



# Visit Tallahassee

Economic Impact of Tourism Report  
Fiscal Year 2016

# Study Methods

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- Economic impact of tourism for Visit Tallahassee was based on data from the following sources:
  - 3,984 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	FY2016
Visitors	2,312,120
Direct expenditures	\$532,484,631
Total economic impact	\$841,325,717
Room nights generated	1,304,257
Jobs created	13,702
Wages paid	\$332,958,600
Taxes paid <sup>1</sup>	\$56,828,669
Tourist Development Tax	\$5,236,879

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

# Key Performance Indicators

Visitor Profile	FY2016
Visitors	2,312,120
Occupancy	62.8%
Room rates	\$96.23
RevPAR	\$60.43
Travel party size	2.6
Nights spent	2.6
Will return	95%
Rating of experience	8.1 <sup>1</sup>

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

# Total Economic Impact

# \$841,325,717

■ Induced ■ Indirect ■ Direct



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

# Inside Story

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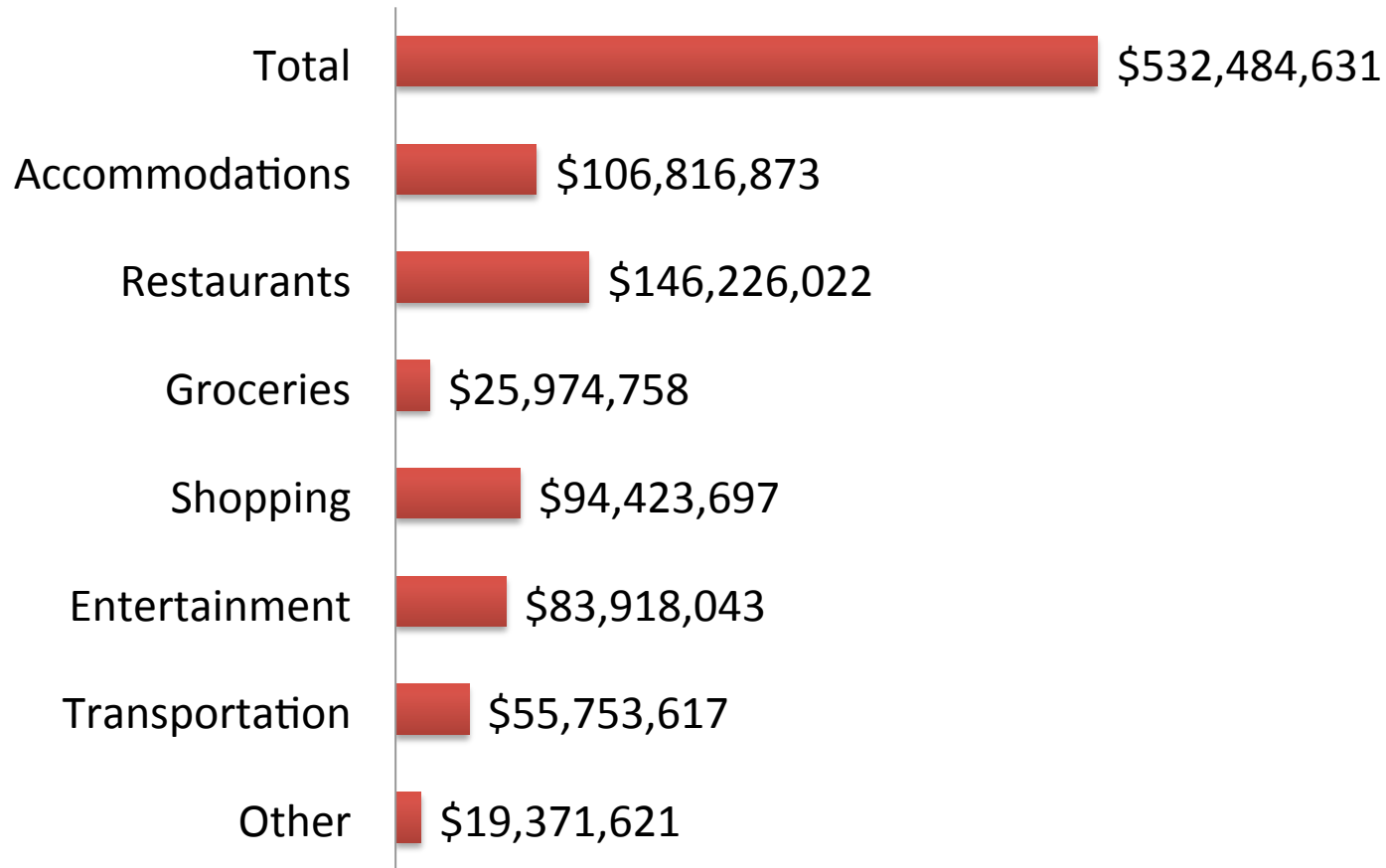
- Each visitor spends \$230 in Leon County
- 168 visitors = 1 job in Leon County
- Visitors save each Leon County household \$445 in taxes

