

Delray Beach Visitor Profile

April 2021

A Platform to bolster the tourism economy



Delray Beach Visitor Profile



Methodology

DTPB acquired 2019 & 2020 cell phone location data for Delray Beach Downtown Development Authority District (highlighted in black on the map). Data reflects domestic smart phones that have common evening locations 50+ miles outside PBC and have spent at least 4 hours in PBC

DTPB analyzed the data to create a visitor profile report including the following data points:

- Visitation by quarter for 2019 & 2020
- Visitation by US metro areas
- Visitation for special events
- Length of Stay
- Cross visitation with Public Beach, Other cities
- Visitor's utilization of PBI or FLL

Delray Beach Visitor Profile

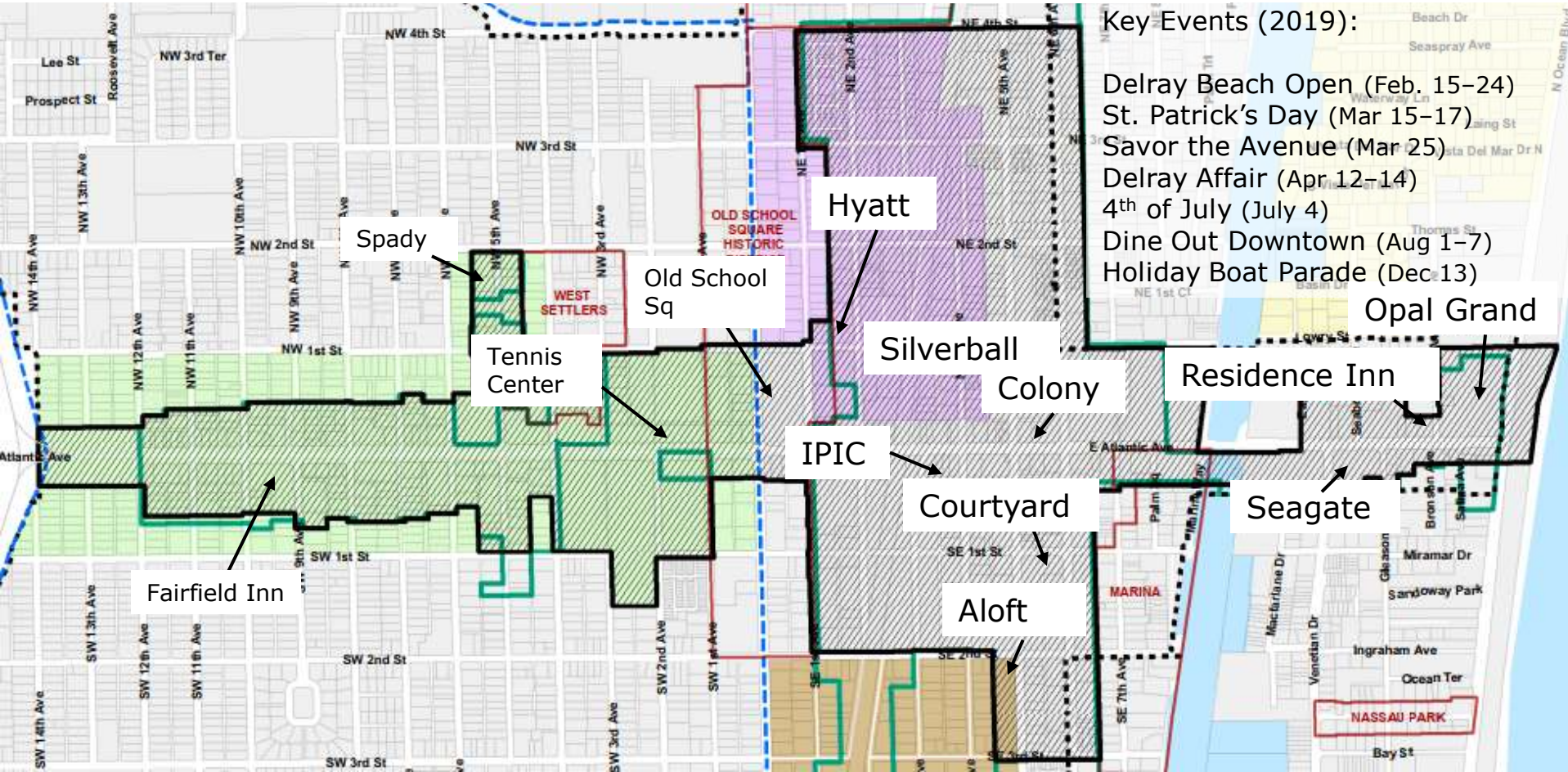


Methodology

The study area focused on the DDA District provided by the Delray Beach DDA and excluded unincorporated Delray Beach and areas of the city not included in the DDA District



Study Area



Key Events (2019):

- Delray Beach Open (Feb. 15-24)
- St. Patrick's Day (Mar 15-17)
- Savor the Avenue (Mar 25)
- Delray Affair (Apr 12-14)
- 4th of July (July 4)
- Dine Out Downtown (Aug 1-7)
- Holiday Boat Parade (Dec 13)

Opal Grand

Residence Inn

Seagate

NASSAU PARK

Delray Beach Visitor Profile



Total Visitation

511,000 Visitors staying 1.47M days in 2019. This dropped 43% to 293,000 visitors staying 757,000 days in 2020

Length of stay was 1.9 nights in 2019 (8% day trips) which declined to 1.6 nights in 2020 (11% day trips)

4,075 visitors on an average day in 2019. 2,365 visitors on an average day in 2020 (-42%)

Delray Beach Visitor Profile



Key Takeaways

6% of PB's Visitation in 2019 & 5.6% in 2020

More seasonal than PB's with proportional annual visitation at 33% in Winter and 14% in Summer

High share of visitation from Cleveland, Charlotte, New York, Boston, Philadelphia and Hartford

Low share of visitation from Florida drive markets

2020 recovery showed significant drive market visitation

Some events were extremely effective at drawing visitors like Delray Open and Affair compared to others

Delray Beach Visitor Profile



Recommendations

Given Delray's tourism appeal there is an opportunity to increase share of visitors and reduce seasonality

Increase visitation from Florida markets to help summer performance

Increase visitation from restaurant and other related events

Align Delray Beach promotional efforts to show PBI as the convenient fly option

Detailed Findings

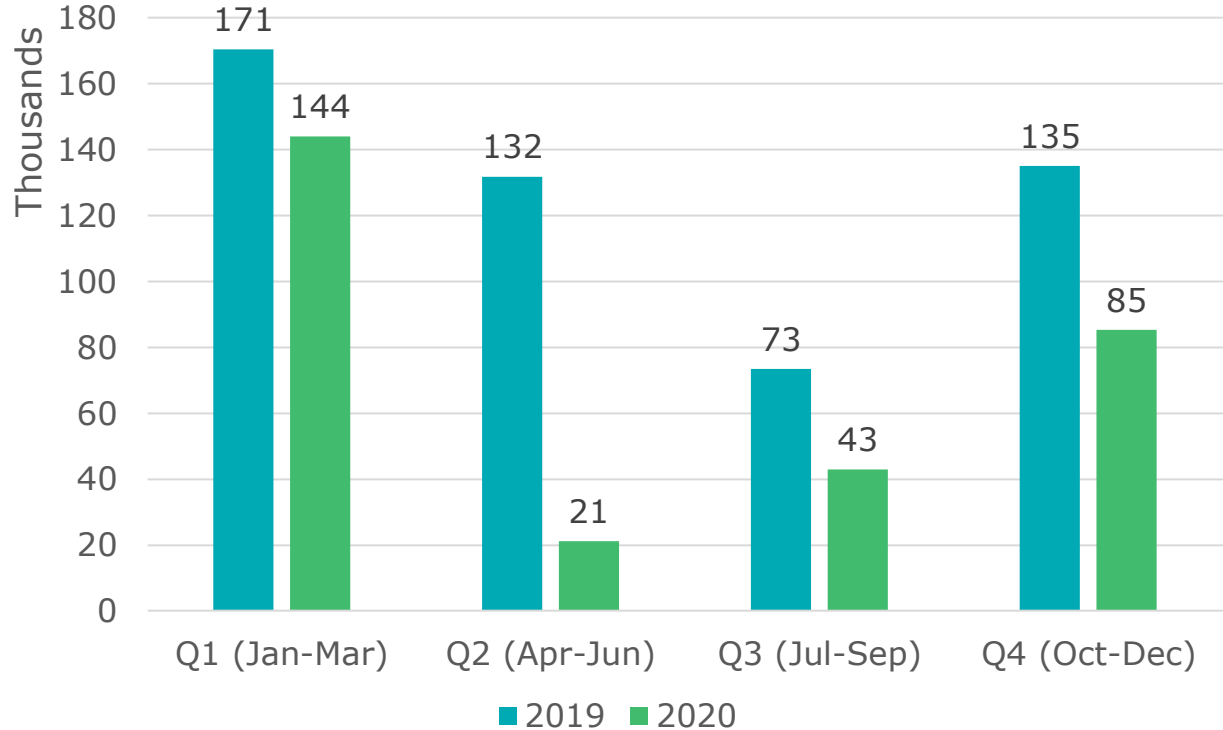


Delray Beach Visitor Profile

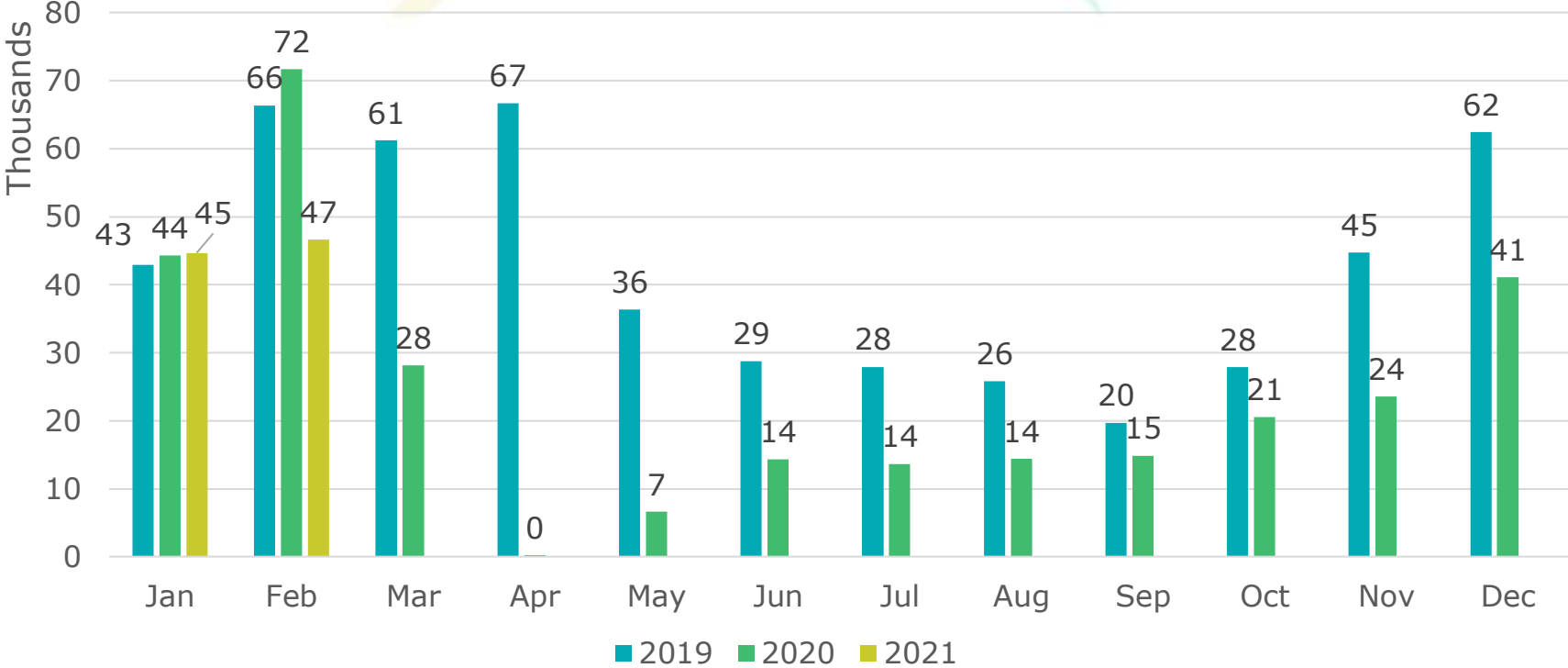
Over 2019, 33% of visits occur in Q1 and 14% in Q3. This is higher seasonality than The Palm Beaches overall (29% in Q1 and 20% in Q3)

