance which took place between the two World Wars. World War II activities are depicted by photographs and paintings of the major battles in which naval aircraft participated during World War II. Large exhibits of scale model aircraft and combat art are also found in the museum. A "Hall of Honor" memorializes Navy and Marine Corps recipients of the Congressional Medal of Honor.

The US Naval Aviation Museum is very interesting but to a fairly narrow clientel. It was not identified as a major drawing factor in the tourist attitude survey conducted during this study.

The present location of the museum is inconvenient to visit because Naval regulations require a visitor's pass for all tourists entering the base, and the facility is difficult to find for someone unfamiliar with NAS Pensacola. However, this deficiency is shortly to be rectified, because there are plans to build a permanent museum structure outside of the Naval Air Station and to provide a more active form of education and information in the facility. This will permit more advertising exposure which could be very beneficial to the improved popularity and visibility of this institution. In a better location with improved visibility the Naval Aviation Museum could be a more valuable component of the local tourist economy.

**Greyhound Racing.** The Pensacola Greyhound Racing Park opens in May and continues through December into September. Matinee and evening races are featured for persons over 21 years of age. A cocktail lounge and restaurant facility are also located at the track.

This attraction is sufficient as a secondary tourist attraction, but it is not a major feature of the area. Because of the restriction to adult patrons, the greyhound track is not important to families who visit the area. In fact, the local track will probably never become a major draw; it cannot compete with the more established greyhound tracks in central and southern Florida.

**Sport Fishing.** Sport fishing in the Pensacola area consists of both fresh and salt water varieties. The primary freshwater fishing areas are on the Perdido and Escambia Rivers, but other inland water bodies also attract the angler. Typical freshwater catches include bass, pickerel, perch, bream, pike and catfish. Although the Pensacola area does not enjoy the widespread reputation of Lake Seminole and Lake Jackson to the east, freshwater fishing can become a more important tourist resource in future years. Improvement of freshwater fishing, however, must be based on maintenance of high water quality standards in both river and estuarine areas while artificially stocking water bodies with game fish suitable for local conditions. Joint use of anti-pollution controls and fishery resources improvement programs could be of great benefit to the local tourist economy.

Salt water fishing occupies a dominant position in local angling. A wide variety of available marine species—sailfish and marlin beyond the 100-fathom line, mackerel and other smaller game fish in inshore areas, redfish in bay waters, and sheepshead around jetties and bridges—provide ample opportunities for fishermen of all interests.

Big game fishing for marlin and sailfish has a good potential for strengthening the regional tourist economy, because Pensacola is the nearest port to the major fishing grounds. Destin to the east has achieved a wider image as a big game fishing headquarters, but there is no rationale behind Pensacola's occupying this secondary role. The fishing opportunities are equal in both locations. More advertising emphasis in the South and Midwest, coupled with establishment of a specific marina complex for sport fishing boats, could make tourists more aware of big game fishing opportunities in the Pensacola area. Greater patronage of sport fishing boats can be stimulated by mooring them in a central, visible location.

Charter boats serving the inshore areas and larger party boats making daily excursions to Gulf snapper banks could also profit from an expanded advertising program and location in a major "sport fishing center." The sport fishing center could contain tackle shops, fishing accessory stores, food stores and cafes, and numerous other goods and services related to sport fishing—as well as the many activities normally associated with boat operations.

Smaller boats (mainly outboards) used for fishing in bay and inshore waters are launched from smaller marinas and fish camps scattered throughout the Pensacola area. Public boat ramps are also provided by local and State authorities. Provision of bait, ice, food, tackle, and related fishing accessories is commonplace in local small boat marinas, but boat ramps generally do not have these added resources.

Formation of an area-wide sport fishing association could help unify all businessmen competing in this segment of the recreation market. It could provide the foundation for a coordinated advertising and promotion effort on its own and through the Pensacola-Escambia County Development Commission. An association of this nature also could be instrumental in sponsoring and promoting additional organized fishing tournaments to supplement the Pensacola Beach Fishing Tournament and the Pensacola Open Billfish Tournament.

To summarize, the role of fishing in the Pensacola tourist economy has not been adequately developed. This is not to say that sport fishing will become the mainstay of the local tourist economy, but the future of sport fishing can be greatly enhanced by concerted effort on the part of local interests. Better advertisement and image building on a broader scale is mandatory if the Pensacola area is to successfully compete with Destin in the sport and big game fishing arena. Also, the establishment of a centralized sport fishing center in a highly visible and accessible location would help focus the activity and reinforce its overall drawing power.

## SUPPORTIVE TOURIST FACILITIES

Supportive tourist facilities are those which do not actually draw visitors to the area but serve many of their needs while vacationing in the locality. They are, however, necessary back-ups to the primary attractions and establishments in the tourist industry. As stated earlier, a sound base of hotel/motel and dining establishments is necessary for maintenance of a viable tourist economy. A lack of acceptable supportive facilities will actually defeat the success of primary tourist attractions, because vacationers will not have sufficient opportunities to meet their basic needs for food and shelter during their stay in the area.

**Hotels/Motels.** Hotel/motel facilities have exhibited healthy growth characteristics during the recent past. Local growth rates in this sector of the tourist economy have out-stripped every other metropolitan area in Florida. An expansion of total business volumes, room inventory, and revenues per rental unit points toward a future market with a great deal of optimism regarding hotel/motel development.

The existing inventory of hotel/motel facilities in the Pensacola area are acceptable to a broad range of economic groups, but a luxury facility is not present. All lodging establishments surveyed reported high summer occupancy rates, but those having the highest occupancy rates on a year-round basis were uniformly those affiliated with hotel/motel chains. Commercial lodging houses on Pensacola Beach cater mainly to a tourist clientele and experience sharp occupancy peaks during the summer vacation season, while the winter months are characterized by very low occupancies. Hotel/motel establishments in downtown Pensacola, especially those owned by chains, have the highest winter occupancy rates in the region, because a significant portion of their business comes from commercial travelers on business trips.

In terms of tourist potential, chain hotel/motel operations with a nationwide advance reservation service and acceptance of a large number of credit cards will fare best.

Since 61 percent of the trips taken in the United States are for pleasure, it is important that lodging establishments gear their operations to capture as large a portion of this potential market as they can possibly reach. Most pleasure travelers make advance reservations and utilize one or more credit cards on their trips. The credit card-advance reservation provisions are even more important in gaining convention business. While approximately two-thirds of all vacationers made lodging reservations ahead of time, nearly 93 percent of those attending conventions arrived with a confirmed reservation made days or weeks ahead of the actual trip. Chain lodging operations, especially those with cooperative agreements with gasoline companies, are in a prime position to reach out and capture the larger share of this growing vacation market.

Locally, one-fourth of the hotel/motel rooms are located in Pensacola Beach, and another quarter of the inventory is found in the downtown area of Pensacola. The remaining half is dispersed throughout the urban area, with most of them in suburban Escambia County. There is a high concentration of commercial lodging establishments along the waterfront with direct access to the beaches, but those located in the central core of Pensacola are too dispersed to efficiently serve for convention use. In fact, most of the hotels/motels in the Pensacola area have very little space to offer organizations which might want to convene in the region.

Scatteration of the existing meeting space also reduces the area's convention potential. A consensus of Florida convention bureau directors interviewed during the course of this study reveals the following specifications for a successful convention complex:

- location in downtown area of major city is preferable for access and visibility
- lodging, parking and meeting space must be in very close proximity
- smaller meeting rooms are more important than large auditoriums
- large, open display areas valuable for industrial exhibits related to the convening groups
- shopping and recreational opportunities must be available for wives and families of delegates
- dining and evening entertainment opportunities must be available for "after hours" activities

Future actions in the Pensacola area should be geared to providing a tourist complex which will contain a major tourist attraction and a convention center possessing all of the above characteristics. This would help the area create a major focus of many activities related to tourism and the larger travel market.

**Eating and Drinking Establishments.** This group of supportive activities includes a wide variety of facilities catering to a broad range of the market. It encompasses activities ranging from a fast food service operation to an expensive specialty restaurant serving a gourmet dinner at a leisurely pace. It spans the great variety of drinking places ranging from the beer garden attracting young adults to sophisticated cocktail lounges and night clubs drawing more affluent clientele. Together, eating and drinking establishments provide most of the food and part of the entertainment for people who are visiting in the Pensacola area. A significant tourist development effort could not be successful without an appropriate complement of eating and drinking places in a supportive role.

Restaurant sales in the Pensacola area increased 15 percent annually during the past decade, growing from a yearly volume of $8.3 million in 1960 to $20.4 million in 1969. The same time span registered a per-seat sales expansion of 151 percent. Local restaurant sales have grown at a faster rate than any other major urban area in the state. This growth history, coupled with expected growth in other sectors of the tourist economy, points toward a continued sound market for expansion of food service establishments.

At present, the area possesses a wide selection of restaurants with a broad range of prices. Few of these establishments are chain operations, but the many independent restaurants are soundly established businesses. Although a considerable variety of cuisine is offered, seafood specialty houses predominate.

Restaurants with entertainment ("supper clubs") are fairly common, and the quality of live entertainment is generally high. The better restaurant establishments are concentrated in the Pensacola urban area; those on the beach are highly seasonal in their operation, as opposed to the year-round operation of those in Pensacola.

In general, the eating and drinking establishments in the Pensacola area are of good quality. A broad selection of prices and fare are available, and the number of establishments are adequate to support the dining needs of a wide spectrum of tastes and interests. If possible, future development of restaurants should be oriented to water locations to achieve maximum benefits from aesthetics and other locational considerations. The downtown Pensacola waterfront area could be developed into a successful restaurant complex, especially if coordinated with development of a modern tourist-convention center.

**Camping Areas.** Camping activities constitute an important element in the present tourist economy, and growing interest in outdoor vacations is indicated for the future. Currently, **Woodall's Directory of Trailering Parks and Campgrounds** lists thirteen privately operated camping areas in the two-county region, but the largest existing facility is found at Ft. Pickens State Park. Added state-owned camp sites are found in the Blackwater River State Forest, but they are generally primative and located quite a distance from the shore.

Operation of privately-owned camping areas is a growing commercial venture with a good chance of success. Interviews with local campground operators and camping equipment dealers revealed a high degree of optimism about the future of camping and outdoor vacations in the Pensacola area. The present $15 million per year impact of camping on the local economy is expected to expand to an annual dollar volume of nearly $36 million by 1980. This expansion rate is highly favorable for development of added camping areas and outdoor resorts, but it is conservative because it lacks the potential impact of the Gulf Islands National Seashore which was recently approved by Congress. According to National Park Service projections, the National Seashore will attract 3½ million annual visitors by its fifth year of operation (by 1976 or 1977), but the Park Service has not made any specific allocation of visitors to the Mississippi and Florida segments. At any rate, it can be safely assumed that the Florida segment (mainly in the Pensacola area) will attract half (1.75 million) of the total visitors. This will greatly expand the need for camping facilities and other tourist attractions in the local area.

Future camping areas should be concentrated in coastal and river areas to take advantage of unique environmental conditions while placing them in locations convenient to the urban center of the region.

Plans for the National Seashore places a minimum emphasis on camping; the camping facilities in Ft. Pickens State Park may even be phased out if the federal government takes title to the property and user pressure for beach activities becomes sufficient to discontinue camping. Therefore, the major responsibility for providing adequate campgrounds will fall on private developers and local government. Future facilities catering to campers and others wanting outdoor vacations should contain more than the basic necessities for human comfort. They should instead be geared to providing a wide range of recreational opportunities for the patrons. In short, they should be "outdoor resorts" rather than only camping areas. Appropriate recreational facilities for an outdoor resort include fishing and boating areas, hiking trails, skeet and trap ranges, marksmanship areas for archery, rifles and pistols, pitch and putt golf courses, trail bike areas, and numerous other opportunities of this nature. A "lodge" or "pavillion" would also provide for more formal dining and evening entertainment for both families and adult groups. "Outdoor resorts" could become strong tourist attractions in themselves and serve as a further base for drawing into the Pensacola region visitors who would patronize other local tourist attractions.

## THE NATIONAL SEASHORE: A POTENTIAL TOURIST RESOURCE

Congress recently cleared the way for implementation of the Gulf Islands National Seashore proposal, a project with tremendous tourist impact on the Pensacola region. The National Seashore will be divided into two major sectors: one in Florida and one in Mississippi. The Florida sector will extend from the mid-point on Perdido Key eastward to Destin (encompassing nearly all of the undeveloped portions of Santa Rosa Island). However, most of the Florida sector which will be immediately available for public use will be developed by the Park Service in the Pensacola region. Shoreline areas to the east will be added to the reserve in future years.

The plan for the National Seashore incorporates four major activity centers and a series of smaller "visitor use areas" in the vicinity of Pensacola. The major activity centers are to be located at Johnson Beach, Fort Barrancas, Fort Pickens, and Live Oak Reservation. A park headquarters center will be located in downtown Pensacola.

The Gulf Beach Area activity center will be constructed in the vicinity of Johnson Beach on Perdido Key. It will contain provision for the following activities:

- visitor contact center
- picnicking and swimming on Gulf and Sound sides
- visitor boat docking from Intracoastal Waterway
- fishing and beach buggy activities
- jitney trips to east end of Key
- history and nature study

The Pensacola Forts center will be taken from the present Pensacola NAS property. It will contain Fort Barrancas and Fort McRae, and the following visitor activities will be provided:

- visitor contact center
- boat docking
- boat tours of fort areas
- picnicking and swimming
- history and nature study

It is anticipated that Fort Pickens State Park will be transferred to National Park Service ownership and become a primary activity center within the National Seashore. It will include:

- boat docking
- boat tours of fort area
- picnicking, swimming and camping
- fishing and beach buggy activities
- history and nature study

The Live Oaks Reservation will be transferred from the Navy Department to the US Park Service and maintained in a relatively natural condition. Visitor activities in this area will encompass the following:

- visitor contact center
- boat docking from Intracoastal Waterway
- environmental study
- history and nature study

Santa Rosa Island in general will be devoted to a lower intensity use of the shoreline. Four small development areas will be constructed at approximately one mile intervals to provide services to patrons. These visitor use areas will include marina facilities, limited concession areas, swimming areas, and intensive play facilities for children. Parking will be provided for approximately 1,400 cars at each visitor use area, and additional parking facilities will be built along the highway between the development modules. An overhead pedestrian way will connect the Gulf shore with the Sound side at each visitor use area. According to the Park Service development plan, the general area of Santa Rosa Island will contain facilities for these activities:

- picnicking on Gulf and Sound sides
- swimming
- fishing
- boat launching
- history and nature study

The Park Service projection of 3½ million annual visitors to the National Seashore by its fifth year of operation reveals only part of its potential impact on the Pensacola area. Federal officials are also anticipating a peak annual visitor load of ten million persons within two decades. These National Seashore visitors will be a tremendous stimulus to the local tourist economy, because the absence of any bridges from the Mississippi mainland to their portion of the National Seashore will effectively preclude any major tourist attraction to that area.