# Visitors to Leon County

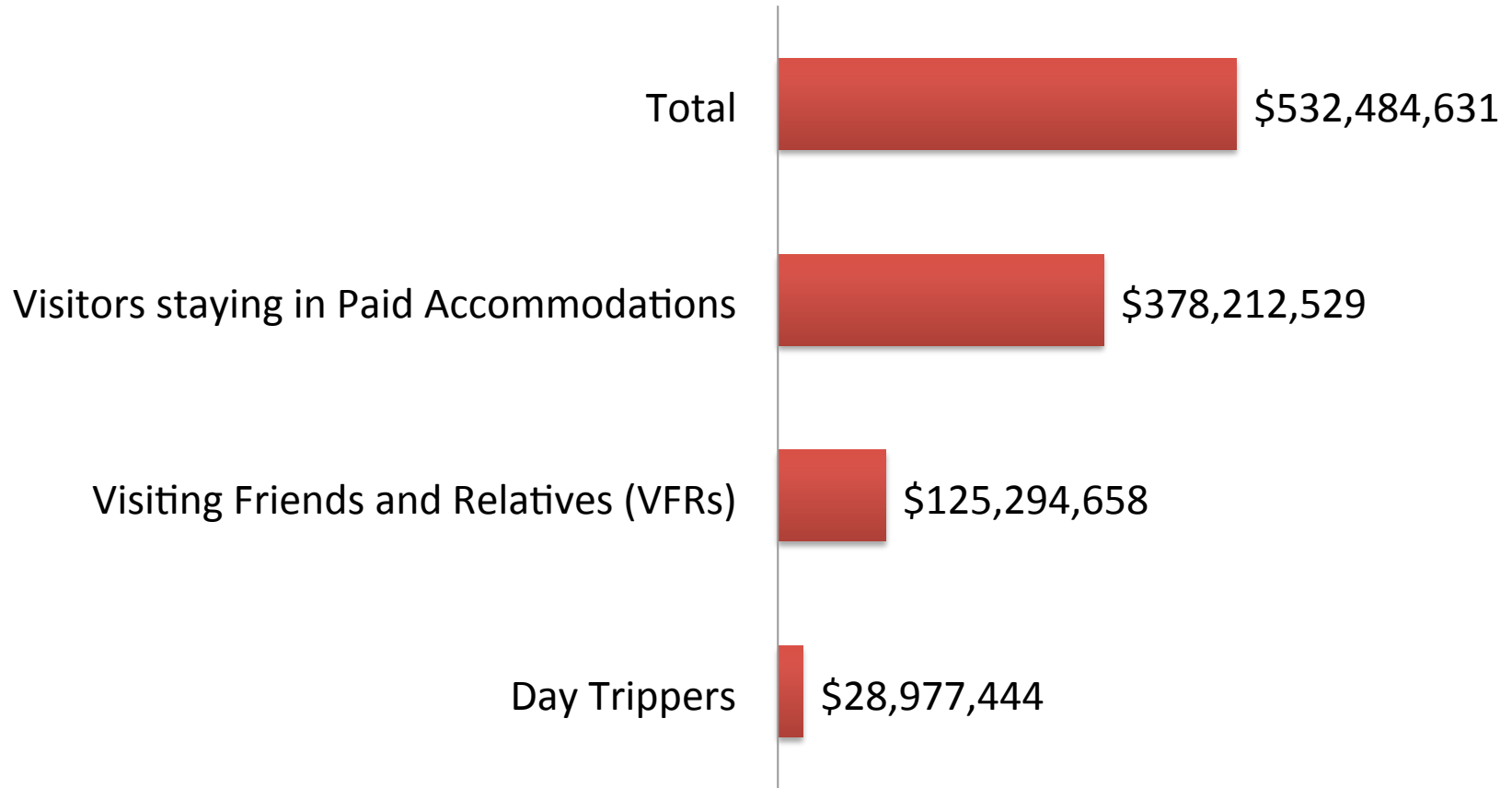
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- 2,312,120** – Total Visitors to Leon County
- **1,323,219** – Stayed in paid accommodations
  - **558,261** – Visited friends and relatives (VFRs)
  - **430,640** – Day visitors