The 2020 pandemic hit Downtown Delray initially harder with visitation dropping 85% but has rebounded 300%, compared to the Palm Beaches up 63% since Q2 2020

Visitation by Quarter



Downtown Delray Visitation by Month



Visitors in Market by Month & Day of Week

The average number of visitors in downtown Delray on a given day peaks over 6,500 in February and April. September has a low of 1,900 daily visitors on average

Month (2019)	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Month Total
Jan	4,430	3,405	2,637	2,963	4,037	5,239	5,156	3,907
Feb	7,044	6,222	6,402	6,312	6,916	7,292	7,142	6,761
Mar	5,829	4,639	4,494	5,013	6,025	6,806	7,235	5,807
Apr	7,550	6,639	5,209	5,961	6,107	6,817	7,655	6,520
May	4,089	2,677	2,551	2,657	2,950	3,945	4,158	3,279
Jun	4,149	3,538	1,955	1,682	1,826	2,011	4,179	2,856
Jul	3,389	2,843	2,088	1,889	2,416	3,014	3,457	2,684
Aug	3,141	2,880	1,861	2,074	1,891	2,234	2,796	2,401
Sep	2,687	2,090	1,070	955	1,210	1,965	3,033	1,894
Oct	4,019	3,013	1,698	1,554	1,840	2,779	4,107	2,617
Nov	5,303	3,846	2,789	2,632	3,290	4,585	5,744	4,103
Dec	6,956	6,396	5,718	4,149	4,719	5,489	6,623	5,783
Day of Week Total	4,884	4,052	3,231	3,085	3,531	4,351	5,098	4,031

Visitors in Market by Month & Day of Week

Downtown Delray had 6,300 visitors on any given day in February before bottoming to 0 during the COVID safer at home orders. Daily visitors was just over 1,000 until Q4, reaching 3,200 in December.

Month (2020)	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Month Total
Jan	4,713	3,943	3,082	2,415	2,825	3,850	4,964	3,621
Feb	6,605	6,316	5,833	5,853	5,852	6,476	6,947	6,292
Mar	3,654	2,903	2,029	2,171	2,030	2,396	2,654	2,579
Apr	0	21	21	27	33	33	12	22
May	666	425	451	450	406	537	718	533
Jun	1,572	1,113	974	1,067	1,010	1,331	1,661	1,233
Jul	1,391	1,116	823	776	1,074	1,278	1,465	1,123
Aug	1,678	1,270	843	750	847	1,291	1,711	1,233
Sep	1,898	1,720	1,086	918	855	901	1,698	1,277
Oct	2,331	1,833	1,399	1,135	1,336	1,619	2,304	1,713
Nov	2,510	2,067	1,642	1,415	1,598	2,314	2,821	2,068
Dec	3,719	3,621	2,765	3,172	3,377	2,825	3,532	3,270
Day of Week Total	2,528	2,168	1,743	1,659	1,766	2,052	2,570	2,067

Visitors in Market by Month & Day of Week (19 vs 20)

Throughout the pandemic the average daily number of visitors in downtown Delray went from 4,000 to 2,000 a 49% drop

Month (%CHG)	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Month Total
Jan	6%	16%	17%	-19%	-30%	-27%	-4%	-7%
Feb	-6%	2%	-9%	-7%	-15%	-11%	-3%	-7%
Mar	-37%	-37%	-55%	-57%	-66%	-65%	-63%	-56%
Apr	-100%	-100%	-100%	-100%	-99%	-100%	-100%	-100%
May	-84%	-84%	-82%	-83%	-86%	-86%	-83%	-84%
Jun	-62%	-69%	-50%	-37%	-45%	-34%	-60%	-57%
Jul	-59%	-61%	-61%	-59%	-56%	-58%	-58%	-58%
Aug	-47%	-56%	-55%	-64%	-55%	-42%	-39%	-49%
Sep	-29%	-18%	2%	-4%	-29%	-54%	-44%	-33%
Oct	-42%	-39%	-18%	-27%	-27%	-42%	-44%	-35%
Nov	-53%	-46%	-41%	-46%	-51%	-50%	-51%	-50%
Dec	-47%	-43%	-52%	-24%	-28%	-49%	-47%	-43%
Day of Week Total	-48%	-46%	-46%	-46%	-50%	-53%	-50%	-49%

Event Impact on **Visitors** in Market per Day

Month	Feb	Mar	Apr	Jul	Aug	Dec	Day of Week Total
Key Event Avg. daily visitors in market	Delray Open 10,870	St. Patrick's 6,908 Savor Ave 4,600	Delray Affair 8,195	4th of July 3,710	Restaurant Week 1,945	Boat Parade 2,500	All Events 6,900
Sun	7,044	5,829	7,550	3,389	3,141	6,956	4,884
Mon	6,222	4,639	6,639	2,843	2,880	6,396	4,052
Tues	6,402	4,494	5,209	2,088	1,861	5,718	3,231
Wed	6,312	5,013	5,961	1,889	2,074	4,149	3,085
Thur	6,916	6,025	6,107	2,416	1,891	4,719	3,531
Fri	7,292	6,806	6,817	3,014	2,234	5,489	4,351
Sat	7,142	7,235	7,655	3,457	2,796	6,623	5,098
Total	6,761	5,807	6,520	2,684	2,401	5,783	4,031

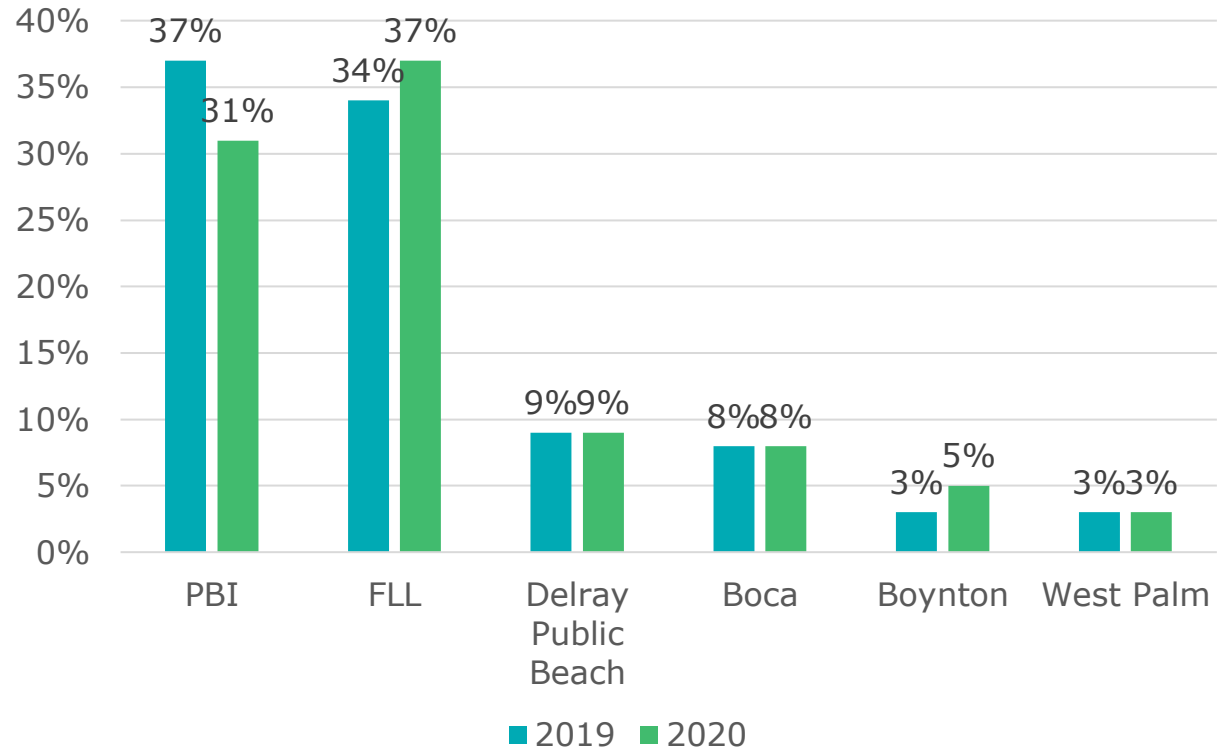
Delray Beach Visitor Profile

In 2019, visitors used PBI more than FLL but in 2020 FLL became more popular, most likely due to lack of flights in PBI.

Delray Public Beach saw 3.2 M and 2 M annual visits of which 130,000 and 70,000 were from visitors, in 2019 and 2020 respectively.

There is slight cross visitation between Boca, Boynton and WPB

Cross Visitation

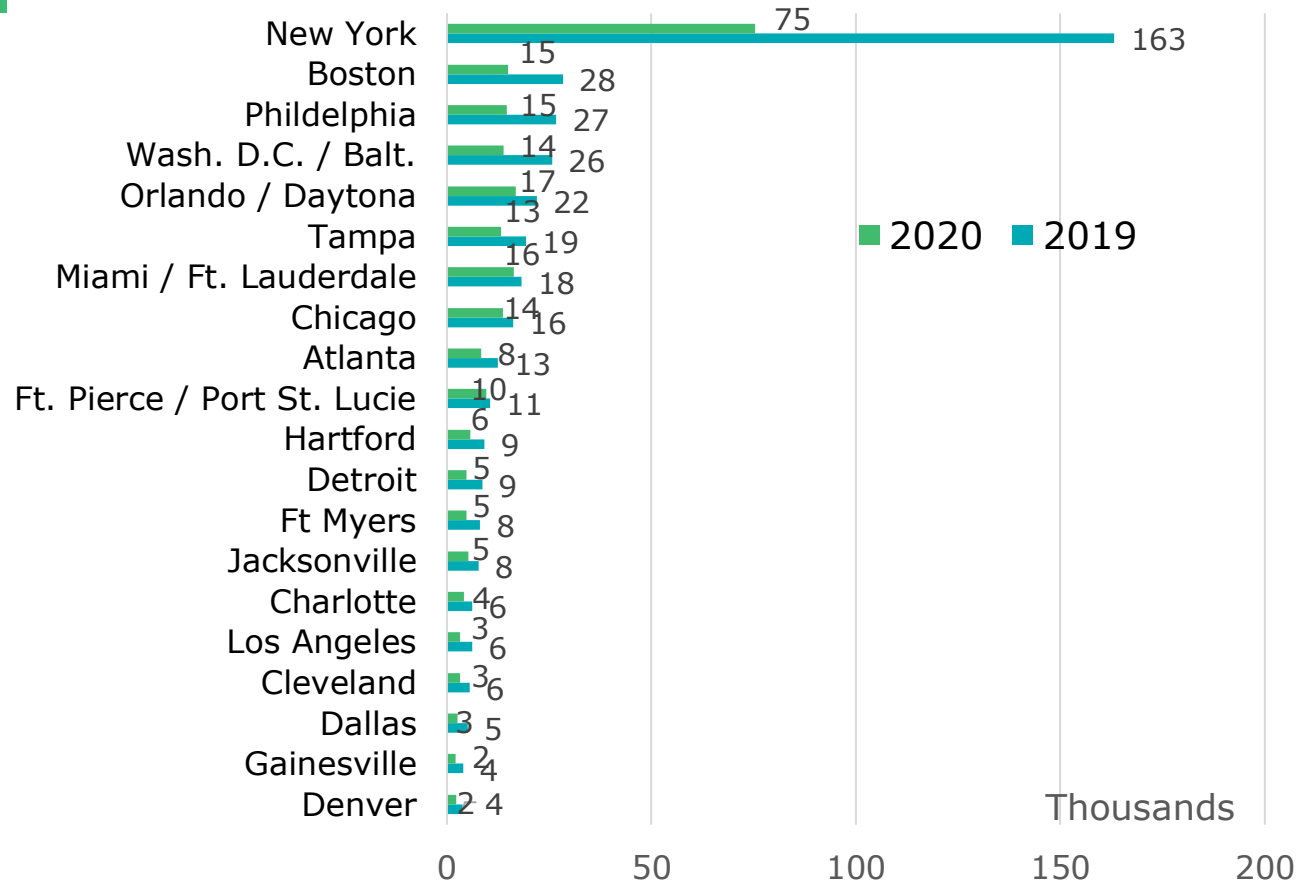


Delray Beach Visitor Profile

80% of visitation comes from the top 20 origin markets

Some unusual markets include Cleveland, Charlotte with high share of visitation as well as New York, Boston, Philadelphia and Hartford