At present, the economic impact of the National Seashore is impossible to determine with any degree of accuracy. But a conservative allocation of 75 percent of the annual visitors spending only one day in the Pensacola region would amount to an additional $48.6 million yearly tourist income at the end of the first five years of National Seashore operation.[1] This would raise the annual tourist revenue to a level significantly above $250 milillion by 1980.

1) Tourist income (expenditures) estimate based on the 1969 statewide average of $18.50 daily expenditure per vacationer.

# STATISTICAL APPENDIX

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# HOTEL/MOTEL FACILITIES INVENTORY: PENSACOLA METROPOLITAN AREA

| NAME | Chain or Independent | Number of Units | Swimming Pool | Restaurant Capacity | Lounge Capacity | Convention Facilities | Kitchenette Availability | Locational Class | Room Rates (Double) (Amt. in $'s) Summer | Room Rates (Double) (Amt. in $'s) Winter | Occupancy Rates (Percent) Summer | Occupancy Rates (Percent) Winter | Credit Cards Honored |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bay Bridge Motel | Ind. | 22 | No | None | None | None | 4 | 3 | 15 | 16 | No return | | None |
| Carlos Motel | Ind. | 20 | Yes | None | None | None | 5 | 3 | 15 | 15 | 75 | 73 | 4,5 |
| Circle Motel | Ind. | 20 | No | None | None | None | 5 | 3 | 11 | 10 | 89 | 89 | 4,5 |
| Court Chandler | Ind. | 26 | No | None | None | None | None | 3 | 12 | 10 | No return | | None |
| Court Florida Motel | Ind. | 14 | No | None | None | None | None | 4 | 9–10 | 9–10 | 50 | 50 | None |
| DeLuna Motor Hotel | Ind. | 66 | Yes | None | None | None | 3 | 3 | 15–19 | 15–19 | No return | | 1,2,3,4 5,8,9,14 |
| Evergreen Motel | Ind. | 22 | No | None | None | None | 12 | 3 | 15 | 8 | 75 | 50 | None |
| Floridan Court | Ind. | 14 | No | None | None | None | 4 | 3 | 3 | 3 | 80 | 50 | 1,4 |
| Gaines Court | Ind. | 9 | No | None | None | None | 8 | 3 | 15 | 10 | 75 | 60 | None |
| Graystone Motel | Ind. | 16 | No | None | None | None | 4 | 4 | 12 | 10 | 80 | 50 | None |
| Holiday Inn – North | Holiday Inn | 163 | Yes | 150 | 50 | 4 Rms. | None | 4 | 16 | 16 | 95 | 80 | 1,2,3,4,7 |
| Howard Johnson – North | Howard Johnson | 80 | Yes | | | | | 4 | | | | | |
| Howard Johnson – West | Howard Johnson | 72 | Yes | 75 | None | None | None | 4 | 15 | 15 | 89 | 70 | 1,2,3,4,5 7,8,9 |
| El Rancho Motel | Ind. | 20 | Yes | None | None | None | 1 | 6 | 16 | 12 | 90 | 40 | 1,2,3,4 |
| Gulf Breeze Cottages | Ind. | 31 | No | None | None | None | 31 | 6 | 16 | | 90 | 40 | 5 |
| Gulf Coast Inn | Ind. | 34 | Yes | None | None | None | 9 | 1–6 | 16 | 12 | 95 | 50 | 1,2,4,6 |
| Holiday Inn – South | Holiday Inn | 170 | Yes | 250 | None | 4 Rms. | None | 1–6 | 20-28 | 15-18 | 96 | 60 | 1,2,3,5,16 |
| Siesta Motel | Ind. | 12 | Yes | None | None | None | None | 6 | 18 | | 85 | 25 | 4,5 |
| Shady Shore Cottages | Ind. | 28 | No | None | None | None | 26 | 6 | 15 | | 75 | 40 | None |
| Barbary Coast Cottages | Ind. | 32 | Yes | No | None | None | 7 | 1–5 | 25-12 | 8 | 90 | 50 | None |
| Sharkshead Beachcomber | Ind. | 91 | No | 183 | 180 | None | 1 | 1–5 | 20-25 | 12 | 85 | 50 | 1,2,3,4,5 |
| Capri Motel | Ind. | 28 | Yes | None | None | None | 17 | 1–5 | 18-20 | No return | No return | | 5 |
| Del Rey Motor Lodge | Ind. | 32 | Yes | None | None | None | 5 | 5–1 | 24 | Closed | 75 | Closed | None |

# HOTEL/MOTEL FACILITIES INVENTORY (CONT'D)

| NAME | Chain or Independent | Number of Units | Swimming Pool | Restaurant Capacity | Lounge Capacity | Convention Facilities | Kitchenette Availability | Locational Class | Room Rates (Double) (Amt. in $'s) Summer | Room Rates (Double) (Amt. in $'s) Winter | Occupancy Rates (Percent) Summer | Occupancy Rates (Percent) Winter | Credit Cards Honored |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Dunes Motel | Ind. | 64 | Yes | None | None | None | None | 1–5 | 26 | 13 | 95 | | 1,3,5,6 |
| El Mar Motel | Ind. | 31 | Yes | None | None | None | 14 | 1–5 | 14-20 | 12-14 | 85 | None | |
| Five Flags Motel | Ind. | 11 | Yes | None | None | None | None | 1–5 | 19 | | 90 | 15 | None |
| Gulf Aire Court | Ind. | 44 | No | None | None | None | 10 | 1–5 | 18 | 12 | 80 | 20 | 5 |
| Holiday Homes | Ind. | 44 | Yes | None | None | None | 26 | 1–5 | 16 | | 85 | Poor | 4 |
| Marua Motel | Ind. | 27 | No | None | None | None | 15 | 1–5 | 18 | 10 | 80 | 40 | None |
| Sun Ray Motel and Cottage | Ind. | 24 | Yes | | | | | | | | | | |
| Surf and Sand Cottages | Ind. | 54 | Yes | None | None | None | 54 | 1–5 | 20 | 14 | 89 | 20 | None |
| Tiki House Motel | Ind. | 86 | Yes | 70 | 125 | None | 30 | 1–5 | 15-28 | 9-18 | 97 | 20 | 1,5 |
| Mai-Kai Motel | Ind. | 41 | Yes | None | None | None | | 1–5 | 21 | 10 | 75 | 30 | 1,2,3,4,5 |
| Ma-Kai Apartments | Ind. | 32 | Yes | None | None | None | 32 | 1–5 | 21 | 10 | 75 | 30 | 1,2,3,4,5 |
| Kaymar Court | Ind. | 11 | No | None | None | None | 5 | 4 | 10 | 9 | 85 | 60 | None |
| Marble Manor | Ind. | 26 | No | None | None | None | None | 3 | No return | | No return | | |
| Maria Motel | Ind. | 22 | Yes | None | None | None | None | 4 | 14 | 14 | 70 | 70 | 1,2,3,4,5, 12,13,16 |
| Mona Lisa Motel | Ind. | 15 | No | 20 | None | None | None | 4 | 8 | 8 | 90 | 75 | None |
| Mayfair Motel | Ind. | 40 | Yes | None | None | None | 4 | 4 | 16 | 14 | 65 | 65 | 1,2,3,6,16 |
| Osceola Ranch Motel | Ind. | 18 | Yes | None | None | None | 1 | 4 | 14 | 14 | 85 | 50 | 1,2,3,4,5 |
| Palmatto Court | Ind. | 20 | Yes | None | None | None | None | 4 | 14 | 10 | 75 | 40 | 5,6 |
| Palms Motel | Ind. | 8 | | | | | | | | | | | |
| Pensacola Motor Lodge | Ind. | 33 | No | None | None | None | 5 | 3 | 12 | 12 | 85 | 65 | 4,5 |
| Philpot's Motor Court | Ind. | 22 | No | None | None | None | 6 | 3 | 12 | 10 | 75 | 60 | None |
| Perdido Bay Inn | Ind. | 75 | Yes | 45 | 60 | 200 people | 15 | 4 | 22 | No return | 90 | | None |
| Rafters Motel | Ind. | 14 | No | None | None | None | None | 4 | 10 | 9 | 75 | 50 | 5 |
| Ramada Inn – Downtown | Ramada Inn | 104 | Yes | 124 | 130 | 150 people | None | 2 | 16 | 16 | 95 | 89 | 1,2,3,4,5 6,10,16 |

## HOTEL/MOTEL FACILITIES INVENTORY (CONT'D)

| NAME | Chain or Independent | Number of Units | Swimming Pool | Restaurant Capacity | Lounge Capacity | Convention Facilities | Kitchenette Availability | Locational Class | Room Rates (Double) (Amt. in $'s) Summer | Room Rates Winter | Occupancy Rates (Percent) Summer | Occupancy Rates Winter | Credit Cards Honored |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Ramada Inn – North | Ramada Inn | 104 | Yes | 75 | 60 | 80 people | None | 4 | 15 | 15 | 90 | 80 | 1,2,3,4,5 6,10,16 |
| Rodeway Inn | Rodeway Inn | 100 | Yes | 85 | 50 | 150 people | None | 3 | 17 | 17 | 98 | 75 | 1,2,3,4,5 9,10,16 |
| Royal Arms Motel | Ind. | 12 | No | None | None | None | 3 | 4 | 14 | 10 | 70 | 50 | 4 |
| Royal House Motel | Ind. | 51 | Yes | None | None | None | None | 4 | 14-16 | 12-16 | 86 | | 1,2,3,5,6 8,16 |
| San Carlos Motel | Styles McAlpin Enterprises | 285 | No | 100 | 100 | Several | None | 2 | 12 | 12 | No return | | 1,2,5,6 |
| Scenic Hills Motel | Ind. | 48 | No | 130 | None | None | None | 4 | 11 | 11 | 75 | 60 | 1,4,5 |
| Smith's Motel | Ind. | 10 | No | None | None | None | None | 4 | 12 | 10 | 50 | 40 | None |
| Spanish Trail Motel | Ind. | 17 | No | 25 | None | None | 6 | 4 | 7 | | 80 | 50 | None |
| Town House Motel | Ind. | 77 | Yes | 25 | 50 | 75 people | None | 3 | 15 | 13 | No return | | 1,3 |
| Travelodge Motel | Travelodge | 48 | Yes | None | None | None | None | 3 | 16 | 16 | No return | | 1,2,3,12,16 |
| Wagon Wheel Motel | Ind. | 14 | No | None | None | None | None | 4 | 8 | 8 | 50 | 40 | None |
| Azalea Motel | Ind. | 9 | No | None | None | None | 2 | 6 | 12 | 10 | 80 | 50 | None |

**Locational Class key for Hotel/Motel Inventory Table:**

1. Waterfront
2. Downtown Pensacola
3. Inside Pensacola city limits
4. Pensacola suburbs
5. Pensacola Beach
6. Other community

**Credit Card key for Hotel/Motel Inventory Table:**

1. American Express
2. Diners Club
3. Carte Blanche
4. BankAmericard
5. Master Charge
6. Bankcardcheck
7. Gulf Oil Company
8. Phillips 66
9. Texaco
10. Shell
11. Anoco
12. Atlantic Richfield
13. BP
14. Enco
15. Citgo
16. Others

## RESTAURANT FACILITIES INVENTORY: PENSACOLA METROPOLITAN AREA

| NAME | Chain or Independent | Type | Number of Seats | Locational Class | Basic Prices | Credit Cards Honored |
|---|---|---|---|---|---|---|
| Adobe | Independent | 1 | 76 | 4 | 1.95–2.25 | None |
| Angus Steak House | Independent | 1 | 94 | 3 | 2.50 | None |
| Arby's | Arby's | | | 3 | | |
| Averill's Seafood | Independent | 1 | 83 | 3 | 1.25 | None |
| Bartels | Independent | 1 | 250 | 3 | 1.50–1.95 | 4,5 |
| Beefy King | Beefy Kings | 1–2 | *56 | 3 | Sandwiches .69 | None |
| Bells Restaurant | Independent | 1 | | 3 | | |
| Bills Fine Food | Independent | 1 | | 3 | | |
| Bills Grill | Independent | 1 | 42 | 3 | .90–1.25 | None |
| Blue Dot Barbecue | Independent | | | | | |
| Bobo's 400 Club | Independent | | | 4 | | |
| Broadway Joe's | Broadway Joe's | 1 | 30 | 4 | .60–.99 | None |
| Brownie's Drive-In | Independent | 2 | None | 4 | 1.55–1.60 | None |
| Burger Chef | Independent | 2 | None | 3 | Sandwiches .29–.79 | None |
| Burger King | Burger Kings | 1–3 | 74 | 3 | Sandwiches .22–.49 | None |
| Busy Bee | Independent | 1 | 50 | 3 | 1.00–1.45 | None |
| Cagle's | Independent | 1 | 140 | 3 | .95–1.25 | 5 |
| Carver's | Independent | 1 | 35 | 4 | 1.00–1.45 | None |
| Chan's Chinese Carry Out | Independent | 3 | None | 3 | 1.92–3.25 | 5,6,1 |
| Chicken Box | Independent | 2–3 | None | 3 | | |
| Chick's Bar-B-Q | Independent | 1–2 | 250 | 4 | 1.25–2.25 | None |
| Chick's Steak Ranch | Independent | 1 | 125 | 3 | 1.19–1.89 | None |
| Childs | Independent | 1 | 96 | 3 | .95–1.35 | None |
| Chuck Wagon | Independent | | | 4 | | |
| Chungs Drive-In | Independent | 2 | | 3 | Short Orders | |

