

# 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 Development/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



# EXECUTIVE SUMMARY



# TOTAL ECONOMIC IMPACT



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

**Economic Impact**

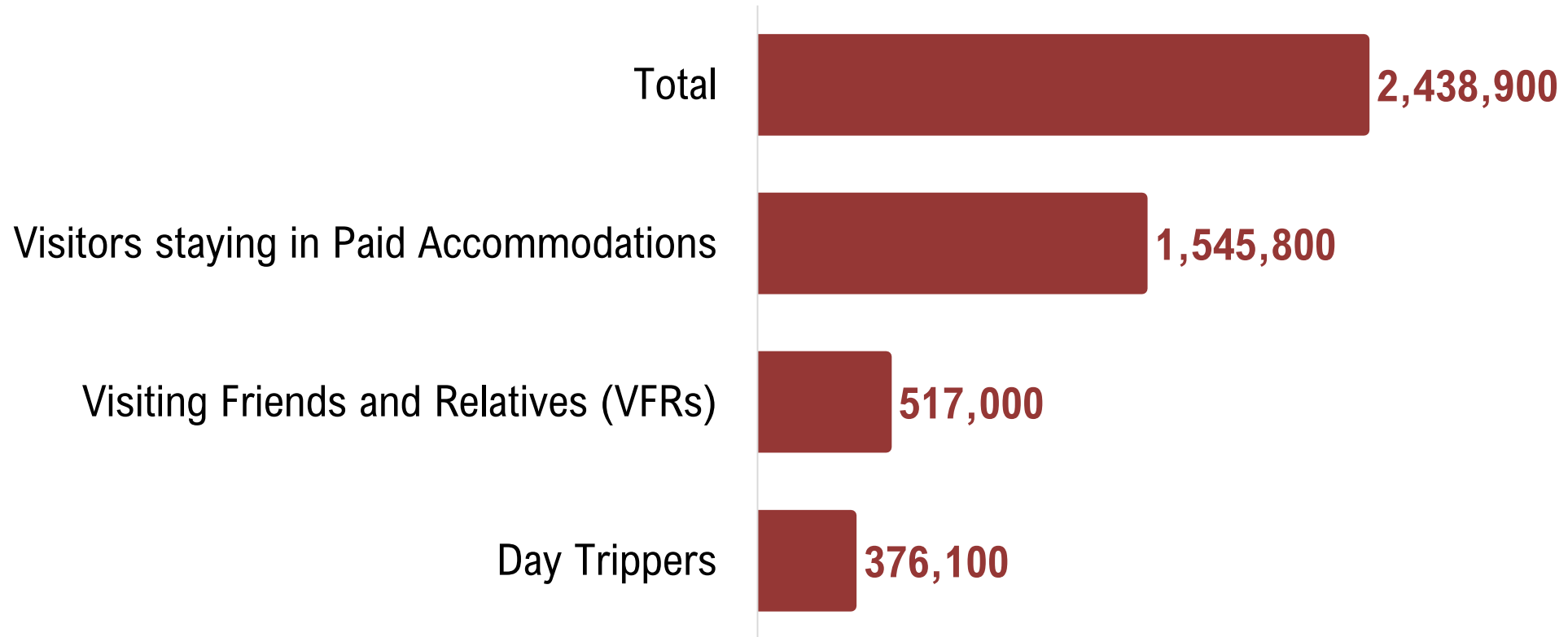
# VISITORS

2,438,900  
Visitors



# 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 2019
Miami – Ft. Lauderdale	11%
Atlanta	11%
Orlando	6%
Surrounding areas	6%
Jacksonville	6%
Tampa Bay area	5%
Panama City – Destin	4%
Pensacola – Mobile	4%
Dallas – Ft. Worth	3%
New York City	2%
Gainesville	2%