Visitation by DMA

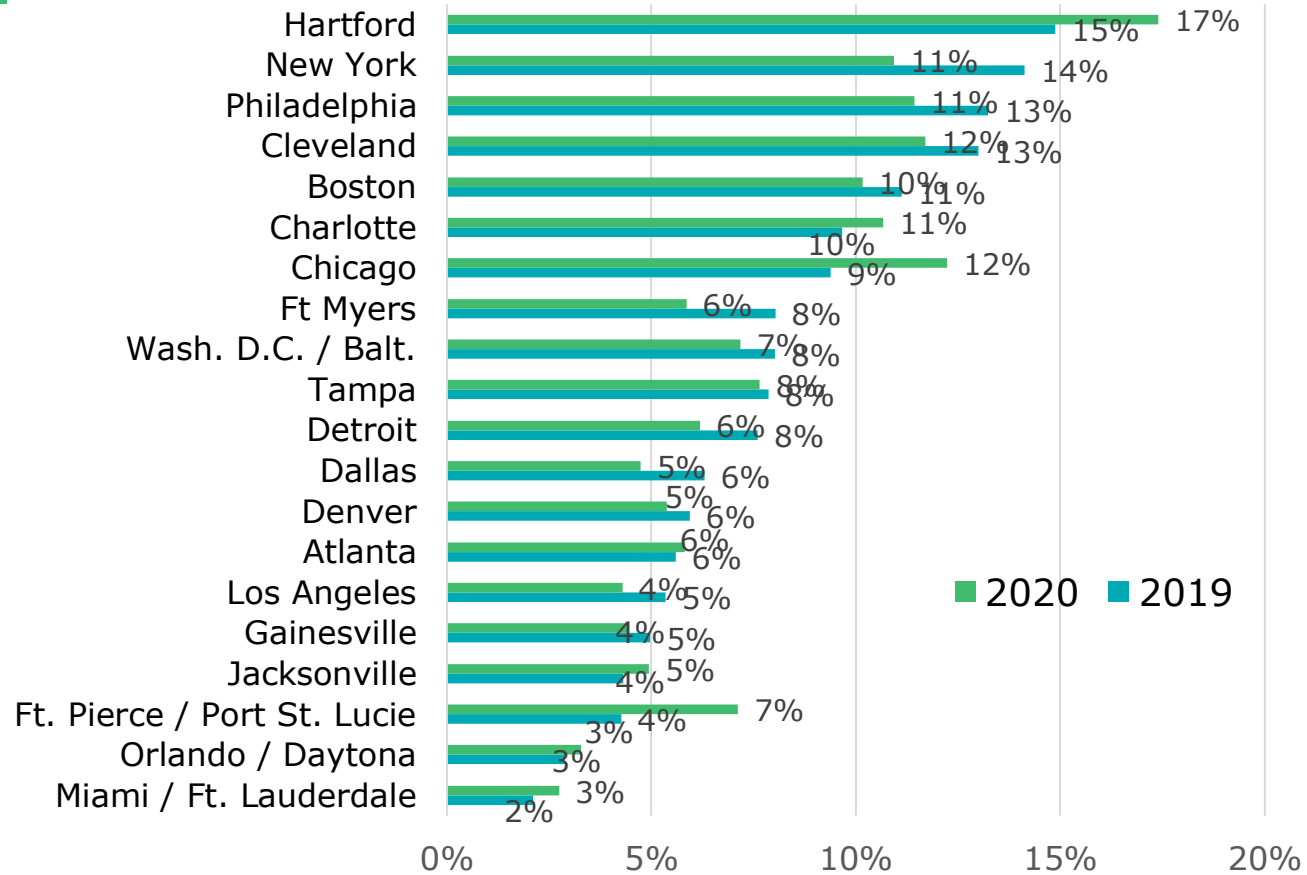


Delray Beach Visitor Profile

80% of visitation comes from the top 20 origin markets

Some unusual markets include Cleveland, Charlotte with high share of visitation as well as New York, Boston, Philadelphia and Hartford

