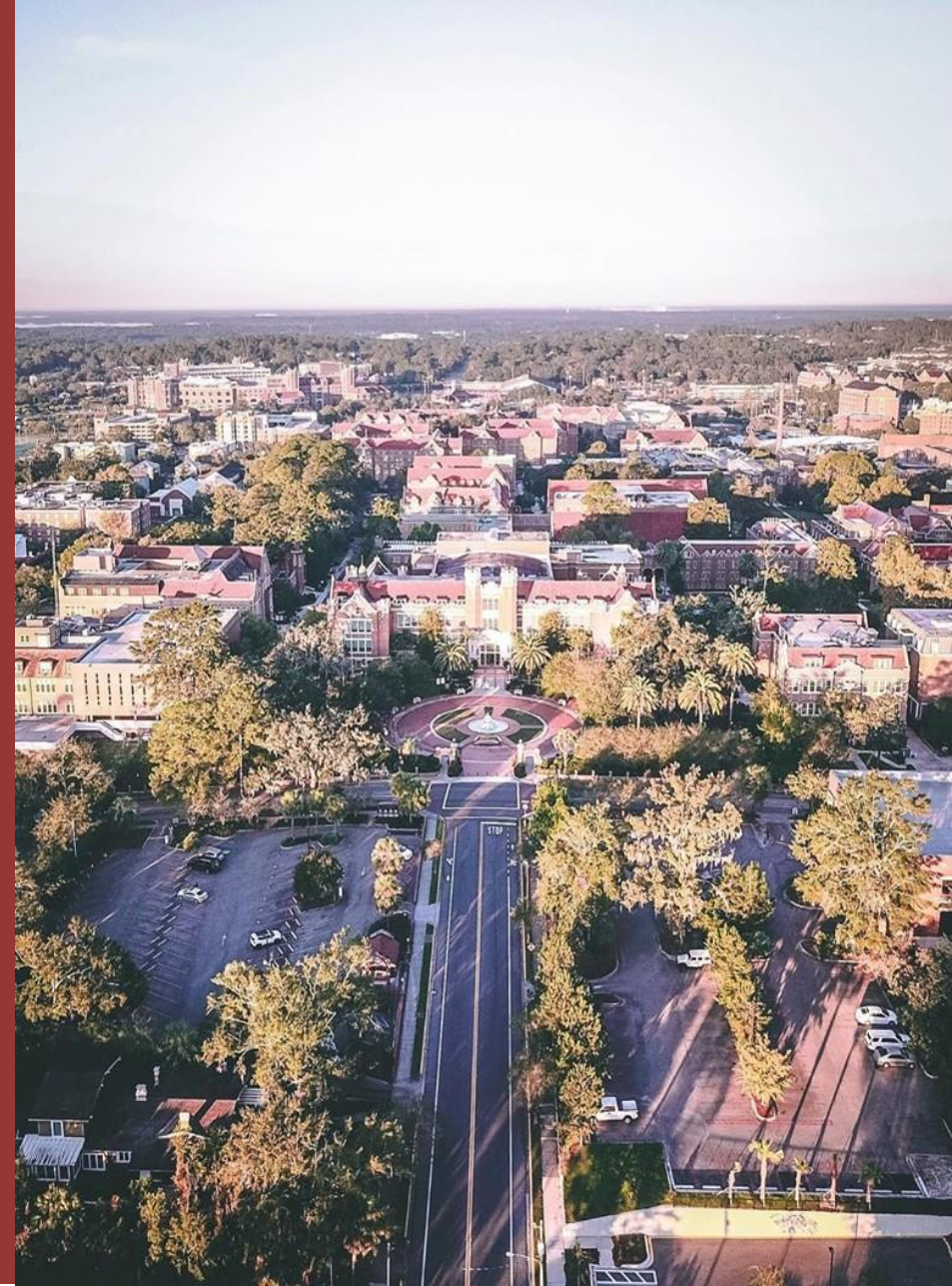


# LEON COUNTY DIVISION OF TOURISM – VISIT TALLAHASSEE

Economic Impact of Tourism Report

Fiscal Year 2019 (October 2018 – September 2019)



Visit  
*Tallahassee*  
A Division of Leon County

**DS** downs & st. germain  
RESEARCH

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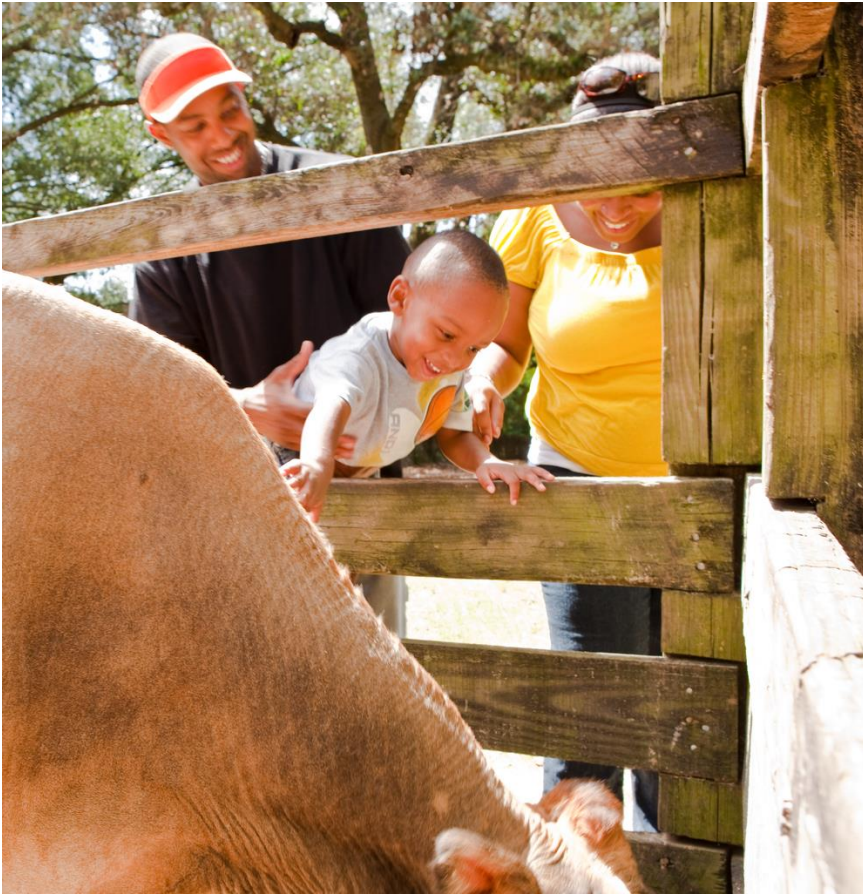
# STUDY METHODOLOGY