# RESTAURANT FACILITIES INVENTORY (CONT'D)

| NAME | Chain or Independent | Type | Number of Seats | Locational Class | Basic Prices | Credit Cards Honored |
|---|---|---|---|---|---|---|
| Old Fire House | Independent | 1–2 | 200 | 3 | 1.25–2.65 | None |
| Oscar's | Independent | 1 | 260 | 3 | 1.45–1.90 | None |
| Oyster Bar | Independent | 1 | 110 | 4 | 1.50–1.75 | 4,5 |
| Paradise Beach Cafe | Independent | 1 | 40 | 4 | .85–2.45 | None |
| Pat's Quick Service | Independent | | | 3 | Short Order | None |
| Pensacola Lunch Room | Independent | 1 | 46 | 3 | .90–1.25 | None |
| Perry's Sea Food | Independent | 1 | 147 | 4 | 1.25–2.85 | 5,6 |
| Phillip's Cafe | Independent | 1 | | | | |
| Pizza House | Independent | 1–2 | 75 | 4 | 2.00 | 1 |
| Pizza Pub | Independent | 1 | 200 | 3 | 1.25–4.10 | None |
| Po Joe's Oyster Bar | Independent | 1–2 | | 3 | | |
| R & J Drive-In | Independent | 2 | | 3 | | |
| Ramada Inn | Ramada Inn | 1 | 130 | 2 | 2.95 | 2,6,1,5 |
| Riverview Chuck Wagon | Independent | 1–2 | 73 | 4 | 1.30–1.65 | None |
| Rodeway Inn | Rodeway Inn | 1 | 75 | 3 | .90–2.85 | All Major |
| Round Down | Independent | 1 | | 5 | | |
| Rustic Inn | Independent | 1 | 60 | 3 | .95–1.25 | None |
| San Carlos | Independent | 1 | 110 | 2 | 1.25 | 1,2,4,5 |
| Sandy's | Sandy's | 2 | | | | |
| Scenic Hills | Independent | 1–2 | 130 | 4 | 1.35 | 6,5,1 |
| Shark's Head Inn | Independent | 60 | 60 | 5–1 | 1.25–2.50 | 1,4,5 |
| Tiki House | Independent | 1 | | 5 | | |
| Moby Dick's | | | | | | |
| Silver Star Cafe | Independent | 1 | 20 | 3 | 1.00 | None |
| Skopelo's | Independent | 1 | 92 | 3 | | |
| Steele's Country Kitchen | Independent | 1 | 45 | 3 | 1.15 | None |
| Taco House | Independent | 1 | 25 | 3 | 1.55 | None |

# RESTAURANT FACILITIES INVENTORY (CONT'D)

| NAME | Chain or Independent | Type | Number of Seats | Locational Class | Basic Prices | Credit Cards Honored |
|---|---|---|---|---|---|---|
| Harold's | Independent | 1–2 | 140 | 3 | 1.40–1.95 | None |
| Hart House | Independent | 1 | 44 | 3 | 1.00–1.50 | None |
| Henry's Drive-In | Henry's Drive-In | 2 | | 3 | | |
| Highland House | Independent | 1 | 60 | 3 | 1.45 | None |
| Kentucky Fried Chicken | Kentucky Fried Chicken | | | | | None |
| Kings Inn | Independent | 1 | 120 | 3 | 3.75–7.25 | 4,5,2,3 |
| Holiday Inn's – South | Holiday Inn | 1 | 150 | 4 | 1.70–2.50 | All |
| Hopkins House | Independent | 1 | 60 | 3 | 1.35 | None |
| House of Chong | Independent | 1 | 150 | 4 | 3.50 | 5,4,1 |
| Howard Johnson's | Howard Johnson's | 1 | 107 | 4 | 1.75–2.60 | None (except H.J's) |
| Humphrey's Pizza House | Independent | | | 3 | | |
| Inferno Steak House | Independent | 1 | 70 | 4 | 3.95 | 5,6 |
| Italian Villiage | Independent | 1 | 150 | 4 | 1.30–1.85 | None |
| Jerry's Bar-B-Q | Independent | 1–2 | | 3 | | None |
| John & Dee's | Independent | 1–2 | 12 | 4 | 1.20–3.95 | None |
| Kelly's Drive-In | Independent | 2 | | 4 | | None |
| LaFitte | Ramada Inn | 1 | 85 | 3 | 2.50–3.50 | All |
| Lakeside Inn | Independent | 1 | 65 | 4 | 1.50–3.95 | 4,5 |
| Liollio's Steak House | Independent | 1 | 250 | 3 | 1.25–2.45 | All |
| Lum's | Lum's | 1–2 | 120 | 3 | Sandwiches .35–1.40 | None |
| Martine's | Martine's | 1 | 1,260 | 3 | 1.15–1.95 | 1,2,3,4,5 |
| Midway Cafe | Independent | | | 3 | | |
| Mr. G's Supper Club | Independent | 1 | 144 | 3 | 2.75–4.95 | 4,3,5 |
| Morrison | Morrisons | 1 | 266 | 3 | 1.45–1.65 | None |
| Neba Mike | Neba Mike | 1–2 | 22 | 4 | Sandwiches | None |
| Newton's Sugar Bowl | Independent | 1 | 30 | 4 | 1.50 | None |

## RESTAURANT FACILITIES INVENTORY (CONT'D)

| NAME | Chain or Independent | Type | Number of Seats | Locational Class | Basic Prices | Credit Cards Honored |
|---|---|---|---|---|---|---|
| Coffee Cup | Independent | 1 | 75 | 3 | 1.10 | None |
| Coffer Snak Shop | Independent | 3 | None | 3 | 1.35–2.00 | None |
| Cook's Cafe | Independent | 1–2 | 25 | 4 | 1.10–1.40 | None |
| Country Kitchen | Independent | 1–2 | 50 | 4 | 1.50–2.50 | None |
| Cutty Sark | Independent | 1 | 28 | 4 | Sandwiches .25–.75 | 6,5,1' |
| Dainty Delicatessen | Independent | 1 | 100 | 3 | 1.10–3.50 | 1,4,5 |
| Dairy Queen | Dairy Queen | | | | | None |
| Dari-Go-Round | Dari-Go-Round | | | | | None |
| Della Spanish Castle | Independent | 1–2 | 150 | 3 | 1.50–2.95 | None |
| Driftwood | Independent | 1 | 200 | 3 | 1.85–7.75 | 4,5,16 |
| Cup and Saucer | Eckerds | 1 | 77 | 3 | 1.10–1.25 | None |
| Edwards | Independent | 1 | 45 | 3 | 1.40–1.65 | None |
| Elbow Room | Independent | 1 | | 3 | | |
| Elder Marshall Snack Shop | Independent | 1 | 16 | 2 | Sandwiches .40 | None |
| Faith Diner | Independent | 1 | 60 | 2 | 1.15 | None |
| Family Restaurant | Independent | | | 3 | | |
| Fchi Tastic Bar-B-Q | Independent | 1 | 100 | 4 | 1.30–1.65 | None |
| Graduate House | Independent | 1–2 | 60 | 3 | 1.29–1.35 | 5 |
| Great Oak Inn | Independent | 1 | 27 | 3 | | |
| Gulf Co \irport | Independent | 1 | 160 | 3 | 1.50 | None |
| Gulf P | Independent | 1 | 22 | 4 | Sandwiches .45–.50 | None |
| H & C e | Independent | | | 3 | | |
| Half V v House | Independent | 1 | 30 | 4 | 1.25–1.50 | None |
| Hank's staurant | Independent | 1–2 | 70 | 6 | 1.25 | |
| Hardee | Independent | 1–2 | 48 | 3 | 1.25–1.85 | None |

# RESTAURANT FACILITIES INVENTORY (CONT'D)

| NAME | Chain or Independent | Type | Number of Seats | Locational Class | Basic Prices | Credit Cards Honored |
|---|---|---|---|---|---|---|
| Taco Kid | Independent | 1–2 | 50 | 3 | A La Carte | None |
| Toddle House | Independent | 1 | 22 | 3 | Short Orders | None |
| Tony's Pizza | Tony's Pizza | 1 | 150 | 3 | 1.70–2.20 | None |
| Town House Coffee Shop | Independent | 1 | 25 | 3 | A La Carte | 1,2,3,4,5,6 |
| Trinchitella's | Independent | 1–3 | 200 | 4 | 1.25–1.40 | 5,6 |
| Twin Gables | Independent | 1 | 34 | 4 | 1.00–3.00 | None |
| Wm. Tally House | Wm. Tally House | 1 | 200 | 3 | A La Carte | None |

**Locational Class key for Restaurant Inventory Table:**

1. Waterfront
2. Downtown Pensacola
3. Inside Pensacola city limits
4. Pensacola suburbs
5. Pensacola Beach
6. Other community

**Credit Card key for Restaurant Inventory Table:**

1. American Express
2. Diners Club
3. Carte Blanche
4. BankAmericard
5. Master Charge
6. Bankcardcheck
7. Gulf Oil Company
8. Phillips 66
9. Texaco
10. Shell
11. Anoco
12. Atlantic Richfield
13. BP
14. Enco
15. Citgo
16. Others

## INVENTORY OF CAMPGROUNDS AND TRAILERING PARKS: PENSACOLA AREA

| ESTABLISHMENT | Class | No. Spaces | Elec. | Water | Dump | Fl. Tlt. | P. Tlt. | Shwr. | Ldry. | Tbl., Shltr. | Frpl. | Fsh. Hnt. | Btg. Btrp. | Swim | Open All yr. | Rest'ns | Rating |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Island View Camping | CG | 200 | yes | yes | yes | yes | no | yes | yes | yes | yes | yes | yes | yes | yes | none | — |
| Bear Lake Campground | CG | | no | yes | no | yes | no | no | no | yes | yes | yes | yes | no | yes | 2 | — |
| Munson Recreation Area | CG | 20 | no | yes | no | yes | yes | yes | no | yes | yes | yes | yes | yes | 3 | | — |
| Wesgate Trailer Park | MH | | yes | yes | no | yes | no | no | yes | no | no | no | no | no | yes | 1 | W |
| Bel-Mar Trailer Village | MH | 8 | yes | yes | no | yes | no | yes | yes | no | no | no | no | no | yes | 1 | •• |
| Bob's Trailer Court | MH | 3 | yes | yes | no | yes | no | yes | yes | no | no | no | no | no | yes | 1 | • |
| Ft. Pickens State Park | CG | 203 | yes | yes | yes | yes | no | yes | yes | yes | yes | yes | yes | yes | yes | 2 | — |
| Hubbard's Mobile Home Park | MH | 6 | yes | yes | no | yes | no | yes | yes | no | no | no | no | yes | yes | 1 | ••• |
| Ludeking's Mobile Home Park | MH | 7 | yes | yes | yes | yes | no | yes | no | no | no | no | no | no | yes | 1 | — |
| Miracle Strip Campground | CG | 31 | yes | yes | yes | yes | no | yes | yes | yes | yes | yes | no | yes | yes | | •• |
| Squirrel's Tent City | CG | 30 | yes | yes | yes | yes | no | yes | yes | yes | yes | yes | yes | yes | yes | | •• |
| Sunset Trailer Ranch | MH | 3 | yes | yes | no | no | no | no | no | no | no | no | no | no | yes | 1 | — |
| The Welcome Mat | MH | 4 | yes | yes | no | no | no | no | yes | no | no | no | no | no | yes | 1 | • |

**RATING KEY:**

— = No Rating
W = Campground or park with minimum facilities
• = Fourth-class rating
•• = Third-class rating
••• = Second-class rating
•••• = First-class rating

**RESTRICTIONS KEY:**

1 = No tents, tent trailers
2 = 14 day limit
3 = Cold showers only

**CLASSIFICATION KEY:**

CG = Campgrounds
MH = Overnight stop in mobile home park

SOURCE: **Woodall's Trailering Parks & Campgrounds Directory: 1970**

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## SURVEY OF TOURIST BEHAVIOR AND ATTITUDES

### OBJECTIVES

The primary objectives of this survey were to determine where Pensacola area visitors come from, what attracts them to the locality, and what they do while vacationing in the region. Another desired result was to determine some of the most important of tourists' attitudes. By investigating these areas it is possible to conduct a more effective program for developing the area's tourist economy, because the strengths and weaknesses of the present tourist base can be more clearly defined.

The overall objective of this survey, then, is not to reveal any revolutionary solution for expanding the tourist economy. Rather, it is a fact-gathering effort which will permit local public officials and businessmen to pursue a long-term development program keyed to facts instead of intuition.

### METHODOLOGY

This survey was accomplished through the use of self-executing questionnaires. That is, in most cases the visitor completed the form on his own initiative rather than being confronted by an interviewer. This approach admittedly results in a lower percentage of returns, but the lack of staff resources and the shortness of available time pointed toward the method used.

Since many tourists stay with friends and families in private homes (and commercial lodging establishments have no way of readily distinguishing vacationers from other visitors), it was impossible to accurately determine the total number of tourists visiting the Pensacola region during the course of the survey. Consequently, it was not possible to compute a sample size. The assumption that the sample reasonably represented a cross-section of local tourists was made, but the findings had to be expressed in percents of responents rather than as a portion of total tourists.

A great deal of cooperation between public officials and local businessmen was required for successfully conducting the survey. Copies of the questionnaires were placed in every hotel/motel establishment in the two-county region, and the Tourist Information Center employees completed a survey form for every vacationer who visited the Center in search of aid. Campers were interviewed directly by Escambia-Santa Rosa Regional Planning Council staff members. Information from the completed survey questionnaires was key punched into data processing cards and analyzed by computer.

## MAJOR FINDINGS

**Tourist Origins.** The most important finding of this survey was a clear determination of the primary tourist market area for the Pensacola region. This is decidedly the Southeastern United States (59.1 percent of vacationers surveyed), but the Mid-West occupies a fairly strong second-place position with almost 20 percent of the visitors. Combined, these two geographic regions contribute approximately four out of every five tourists coming to the Pensacola area. The West and Northeast, respectively, follow the South and Mid-West in terms of importance as tourist market areas.

Pensacola and its surrounding area exhibits a marked difference from statewide patterns of tourist origins. This difference is primarily found in the basic market orientation of the Pensacola region and Florida as a whole. Local attractions draw nearly 60 percent of their visitors from the Southern States, but on a statewide basis only 22.6 percent come from the South. In general, the state presently draws its vacationers from a broader area of the nation and the Pensacola region possesses a market area strongly dominated by the South and Midwest. A comparison of tourist origins for the local area and the state are shown below and clearly points out the fundamental differences in the market structure of the two geographic units.

**TABLE I. Comparative Selected Origins of Tourists: Florida and Pensacola Region**

| MAJOR AREA | PERCENT OF TOTAL TOURISTS | |
|---|---|---|
| | PENSACOLA 1) | STATEWIDE 2) |
| South | 59.1% | 22.6% |
| Midwest | 19.6% | 33.8% |
| Northeast | 5.7% | 26.5% |

1) Survey by Escambia-Santa Rosa Regional Planning Council & Milo Smith + Associates

2) Tourist Study by Florida Department of Commerce

In terms of the southern sector of the local market area, Louisiana is the most important state of origin, with nearly one out of five vacationers coming from that state. Georgia, Alabama, and Mississippi are also notable in the Pensacola area tourist economy. Details of this southern market sector are presented below in Table II.

