



Visit Tallahassee

Economic Impact of Tourism Report

Fiscal Year 2015

Study Methods

- Economic impact of tourism for Visit Tallahassee was based on data from the following sources:
 - 3,438 interviews conducted by Downs & St. Germain Research with visitors to Leon County
 - Twelve (12) monthly STR Reports
 - Downs & St. Germain Research's tourism database
 - Various government agencies and data sources
 - IMPLAN Online Economic Impact Modeling software
 - TDT Collections provided by Leon County

Key Performance Indicators

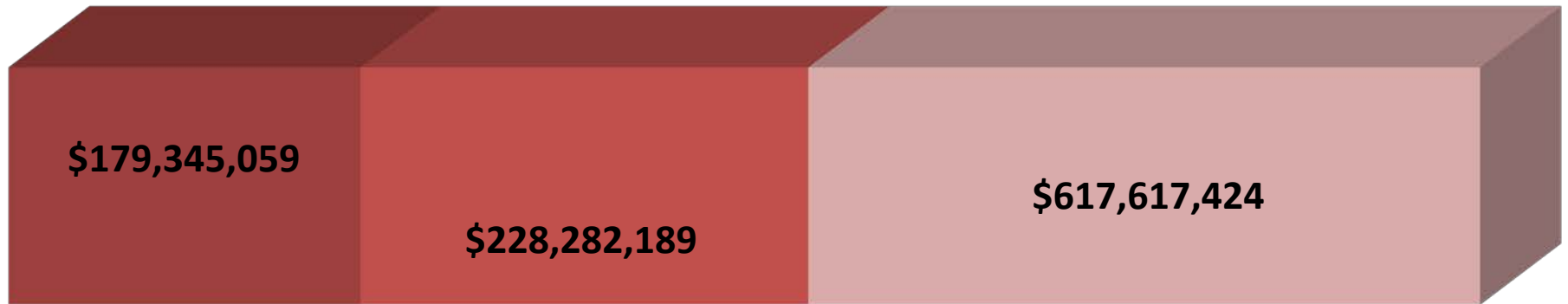
Economic Indicators	FY2015
Visitors	2,448,641
Direct expenditures	\$617,617,727
Total economic impact	\$1,025,244,672
Room nights generated	1,276,784
Jobs created	11,389
Wages paid	\$275,405,993
Taxes paid ¹	\$67,104,240
Tourist Development Tax	\$5,141,424

¹Sales, use, and property taxes.

Total Economic Impact

\$1,025,244,672

■ Induced ■ Indirect ■ Direct



Indirect effects are increased business spending resulting from tourism dollars.
Induced effects are increased household spending resulting from tourism dollars.

Key Performance Indicators

Visitor Profile	FY2015
Visitors	2,448,641
Occupancy	61.7%
Room rates	\$94.40
RevPAR	\$58.24
Travel party size	2.7
Nights spent	2.6
Will return	92%
Rating of experience	7.6 ¹

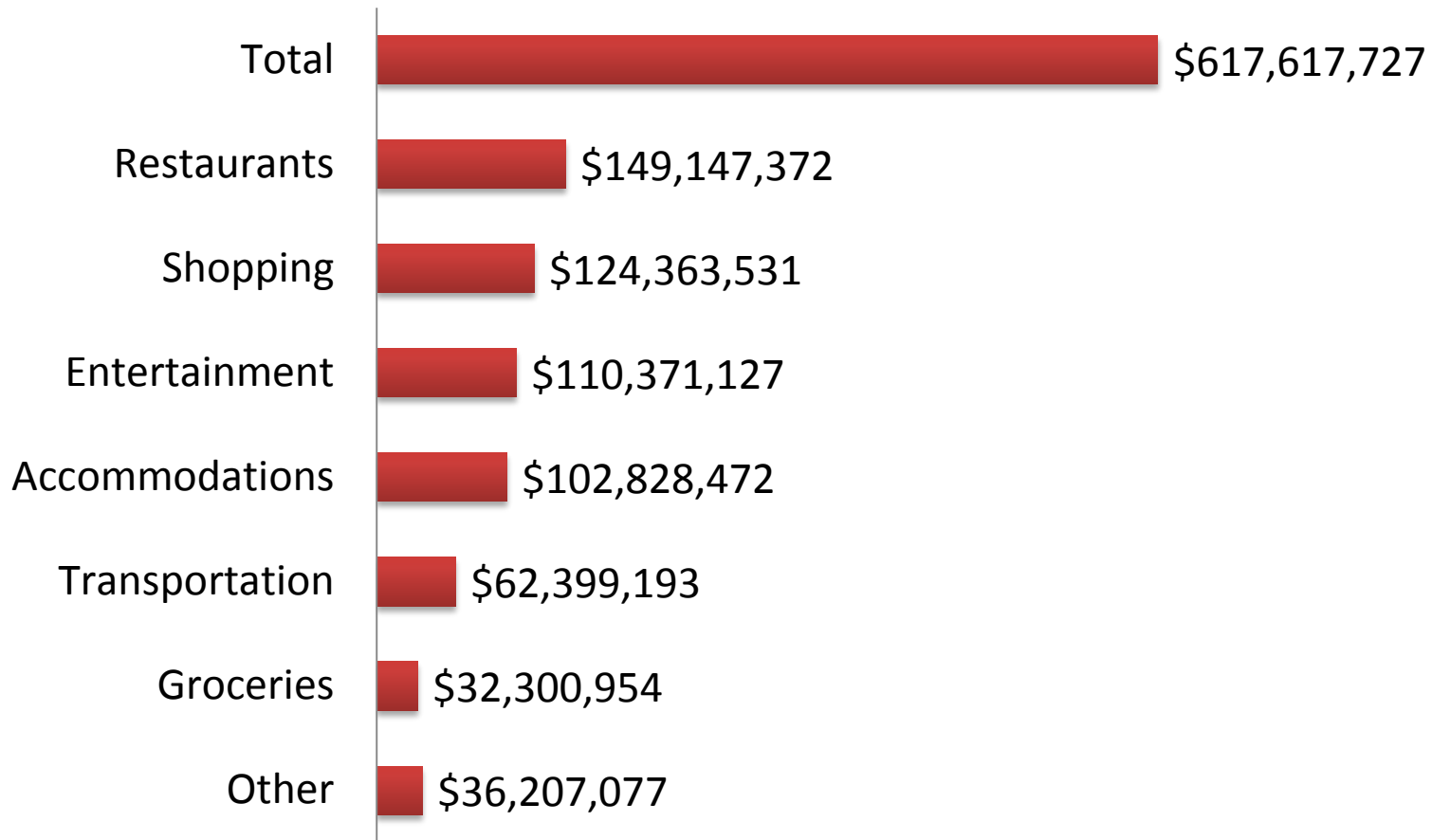
¹On a 10-point scale.