Share of PBC Visitors in Delray by MSA



Appendix

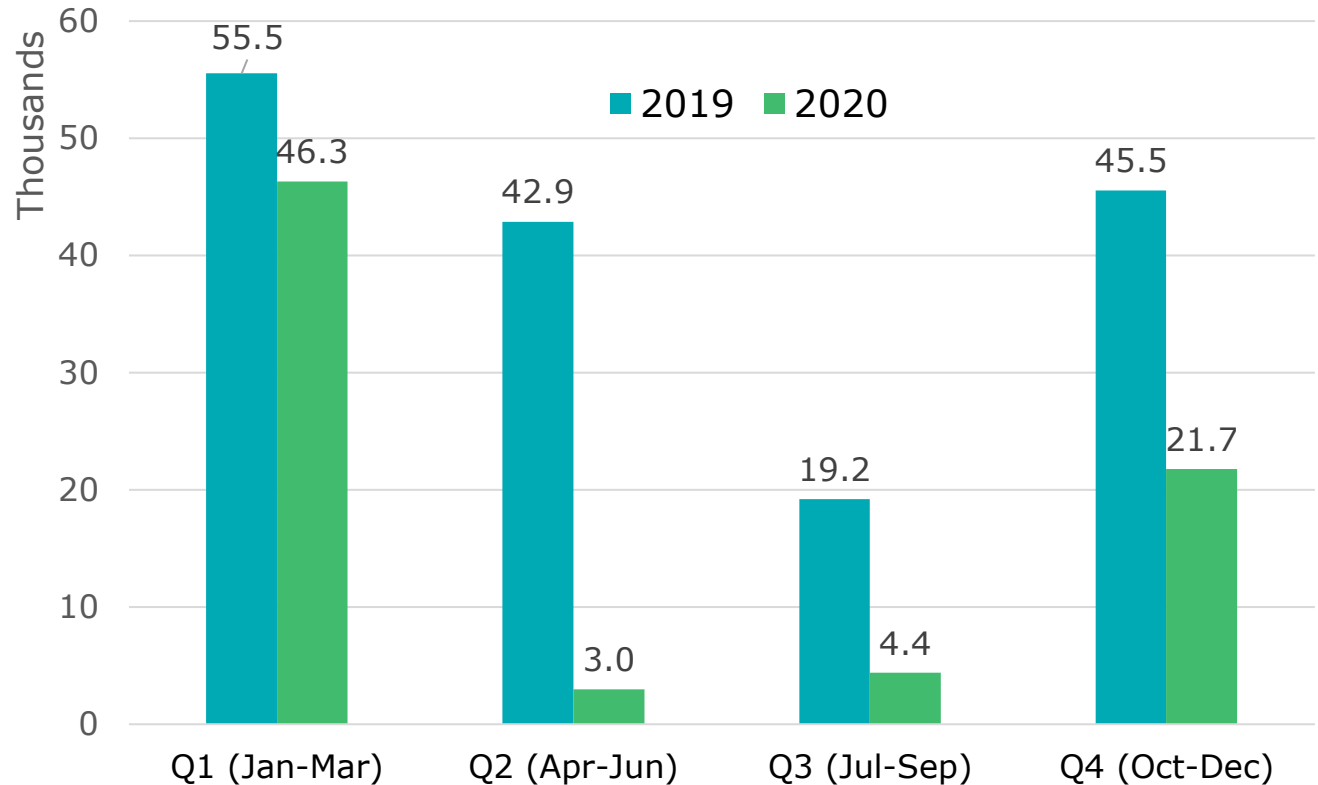


Delray Beach Visitor Profile

14% of Visits to The Palm Beaches captured in 2019 with 163,000 visitors

11% of Visits to The Palm Beaches captured in 2020 with 75,000 visitors

Visitation from New York

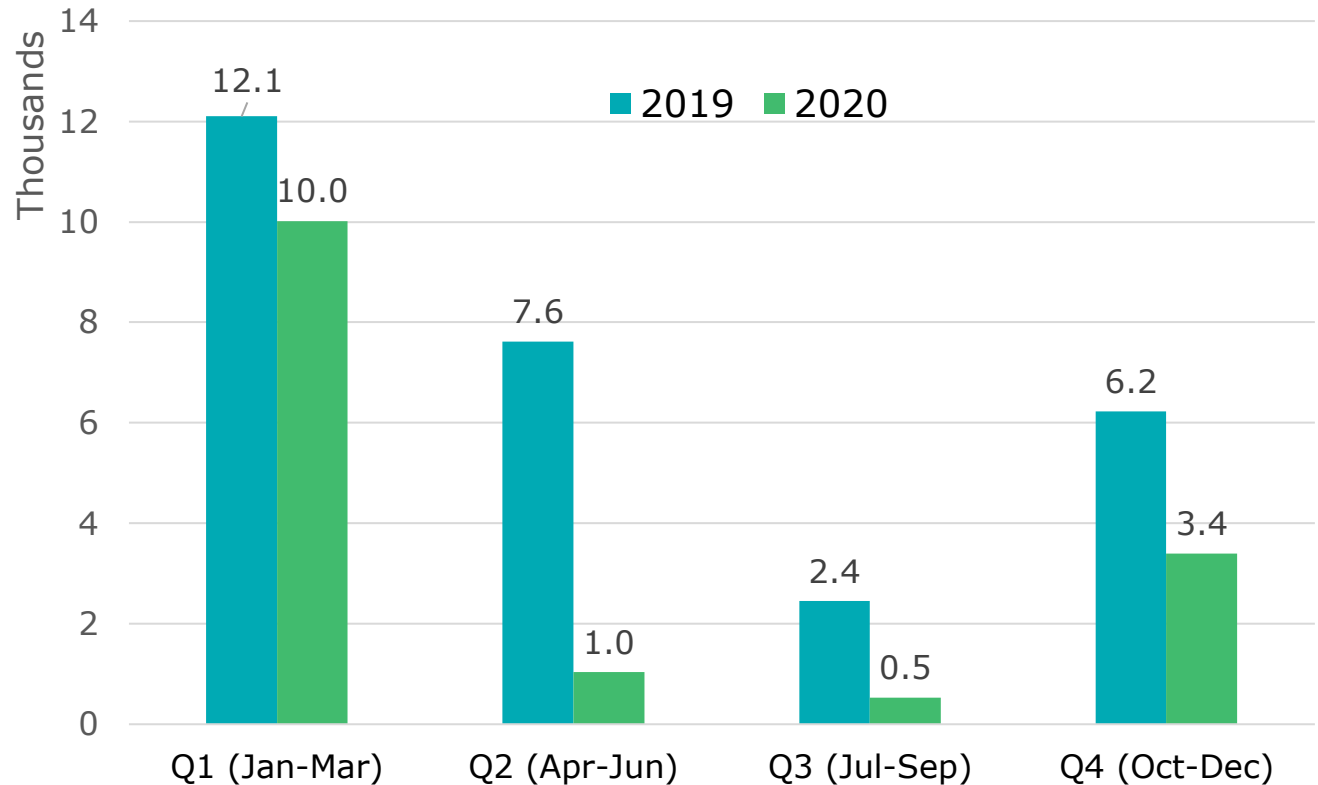


Delray Beach Visitor Profile

11% of Visits to The Palm Beaches captured in 2019 with 28,000 visitors

10% of Visits to The Palm Beaches captured in 2020 with 15,000 visitors

Visitation from Boston

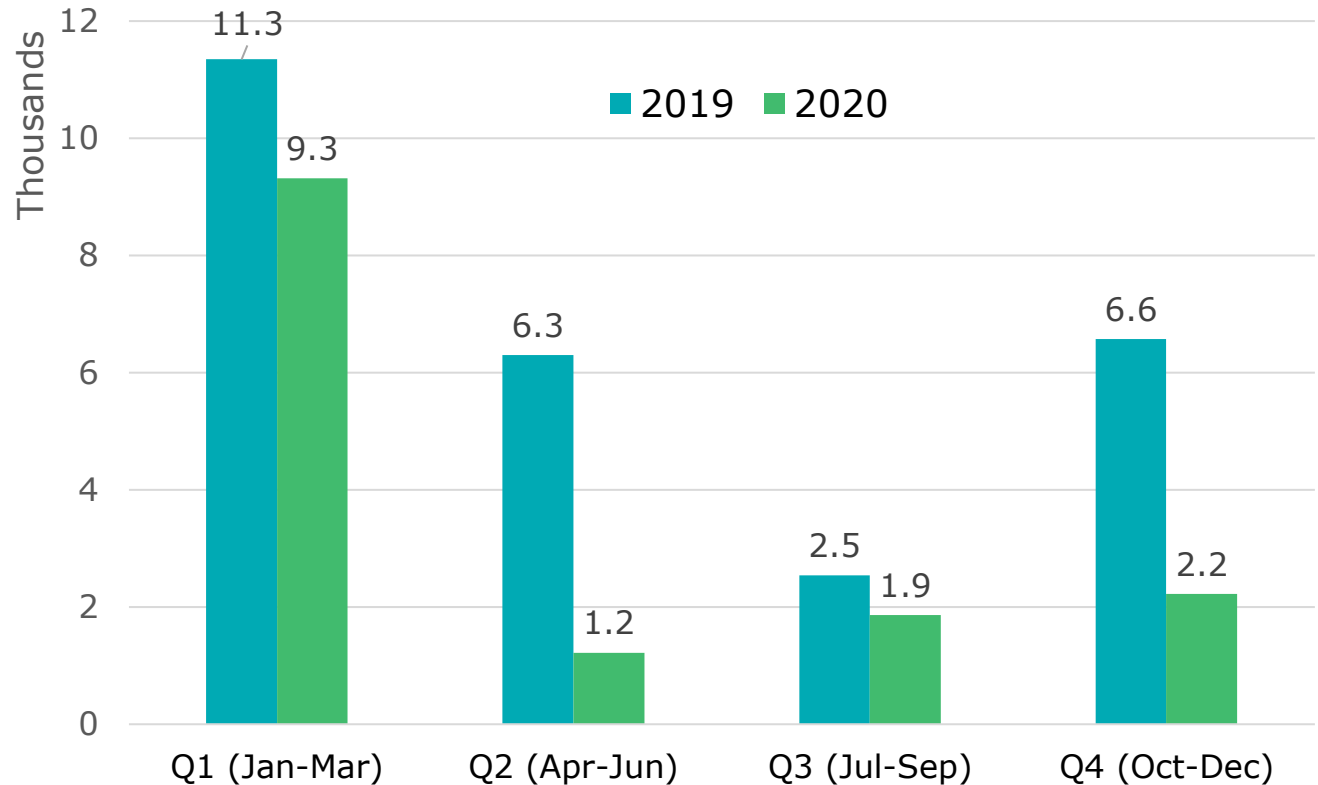


Delray Beach Visitor Profile

13% of Visits to The Palm Beaches captured in 2019 with 26,800 visitors

11% of Visits to The Palm Beaches captured in 2020 with 14,600 visitors

Visitation from Philadelphia

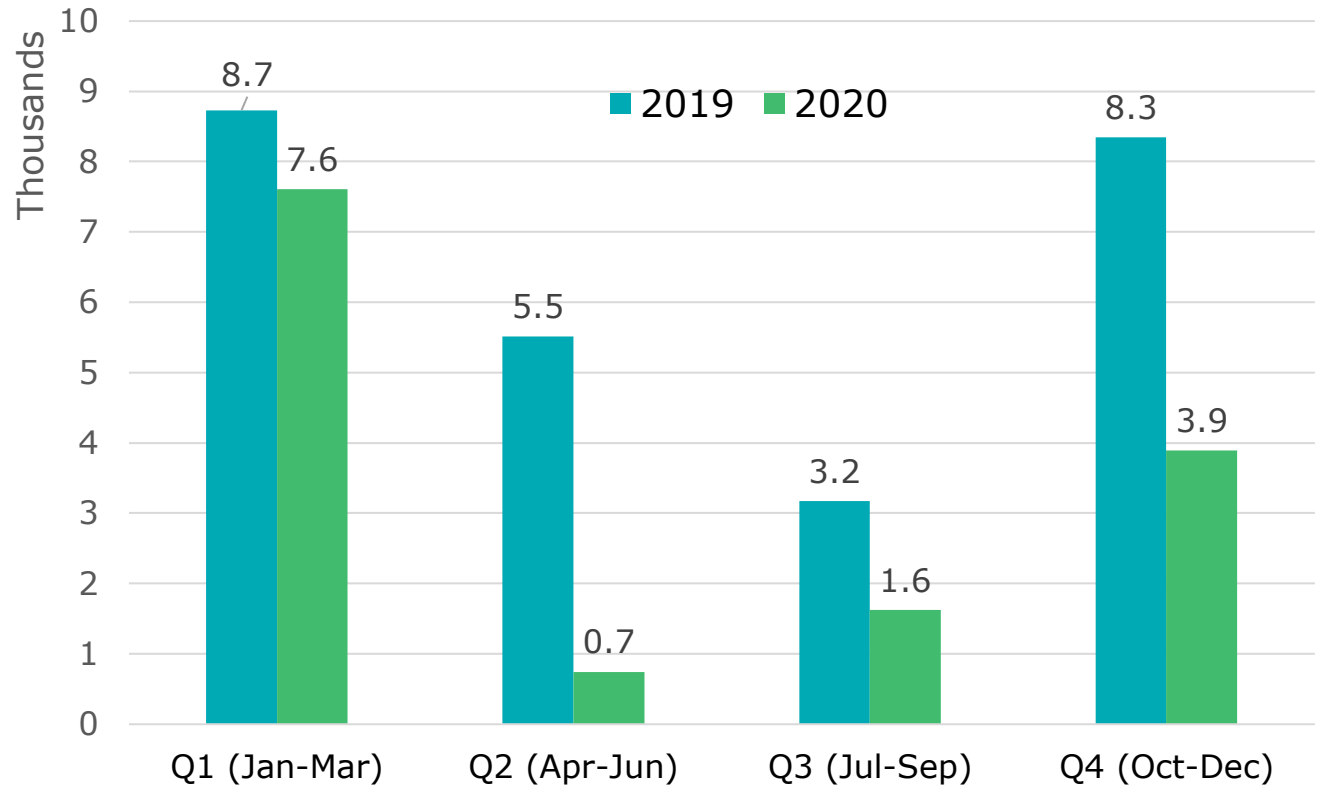


Delray Beach Visitor Profile

8% of Visits to The Palm Beaches captured in 2019 with 25,800 visitors

7% of Visits to The Palm Beaches captured in 2020 with 13,900 visitors