# STUDY METHODS

## Visitor Tracking Study

- » Economic impact of tourism for Leon County Division of Tourism/Visit Tallahassee was based on data from the following sources:
  - » 2,293 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



# YEAR-OVER-YEAR DIFFERENCES FROM FY2018 TO FY2019

- » Hurricane Michael and subsequent recovery
- » Governor's Inauguration
- » New Legislators and staffing during session
- » One fewer Florida State Home Football Game



# EXECUTIVE SUMMARY



# TOTAL ECONOMIC IMPACT



**\$1,041,345,800**

**Economic Impact**

**(+14.4% from FY2018)**

# VISITORS

**2,438,900**  
**Visitors**

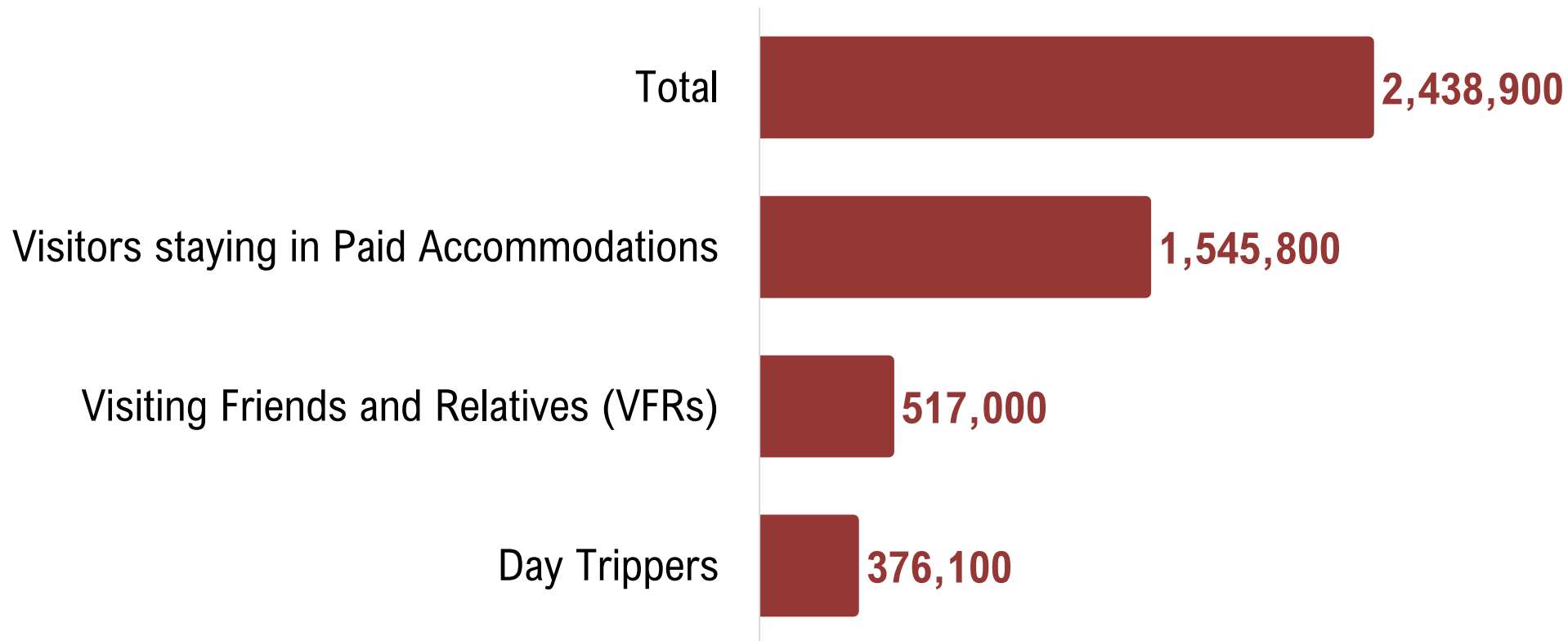
**(+3.0% from FY2018)**





# VISITORS TO LEON COUNTY

» **3 in 5** visitors stayed in Paid Accommodations



# TOP MARKETS OF ORIGIN



**60%** of Leon County visitors lived in **11** markets

Market	FY 2018	FY 2019
Miami – Ft. Lauderdale	16%	11%
Atlanta	9%	11%
Orlando	7%	6%
Surrounding areas	4%	6%
Jacksonville	6%	6%
Tampa Bay area	7%	5%
Panama City – Destin	2%	4%
Pensacola – Mobile	3%	4%
Dallas – Ft. Worth	1%	3%
New York City	2%	2%
Gainesville	2%	2%

# JOB CREATION

# 16,150 Jobs

(+10.8% from FY2018)