Visitors to Leon County

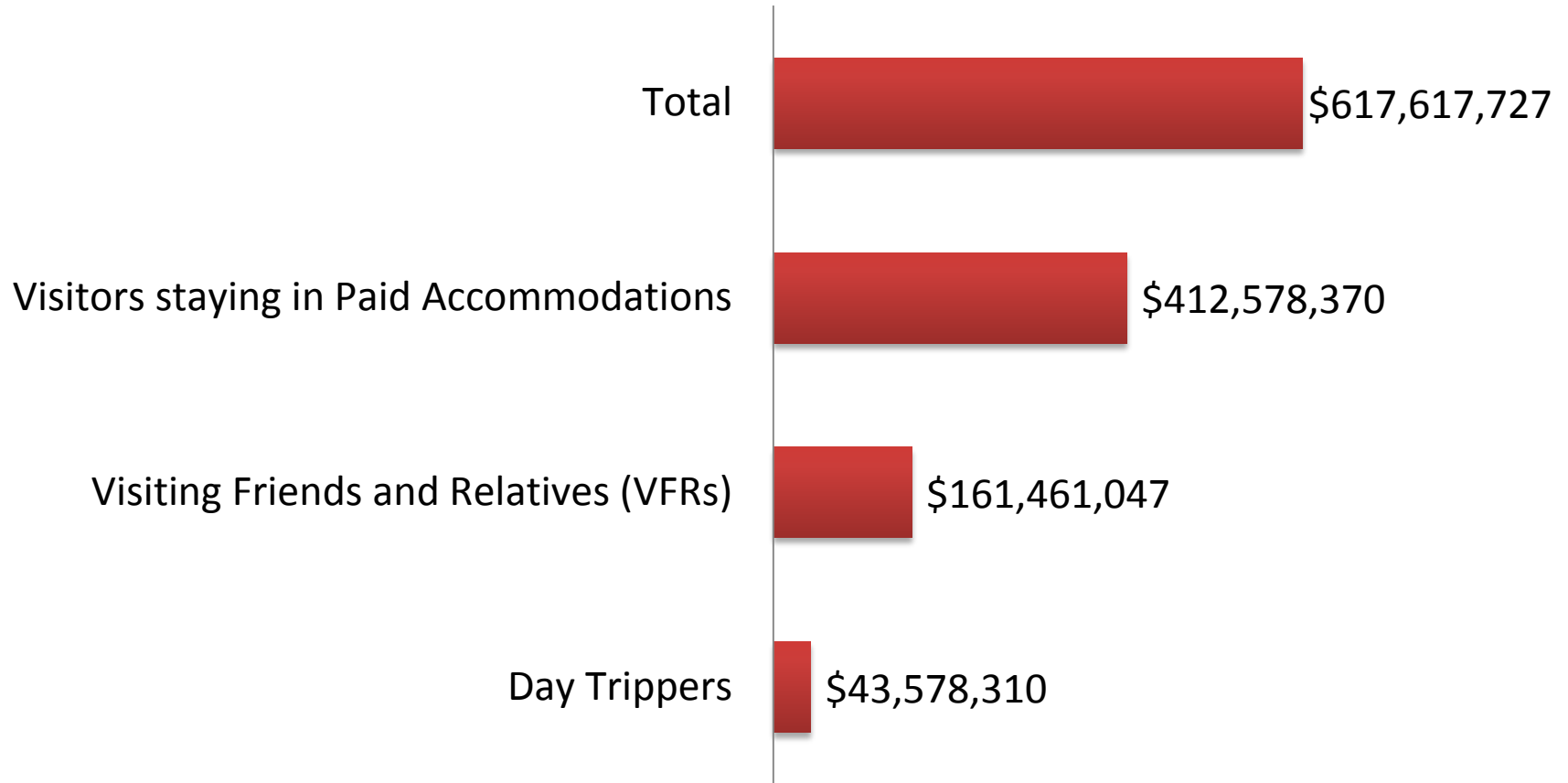
2,448,641 – Total Visitors to Leon County

- **1,308,504** – Stayed in paid accommodations
- **569,683** – Visited friends and relatives (VFRs)
- **570,454** – Day visitors

Visitors' Direct Spending



Direct Spending by Visitor Type



KPIs– Oct-Dec 2014 (Q1)

Visitor Profile	Oct-Dec 2014 (Q1)
Visitors	594,240
Direct Expenditures	\$147,969,155
Economic Impact	\$245,628,608
Occupancy	56.1%
Room Rates	\$101.77
RevPAR	\$57.09
Travel party size	2.6
Nights spent	2.7
Will return	91%
Rating of experience	7.2 ¹

KPIs – Jan-Mar 2015 (Q2)

Visitor Profile	Jan-Mar 2015 (Q2)
Visitors	673,651
Direct Expenditures	\$175,523,671
Economic Impact	\$291,369,106
Occupancy	65.2%
Room Rates	\$92.66
RevPAR	\$60.41
Travel party size	2.7
Nights spent	2.4
Will return	95%
Rating of experience	7.7 ¹

KPIs – Apr-Jun 2015 (Q3)