# JOB CREATION

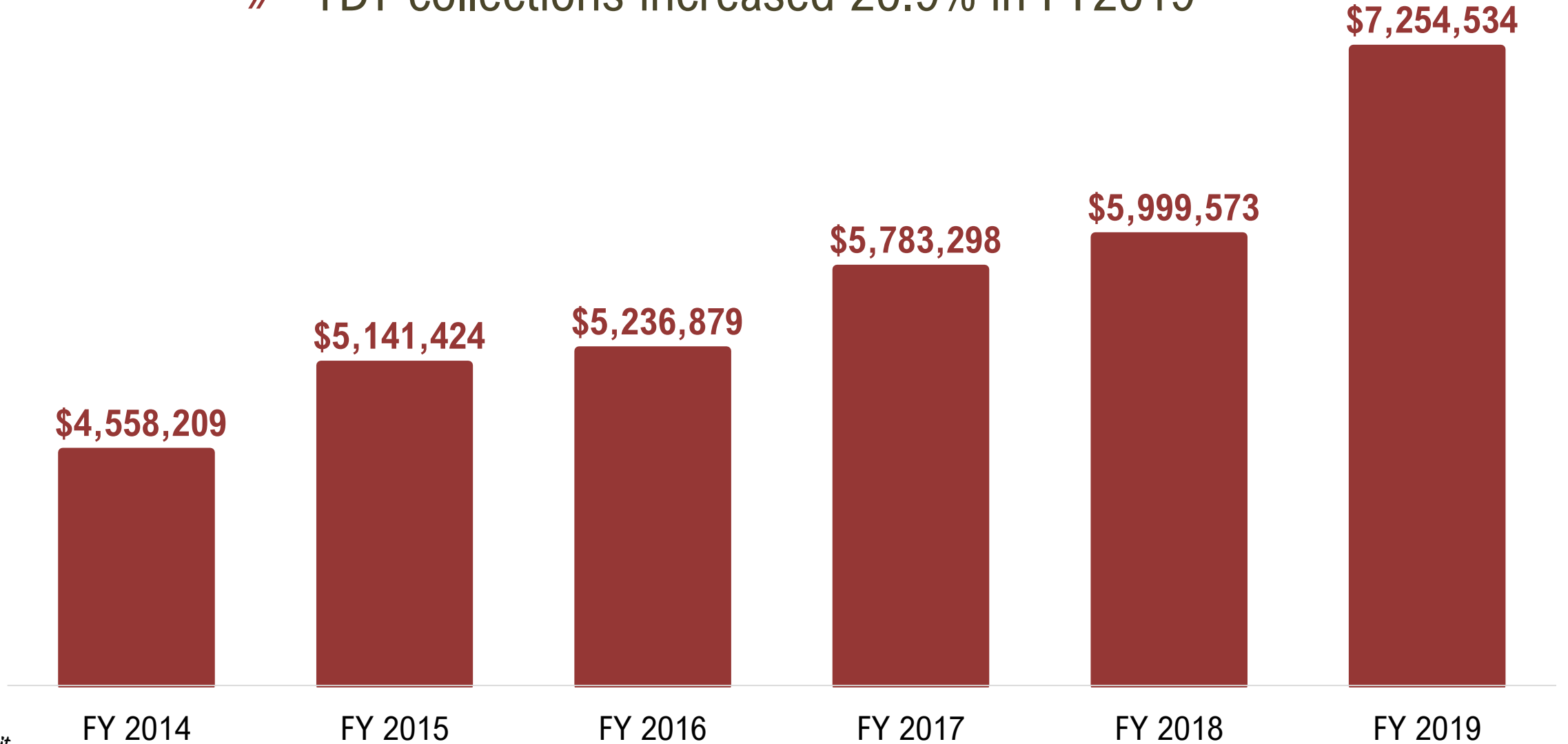
16,150 Jobs

\$414,448,400 in wages



# 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	FY 2019
Visitors	2,438,900
Direct expenditures	\$659,079,600
Total economic impact	\$1,041,345,800
Room nights generated	1,555,469
Jobs created	16,150
Wages paid	\$414,448,400
Taxes paid <sup>1</sup>	\$68,747,500
Tourist Development Tax	\$7,254,534

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



# KEY PERFORMANCE INDICATORS

Economic Indicators	FY 2019
Visitors	2,438,900
Occupancy	73.5%
Room rates	\$113.10
RevPAR	\$83.13
Travel party size	2.5
Nights spent	3.3
Will return	82%
Rating of experience	7.8 <sup>1</sup>