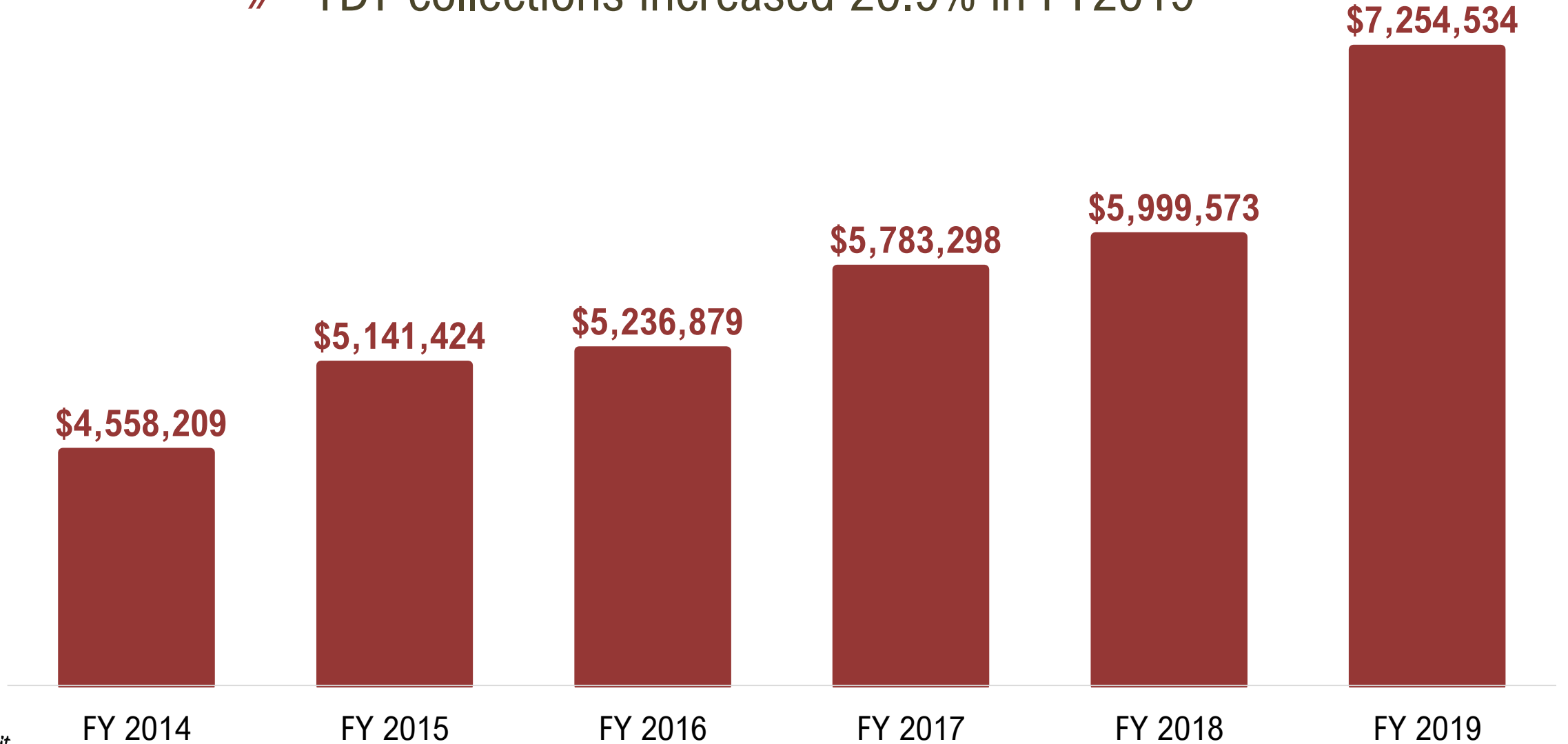
# \$414,448,400 in wages

(+13.2% from FY2018)



# TDT COLLECTIONS FY2014 – FY2019

» TDT collections increased 20.9% in FY2019



# YEAR – TO – YEAR COMPARISONS



# ECONOMIC COMPARISONS

Economic Indicators	FY2018	FY 2019	% Change
Visitors	2,369,000	2,438,900	+3.0%
Direct expenditures	\$576,099,100	\$659,079,600	+14.4%
Total economic impact	\$910,236,600	\$1,041,345,800	+14.4%
Room nights generated	1,369,756	1,555,469	+13.6%
Jobs created	14,573	16,150	+10.8%
Wages paid	\$366,161,200	\$414,448,400	+13.2%
Tourist Development Tax	\$5,999,573	\$7,254,534	+20.9%
Occupancy	66.9%	73.5%	+9.9%
Room Rates	\$102.96	\$113.10	+9.9%
RevPAR	\$68.88	\$83.13	+20.7%



# DETAILED FINDINGS



# KEY PERFORMANCE INDICATORS

Economic Indicators	FY2019	FY 2019	% Change
Visitors	2,368,988	2,438,900	+3.0%
Direct expenditures	\$576,099,100	\$659,079,600	+14.4%
Total economic impact	\$910,236,600	\$1,041,345,800	+14.4%
Room nights generated	1,369,756	1,555,469	+13.6%
Jobs created	14,573	16,150	+10.8%
Wages paid	\$366,161,200	\$414,448,400	+13.2%
Taxes paid <sup>1</sup>	\$60,894,800	\$68,747,500	+12.9%
Tourist Development Tax	\$5,999,574	\$7,254,534	+20.9%

<sup>1</sup>Sales, use, and property taxes.