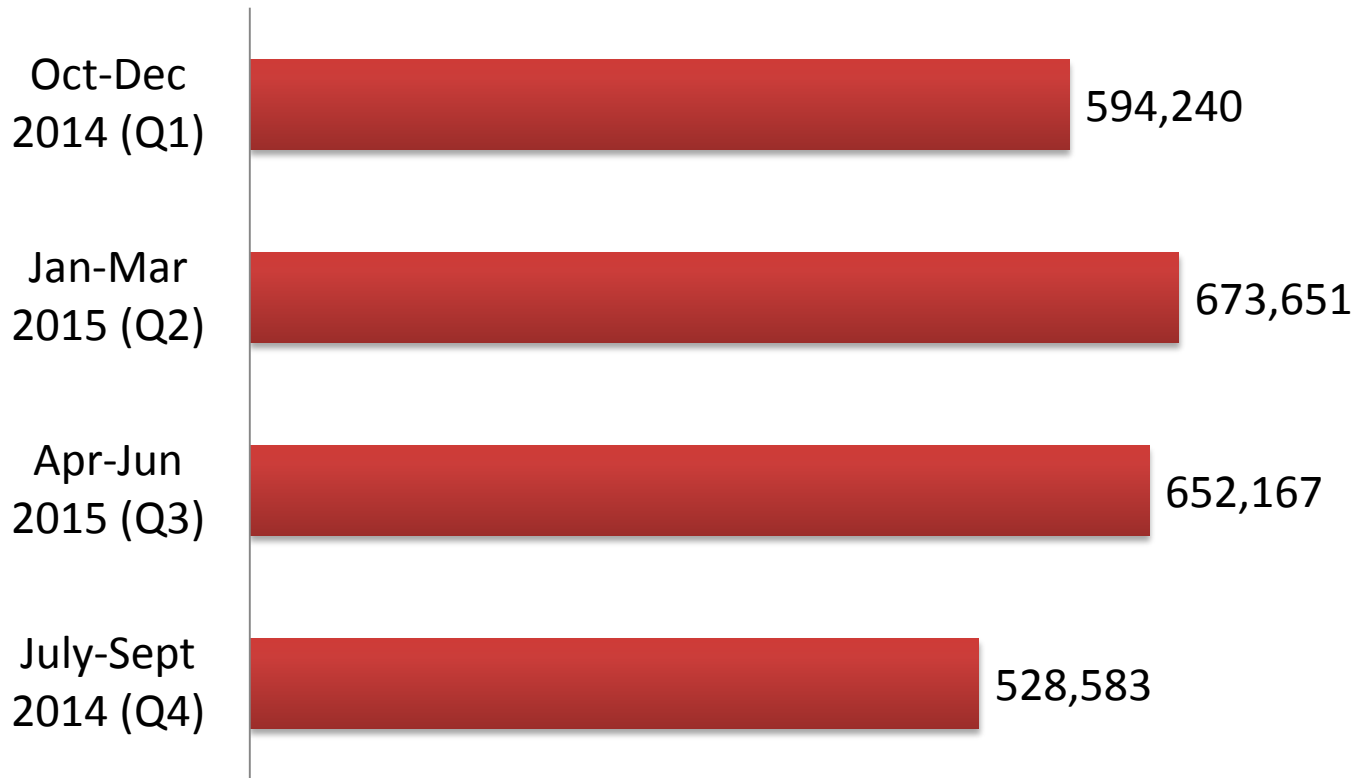
Visitor Profile	Apr-Jun 2015 (Q3)
Visitors	652,167
Direct Expenditures	\$160,522,300
Economic Impact	\$266,466,829
Occupancy	64.9%
Room Rates	\$93.33
RevPAR	\$60.57
Travel party size	2.8
Nights spent	2.5
Will return	92%
Rating of experience	7.5 ¹

KPIs – July-Sept 2015 (Q4)

Visitor Profile	July-Sept 2015 (Q4)
Visitors	528,583
Direct Expenditures	\$133,602,601
Economic Impact	\$221,780,129
Occupancy	60.4%
Room Rates	\$87.96
RevPAR	\$53.12
Travel party size	2.8
Nights spent	2.7
Will return	90%
Rating of experience	7.9 ¹