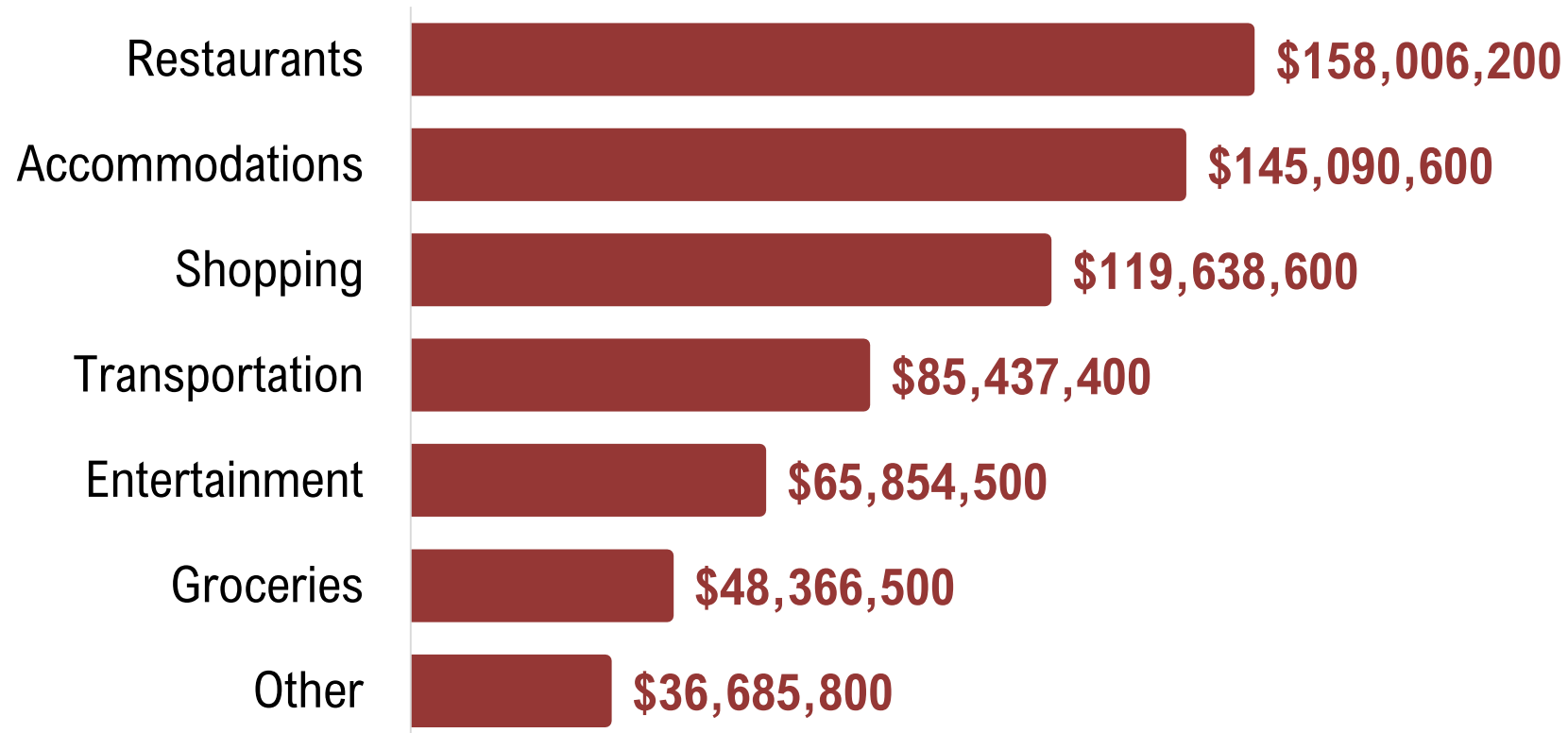
<sup>1</sup>On a 10-point scale.