# KEY PERFORMANCE INDICATORS

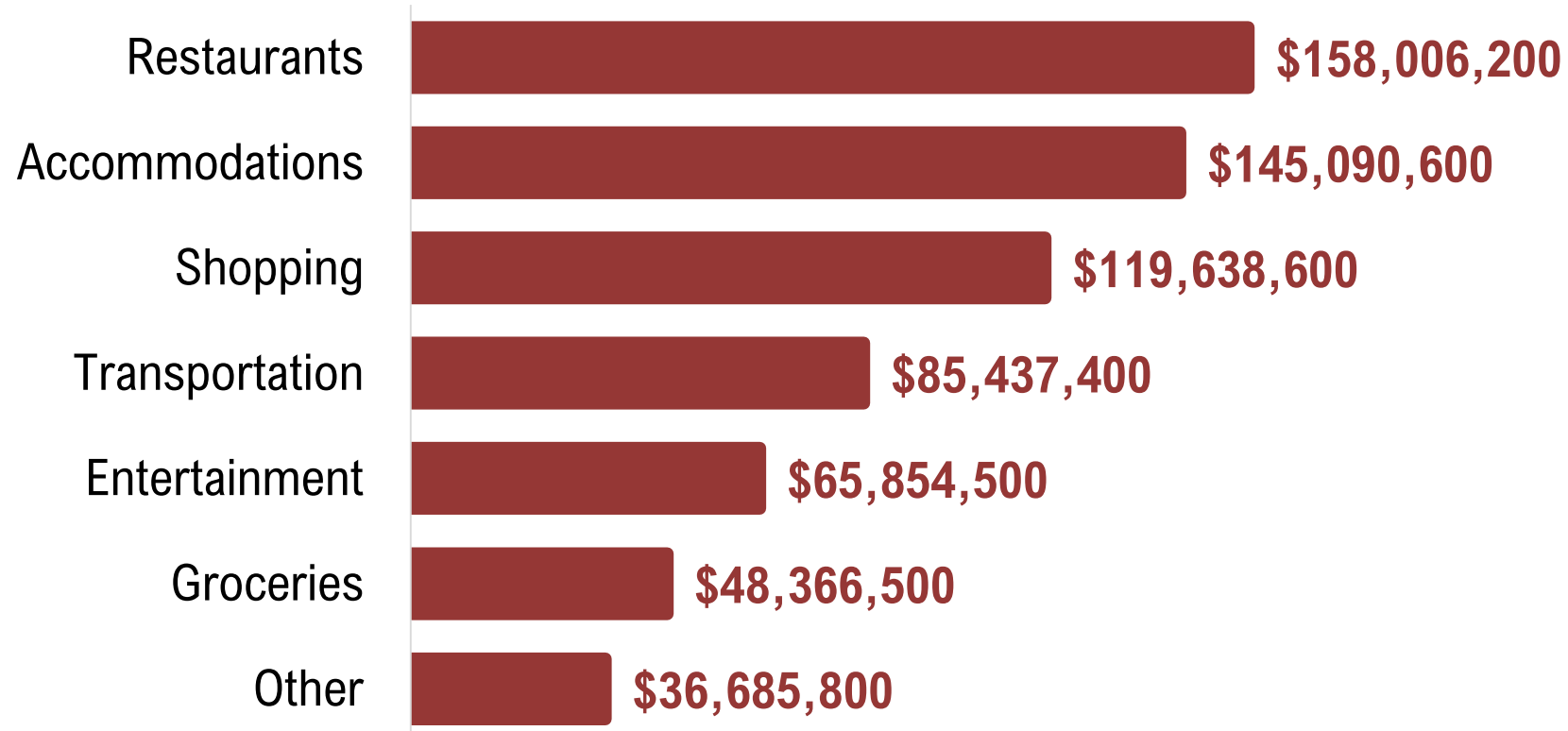
Economic Indicators	FY 2018	FY 2019	
Visitors	2,368,988	2,438,900	+3.0%
Occupancy	66.9%	73.5%	+9.9%
Room rates	\$102.96	\$113.10	+9.9%
RevPAR	\$68.90	\$83.13	+20.7%
Travel party size	2.8	2.5	
Nights spent	3.1	3.3	
Will return	83%	82%	
Rating of experience	8.1 <sup>1</sup>	7.8 <sup>1</sup>	

<sup>1</sup>On a 10-point scale.