Visitors by Quarter

Total: 2,448,641



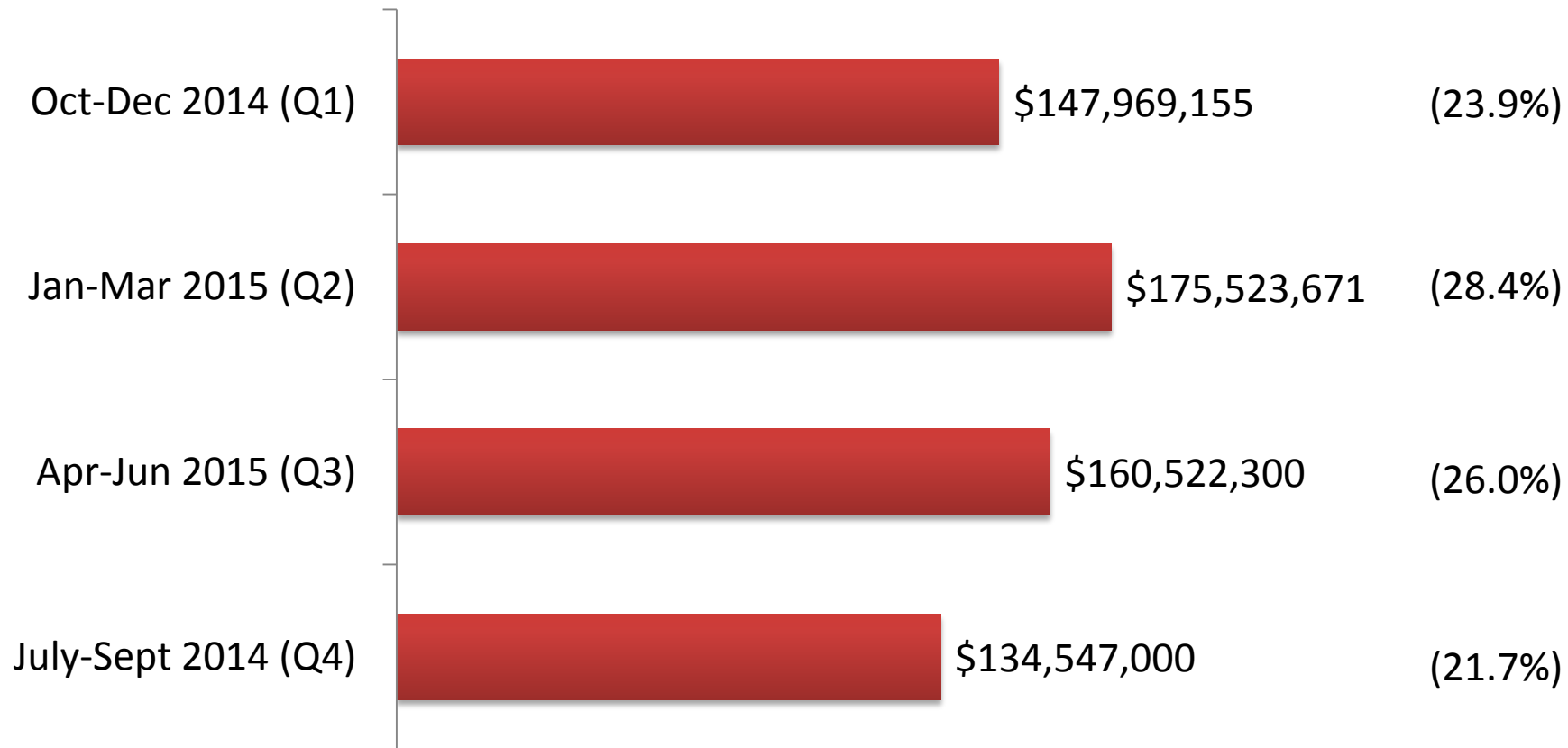
Room Nights by Quarter

Total: 1,276,784



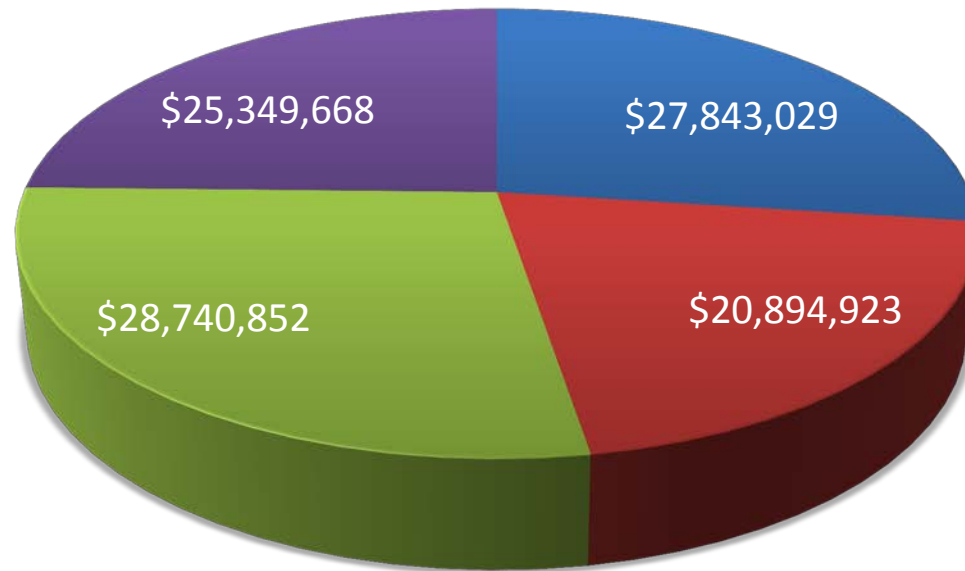
Visitors' Direct Spending by Quarter

Total: \$617,617,727



Accommodation Spending by Quarter

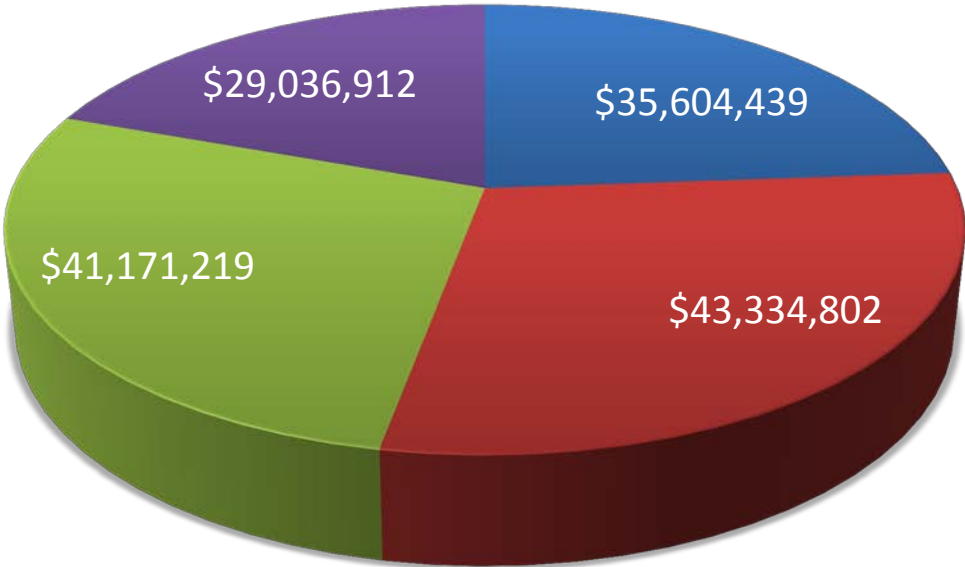
Total: \$102,828,472



■ Oct-Dec 2014 (Q1) ■ Jan-Mar 2015 (Q2) ■ Apr-Jun 2015 (Q3) ■ July-Sept 2014 (Q4)

Restaurant Spending by Quarter

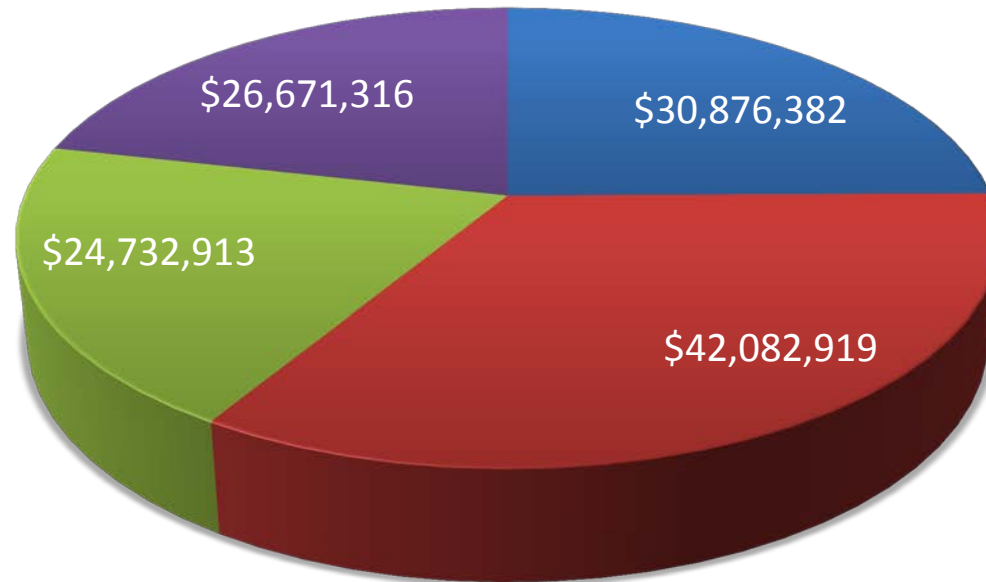
Total: \$149,147,372



■ Oct-Dec 2014 (Q1) ■ Jan-Mar 2015 (Q2) ■ Apr-Jun 2015 (Q3) ■ July-Sept 2014 (Q4)