**TABLE II. Share of Total Local Tourists from Southern States**

| | |
|---|---|
| TOTAL | 59.1% |
| Florida | 8.8% |
| Georgia | 8.6% |
| Alabama | 8.6% |
| Louisiana | 17.9% |
| Mississippi | 6.7% |
| Remainder of South | 8.5% |

SOURCE: Survey by Escambia-Santa Rosa Regional Planning Council and Milo Smith + Assoc.

**Transportation Mode.** Travel modes of vacationers are important to both local businessmen and public officials. Since 3½ million National Seashore visitors and an additional 630,000 vacationers not related to the new federal project are expected within the next ten years, their method of transportation can have an extremely important bearing on numerous local decisions.

The existing travel pattern of local vacationers is very similar to that for the state as a whole. Statewide, 78 percent of all tourists arrive by automobile, and 88 percent of those patronizing the Pensacola area travel in the same manner. Although there is a heavier dependence on automobile travel in the local tourist market, both areas are characterized by a major emphasis on this mode. All other means of transportation are grouped together at the state level. These amount to 22 percent of local tourist traffic. Locally, the combined group of non-automotive travel modes can be subdivided according to the following methods of transportation: (1) bus = 3.5% of all incoming tourists, (2) train = 1.2%, and (3) airplane = 7.8%.

**Purpose of Visit.** Because of the study method employed, persons other than those strictly on vacation were included in the survey sample. It is believed that these non-pleasure travelers failed to distort the other findings of the survey, because they were instructed to disregard all other questions on the form. The findings were as shown on the following table.

**TABLE III. Purpose of Visit**

| | |
|---|---|
| Vacation | 78.1 |
| Business | 12.4 |
| Other | 9.4 |

SOURCE: Survey by Escambia-Santa Rosa Regional Planning Council and Milo Smith + Associates.

**Number of Visits.** Repeat business is as important in tourism as in any other commercial venture. The tourist who returns annually to spend his vacation in the Pensacola area is extremely valuable to the local economy and all feasible efforts should be directed toward attracting this type of clientele. This survey indicated that a large share (68.3%) of the tourists surveyed had visited the Pensacola area on previous occasions. Almost seven of every ten vacationers had visited the local area before.

**TABLE IV. Number of Vacations in Pensacola Area**

| | |
|---|---|
| None | 31.7 |
| One | 27.8 |
| Two | 12.7 |
| Three | 7.4 |
| More Than Three | 4.6 |

SOURCE: Survey by Escambia-Santa Rosa Regional Planning Council & Milo Smith + Assoc.

**Dominant Attractions of Pensacola Area.** The sample of visitors surveyed in this study was requested to cite the dominant local attractions which drew them into the region.

Overwhelmingly, natural beauty and the beach areas were the most important attributes noted by the persons surveyed. These attractions accounted for almost one-half of all responses. When sport fishing is included in the tabulations, approximately six out of every ten responses were counted. Other important attractions included camping opportunities, historic areas, and availability of state park facilities. A relatively small share (5.1%) of the total responses indicated that nightclubs and other evening entertainment of this nature were important in the decision to vacation in the Pensacola area. The detail of these responses are presented in Table V, below.

**TABLE V. Dominant Tourist Attractions in the Pensacola Area**

| Type of Attraction | Percent of Total Responses* |
|---|---|
| Beaches | 34.2 |
| Fishing | 10.1 |
| Boating | 4.0 |
| Hunting | 0.5 |
| Scenery | 13.9 |
| State Parks | 6.6 |
| Camping | 8.2 |
| Historic Areas | 7.5 |
| Night Life | 5.1 |

SOURCE: Survey by Escambia-Santa Rosa Regional Planning Council and Milo Smith + Associates

*Percentages should not total 100.0% because of multiple responses by visitor.

**Length of Stay.** This item is extremely important because it relates directly to the amount of money a tourist will spend in the area. A longer stay brings more income to local establishments. This, therefore, should prompt area businessmen to create a better climate and added recreational opportunities to encourage longer vacations in the region.

The average length of stay on a statewide basis increased steadily from slightly more than eleven days in 1964 to more than 15½ days in 1968. The statewide average for 1969 declined to 12.9 days per tourist, but this one-year decline may be a result of current national economic conditions (inflation – recession – lack of discretionary income for vacation purposes). General anticipation of more leisure time and higher personal incomes throughout the nation points toward substantial increases in vacation lengths during the coming decade.

Although the information collected in this sample survey is not directly comparable to statewide averages, the percentage distribution of vacation groups by length of stay indicates a favorable position for the Pensacola region within the state. More than 86 percent of the tourists remained for ten or more days. The second highest interval was one day (7.4%), probably groups from Alabama, Georgia, and nearby Florida counties. Two and three-day stays ranked in the third position and comprised five percent of the groups surveyed.

**Type of Lodging.** The survey question dealing with lodging types is probably not truly representative of all tourists who vacation in the area because of the methodology used. Since it was not possible to make adequate contact with those visiting with friends or relatives, this group was obviously under-represented in the sample. The sample drew most heavily from those staying in some kind of transient lodging facility;

only 8.4 percent of the sample group responded as staying in a private home. This much disparity between the Pensacola area and the statewide rate of 21.5 percent staying with friends or relatives is unlikely. A local rate more closely approximating the state figure is undoubtedly more realistic.

Omitting the "private home" respondents, hotel/motel establishments accounted for the largest share (72.9%) of tourist lodgings. Mobile homes and camping outfits comprised 12.8 percent and 14.3 percent, respectively, of the transient lodging types. Both of these rates are substantially higher in the Pensacola region than for the state as a whole.

**Composition of Vacation Group.** According to the findings of this survey, the primary type of vacationers attracted to the Pensacola area are family groups. Families totaled 81.3 percent of the study sample, with lone adult tourists comprising another 10.3 percent. Adults traveling in groups accounted for the final 8.4 percent.

**Children in Family Groups.** On the average, there are two children accompanying each family vacation group. Half of the accompanying children are over 12 years old, 35 percent are in the five-to-twelve age group, and 15 percent are less than five years old. In purely statistical terms, the average vacationing family will generate one child over twelve years old, 0.7 child between five and seven, and 0.3 child under five.

## IMPLICATIONS OF SURVEY FINDINGS

The following are the most important implications indicated by the findings of this survey. They point out some general directions in which businessmen and public officials can move to improve the competitive position of the Pensacola area in the statewide tourist market.

**Tourist Origins:**

- The South and Midwest, as the primary areas of local tourist origins, constitute major market segments which should be subjected to increased advertising efforts.
- Local business and political leaders should push strongly for an Interstate connector which will improve local linkage with the Interstate highways serving the Midwest and other portions of the South.
- Local visibility should be increased in the Northeast to draw more tourists from that area, but this area has a lower market potential than those with more direct access to the Pensacola region.
- Improve local visibility in the Southwest to capture some of the Disney-bound tourists entering Florida on I-10.

**Transportation Modes:**

- The heavy emphasis on automobile travel by tourists will require that all important tourist attractions be served by streets and highways having sufficient access to meet the traffic demands.
- Motoring tourists should be guided to major recreational and other attractions by a pleasing, coordinated system of informational signs which will be a credit to the aesthetic qualities of the area.
- Heavy emphasis on automobile travel will require extensive parking areas at the beaches and other tourist attractions.

- If properly handled, tourists' cars can be a substantial aid in an advertising effort. Attractive bumper stickers can be used to publicize the area in a "See Rock City" vein.

**Number of Visits:**

- The high percentage of repeat trips to the Pensacola area indicates that concerted local efforts to further generate repeat vacations would be valuable. This could possibly take the form of a "Pensacola Hospitality" campaign entailing direct-mailing of brochures, hotel/motel reservation forms, activity announcements, and other appropriate items to prior tourists who register with the Tourist Information Center, or in local hotels and motels, and who attend conventions in the local area.
- Repeat trips by family groups can be stimulated by providing a wide variety of recreational opportunities for children as well as adults.

**Dominant Attractions:**

- Strong response by the survey sample indicates that the beach areas and natural scenic beauty are the most important attractive forces in the Pensacola region. Thus, the true economic value of aesthetic quality in these areas is very high. Public efforts should be directed toward preserving environmental conditions and avoiding visual blight in the coastal areas.
- The importance of water sports in local tourism is very great at the present time, and it is anticipated that their role will expand to an even greater level in the future. To meet this increased demand, added facilities must be provided for boaters and fishermen as well as for bathers.
- The importance of camping to the area tourist economy is clearly established. However, the present popularity of camping activities does not approach the influx of outdoor vacationers that will accompany the opening of the National Seashore. The entire coastal area within the Pensacola region is admirably suited to camping, and local land use regulations should be geared to encouraging development of high quality campgrounds and outdoor resorts in appropriate locations. An active program by the Pensacola—Escambia County Development Commission could help publicize camping opportunities in the region.
- Historic areas have not achieved their economic potential as yet. With development of one or more major tourist attractions, historic sites and areas will contribute more positively to the local tourist economy.

**Length of Stay:**

- The large proportion of local tourists who stay in the area for more than ten days provides many opportunities for development of numerous recreation-tourist activities which can give variety to a vacation in the Pensacola area.
- The long duration of visits and the area's strategic location also opens the potential for visitors to use the Pensacola area as a convenient "base of operations" for side trips into other areas of West Florida, Alabama, and Georgia.

- Groups from nearby areas staying for two to three days can be further enticed into the region by coordinated use of special long-weekend package arrangements at local resorts. This technique can be used in the spring and fall to help lengthen the tourist season.

**Type of Lodging:**

- The strong emphasis on hotel/motel accommodations evidenced by the survey group indicates a continuing demand for good quality commercial lodging establishments in the Pensacola area. An aggressive program geared to meeting this growing demand could be assisted by an active organization of hotel/motel managers and owners.
- Local popularity of camping is almost twice as great as that indicated on a statewide basis. This trend is expected to continue, especially with the opening of the National Seashore, and more facilities should be provided for this group. "Outdoor resorts" offering a wide range of recreational activities also offer a sound potential in the area.

**Composition of Vacation Group:**

- The heavy concentration of family groups in the survey sample implies that recreation opportunities oriented to widely varying age levels should receive major emphasis in local tourist development.
- The area is also popular with the young adult group, but their primary interest lies in activities closely related to the beaches.

**Children in Family Groups:**

- Most of the children are over twelve years of age and comprise a considerable sector of demand for goods and services. This opportunity should be capitalized upon by providing goods and recreational opportunities geared to this portion of the tourist market.

CHAPTER 4

THE FUTURE OF TOURISM

BEACH / BAY / CITY

## THE FUTURE OF TOURISM

The future of tourism in the Pensacola area is very bright, but the community must exert aggressive and coordinated efforts if the growth in this economic sector is to benefit the general public as well as the private businessman. A high degree of community action is warranted, because future tourist activity promises to become a major source of growth income for the Pensacola area. Unlike the business activities catering to residents, tourism expands the market for goods and services vended locally by bringing outside people and dollars into the area. This "imported" income is effective in providing sales, jobs and disposable income to numerous local citizens.

The most important factors affecting the future of tourism in the Pensacola area are the qualities of the natural environment and the historical tradition found throughout the region. The importance of these factors is so great in the minds of tourists that the preservation of them becomes an economic necessity. Their importance is the keystone around which to expand tourist interest. The beaches, the bays, and the city are the three-point foundation for providing attractions which will strengthen the potential for tourist development in the area. Preservation and proper utilization of the beaches are crucial to meeting the demands of a large segment of the current and future vacation market. Without high quality beach areas maintained in a good condition, the Pensacola area will lose one of its basic attractions. Implementation of the Gulf Islands National Seashore will provide an effective vehicle for accomplishing these general objectives.

The bays provide an additional opportunity for bringing the maritime environment into contact with larger areas of the region. Although industrial pollution has been instrumental in the declining quality of sport fishing in recent years, the bay areas still represent an important tourism resource in terms of overall aesthetic quality and providing opportunities for boating and similar water sports. In addition, the bays provide a setting suitable for development of numerous recreational facilities along the shoreline. Finally, the city can become increasingly important by providing recreational and entertainment opportunities within a historical context. The future of the city in tourist development can be greatly enhanced by aggressive action on the part of both public and private groups. A major catalyst to bring more people into the historic sections of Pensacola will be necessary, however, to fully realize the tourist potential of the area.

If National Park Service projections hold true, the National Seashore will eventually bring 3.5 million visitors per year into the Pensacola area, creating demands for goods and services without parallel in the past. Simultaneously, the tremendous surge of visitors will bring about untold needs for public facilities and services which must be provided by local government. In order to meet these challenges, both the public and private sectors of the community must mobilize their forces and prepare to meet the oncoming demands of an exploding tourist market.

All of the primary tourist resources, mainly those related to the natural environment and to the area's historical tradition, present an optimistic picture in terms of future expansion. Beaches and natural scenic beauty were listed as the two most popular attractions in the survey of tourist attitudes. Since the Pensacola area possesses some of the most beautiful and unspoiled beaches on the upper Gulf Coast, it is in an excellent position to capture an increasing share of that portion of the vacation market which prefers to enjoy its water sports outside of a large city such as Miami. The Gulf Islands National Seashore will further reinforce this position by attracting large numbers of visitors while preserving the beach resources in their natural conditions. The National Seashore will also act as a stimulus for additional development of related tourist attractions in other parts of the region. These other attractions can capitalize on the major expansion of the market created by persons coming into the Pensacola area to visit the federal facility.

The historical heritage of Pensacola can become an even more important element in future tourist development. By adding further quality to the image of Pensacola as a vacation area, existing and developing historical attractions can reinforce other tourist resources by increasing the variety of entertainment and recreational opportunities available to the visitors.

Fort Pickens State Park is a combination of history and shoreline recreation. While it will be absorbed into the National Seashore, it will continue to serve as a reflection of popular water sports and the historical significance of a fort dating back to a period before the Civil War. It will serve as a key component of the National Seashore, and in addition to its fine beach facilities, it also contains a significant number of camping spaces within its boundaries. The ownership of this facility is unimportant, because it will continue to draw visitors to the Pensacola beaches as well as to the area in general.

A smaller facility which has an expanded potential within local tourist development is the Naval Aviation Museum. It is anticipated that the Naval Aviation Museum will experience even better attendance in the future when the facility is moved to its new location outside of the Naval Air Station and placed in a larger building. Although of a much more recent vintage, the Naval Museum is in keeping with the general historical perspective of the area, because Pensacola is the home of naval aviation and the museum traces the growth of this activity by our Navy from its inception to the present space program.