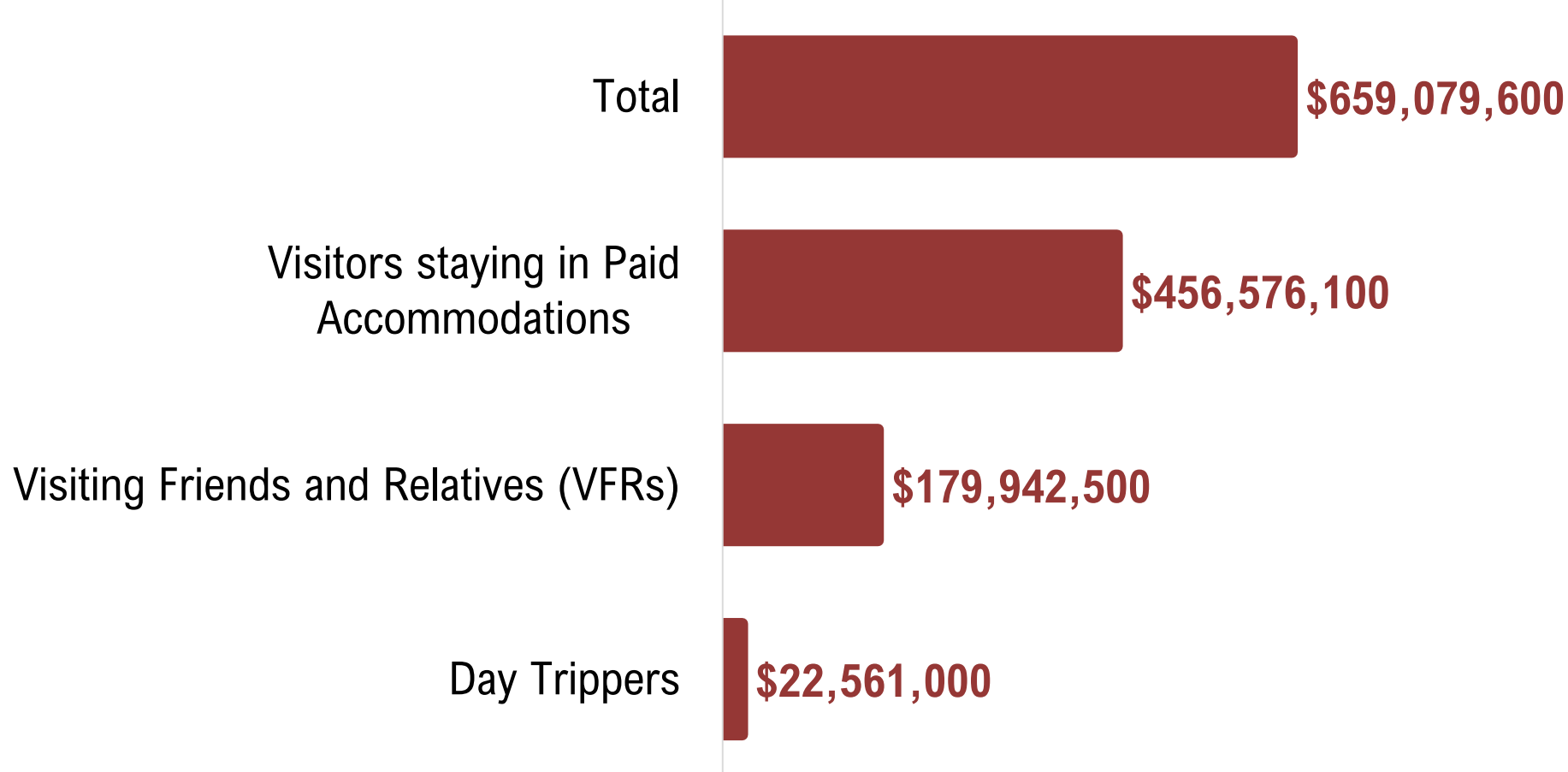
# VISITORS DIRECT SPENDING

» Leon County Visitors spent **\$659,079,600** in FY2019



# DIRECT SPENDING BY VISITOR TYPE

- » Visitors who stay in paid accommodations account for **69%** of visitor spending



# KPIs – OCT-DEC 2018 (Q1)

Economic Indicators	Oct-Dec 2017 (Q1)	Oct-Dec 2018 (Q1)	% Change
Visitors	529,474	567,200	+7.1%
Direct Expenditures	\$140,151,400	\$165,392,800	+18.0%
Economic Impact	\$221,439,200	\$261,320,600	+18.0%
Occupancy	64.8%	79.0%	+21.9%
Room Rates	\$107.16	\$116.89	+9.1%
RevPAR	\$69.44	\$92.34	+33.0%
Travel party size	2.9	2.9	
Nights spent	2.6	3.0	
Will return	86%	85%	
Rating of experience	8.3 <sup>1</sup>	8.7 <sup>1</sup>	

<sup>1</sup>On a 10-point scale.



# KPIs – JAN-MAR 2019 (Q2)

Economic Indicators	Jan-Mar 2018 (Q2)	Jan-Mar 2019 (Q2)	% Change
Visitors	700,206	713,200	+1.9%
Direct Expenditures	\$168,613,200	\$185,358,400	+9.9%