Shopping Spending by Quarter

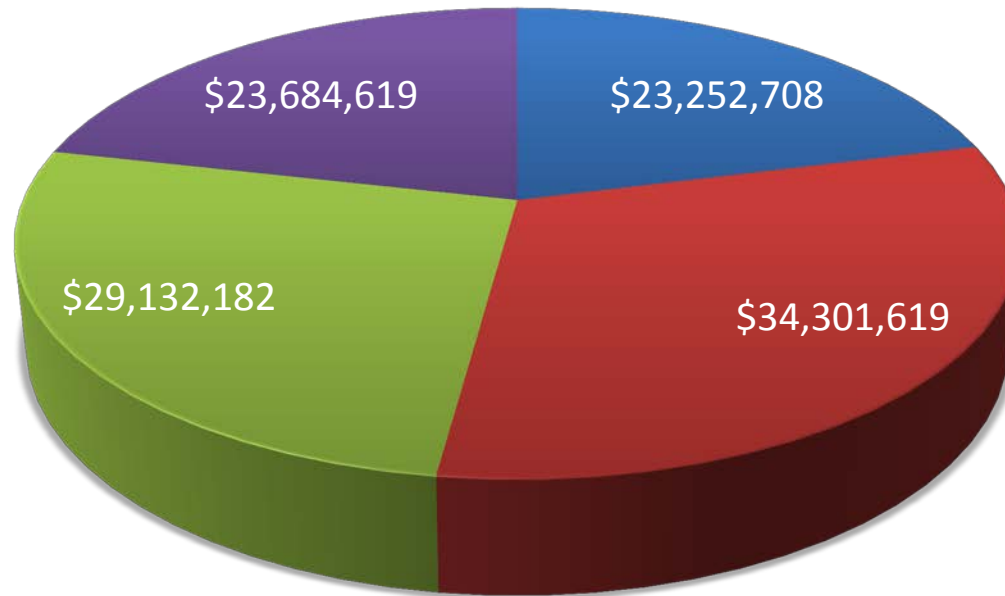
Total: \$124,363,531



■ Oct-Dec 2014 (Q1) ■ Jan-Mar 2015 (Q2) ■ Apr-Jun 2015 (Q3) ■ July-Sept 2014 (Q4)

Entertainment Spending by Quarter

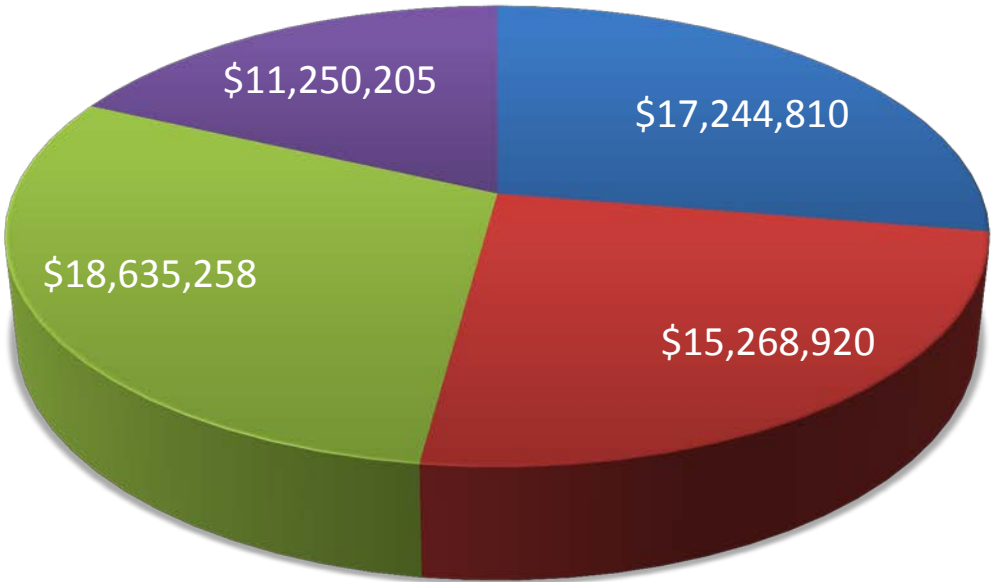
Total: \$110,371,127



■ Oct-Dec 2014 (Q1) ■ Jan-Mar 2015 (Q2) ■ Apr-Jun 2015 (Q3) ■ July-Sept 2014 (Q4)

Transportation Spending by Quarter

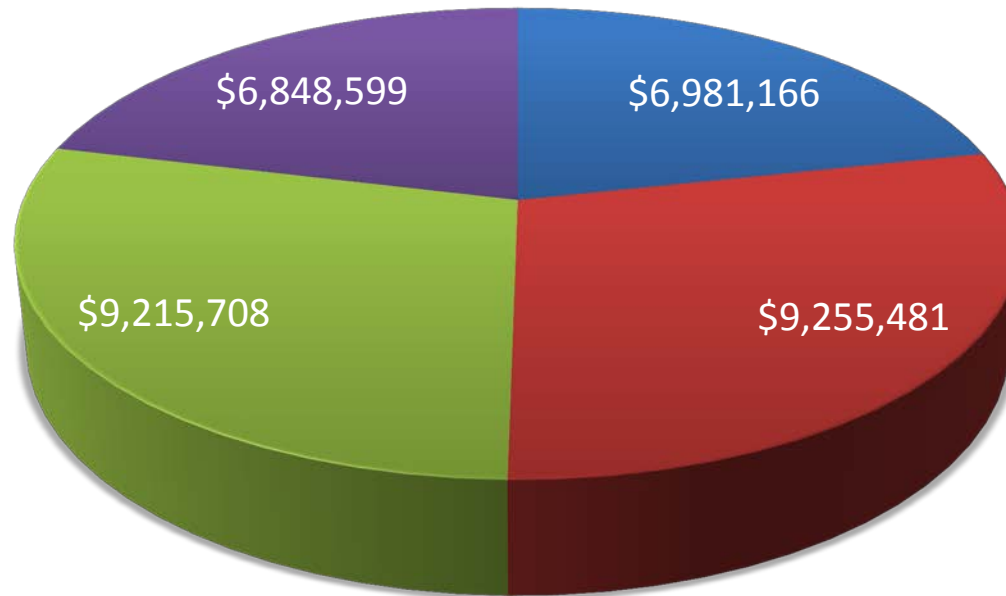
Total: \$62,399,193



■ Oct-Dec 2014 (Q1) ■ Jan-Mar 2015 (Q2) ■ Apr-Jun 2015 (Q3) ■ July-Sept 2014 (Q4)

Grocery Spending by Quarter

Total: \$32,300,954



■ Oct-Dec 2014 (Q1) ■ Jan-Mar 2015 (Q2) ■ Apr-Jun 2015 (Q3) ■ July-Sept 2014 (Q4)