Closely related to the attraction exerted by beaches and natural scenic beauty, sport fishing has good growth potential because of the good fishing opportunities available and the general relationship of this activity to other popular outdoor recreational opportunities in the area. On the other hand, better visibility to a broad range of vacationers is necessary if sports fishing is to attain a level of development in keeping with its intrinsic potential. This increase in visibility can be partially accomplished by establishment of the sport fishing center in a highly visible location and by better organization of fishing boat captains and guides. Accomplishment of this goal can elevate sports fishing to a more important position within the local tourist economy.

Supportive tourist facilities such as commercial lodging establishments and food service businesses generally are not the major magnets for drawing vacationers into an area, but an adequate inventory of these facilities is necessary if tourism is to become a viable economic force. In short, if a vacationer cannot find an adequate place to sleep and eat he will not patronize the area during his vacation. These supportive facilities constitute a necessary back-up to the primary tourist attractions and are in many respects as important to successful tourist development as the attractions which initially draw vacationers into the area.

Hotels/motels offer a very good expansion potential and a good investment for area businessmen. At present, the bulk of the hotel/motel facilities is located on the beach and in downtown Pensacola. This pattern will probably continue into the future and local efforts should be directed toward encouraging the positive factors resulting from these concentrations while minimizing any adverse effects resulting from this pattern. In general, the pattern has many factors in favor of its continuance and the potential for success in these two areas is great.

Eating and drinking places, like hotel and motel facilities, must be adequate in number and in range of choice to meet the demands of an expanding tourist market. The large number of expected tourists in the Pensacola area points toward an exceptionally good growth potential for these establishments. Also like hotel/motel facilities, the future expansion of eating and drinking establishments should be oriented toward locations adjacent to the water. This will permit a better capitalization upon the aesthetics of location while providing for an expansion of seafood restaurants in keeping with the general character of the Pensacola area.

Camping areas also will be greatly demanded by the incoming tourists during the next decade. Past history has shown the major expansion of camping demand in the region, and the area has a good potential for development additional commercial campgrounds to meet the anticipated increase in camping vacationers during the next decade. "Outdoor resorts" with a wide range of recreational opportunities appear to be a fertile area of opportunity for capturing part of this expanding segment of the tourist market. Generally, the future development of camping areas and outdoor recreations should be concentrated in the coastal zone to take advantage of environmental conditions and to be located within convenient driving distance to the central city.

In general, the most effective strategy for local officials and citizens to follow is that of capitalizing on the existing strengths within the present tourism market. This primarily means a better utilization of existing beach resources and natural scenery as attractions to tourists. Events such as golf and fishing tournaments are important tools to be used in lengthening the present tourist season but they cannot support a significant tourist economy by themselves. The area must contain other attractions which will draw tourists over a longer period of time and for longer stays. However, it is important that a major commercial tourist attraction be recruited. This attraction should be in keeping with the natural setting of the Pensacola region while having a widespread image and broad range of interests to many members of the vacationing public. A major tourist-entertainment-convention complex located in downtown Pensacola could have such a catalytic impact on the entire area.

## WHAT IS QUAYSIDE PENSACOLA?

Quayside Pensacola as an entertainment and shopping district captures a heritage of maritime life for tourists and residents alike. It expresses the historical importance of Pensacola, the port city, within the modern context of Pensacola, the vacation city. Centering around South Palafox Street and Baylen Street Wharf, Quayside Pensacola represents a tremendous potential for local tourist development. It occupies a pivotal position between the proposed governmental center, the central business district, and the outstanding historical preservation area. In addition, programmed street improvements will provide excellent access to the area from Interstate 10, an important touist corridor in coming years. East-west access will be enhanced by the proposed construction of the shoreline drive beginning in this area and continuing along the waterfront in an east and north direction.

Reinforcing the area's locational advantages, South Palafox Street retains much of the flavor and character of an historic waterfront city: Pensacola the Port. Marine hardware and equipment companies, commercial fishing, open boat docking, steamship agents, taverns, and similar activities create the nucleus of a potentially significant tourist district. The opportunity to infuse life and additional commercial activity into this area exists in its basic character. In addition to the architectural style and commercial activities found along South Palafox, the Baylen Street Wharf property offers immediate availability for development of a major tourist attraction which would reinforce the commercial strength of South Palafox and complement its historic character through proper thematic development. Properly implemented, this proposal could become a strong tourist center in the Pensacola area.

South Palafox Street and much of its surrounding area demonstrate an architectural and historical quality reminiscent of several of the nation's most well known tourist areas: New Orleans' French Quarter, St. Louis' Gas Light District, Underground Atlanta, San Antonio's Riverfront, and Tampa's Ybor City. Each of these areas built upon its past and histroical tradition to become important assets to the tourist economy in its locale. Similarly, Pensacola can follow the successful paths of these

other areas by converting South Palafox to a tourist complex based on a varied historical theme. Quayside Pensacola would reflect the natural architectural theme and character developed through the area's long history. It would not conflict with Pitt's Slip or other portions of the historic district; rather Quayside Pensacola would accept and expand its given form into a new activity center which would reinforce other important community development objectives. Its mixture of activities would complement, complete, and revive Pensacola's commercial waterfront.

Even today there are healthy signs within the community which point toward the potential success of Quayside Pensacola. In addition to the numerous restoration efforts taking place in the historic district, Pensacola businessmen are taking advantage of the presence of many fine old buildings which express the local architectural character by converting them to retail and office space. Notable examples of these projects are the 200 East Government Building, Seville Quarter, and Pensacola Restaurant Supply.

## WHAT WILL BE INCLUDED IN QUAYSIDE PENSACOLA?

Since an important objective is to bring more tourists into the area and strengthen the region's commercial center, the potential activities are many and varied. However, the key elements are an amusement complex, a 250-room motor hotel, a convention center, an international bazaar selling mainly imported goods, restaurant and nightclub establishments, and a sport fishing center. Specialty retail outlets and personal services are other fitting activities for Quayside Pensacola. The area would also be suitable for a limited amount of rentable office space.

Quayside Pensacola contains three primary functions: tourist amusements for the entire family, convention facilities to meet the growing demands in this area, and commercial establishments to satisfy the needs of vacationing shoppers. The amusement center, situated on the Baylen Street Wharf property, is proposed as a "theme park" capturing the historical flavor of the general area while providing separate entertainment opportunities for adults and children and a third area for family groups. There is a strong potential for closely relating the amusement activities to the harbor.

The convention complex forms the eastern boundary to Quayside Pensacola. It is divided into two centers: space for smaller group conferences at the northern end of the area and display areas and space for large assemblies in the existing municipal auditorium. The seemingly long separation between the two convention facilities will actually strengthen the shopping corridor along Palafox Street by establishing a clearly defined pedestrian movement pattern between meeting rooms and industrial display space. The success of the convention center is enhanced by nearby location of adequate lodging facilities, amusement opportunities, and shopping facilities. In short, a convention can be held in a location offering a full-range of activities to the delegates and their families.

Tourist-oriented retail and service establishments help unify Quayside Pensacola by forming a transition area between the amusement center and the convention facilities. They form a corridor oriented along South Palafox modified into a semi-mall. The international bazaar occupies a key position for daytime shopping activities by drawing visitors into the semi-mall from all directions. Its "magnetic pull" will serve as the main force for bringing shoppers into the complex from both the amusement center and the convention area. While in the mall corridor, the shoppers also become potential customers for other business establishments located in the complex.

Quayside Pensacola is also designed to have a lively evening business. A cluster of night clubs situated at the northern end of the mall area forms a strong magnet, and a major waterside restaurant and adjacent evening entertainment establishments form the southern anchor. The location of these two major centers of night life will help maintain an active flow of visitors along the mall during evening hours.

Finally, Quayside Pensacola will contain a sport fishing center to serve the needs of charter boat captains and individual anglers alike. Not a marina, the sport fishing center will be a terminal for departing and arriving from saltwater fishing expeditions. In addition to providing more character to the entire area, it will also provide better exposure for the local sport fishing industry while providing vacationers a better opportunity to enjoy this recreation activity.

Quayside Pensacola will be linked to the Interstate highway system and other parts of the community by an efficient system of arterial streets presently being programmed by the City. Internal circulation will be oriented toward the pedestrian, but electric jitneys will be available to transport visitors over long distances. Parking will be available for more than 2,500 autos.

## IS THERE A MARKET FOR QUAYSIDE PENSACOLA?

A realistic appraisal of development potential is the crucial element that separates dreaming from rational planning. Since this is primarily a commercial venture geared to stimulating growth in the local tourist economy, it must be economically feasible if it is to be implemented. The economic feasibility of Quayside Pensacola is vitally important, because it is proposed as a joint venture between local government and private business. Local government has the responsibility for improvements within street rights-of-way and for making the Baylen Street Wharf property available for development by business groups who must furnish the bulk of the necessary development capital. A brief review of the tourist market will provide economic justification for carrying out the plans for Quayside Pensacola.

**Future Tourists.** Even without the recent Congressional authorization of the Gulf Islands National Seashore, the local tourist economy should undergo a steady strengthening during the next decade. An annual increase rate of 8.7 percent can be reasonably expected without the added impact of the new federal facility. However, National Park Service projections call for 3.5 million annual visitors to the National Seashore by its fifth year of operation – most of whom will patronize the Pensacola section because of access problems in the Mississippi sector.

- Excluding any influence by National Seashore development, the Pensacola area can expect its yearly volume of vacationers to increase from 305,000 to 630,000 during the 1970-80 decade.

- The lack of connecting bridges between the Mississippi mainland and its seashore islands should divert the majority of these visitors to the Pensacola area. If 75 percent of the Park Service projection comes to the Pensacola segment of the National Seashore, the local tourist load will be expanded by 2.6 additional tourists by 1978-80.

- Disney World is another positive influence which cannot be clearly measured. But Disney economists and State Department of Transportation officials anticipate significant volumes of trouist traffic from the Southwest to enter Florida along Interstate 10. These vacationers will constitute an additional market resource for the Pensacola area if they can be drawn from I-10 by a major tourist attraction.

**Tourist Expenditures.** Expenditure levels for vacationers are as important as the number visiting the Pensacola area. The average expenditure per tourist has been increasing along with the rising number of persons taking vacation trips.

— It is projected that the total expenditure of a vacationer during his vacation stay will increase from its present level of $288 to $358 by the end of this decade.

— Convention delegates, though not part of the basic tourist projections, can become a more important part of the overall "hospitality industry". Each delegate spends an estimated $105 while attending a meeting in the Pensacola area.

— Projected tourist expenditures, omitting National Seashore and convention influences, should expand from $81 million to $208 million between the present and 1980. National Seashore visitors staying in the Pensacola area for an average of three days would boost the total by another $146 million by the end of this decade.

— Expenditures for hotel/motel accommodations are expected to increase from $7.2 million to $18.4 million by 1980.

— Restaurant and amusement establishments also can look for significant expansions in business volume. The 1970 level of $28 million is expected to grow to $71 million by 1980.

— Spending for lodging, food and entertainment will be inflated accordingly by the influx of tourists attracted to the National Seashore.

— Other tourist-related expenditures — still not including convention or National Seashore impact — will experience an increase in volume from $41 million to $101 million during the next ten years.

**Future Space Needs.** Added numbers of vacationers spending more money in the Pensacola area will require more places for recreation, shopping, and lodging. This will open numerous opportunities for local businessmen and also help in attracting new concerns into the Pensacola area. As an indication of the challenges that face those meeting the needs of the tourist market during coming years, the following items indicate the space needs adequate to meet the potential of only 630,000 vacationers by 1980. They will increase significantly with implementation of the National Seashore.

— The need for hotel/motel rooms should increase by a factor of 2,000 units, to a total of 5,041, over the decade.

— Demands for more restaurant and food service establishments will bring about an added 9,100 restaurant seats between now and 1980. The 1980 total should approach 23,000 seats.

— The need for space to house establishments dealing in specialty goods and services catering to tourists will expand by slightly more than 200,000 square feet by 1980. The tourist market will create a demand for 536,000 square feet of this type of retail and service space by the end of the decade.

## WHAT IS THE EXISTING CHARACTER?

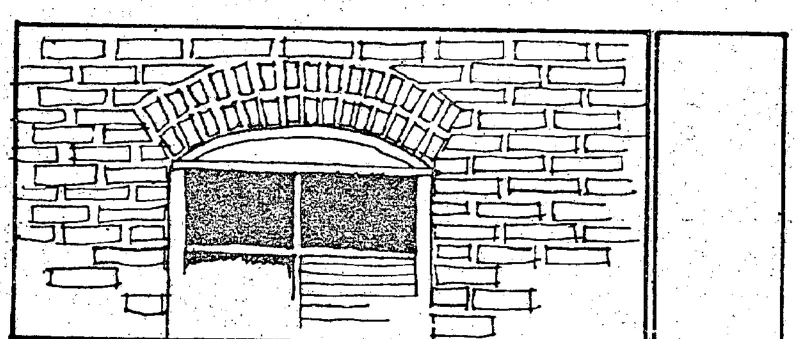
It is the intrinsic architectural style and historic air of South Palafox - Baylen Street Wharf, which strongly argues for a breath of new life. The area's traditional role of being the bridge between land and water can provide a dramatic backdrop for contemporary activities. What may have once been a tight, extremely united area, now suffers from fragmentation, both architecturally and functionally. This same sense of fragmentation is felt in the commercial life: marginal businesses, vacant storefronts and declining structures. Yet, the basic character and authenticity prevails: marine suppliers, commercial fishing company; open docking, steamship lines, bars and similar uses. The infrastructure of architecture and activities is there; the task is to reunite it into a strong, workable district.

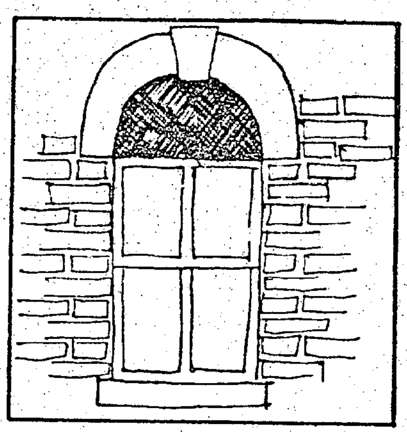
The essential character and theme will be jointly derived from the architectural setting and the activities within this setting. The type of activities, the amounts required and space requirements have been quantitatively outlined. The space within which the activities will be played in a large way, will determine the success of Quayside Pensacola. The environmental package is of primary concern.