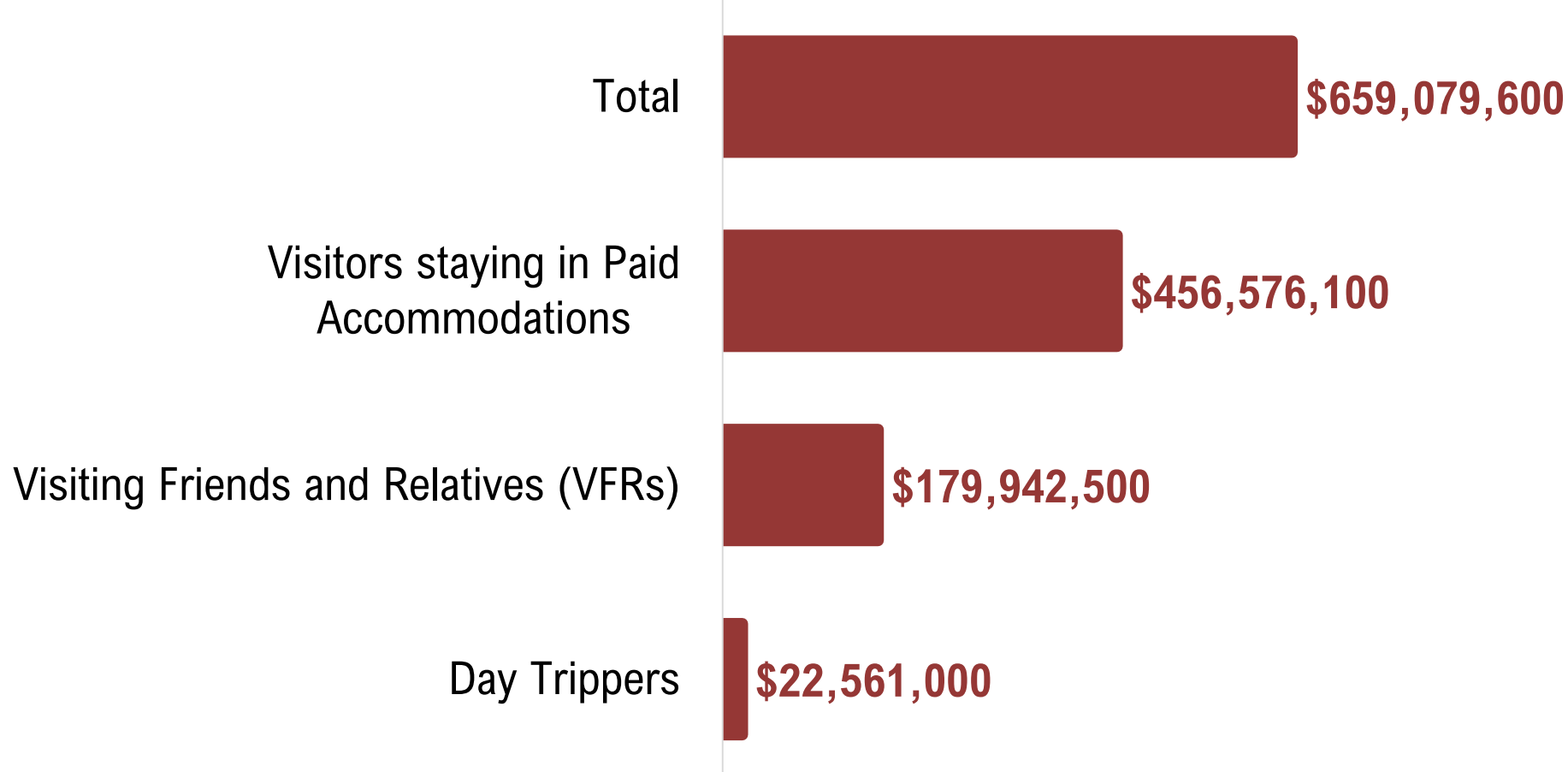
# VISITORS DIRECT SPENDING

» 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 2018 (Q1)
Visitors	567,200
Direct Expenditures	\$165,392,800
Economic Impact	\$261,320,600
Occupancy	79.0%
Room Rates	\$116.89
RevPAR	\$92.34
Travel party size	2.9
Nights spent	3.0
Will return	85%
Rating of experience	8.7 <sup>1</sup>

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



# KPIs – JAN-MAR 2019 (Q2)

Economic Indicators	Jan-Mar 2019 (Q2)
Visitors	713,200
Direct Expenditures	\$185,358,400
Economic Impact	\$292,866,300
Occupancy	79.2%
Room Rates	\$115.27
RevPAR	\$91.29
Travel party size	3.1
Nights spent	3.3
Will return	88%
Rating of experience	8.0 <sup>1</sup>