Quarter Comparisons

Quarter Comparisons

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	FY 2015
Visitors*	594,240	673,651	652,167	528,583	2,448,641
Occupancy	56.1%	65.2%	64.9%	60.4%	61.7%
Median age	47	50	47	42	47
Median household income	\$87,500	\$100,000	\$90,000	\$74,100	\$87,700
From Southeast	87%	85%	85%	87%	87%
From Florida	65%	69%	64%	71%	67%
Travel party size	2.6	2.7	2.8	2.8	2.7
Drove	83%	90%	87%	84%	85%
Length of stay	2.7	2.4	2.5	2.7	2.6
1 st time visitor	21%	25%	29%	21%	25%

* Includes day trippers and visitors staying with friends and relatives (VFRs)

Quarter Comparisons

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	FY 2015
Rating of Leon County*	7.2	7.7	7.5	7.9	7.6
Likelihood of returning	91%	95%	92%	90%	92%
Spending per travel party	\$895	\$928	\$741	\$816	\$856
Planned trip	A month or so in advance	A month or so in advance	A month or so in advance	A month or so in advance	A month or so in advance
Used VisitTallahassee.com	10%	10%	13%	13%	11%
Used hotel website	42%	41%	52%	52%	46%
Used smartphone on trip	64%	66%	72%	70%	68%
Married	63%	70%	67%	61%	65%
Has college degree	74%	72%	70%	74%	72%

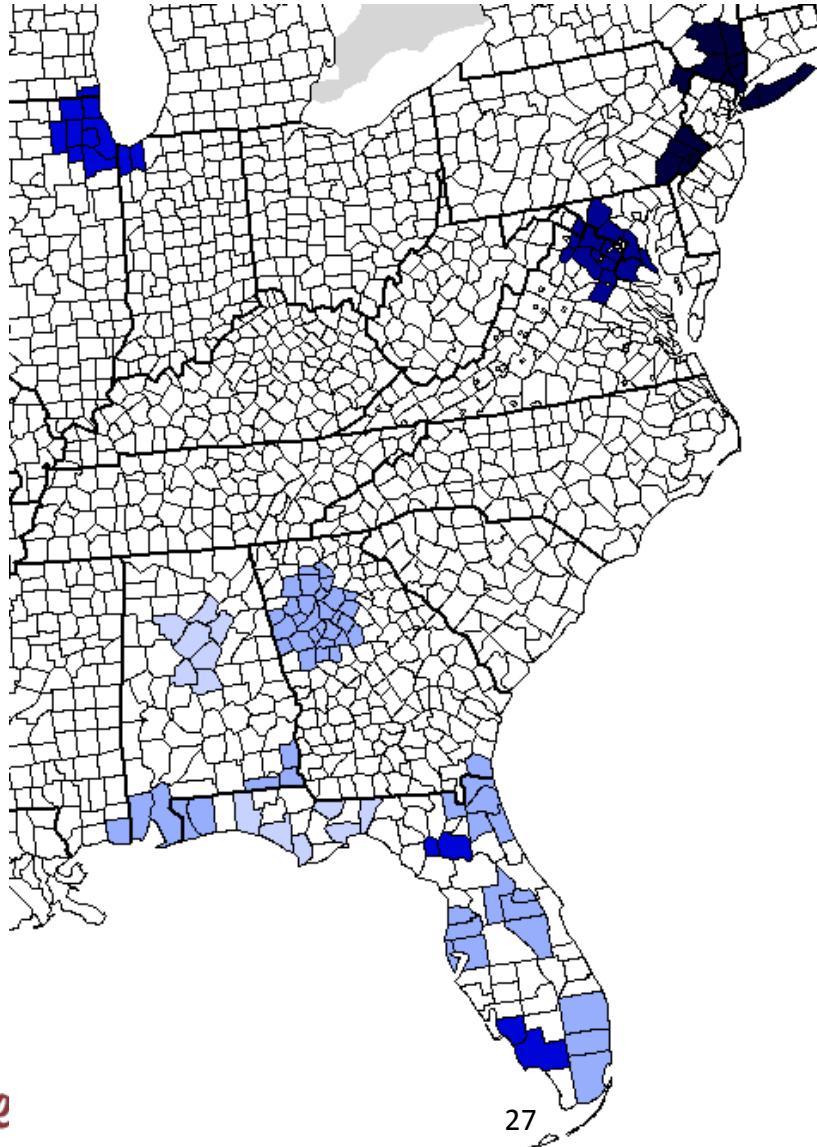
* 10 point scale

GIS Maps

GIS Maps

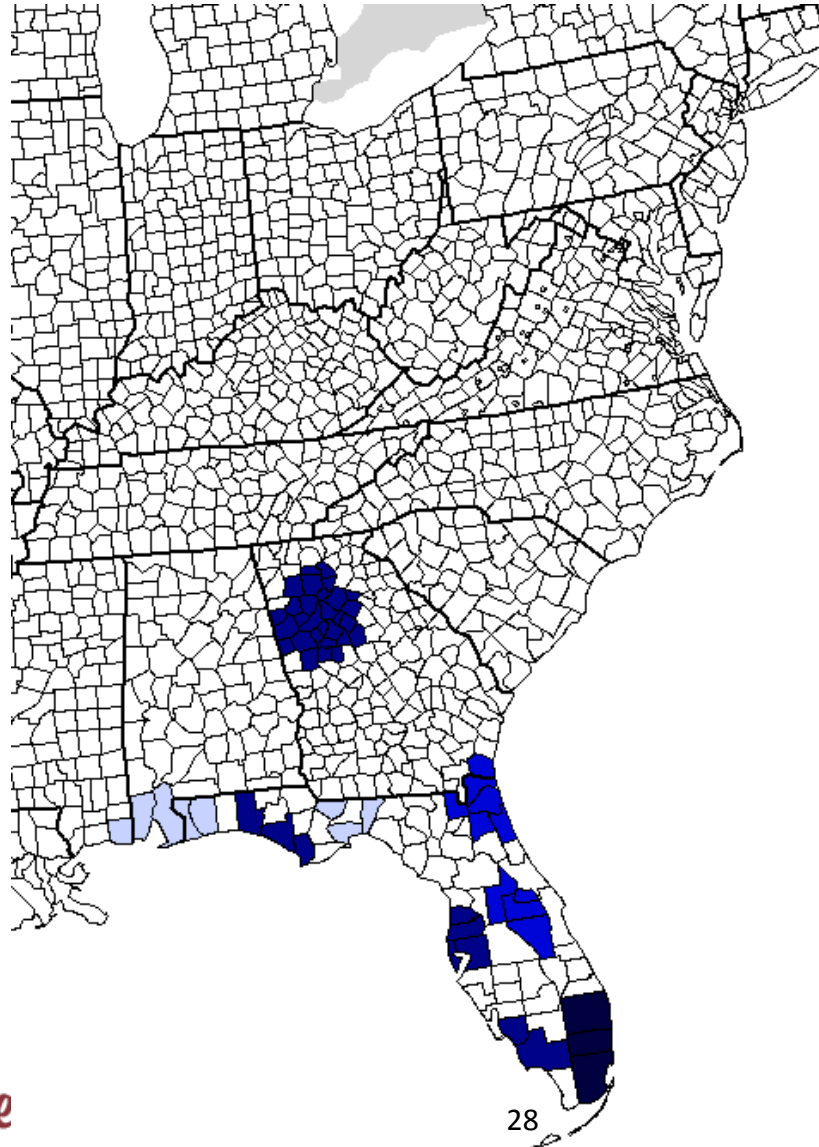
- Utilizing self-report data from 3,438 visitors to Leon County from October 2014 through September 2015, Downs & St. Germain Research created GIS Maps displaying the following data by market:
 - Spending per party
 - First time visitation
 - Traveled with children
 - Income
 - Flew to destination
- The number of markets displayed for each map vary due to sample size. All markets displayed in each map have a sufficient sample size for comparison of data.