Visitation from Washington D.C. / Baltimore

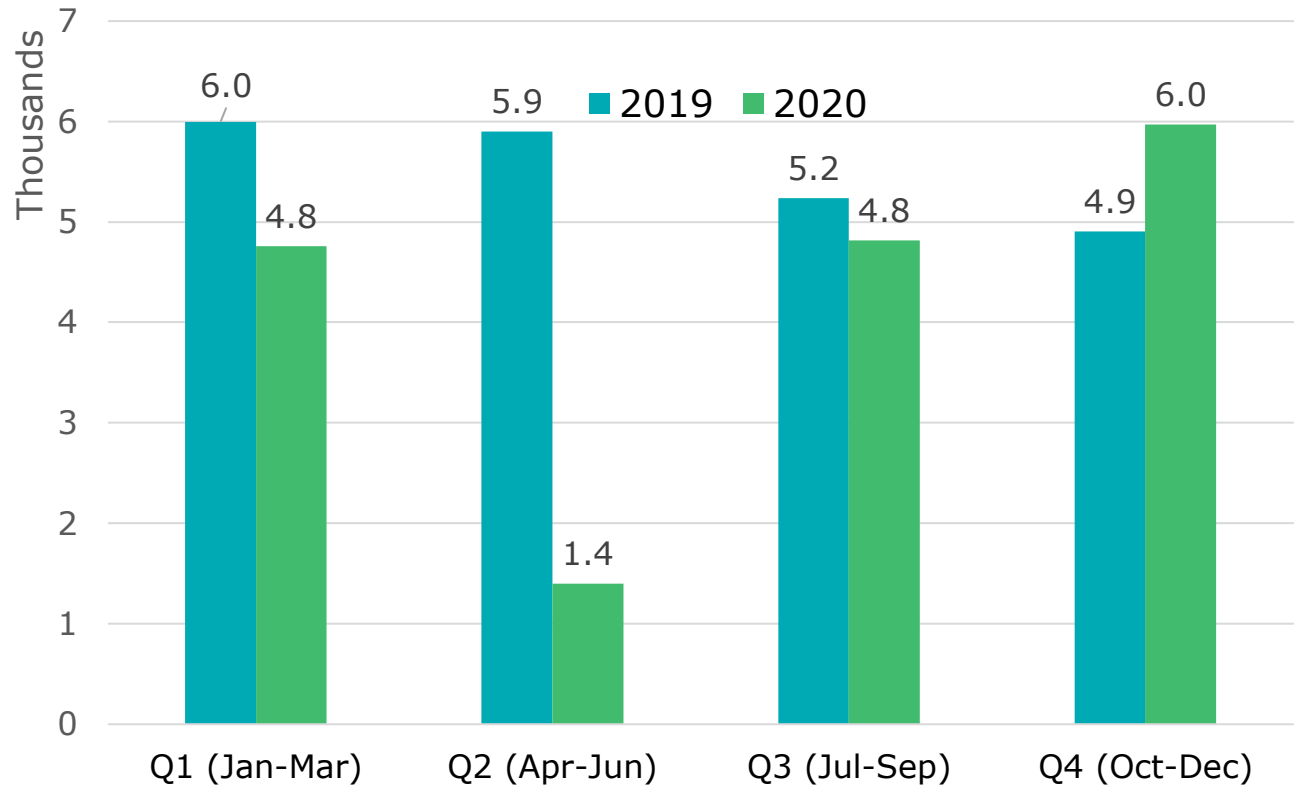


Delray Beach Visitor Profile

3% of Visits to The Palm Beaches captured in 2019 with 22,000 visitors

3% of Visits to The Palm Beaches captured in 2020 with 17,000 visitors

Visitation from Orlando / Daytona / Melbourne

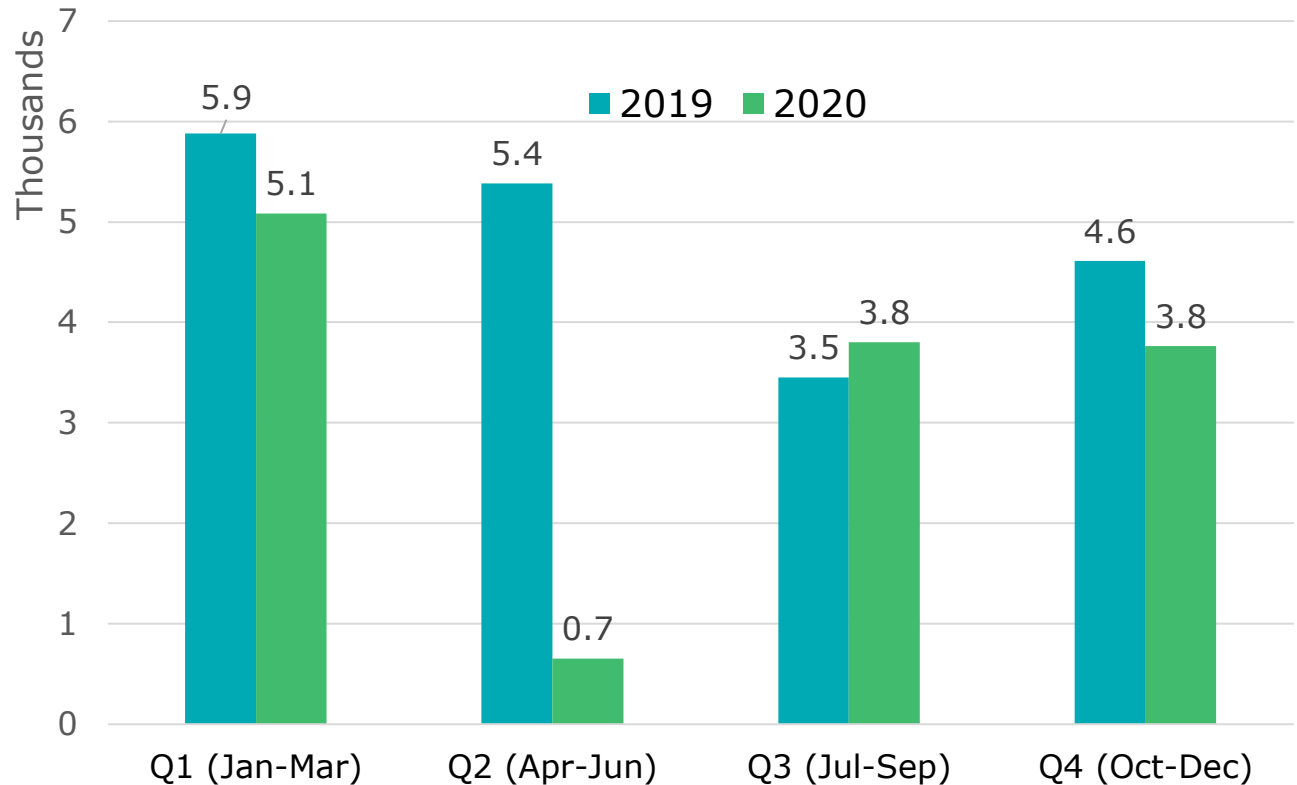


Delray Beach Visitor Profile

8% of Visits to The Palm Beaches captured in 2019 with 19,300 visitors

8% of Visits to The Palm Beaches captured in 2020 with 13,300 visitors

Visitation from Tampa / St. Pete

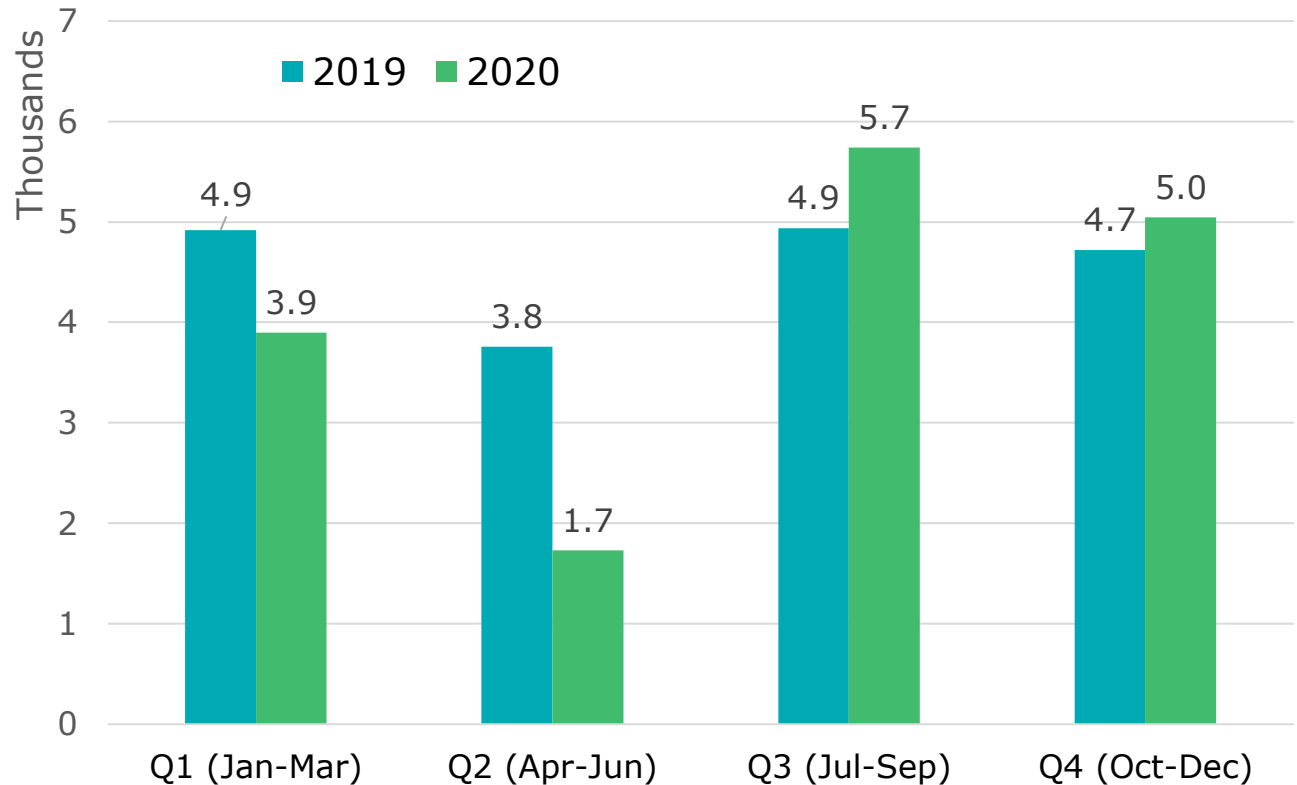


Delray Beach Visitor Profile

2% of Visits to The Palm Beaches captured in 2019 with 18,300 visitors

3% of Visits to The Palm Beaches captured in 2020 with 16,400 visitors

Visitation from Miami / Ft. Lauderdale

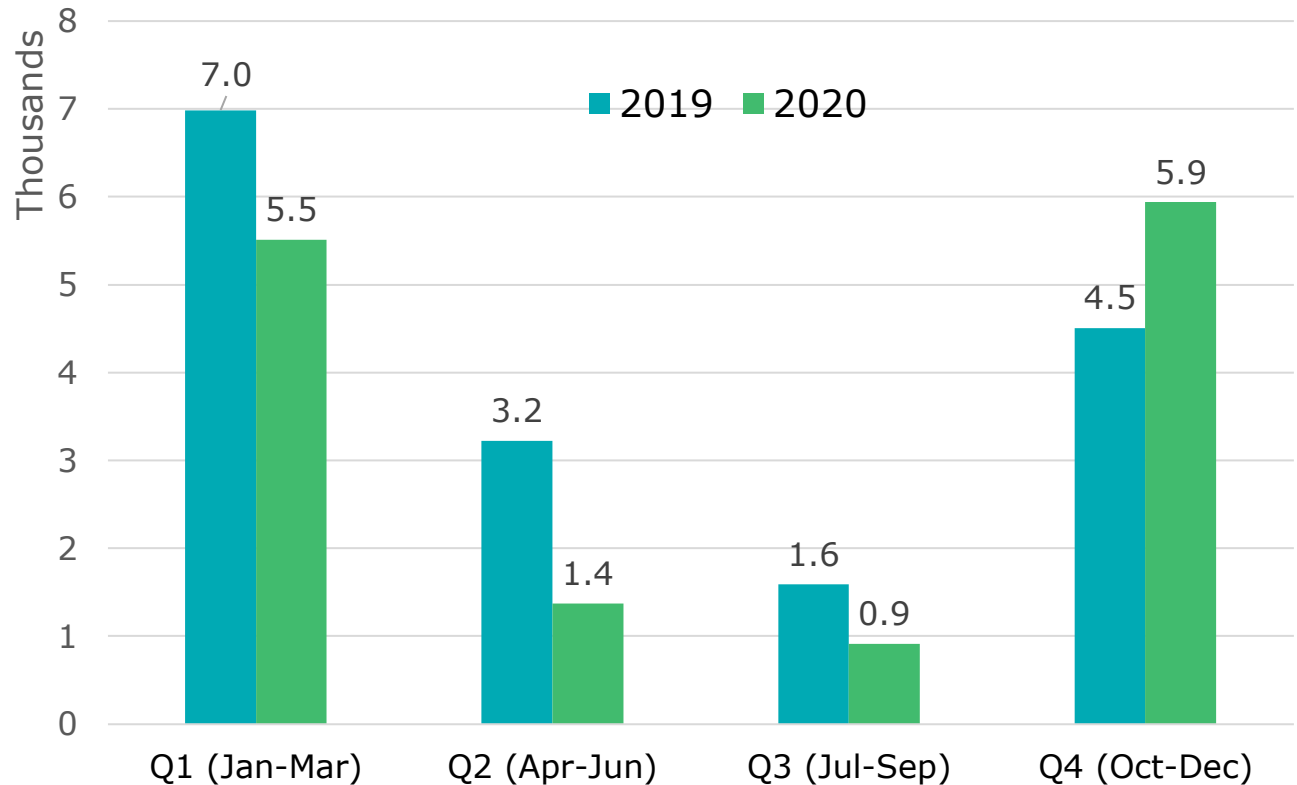


Delray Beach Visitor Profile

9% of Visits to The Palm Beaches captured in 2019 with 16,300 visitors