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



# KPIs – APR-JUN 2019 (Q3)

Economic Indicators	Apr-Jun 2019 (Q3)
Visitors	629,600
Direct Expenditures	\$155,482,700
Economic Impact	\$245,662,700
Occupancy	69.3%
Room Rates	\$110.68
RevPAR	\$76.70
Travel party size	2.5
Nights spent	3.1
Will return	88%
Rating of experience	7.8 <sup>1</sup>

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



# KPIs – JULY-SEPT 2019 (Q4)

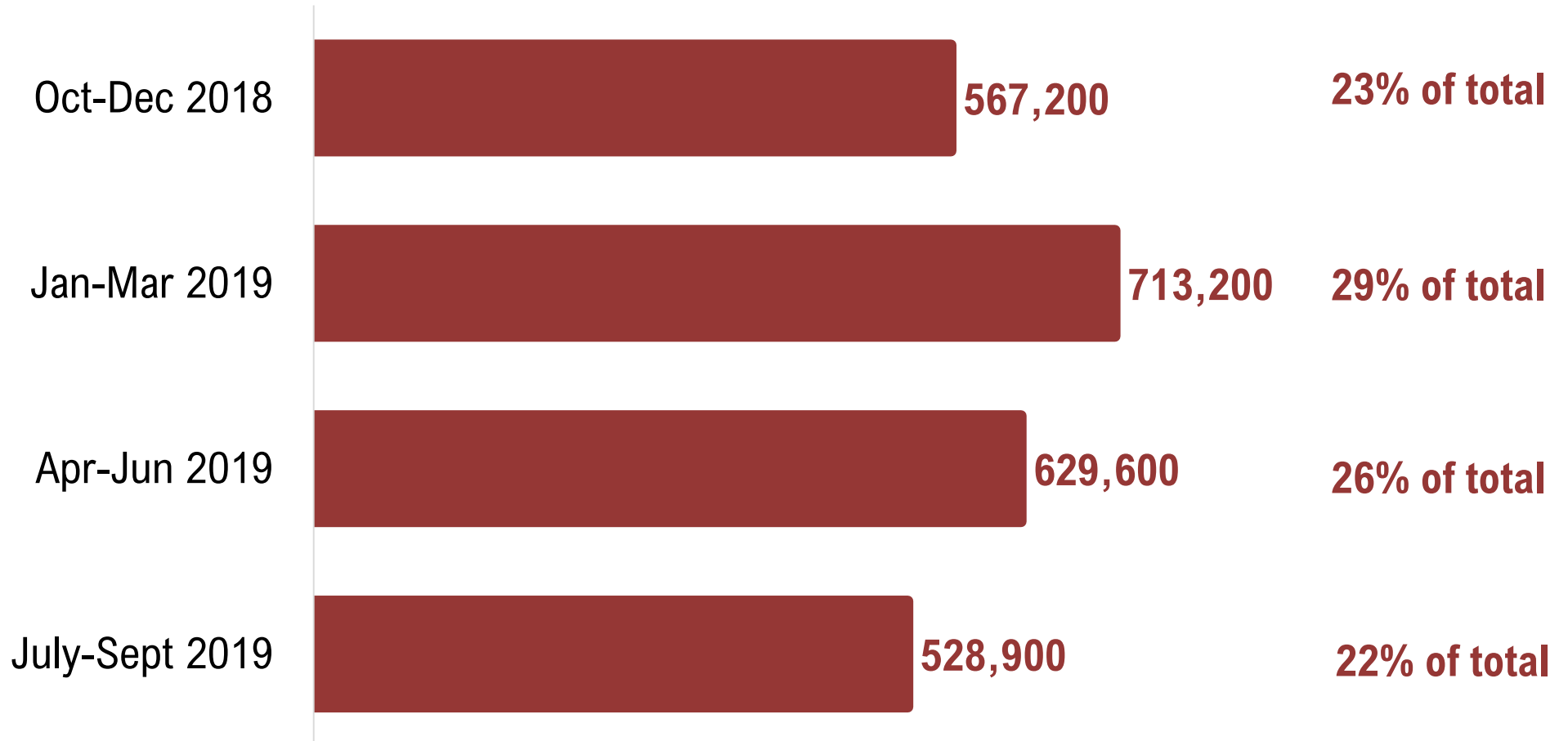
Economic Indicators	July-Sept 2019 (Q4)
Visitors	528,900
Direct Expenditures	\$152,845,700
Economic Impact	\$241,496,200
Occupancy	66.9%
Room Rates	\$107.19
RevPAR	\$71.70
Travel party size	2.5
Nights spent	3.5
Will return	87%
Rating of experience	7.9 <sup>1</sup>