Economic Impact	\$266,408,900	\$292,866,300	+9.9%
Occupancy	71.1%	79.2%	+11.4%
Room Rates	\$104.36	\$115.27	+10.5%
RevPAR	\$74.20	\$91.29	+23.0%
Travel party size	2.8	3.1	
Nights spent	3.5	3.3	
Will return	86%	88%	
Rating of experience	7.9 <sup>1</sup>	8.0 <sup>1</sup>	

<sup>1</sup>On a 10-point scale.



# KPIs – APR-JUN 2019 (Q3)

Economic Indicators	Apr-Jun 2018 (Q3)	Apr-Jun 2019 (Q3)	% Change
Visitors	613,312	629,600	+2.7%
Direct Expenditures	\$136,279,300	\$155,482,700	+14.1%
Economic Impact	\$215,321,300	\$245,662,700	+14.1%
Occupancy	67.2%	69.3%	+3.1%
Room Rates	\$98.56	\$110.68	+12.3%
RevPAR	\$66.23	\$76.70	+15.8%
Travel party size	2.6	2.5	
Nights spent	2.7	3.1	
Will return	86%	88%	
Rating of experience	8.1 <sup>1</sup>	7.8 <sup>1</sup>	

<sup>1</sup>On a 10-point scale.



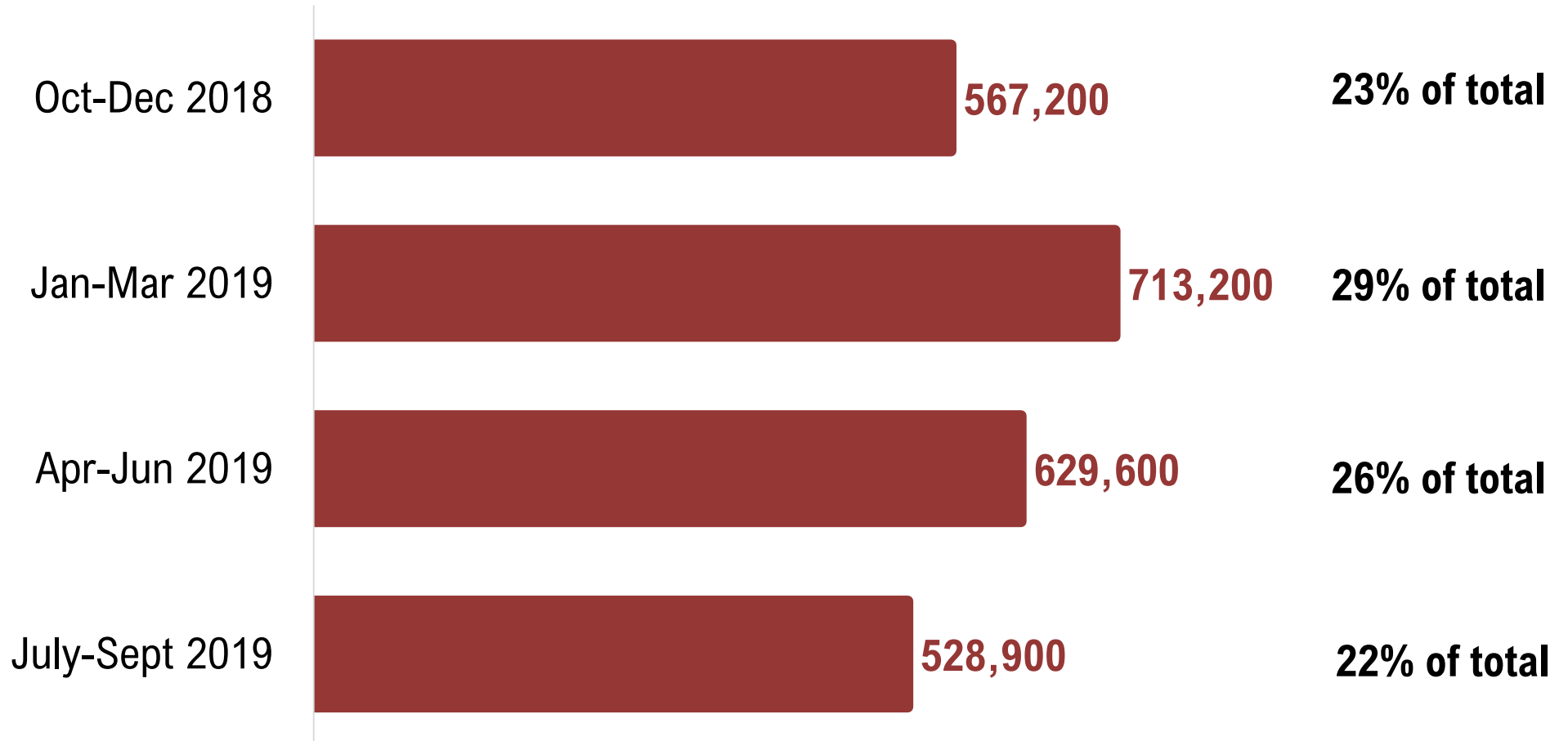
# KPIs – JULY-SEPT 2019 (Q4)