12% of Visits to The Palm Beaches captured in 2020 with 13,700 visitors

Visitation from Chicago

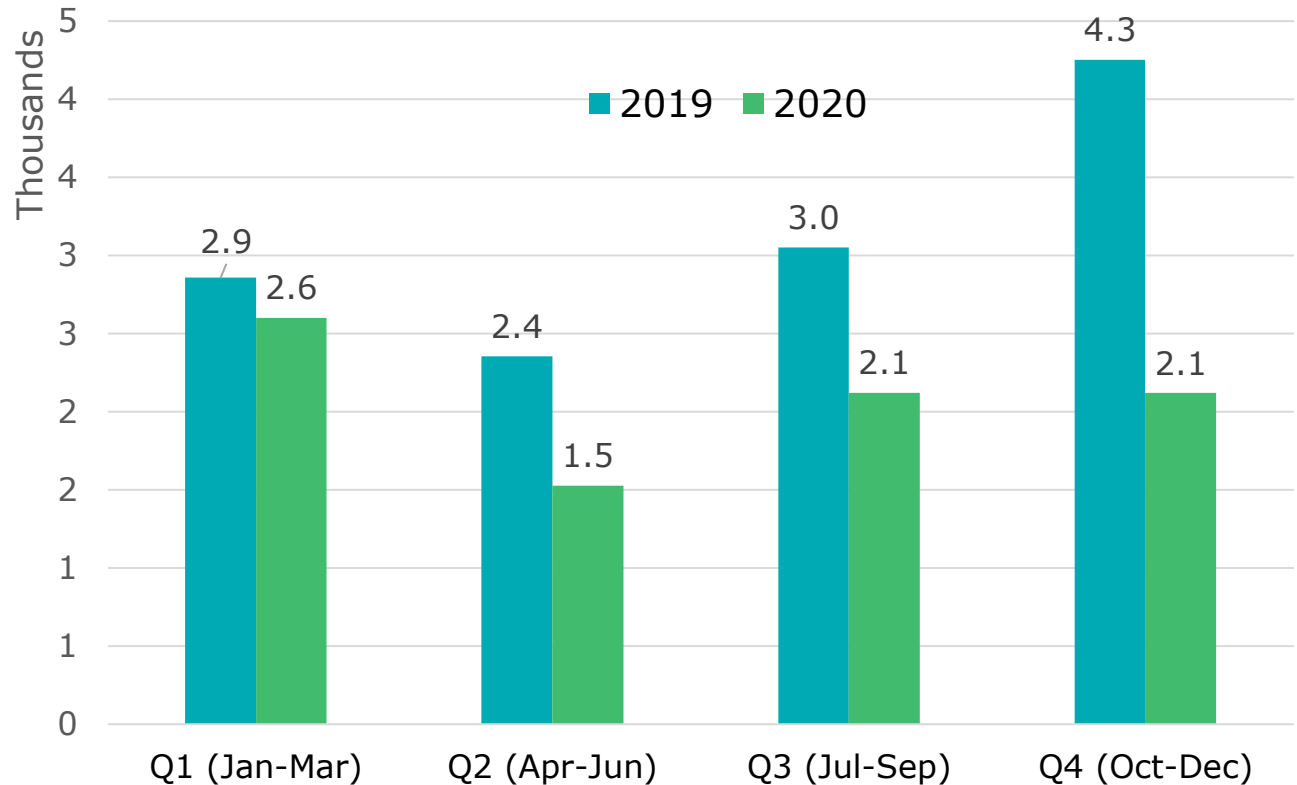


Delray Beach Visitor Profile

6% of Visits to The Palm Beaches captured in 2019 with 12,500 visitors

6% of Visits to The Palm Beaches captured in 2020 with 8,300 visitors

Visitation from Atlanta

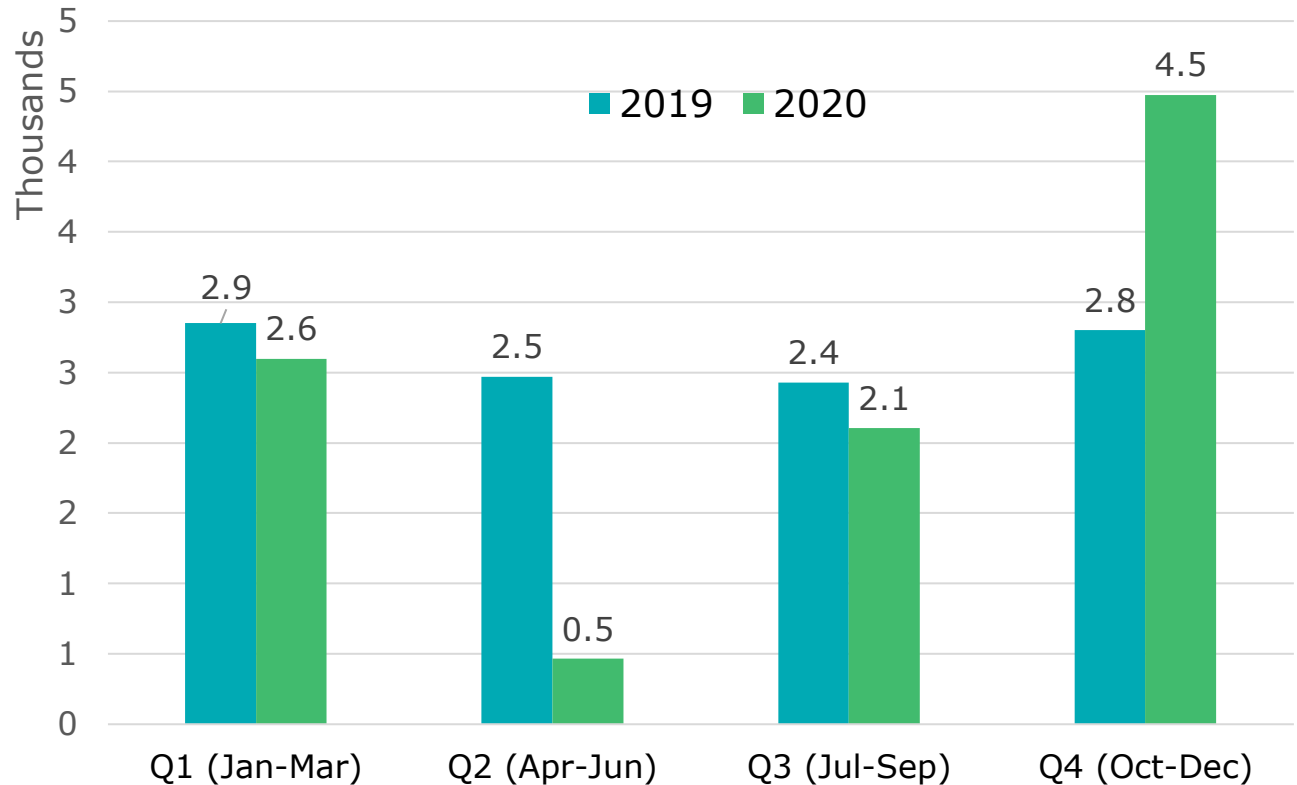


Delray Beach Visitor Profile

4% of Visits to The Palm Beaches captured in 2019 with 10,500 visitors

7% of Visits to The Palm Beaches captured in 2020 with 9,600 visitors

Visitation from Ft. Pierce / Port St. Lucie

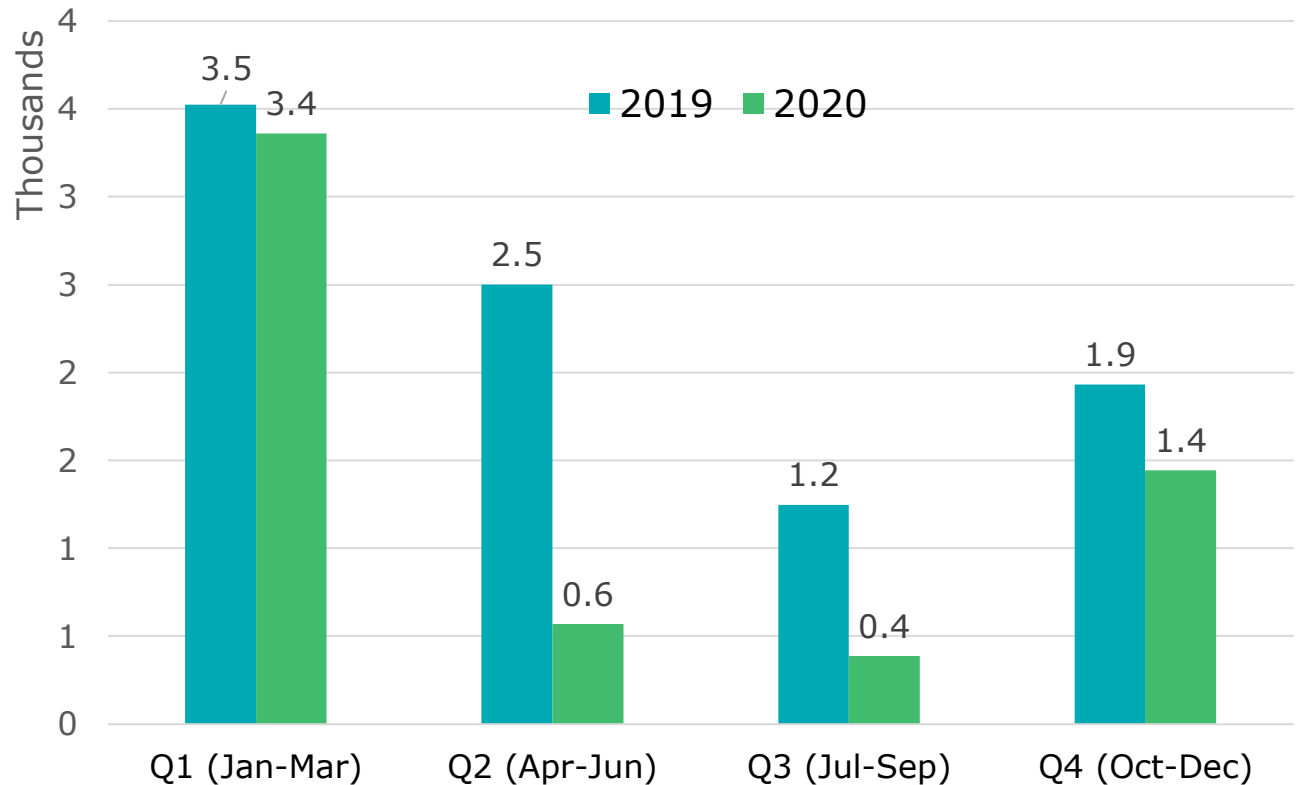


Delray Beach Visitor Profile

15% of Visits to The Palm Beaches captured in 2019 with 9,200 visitors

17% of Visits to The Palm Beaches captured in 2020 with 5,800 visitors

Visitation from Hartford

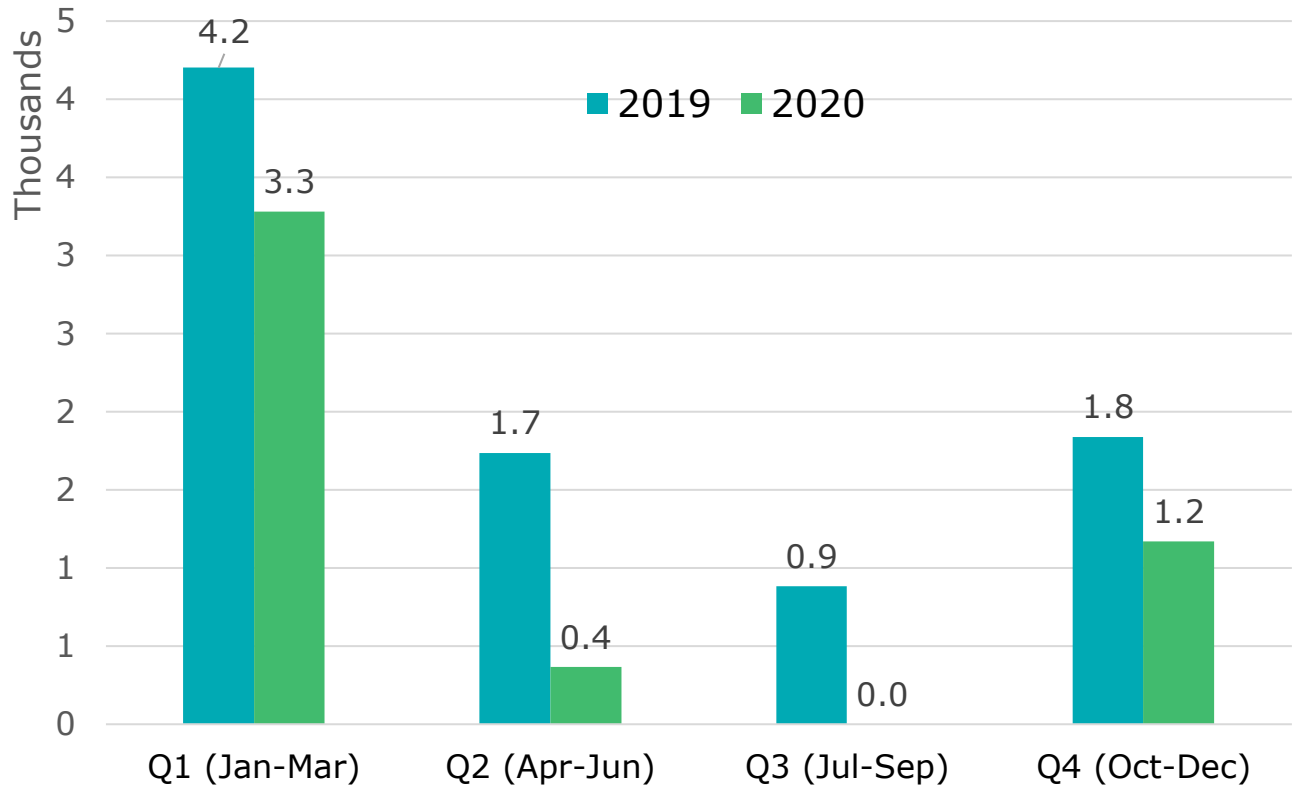


Delray Beach Visitor Profile

8% of Visits to The Palm Beaches captured in 2019 with 8,700 visitors