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



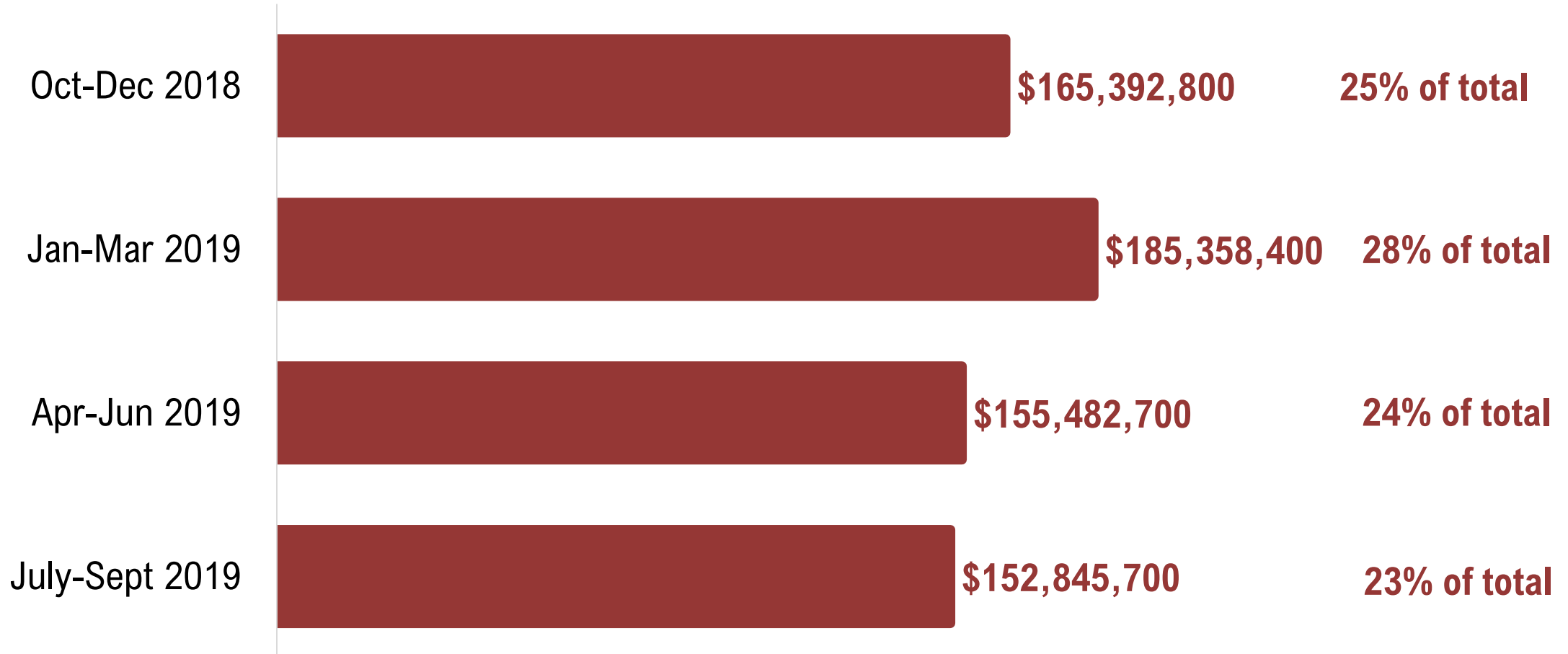
# VISITORS BY QUARTER

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



# VISITORS DIRECT SPENDING BY QUARTER

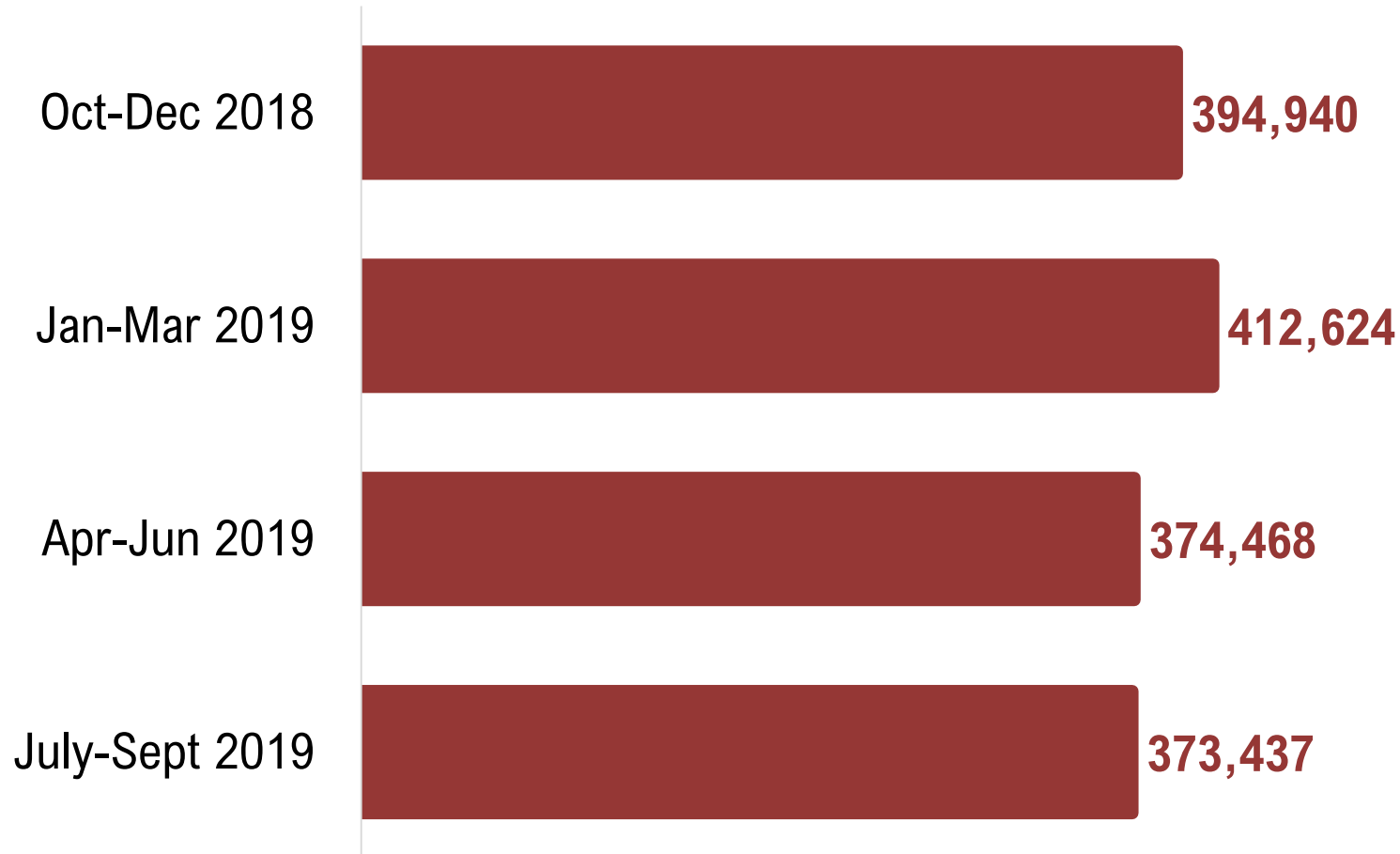
Total Direct Spend: **\$659,079,600**