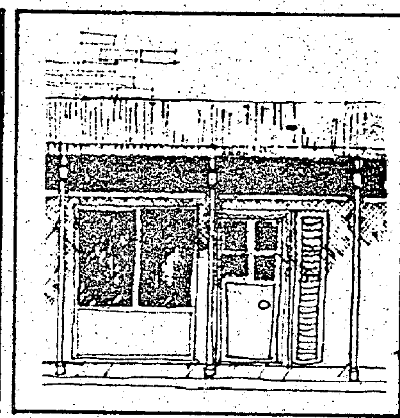
Although South Palafox is disjointed physically and functionally, several characteristics are clearly discernible. Therefore, common design elements assist in providing continuity to the area. These elements have varying degrees of relatedness and noticeability. The purpose is to outline the essential elements which point to the overall desired character. As redevelopment and revitalization occurs, care should be taken to employ these design elements as "standards". These standards are given as guide lines, not absolutes. It is hoped that they will be used to integrate new construction, in accordance with the plan, to blend in and expand the character of the area. The ultimate goal is not to replicate the past but properly restore and enrich the environmental image of Quayside Pensacola.

The primary design elements which constitute the criteria for determining additions to Quayside Pensacola are:

Arch Details — The predominant arch which is evident is the flat arch although there are several variations. This is the basic architectural element found today in the South Palafox Area. The arch may be brick or a solid concrete form. In existing buildings (especially if converted), closed windows should be reopened, if functionally possible.







Materials — The primary materials prevalent in South Palafox are brick, stucco, metals and to a lesser extent vertical siding.

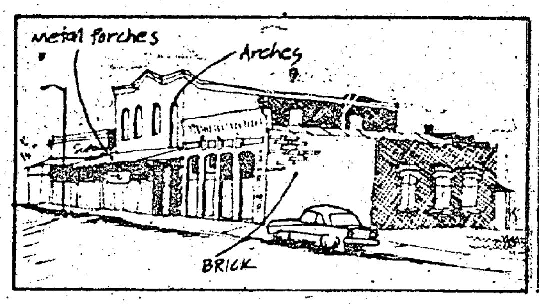
Metal Porches — The minor design characteristic which provides continuity is the metal or tin-roofed porch. The occurs with irregularity but provides an attractive balance to the arch detail. The delicate visual appearance contrasts successfully with the solid structural masses.

Textures — These are functions of materials, to a large degree, and are smooth (stucco and metal), rough (brick and raked joints), relief and other textures.

Color — The natural brown of the brick is predominant color, with beige and white of stucco being a strong secondary color. Other warm colors are provided by weathering of wood, siding and exposed metal. Accents to these basic colors are of importance.

Relationships of various elements are illustrated as:

| | | |
|---|---|---|
| Material | — | Brick |
| Texture | — | Rough, raked joints |
| Color | — | Brown brick, weathered trim |



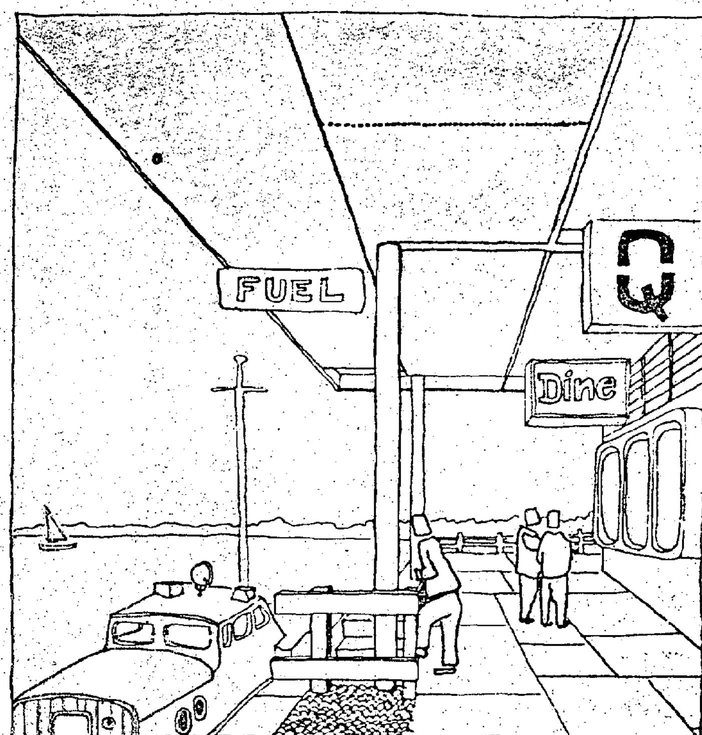

PRIMARY DESIGN CHARACTERISTICS

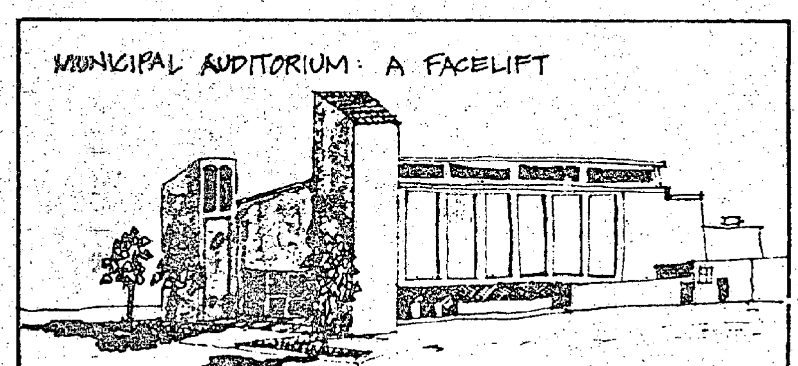
- ARCHES
- METAL PORCHES
- BRICKS

Scale — This is a quality which relates the building masses and units to human capabilities of comprehension. Masses (objects, buildings and forms in space) should relate to the size of man and open space around them.

Height — To keep in scale with existing development, heights should vary from one to three stories. Additions to Quayside Pensacola should respect the height limitations in order to maintain continuity. West of Palafox Street there are opportunities to add taller buildings to balance the bulk and height the uses east of Palafox display.

The composite of these various elements will serve to add distinction, continuity and image to the area. Proper face-lifting, judicious landscaping and integration of the appropriate uses and buildings will ensure the success of Quayside Pensacola as a tourist district.

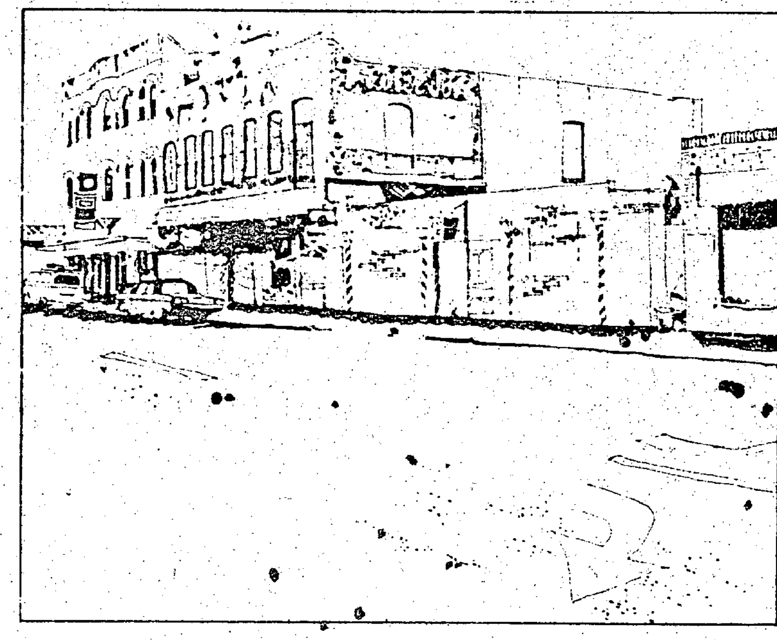


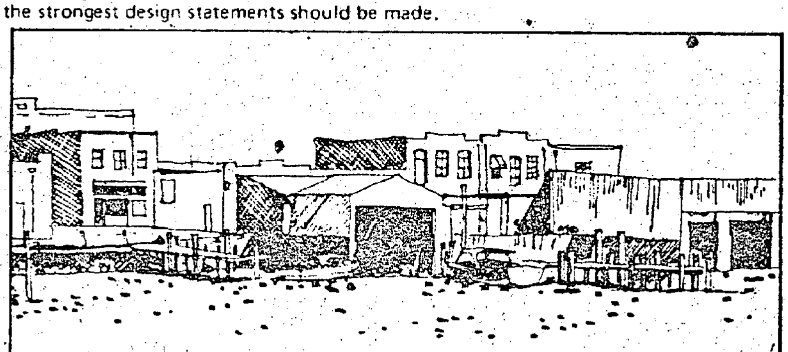
## WHAT ARE THE MAJOR DESIGN ELEMENTS?

What is the current physical status of the proposed district? It is a curious admixture of varying enterprises; it holds the possibility for coalescing into a compact, highly imageable tourist area. The area, however, does have its problems as the following suggests. The areas of concern in the design analysis will cover negative items which need to be surmounted. In a large measure, the problem areas can be corrected with imagination and commitment to the ultimate completion of the total district.

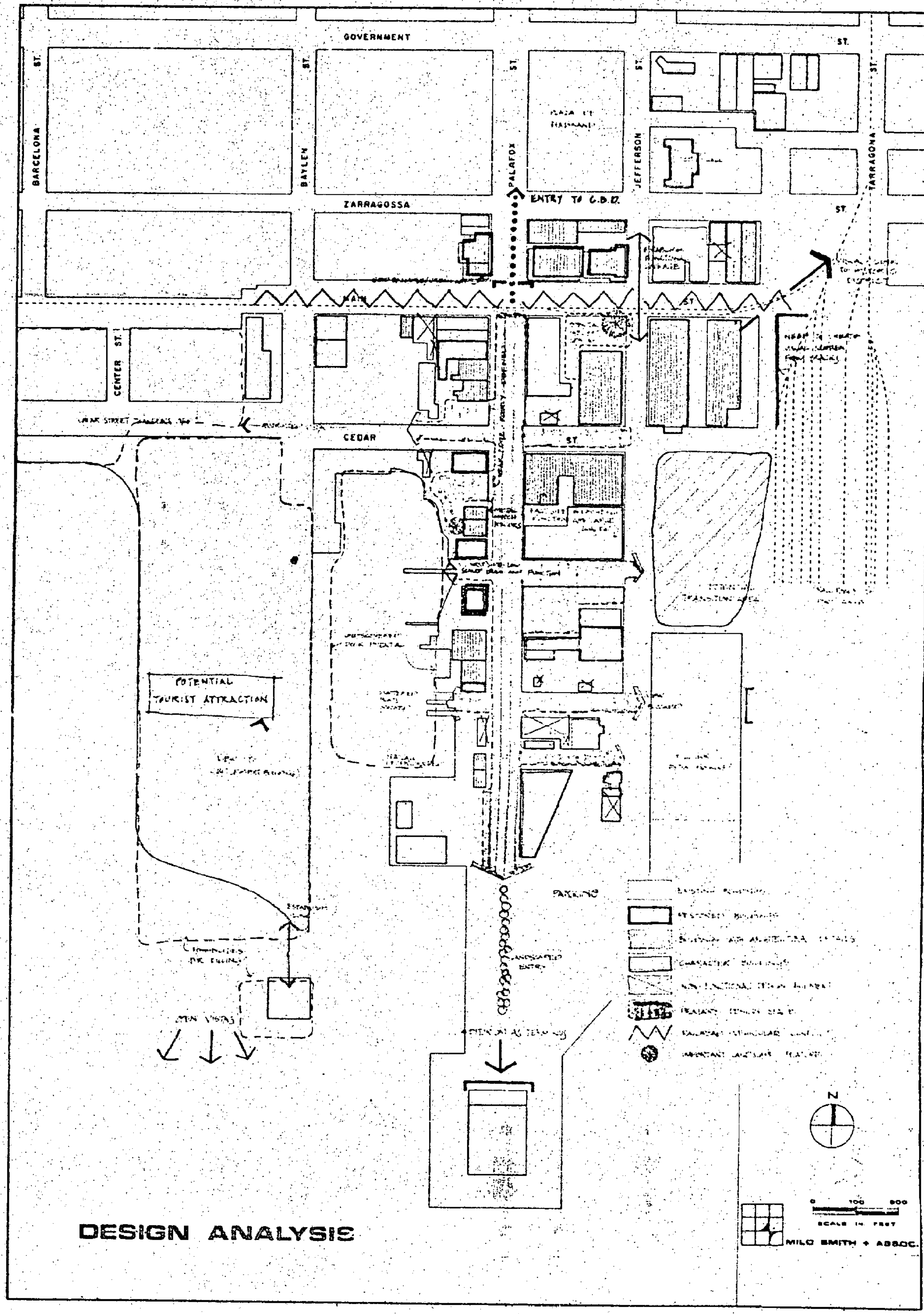
Two problems which stand out are illustrated by the accompanying sketch: the excessive width of Palafox and buildings (having essential design elements) which have declined or suffered from improper renovation. The width of Palafox effectively prohibits any intimate scale necessary for the desired atmosphere.



Potential and problems are not limited to the front of Palafox only. Along the rear — especially west of Palafox on the slip — is a wealth of undiscovered dock potential. Fragmented uses and ownerships keep any unity from occurring. There is potential for linking the waterfront in a pedestrian walk. The sketch demonstrates existing conditions along the waterfront. This area is of extreme importance and an area where the strongest design statements should be made.



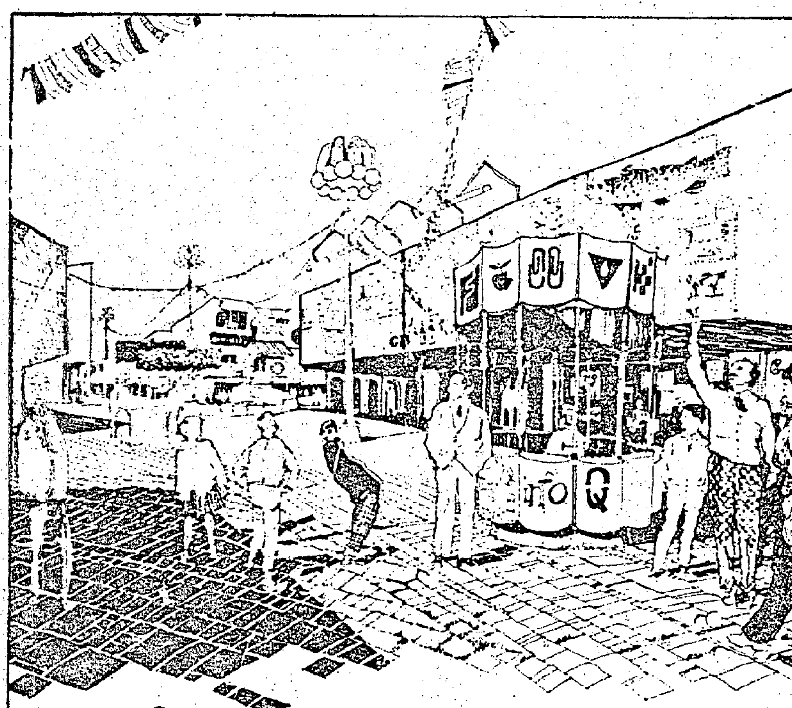
Related analysis findings are illustrated on the accompanying Design Analysis diagram.