Economic Indicators	July-Sept 2018 (Q4)	July-Sept 2019 (Q4)	% Change
Visitors	525,996	528,900	+0.6%
Direct Expenditures	\$131,055,200	\$152,845,700	+16.6%
Economic Impact	\$207,067,200	\$241,496,200	+16.6%
Occupancy	64.6%	66.9%	+3.6%
Room Rates	\$101.74	\$107.19	+5.4%
RevPAR	\$65.72	\$71.70	+9.1%
Travel party size	2.9	2.5	
Nights spent	3.3	3.5	
Will return	76%	87%	
Rating of experience	7.8 <sup>1</sup>	7.9 <sup>1</sup>	

<sup>1</sup>On a 10-point scale.

# VISITORS BY QUARTER

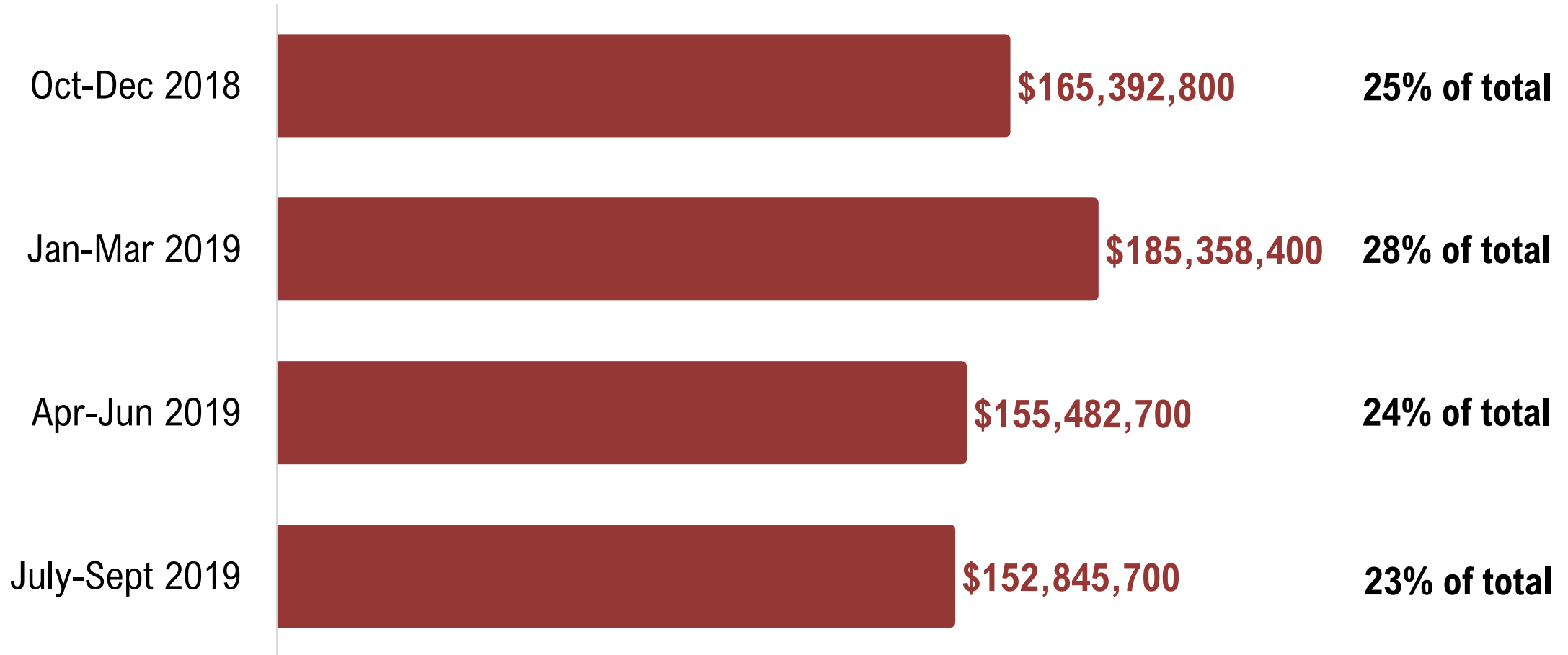
Total Visitors: **2,438,900**





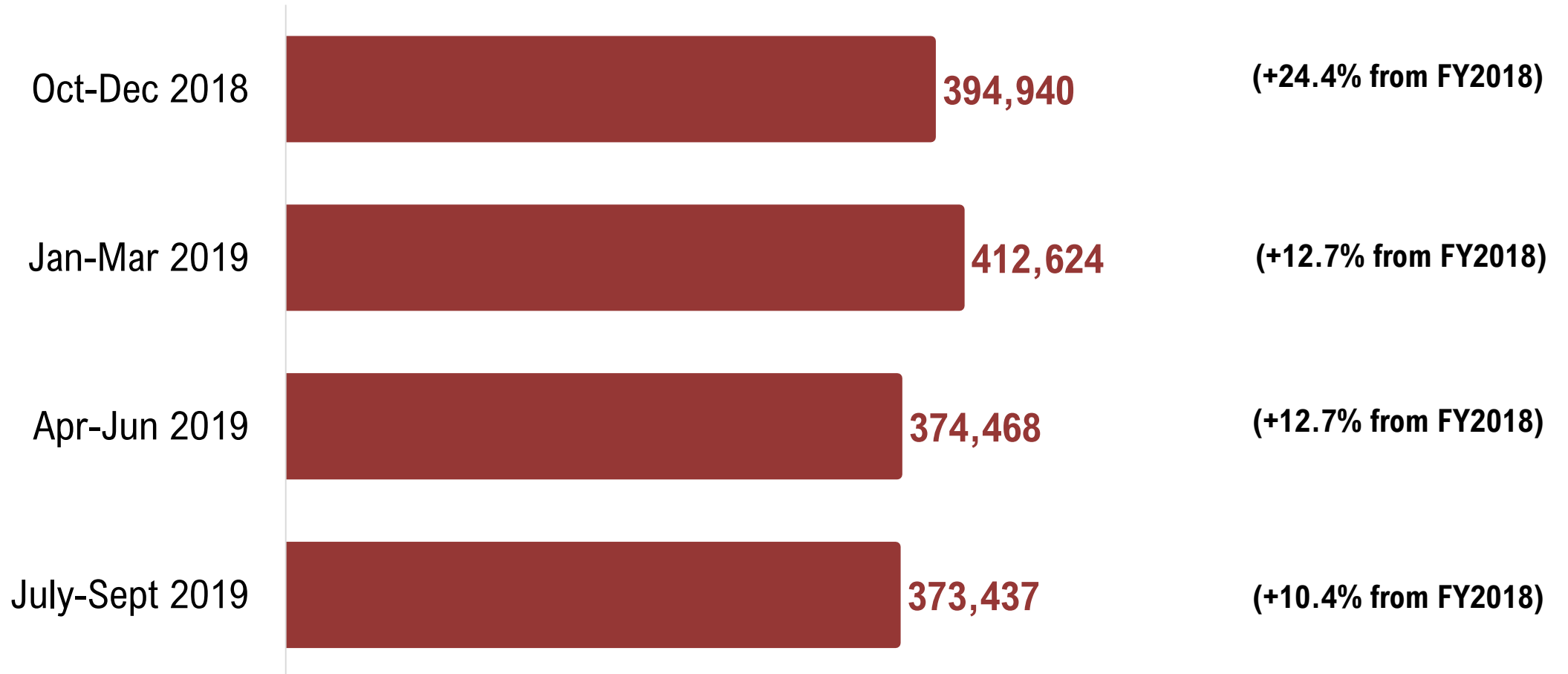
# VISITORS DIRECT SPENDING BY QUARTER

Total Direct Spend: **\$659,079,600**



# ROOM NIGHTS BY QUARTER

Total Room Nights: **1,555,469**



# FISCAL YEAR 2019: VISITOR TRACKING



# QUARTERLY COMPARISONS

Economic Indicators	Oct-Dec 2018 (Q1)	Jan-Mar 2019 (Q2)	Apr-Jun 2019 (Q3)	July-Sept 2019 (Q4)
Visitors*	567,200	713,200	629,600	528,900
Occupancy	79.0%	79.2%	69.3%	66.9%
Median age	44	44	44	48
Median HH income	\$98,800	\$88,100	\$91,000	\$110,400
From Southeast	82%	80%	80%	75%
From Florida	54%	54%	54%	50%
Travel party size	2.9	3.1	2.5	2.5
Drove	73%	78%	82%	83%
Length of stay	3.0	3.3	3.1	3.5
1st time visitor	19%	27%	25%	29%

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



# QUARTERLY COMPARISONS

Economic Indicators	Oct-Dec 2018 (Q1)	Jan-Mar 2019 (Q2)	Apr-Jun 2019 (Q3)	July-Sept 2019 (Q4)
Rating of Leon County*	8.7	8.0	7.8	7.9
Likelihood of returning	85%	88%	88%	87%
Spending per travel party	\$1,029	\$1,079	\$778	\$1,166
Used VisitTallahassee.com	3%	7%	9%	4%
Used hotel website	20%	21%	23%	25%
Used smartphone on trip	77%	41%	66%	82%
Married	68%	62%	66%	64%
Has college degree	72%	69%	77%	76%