6% of Visits to The Palm Beaches captured in 2020 with 4,800 visitors

Visitation from Detroit

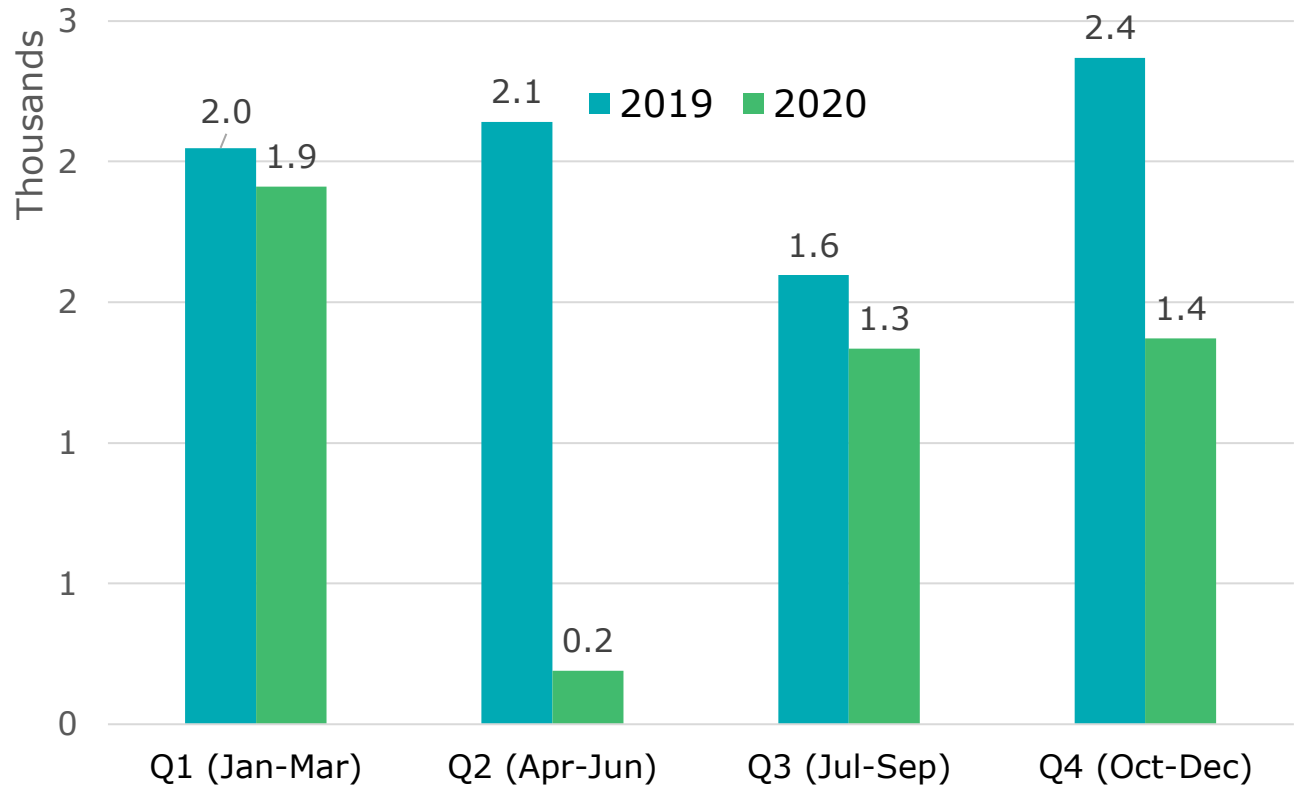


Delray Beach Visitor Profile

8% of Visits to The Palm Beaches captured in 2019 with 8,200 visitors

6% of Visits to The Palm Beaches captured in 2020 with 4,800 visitors

Visitation from Ft. Myers

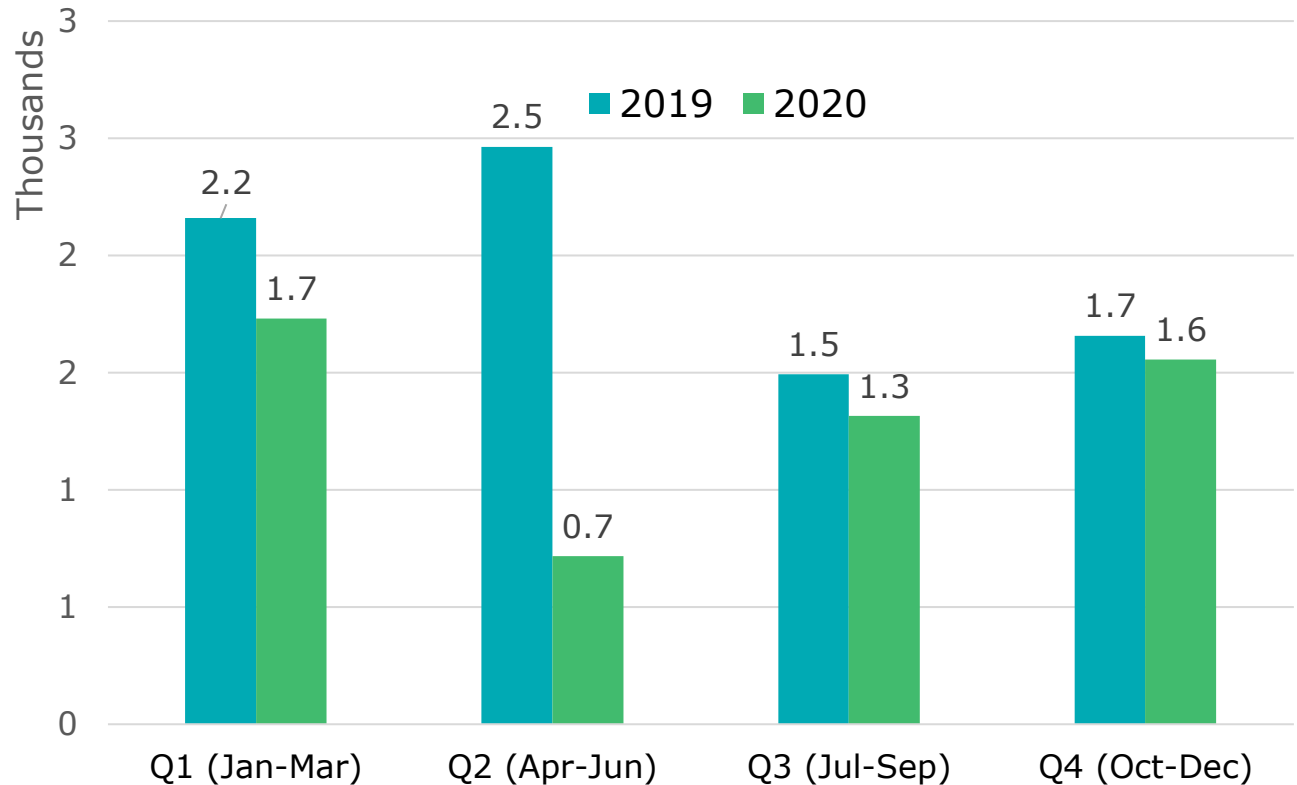


Delray Beach Visitor Profile

4% of Visits to The Palm Beaches captured in 2019 with 7,800 visitors

5% of Visits to The Palm Beaches captured in 2020 with 5,300 visitors

Visitation from Jacksonville

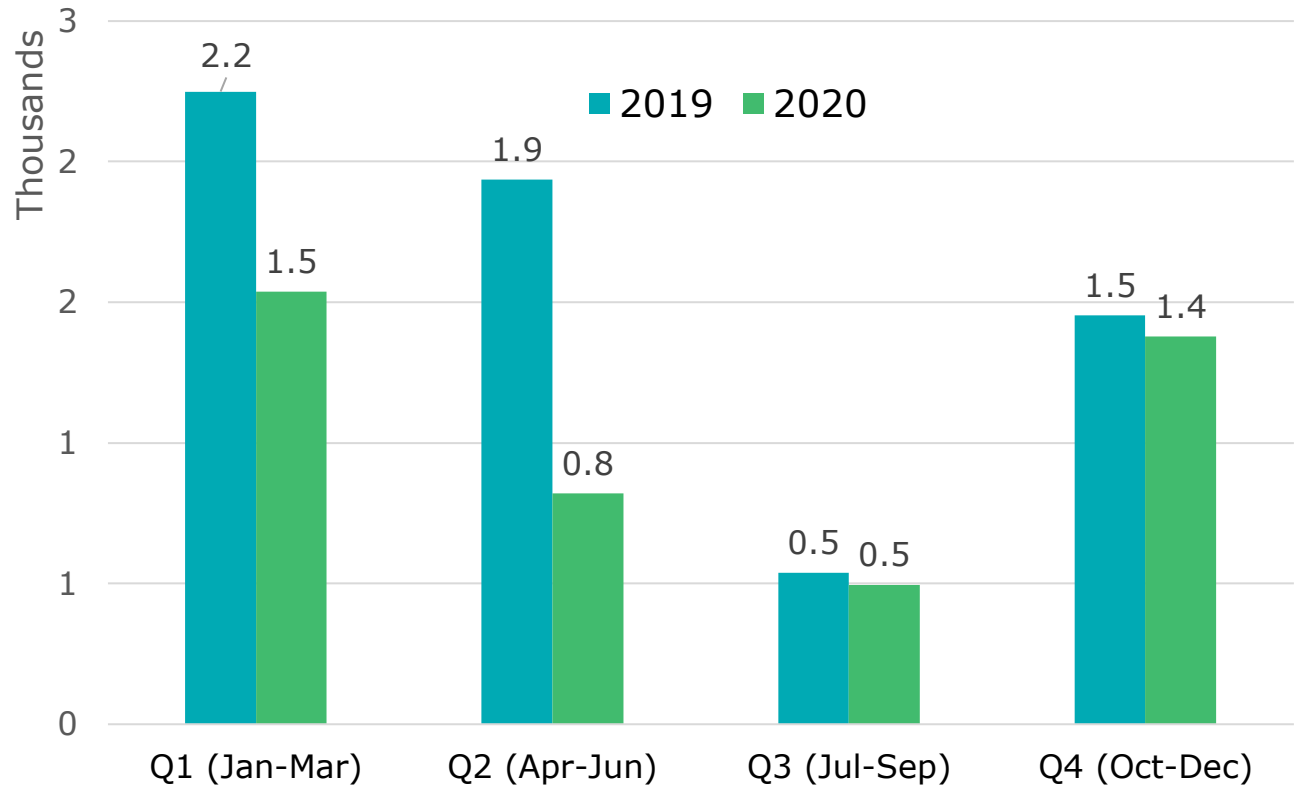


Delray Beach Visitor Profile

10% of Visits to The Palm Beaches captured in 2019 with 6,200 visitors

11% of Visits to The Palm Beaches captured in 2020 with 4,200 visitors

Visitation from Charlotte

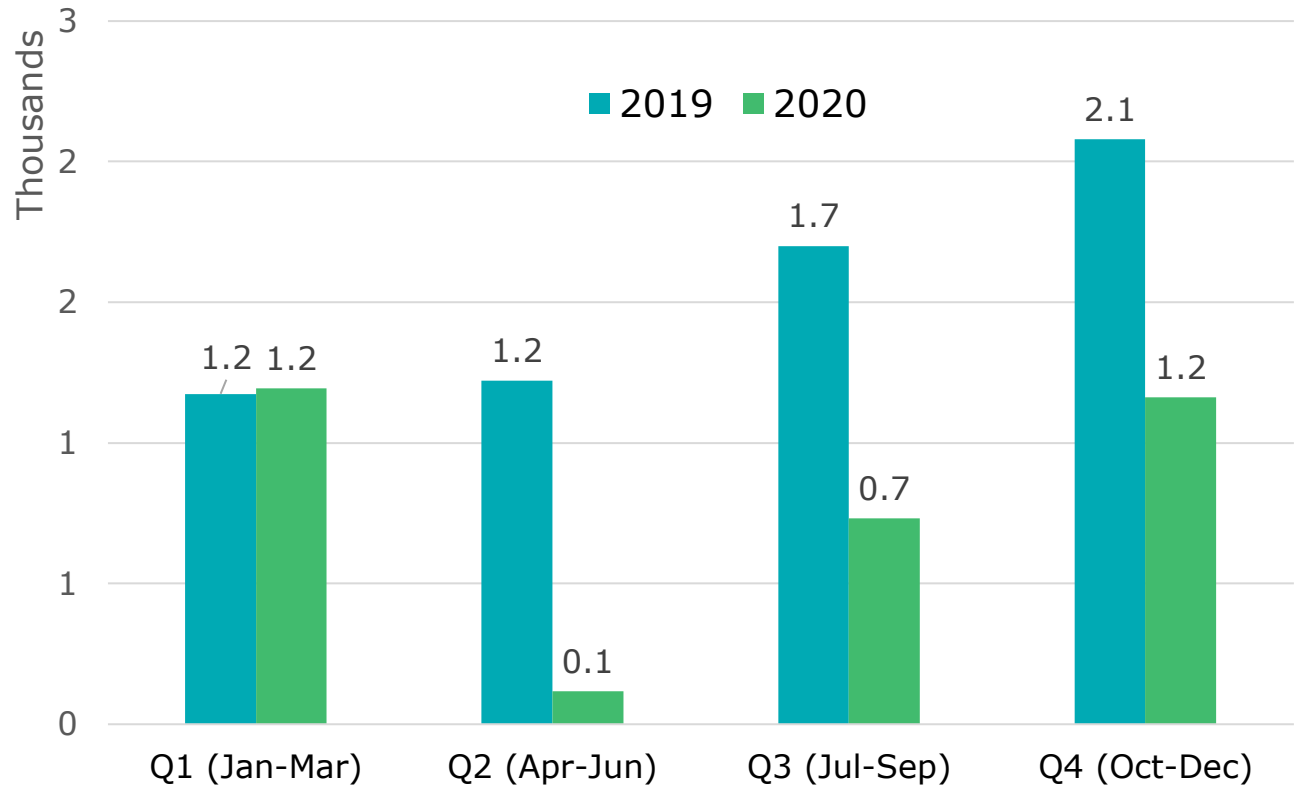


Delray Beach Visitor Profile

5% of Visits to The Palm Beaches captured in 2019 with 6,200 visitors