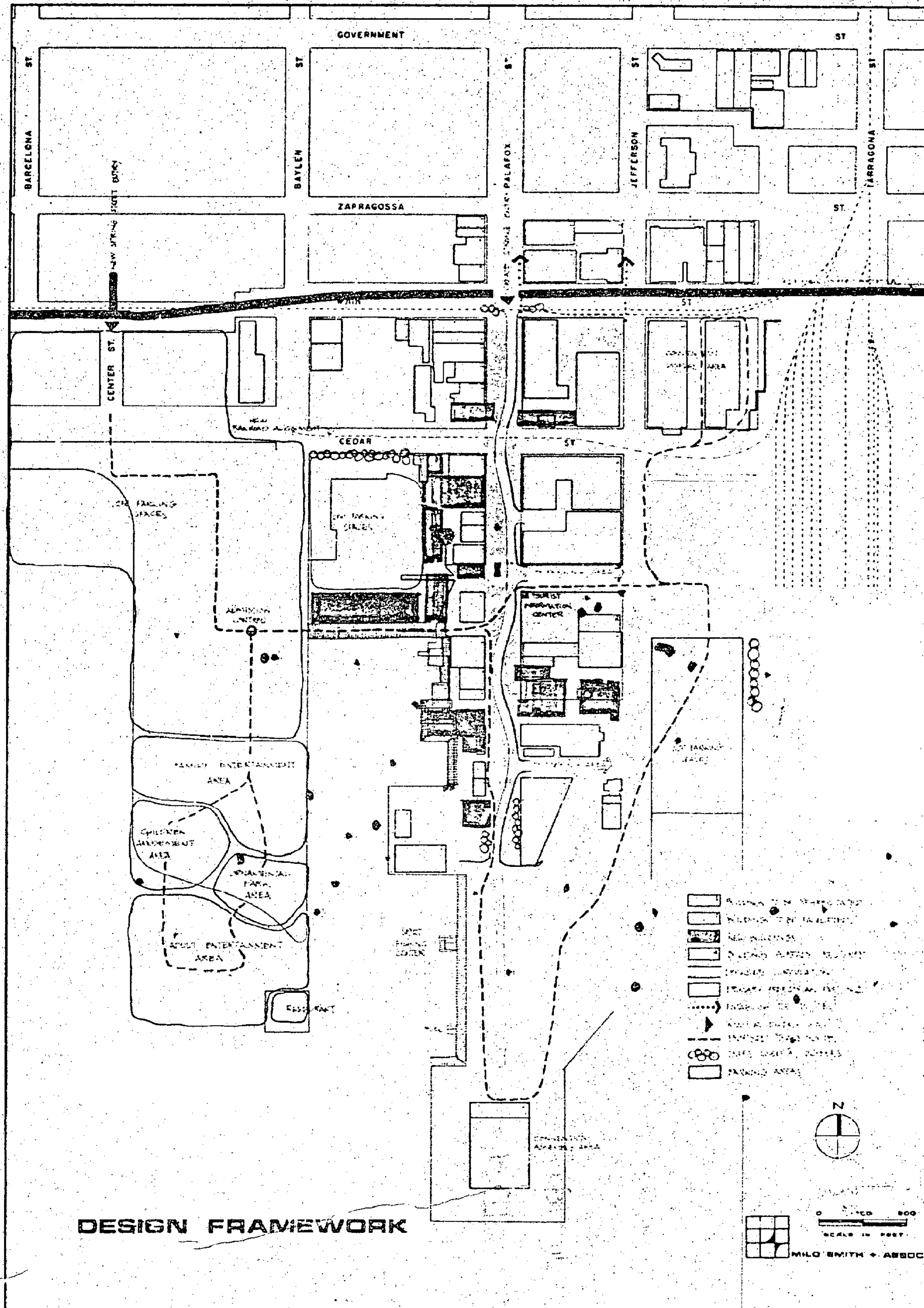

GOVERNMENT
BARCELONA ST.
BAYLEN ST.
PALAFOX ST.
JEFFERSON ST.
TARRAGONA ST.
ZARRAGOSSA ST.
ENTRY TO C.B.D.
MAIN ST.
CENTER ST.
CEDAR ST.
POTENTIAL TOURIST ATTRACTION
PARKING
DESIGN ANALYSIS
MILO SMITH + ASSOC.
SCALE IN FEET
N

## WHAT IS THE FRAMEWORK FOR FUTURE DESIGN?

The design framework accomplishes dual purposes. It provides the first translation of projected space needs and begins to crystalize the form of Quayside Pensacola. Utilizing the Design Analysis and projected space requirements the following important elements emerge:

1. A pedestrian district is defined
2. South Palafox takes the form of a semi-mall
3. A system for physical development is displayed
   a. buildings to be rehabilitated
   b. buildings to be face-lifted only
   c. new buildings
4. A succession of spaces is created — using new and existing development — to create the desired character, scale and image.
5. A waterside walk is defined
6. New parking is incorporated
7. Convention facilities, employing existing buildings, are suggested
8. The amusement center is located
9. The introduction of a sport fishing center
10. Major landscape elements



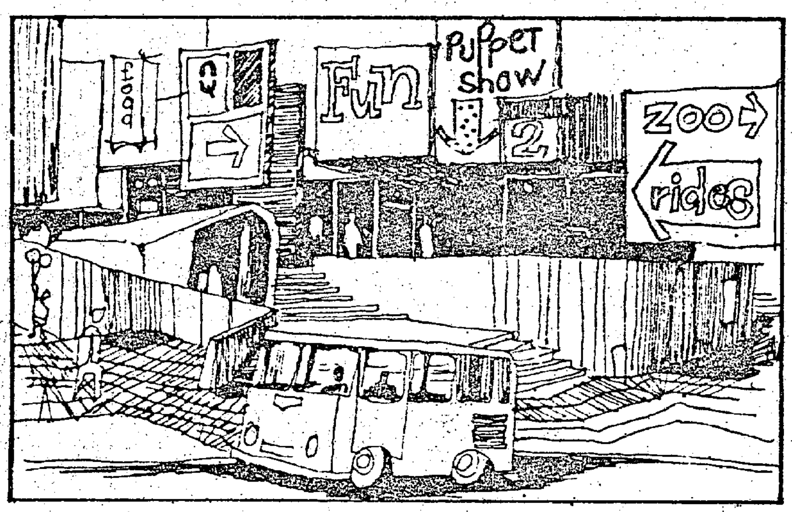


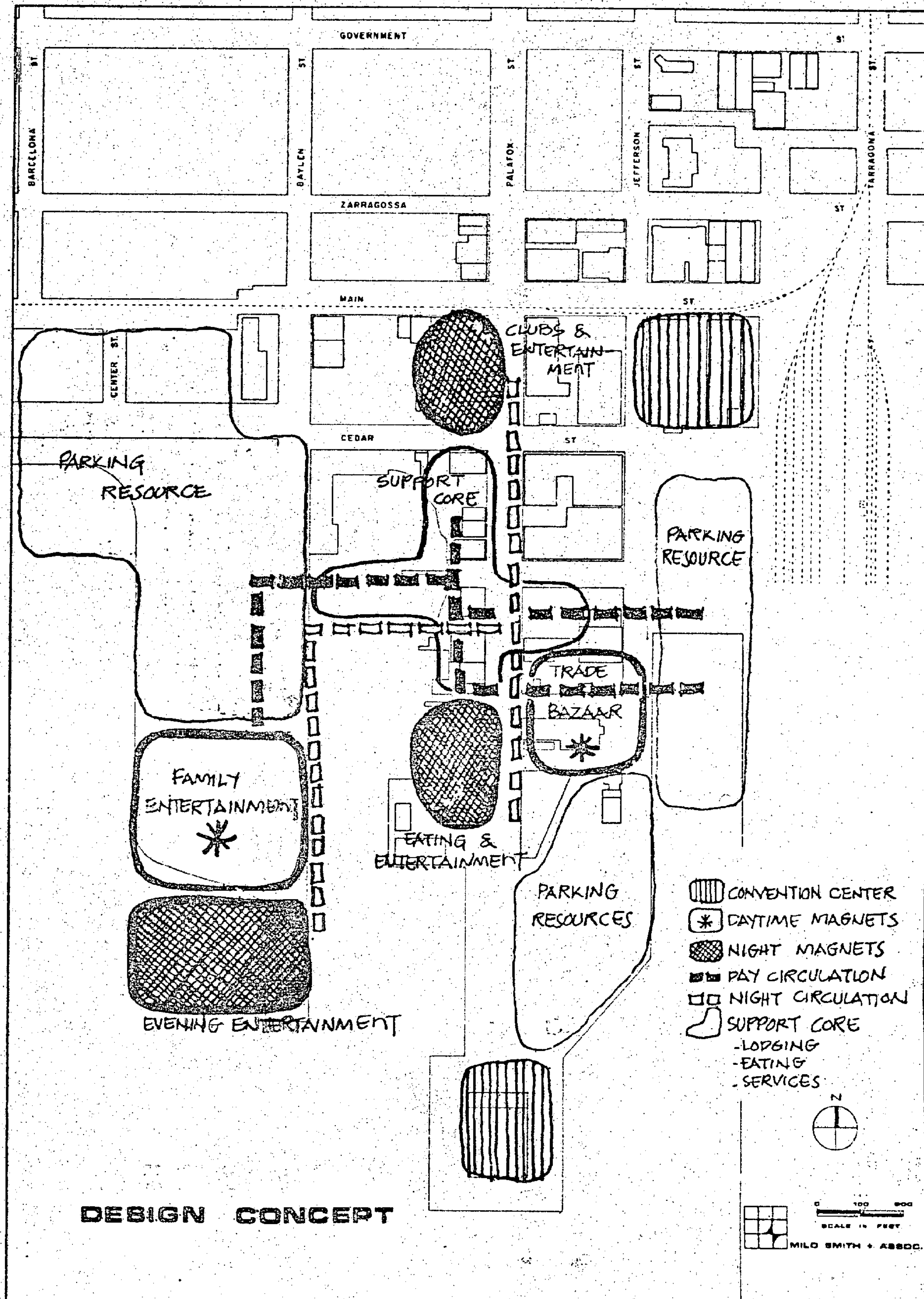

DESIGN FRAMEWORK

## WHAT IS THE CONCEPT FOR FUTURE DESIGN?

A derivative of the design framework is the design concept. This is largely an activity diagram which explains the nature of the area as it was conceived. Quayside Pensacola was envisioned as both a day and night activity center. In order to accomplish this several major elements were central to the success of the desired goal. The elements and their arrangement are explained in the accompanying diagram:

1. Daytime Activity Generators
   - Family and children's amusement centers
   - An international trade bazaar
   - Convention display and assembly areas
   - Sport fishing center
2. A core of supportive uses
   - 250 room motel
   - eating places
   - boutiques and haberdasheries
   - specialty shops
   - personal services
   - tourist information
3. Nighttime Activity Generators
   - Adult entertainment areas
   - Major restaurants
   - Night clubs and related entertainment
4. Convenient Parking Resources and Circulation
   - a potential for access to 2,500 parking spaces
   - a well defined pedestrian system
   - an electric tram system (oriented to the convention center and amusement area).