# ROOM NIGHTS BY QUARTER

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



# QUARTERLY COMPARISONS: 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



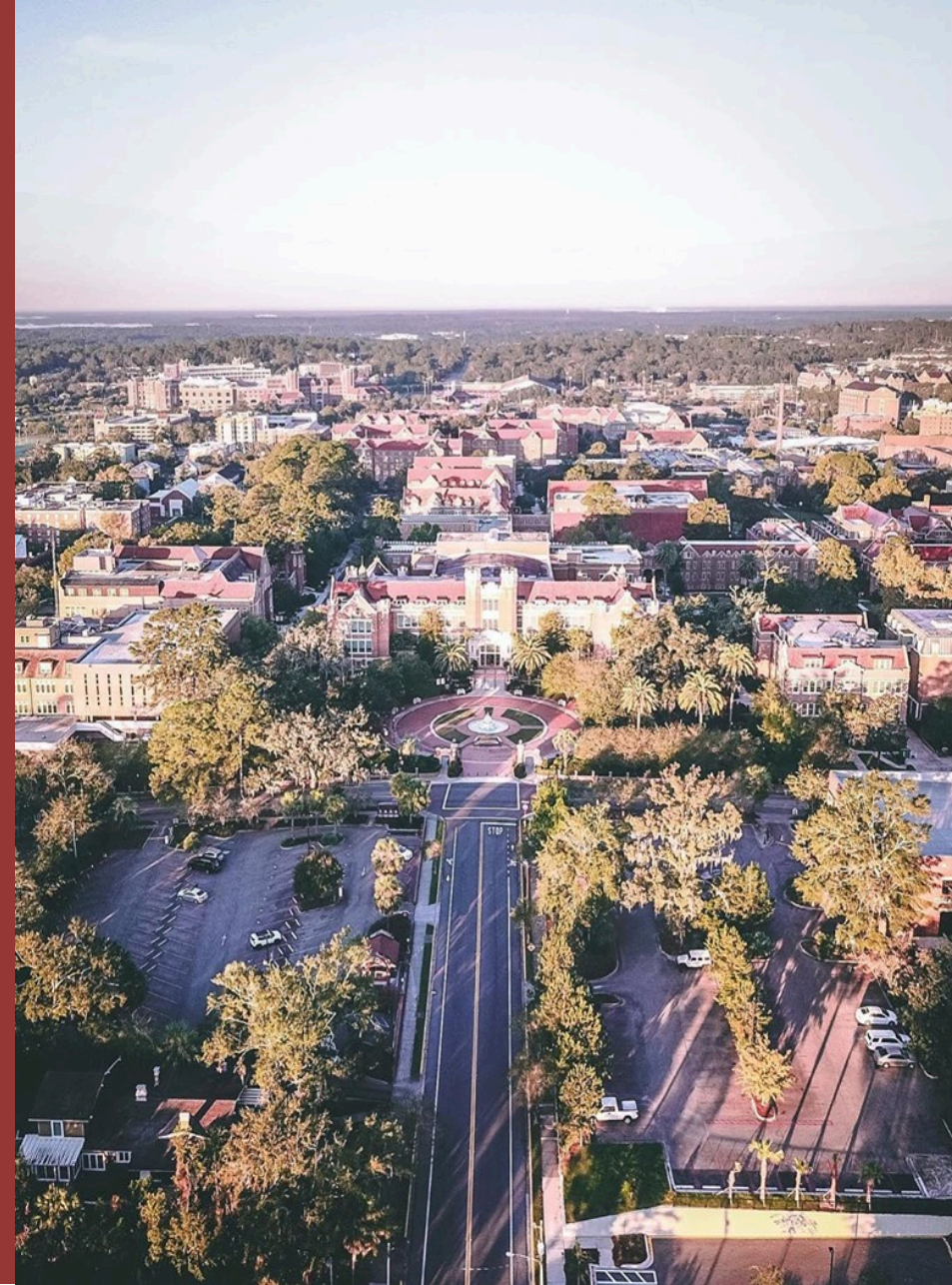
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Kerri Post

Executive Director, Leon County Division of Tourism/ Visit Tallahassee  
850-606-2313, PostK@leoncountyfl.gov

Joseph St. Germain, Ph.D., President  
Phillip Downs, Ph.D., Senior Partner  
Rachael Anglin, Senior Project Director  
Isiah Lewis, Project Director  
Glencora Haskins, Project Director  
Downs & St. Germain Research  
850-906-3111 | [www.dsg-research.com](http://www.dsg-research.com)



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