4% of Visits to The Palm Beaches captured in 2020 with 4,200 visitors

Visitation from Los Angeles

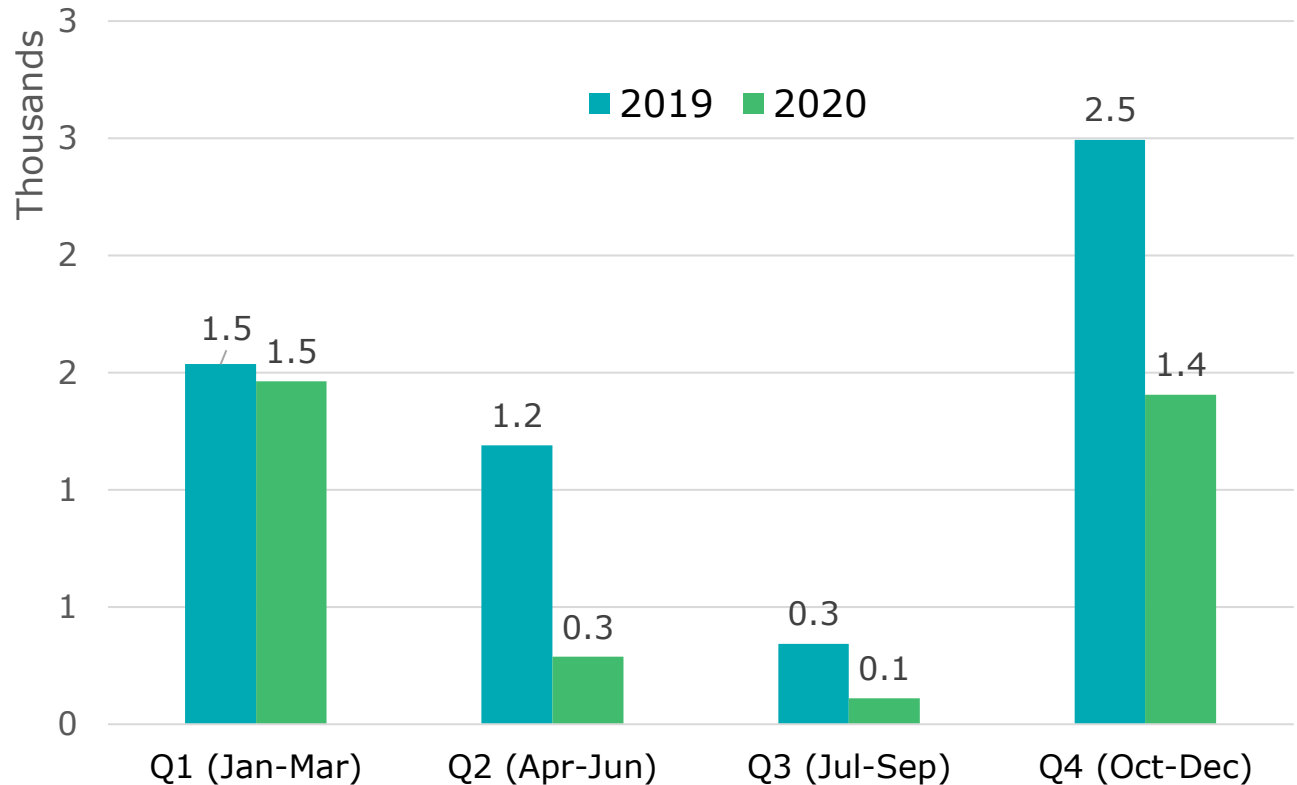


Delray Beach Visitor Profile

13% of Visits to The Palm Beaches captured in 2019 with 5,600 visitors

12% of Visits to The Palm Beaches captured in 2020 with 3,300 visitors

Visitation from Cleveland

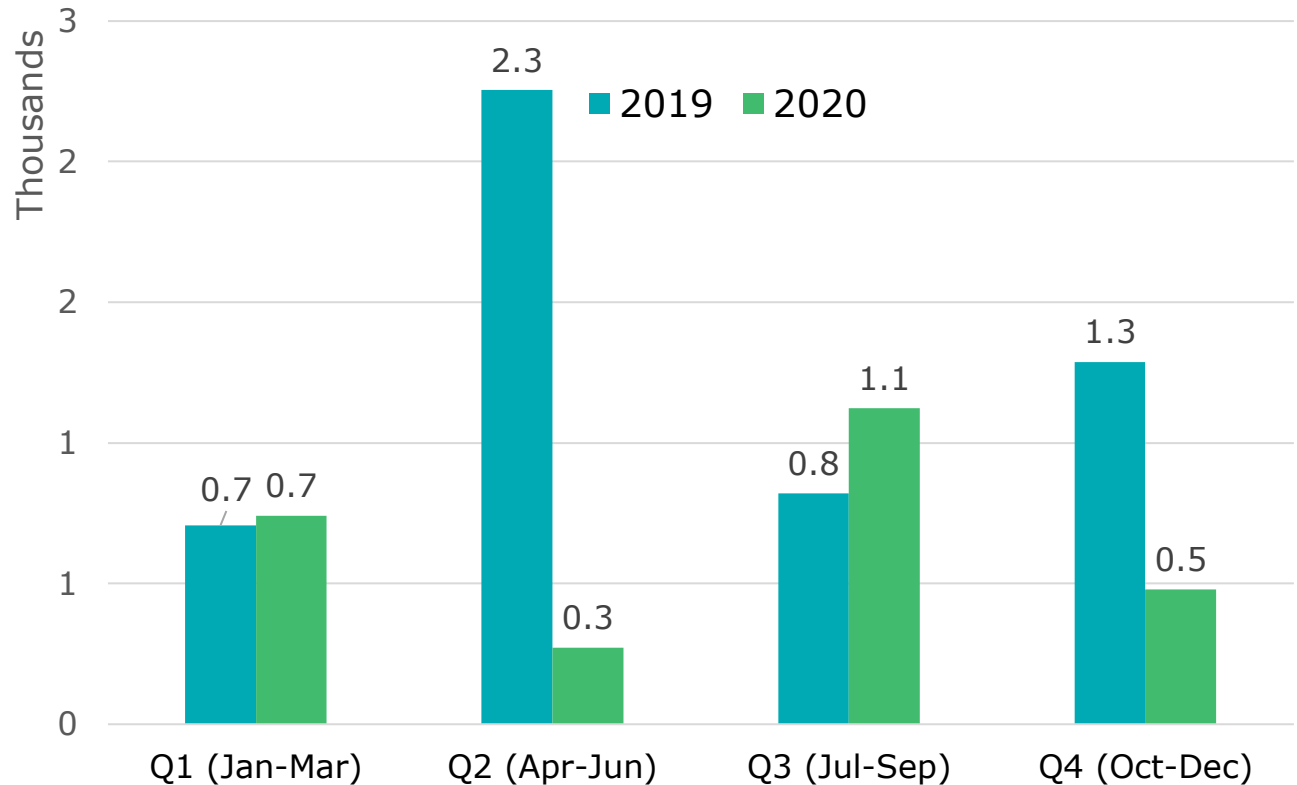


Delray Beach Visitor Profile

6% of Visits to The Palm Beaches captured in 2019 with 5,100 visitors

5% of Visits to The Palm Beaches captured in 2020 2,600 visitors

Visitation from Dallas

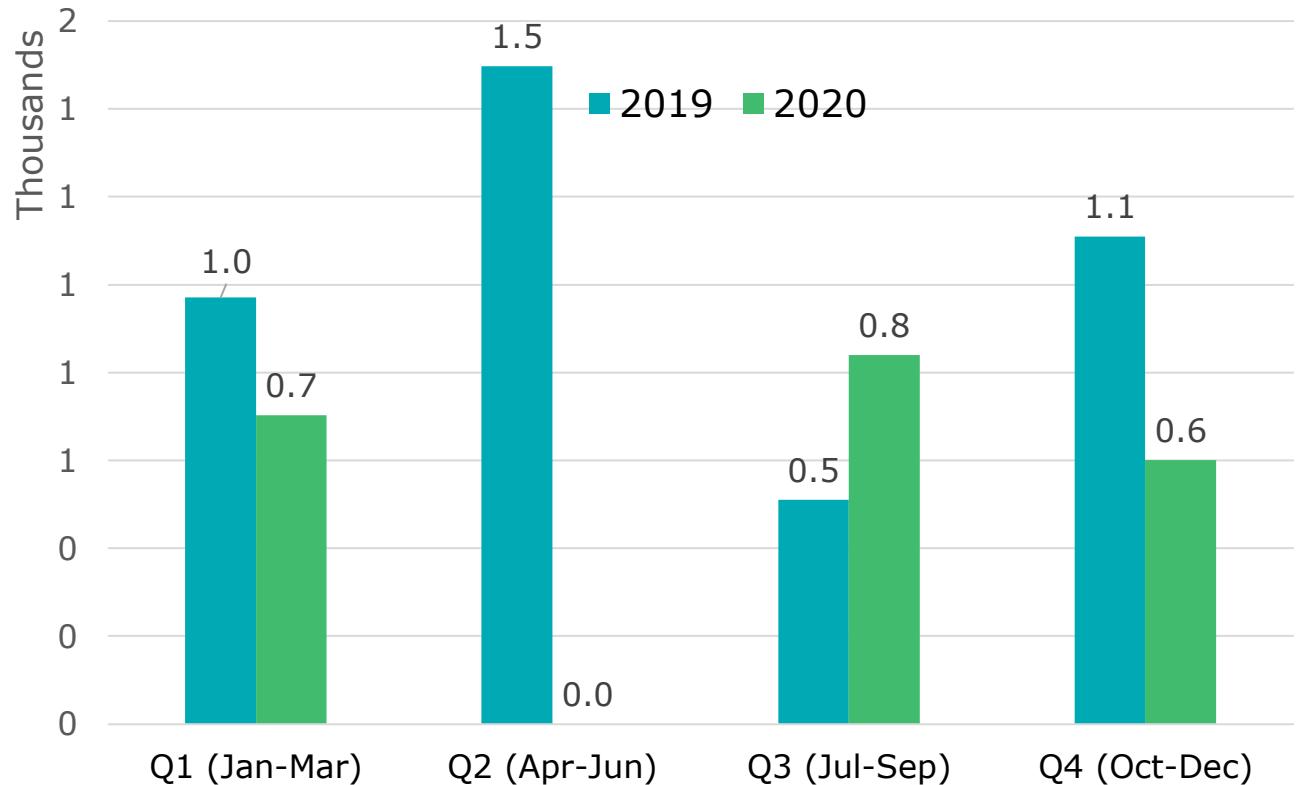


Delray Beach Visitor Profile

5% of Visits to The Palm Beaches captured in 2019 with 4,100 visitors

4% of Visits to The Palm Beaches captured in 2020 with 2,100 visitors

Visitation from Gainesville



Delray Beach Visitor Profile

6% of Visits to The Palm Beaches captured in 2019 4,000 visitors

5% of Visits to The Palm Beaches captured in 2020 with 2,300 visitors

Visitation from Denver