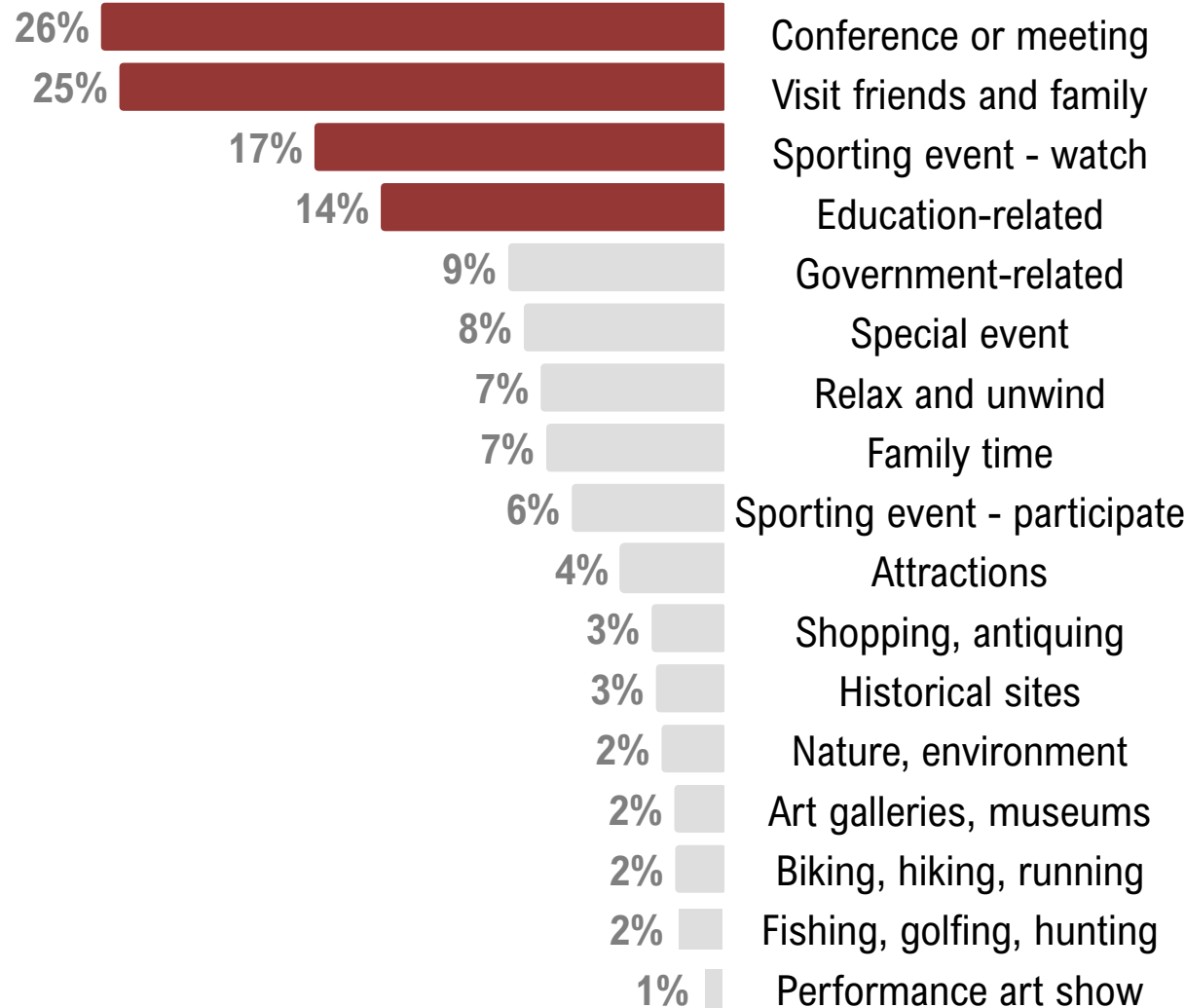
\* Using a 10-point scale



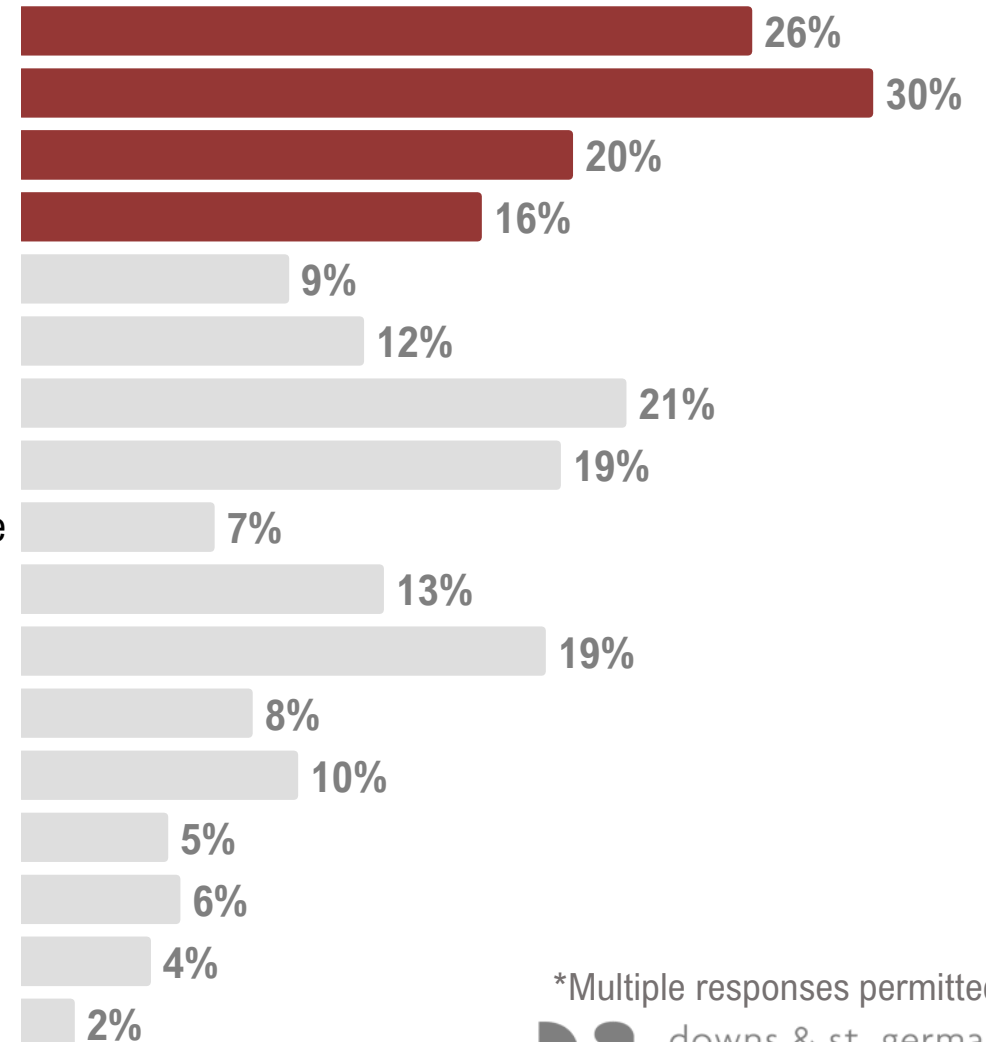
# FY 2019 REASONS FOR VISITING VS. VISITOR ACTIVITIES



## Reasons for Visiting\*



## Visitor Activities\*



\*Multiple responses permitted.

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Kerri Post

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