Spending per Party by Market



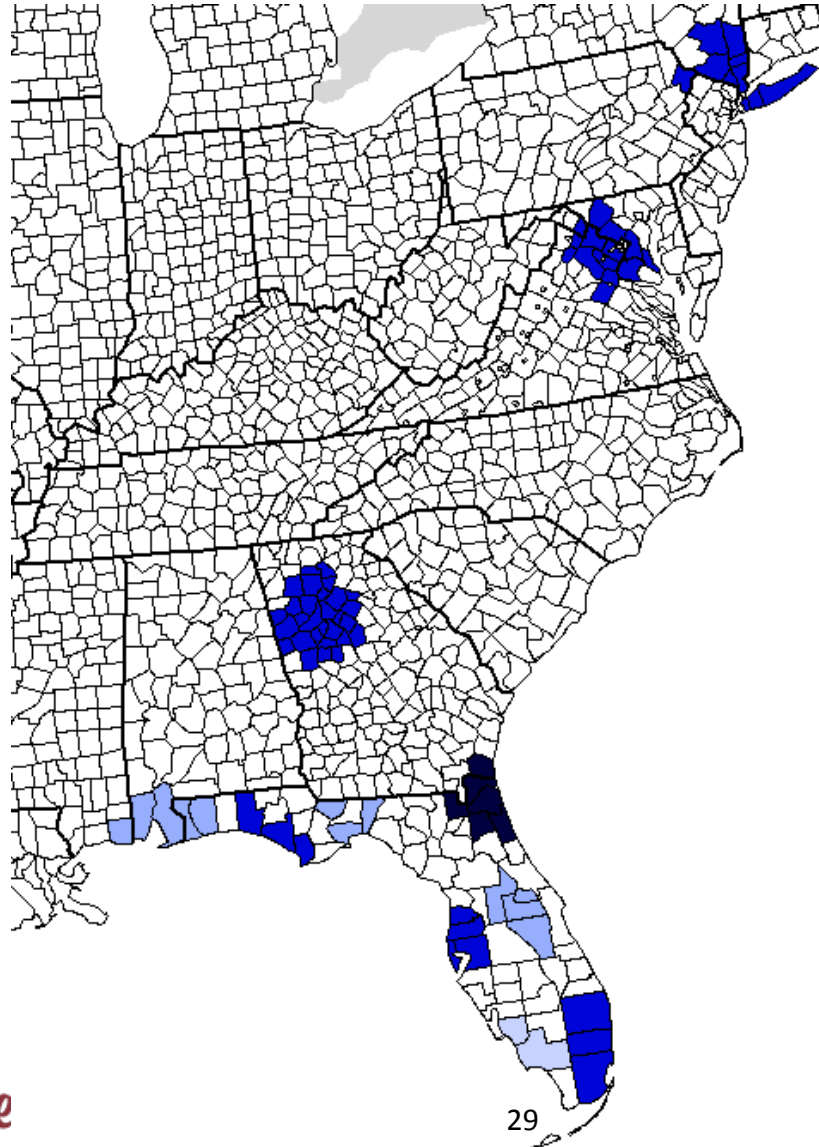
Market	Mean
Philadelphia	\$ 1,314
New York City	\$ 1,222
Washington DC-Baltimore	\$ 1,016
Naples-Ft. Myers	\$ 890
Chicago	\$ 869
Gainesville	\$ 856
Atlanta	\$ 778
Miami-Ft. Lauderdale	\$ 774
Pensacola-Mobile	\$ 750
Dothan	\$ 736
Tampa-St. Petersburg	\$ 730
Orlando	\$ 678
Jacksonville	\$ 641
Birmingham	\$ 567
Surrounding Counties	\$ 560
Panama City-Destin	\$ 523

First Time Visitors by Market



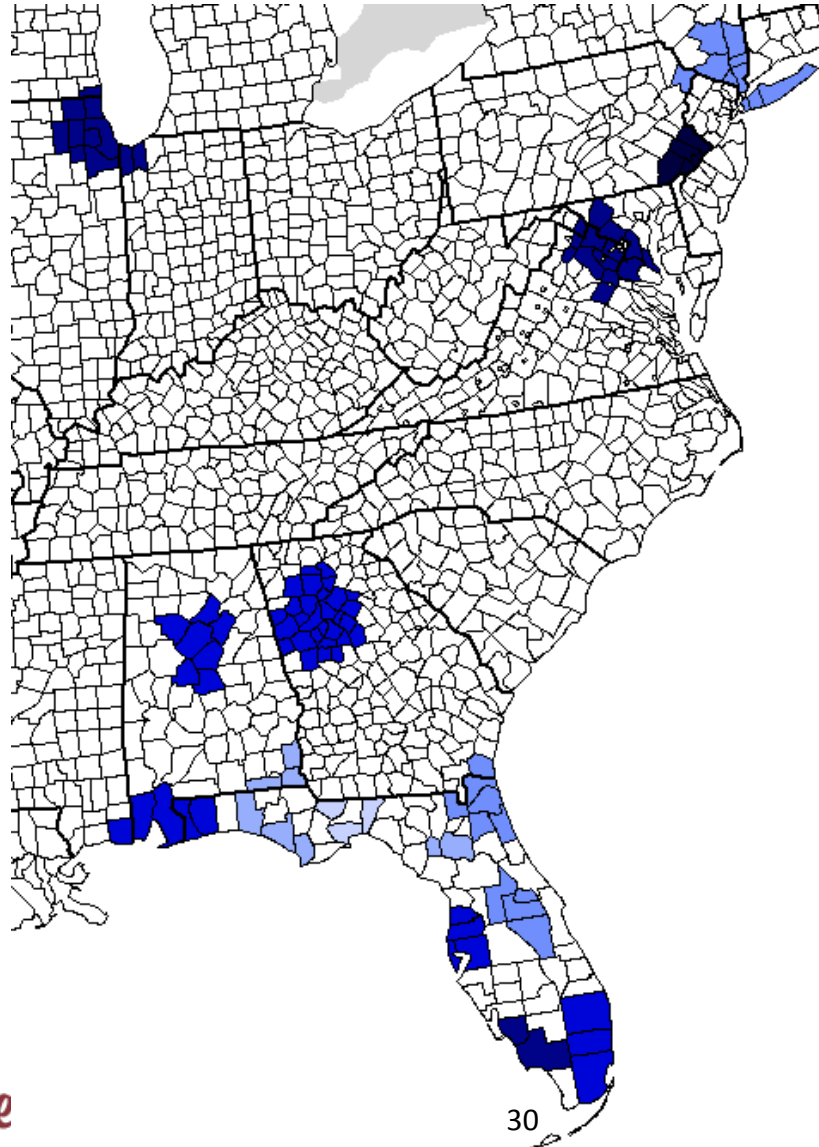
Market	1st Time Visitors
Miami-Ft. Lauderdale	41%
Tampa-St. Petersburg	39%
Atlanta	33%
Naples-Ft. Myers	31%
Panama City-Destin	31%
Orlando	25%
Jacksonville	21%
Pensacola-Mobile	8%
Surrounding Counties	2%