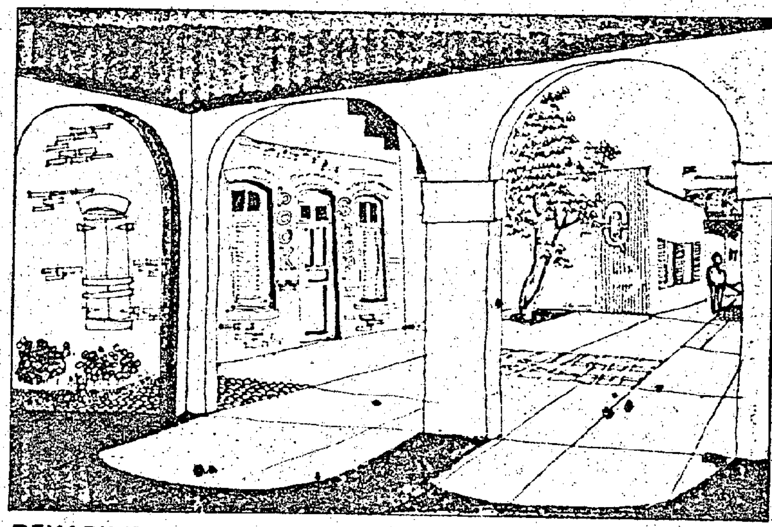




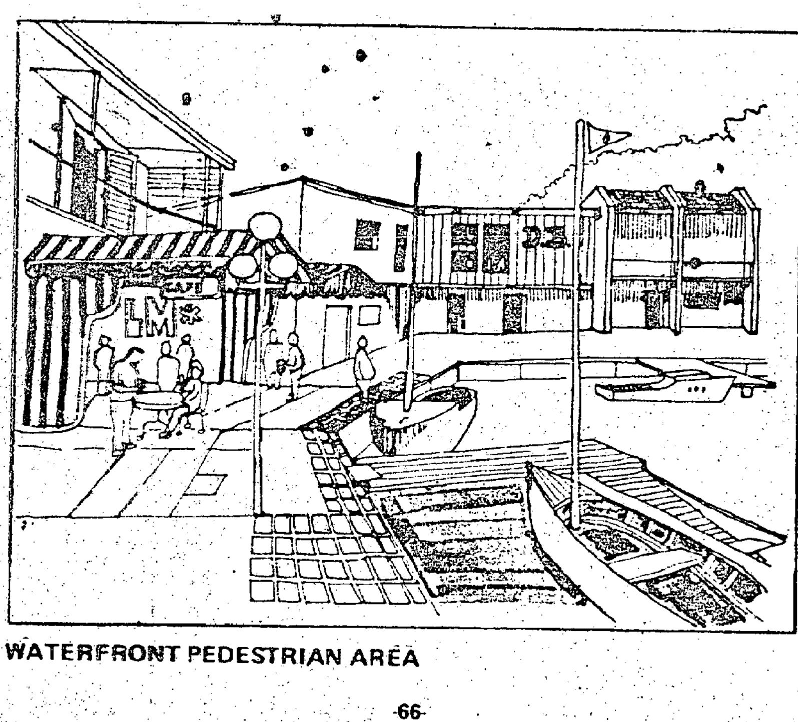

DESIGN CONCEPT

## QUAYSIDE PENSACOLA: THE DEVELOPMENT PLAN

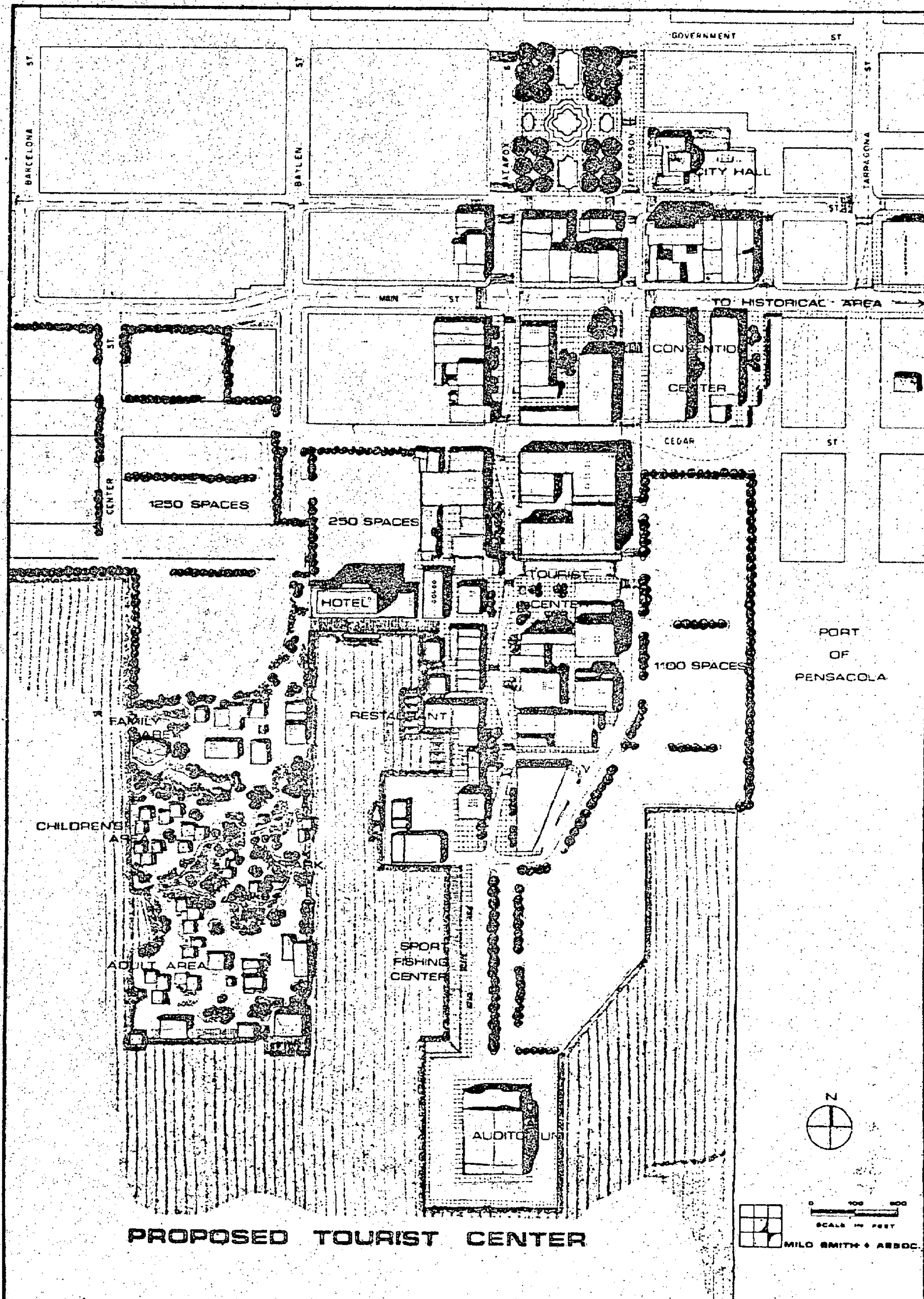
The culumination of the various studies is the proposed district: Quayside Pensacola. A lively combination of entertainment and business, the new tourist district becomes a mutually supporting whole. Whether it is day or night, residents or visitors are exposed to a variety of activities to meet a range of needs and demand. Properly oriented to the downtown, the Historic Area and proposed Governmental Center, Quayside Pensacola works toward the overall goal of reinforcing Pensacola as the region's center while providing a dynamic, new addition to the overall tourist economy.



REHABILITATION IN THE PALAFOX AREA.



WATERFRONT PEDESTRIAN AREA



PROPOSED TOURIST CENTER

## HOW CAN WE IMPLEMENT QUAYSIDE PENSACOLA?

The question of how Quayside Pensacola becomes a reality is important to everyone involved. While this proposal is not a complete construction and financial program, it is nevertheless important to outline the responsibilities and actions inherent in accomplishing the stated goals. Decisions and commitments by private businessmen and the City will be necessary to bring Quayside Pensacola to fruition. Unless the decisions and commitments are firmly made, the plan will never become a functioning reality. The implementation effort will require a closely coordinated action plan by both the local government and private entrepreneurs.

Overall public responsibilities supporting implementation are:

- environmental protection and pollution control
- aesthetic considerations in local public works projects
- provide suitable access and visibility to major tourist attractions
- create climate conducive to continued development of tourist economy
- encourage development of major tourist attraction in appropriate location

Basic City responsibilities involve the following areas:

- improvement of street rights-of-way
- fill portions of slips to provide space for additional parking
- provide for relocation of tank farm to other port area
- make Baylen Street Wharf property available for development by private capital within plan framework
- provide traffic planning and controls in Quayside Pensacola area to improve access levels
- improve Municipal Auditorium to better accommodate convention activities
- protect integrity of plan by institution of proper zoning regulations that will encourage development according to plan goals
- assist public and private groups in recruiting major tourist attraction and proposed motor hotel

The primary responsibilities of private businessmen are:

- formation of a viable organization of area businessmen and property owners that will lead to establishment of a Local Development Corporation empowered to receive loans under the Small Business Administration's "502 Program"
- establish firm support by local financial institutions
- pledge reasonable amount of seed money to show active commitment to implementing Quayside Pensacola
- willingness on the part of local businessmen to begin, relocate or open branch operations in Quayside Pensacola

Definition of responsibilities, alone, will not accomplish the task. Concerted actions by all involved groups will be necessary to reach these plan objectives. Scheduling, coordination and widespread support are integral parts of making Quayside Pensacola a reality. In order to more clearly relate the implementation of this plan to a feasible action program, the major elements of the development process are portrayed in the following flow chart. This flow chart shows neither the time schedule which must be followed nor all of the actions that must be undertaken. Rather, it identifies the sequences and relationships of the major tasks that the City, local businessmen, and the developer of the tourist attraction must complete to implement Quayside Pensacola.

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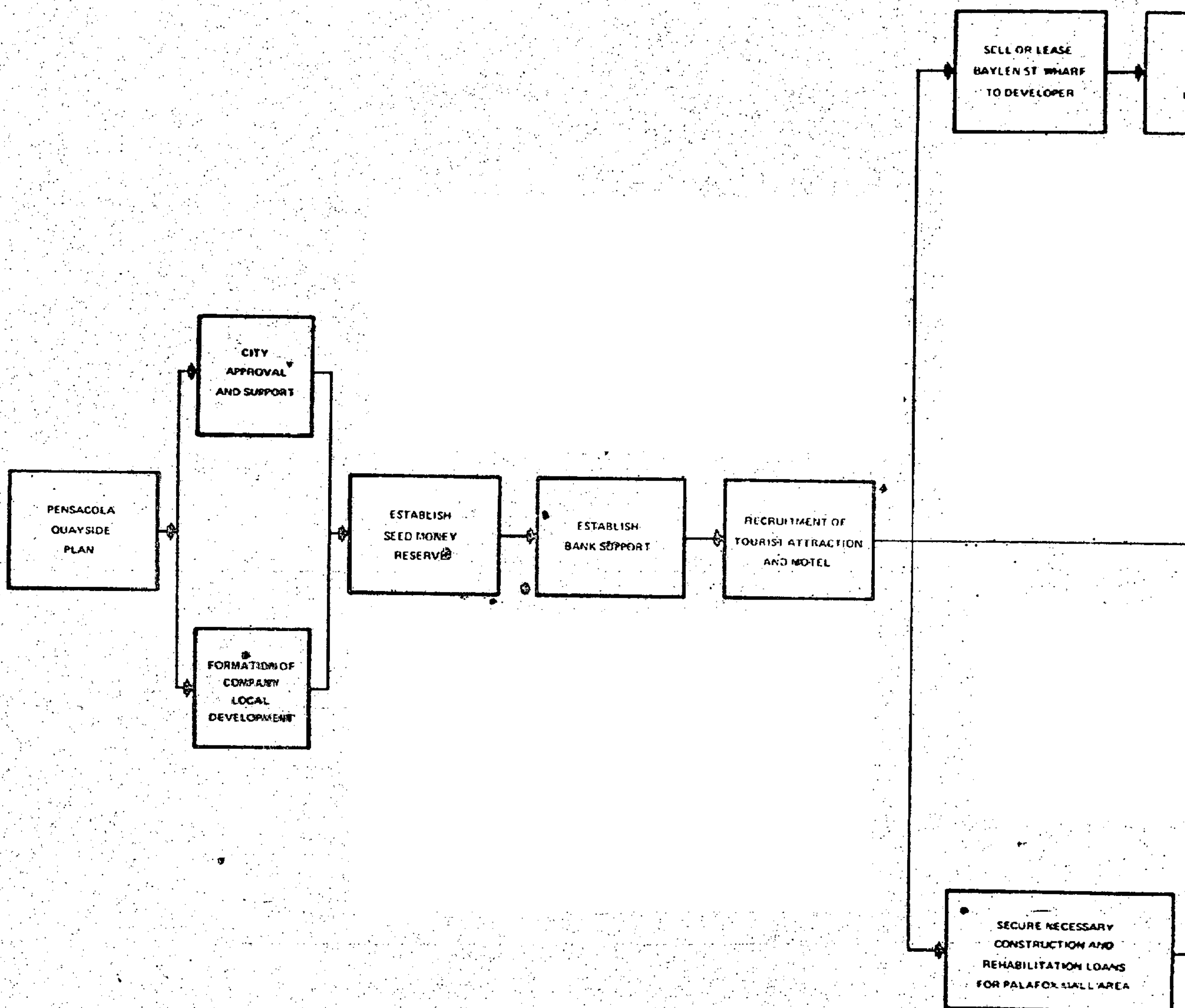


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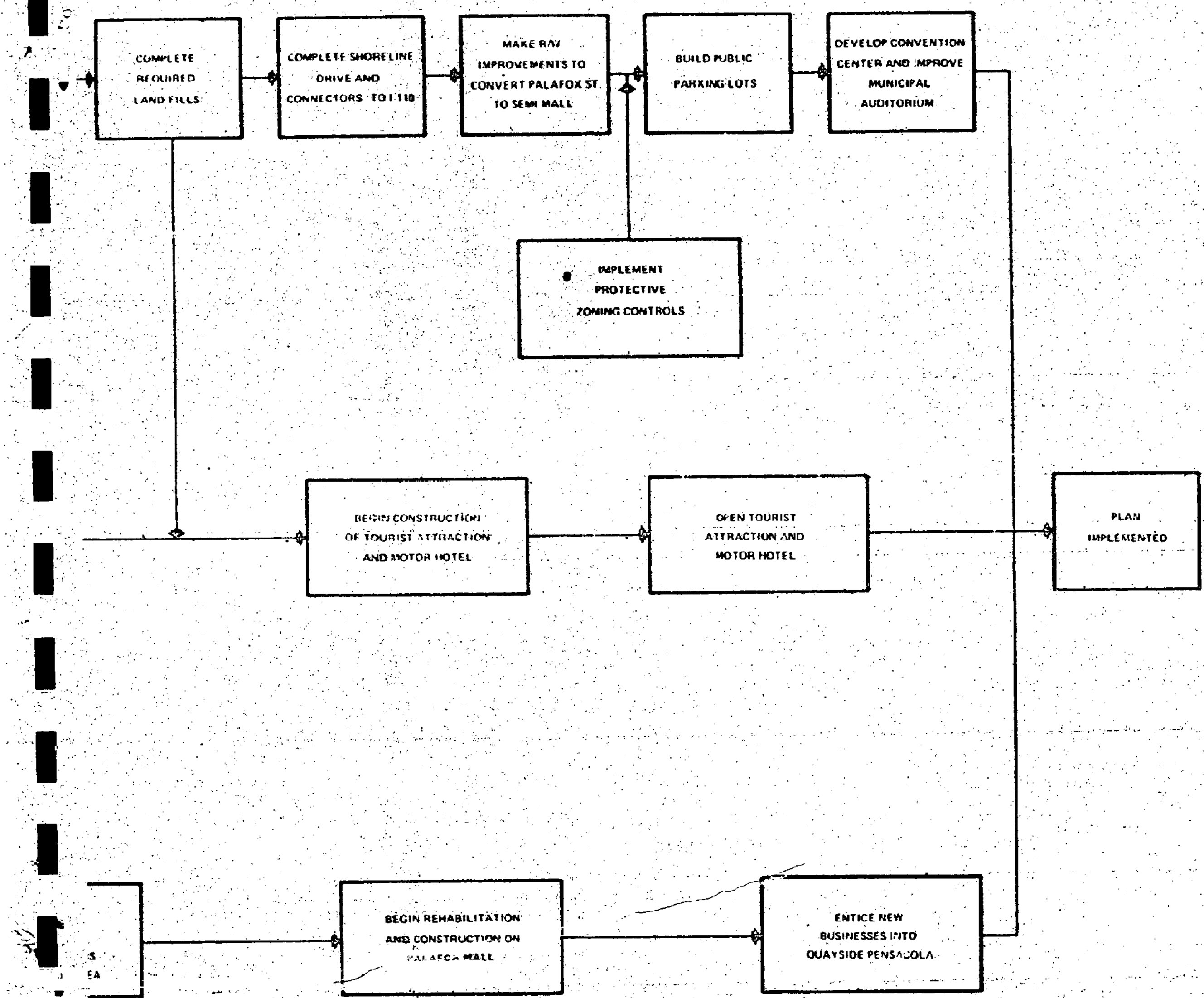
CITY PLANNING CONSULTANTS

B

# QUAYSIDE PENSACOLA



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