Traveled with Children by Market



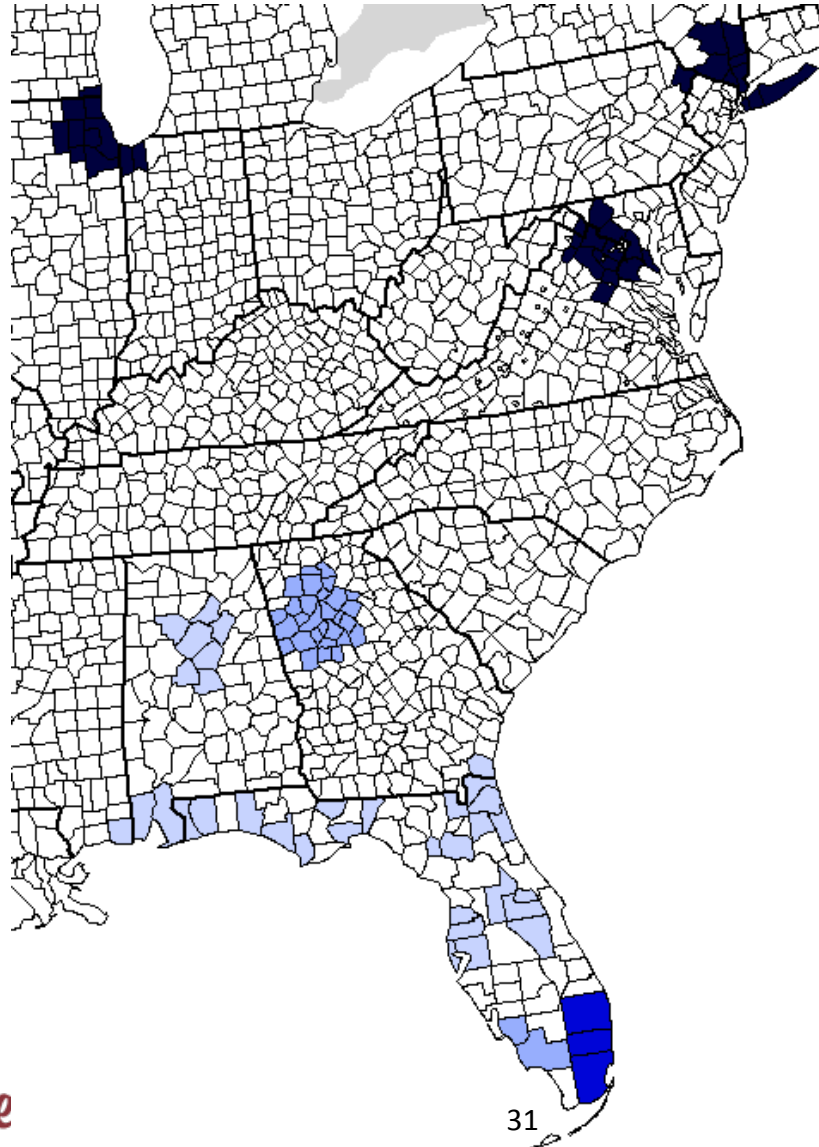
Market	% with Children
Jacksonville	51%
Miami-Ft. Lauderdale	35%
Tampa-St. Petersburg	35%
Atlanta	34%
Washington DC-Baltimore	33%
New York City	33%
Panama City-Destin	33%
Pensacola-Mobile	30%
Orlando	27%
Surrounding Counties	25%
Naples-Ft. Myers	18%

Average Income by Market



Market	Mean
Philadelphia	\$ 137,500
Naples-Ft. Myers	\$ 129,167
Washington DC-Baltimore	\$ 125,259
Chicago	\$ 121,591
Birmingham	\$ 109,844
Miami-Ft. Lauderdale	\$ 107,466
Atlanta	\$ 107,030
Pensacola-Mobile	\$ 106,438
Tampa-St. Petersburg	\$ 105,437
Orlando	\$ 102,190
New York City	\$ 98,864
Jacksonville	\$ 98,311
Gainesville	\$ 89,191
Dothan	\$ 78,571
Panama City-Destin	\$ 75,357
Surrounding Counties	\$ 65,774

Percent who Flew by Market



Market	Fly %
Chicago	73%
Washington DC-Baltimore	67%
New York City	51%
Miami-Ft. Lauderdale	21%
Naples-Ft. Myers	9%
Atlanta	8%
Tampa-St. Petersburg	4%
Orlando	3%
Jacksonville	1%
Gainesville	1%
Pensacola-Mobile	1%
Panama City-Destin	0%
Surrounding Counties	0%
Birmingham	0%

Visit Tallahassee Economic Impact of Tourism Study Fiscal Year 2015

Lee Daniel, CDME – Director, Visit Tallahassee
850-606-2300, DanielLee@leoncountyfl.gov

Phillip Downs, Ph.D., Senior Partner, pd@dsg-research.com
Joseph St. Germain, Ph.D., President, joseph@dsg-research.com
Rachael Powell, Project Director, rachael@dsg-research.com
Downs & St. Germain Research
850-906-3111: www.dsg-research.com