# Visitors' Direct Spending



# Direct Spending by Visitor Type



# KPIs— Oct-Dec 2015 (Q1)

Visitor Profile	Oct-Dec 2015 (Q1)
Visitors	503,580
Direct Expenditures	\$139,580,743
Economic Impact	\$220,537,574
Occupancy	57.0%
Room Rates	\$104.56
RevPAR	\$59.60
Travel party size	2.6
Nights spent	2.7
Will return	92%
Rating of experience	8.2 <sup>1</sup>

# KPIs – Jan-Mar 2016 (Q2)

Visitor Profile	Jan-Mar 2016 (Q2)
Visitors	692,211
Direct Expenditures	\$162,379,704
Economic Impact	\$256,559,932
Occupancy	65.5%
Room Rates	\$98.70
RevPAR	\$64.64
Travel party size	3.1
Nights spent	2.9
Will return	99%
Rating of experience	8.0 <sup>1</sup>

# KPIs – Apr-Jun 2016 (Q3)

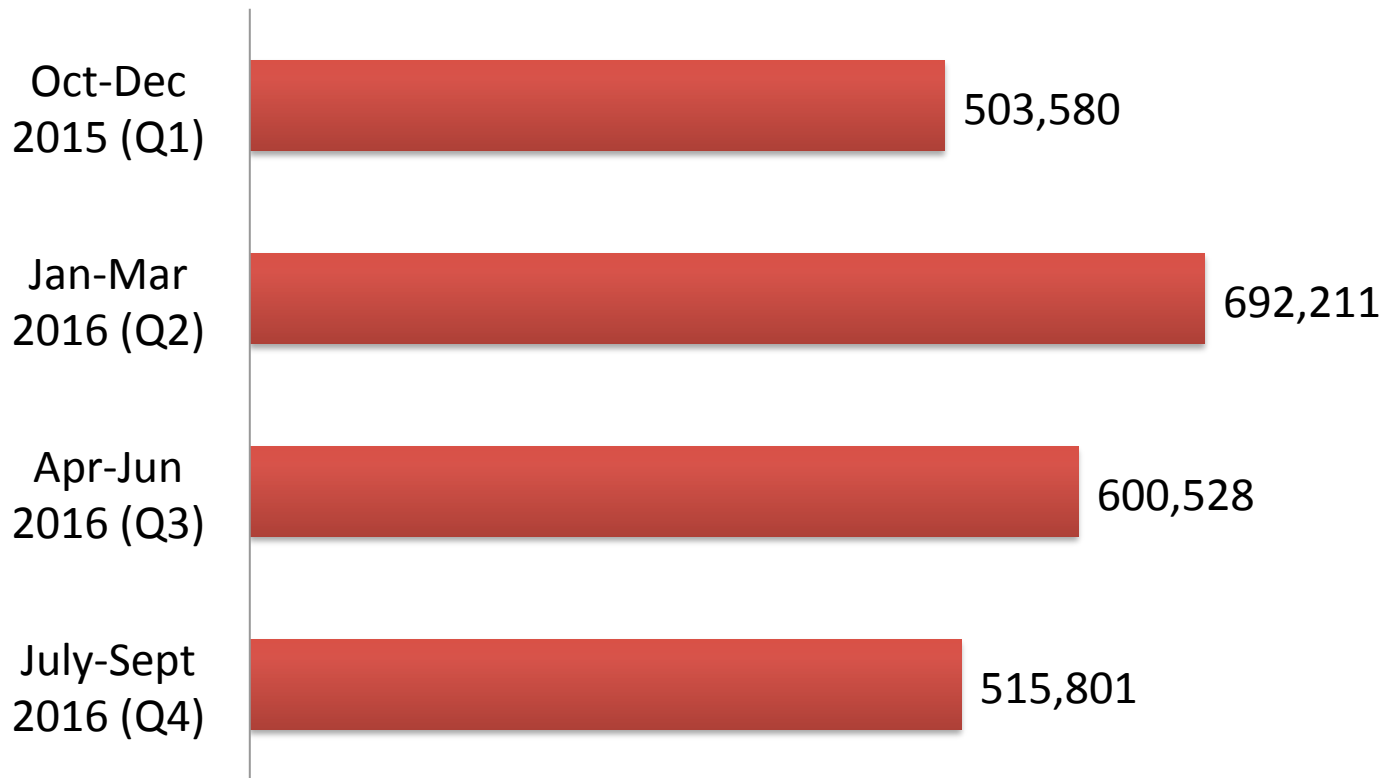
Visitor Profile	Apr-Jun 2016 (Q3)
Visitors	600,528
Direct Expenditures	\$120,686,969
Economic Impact	\$190,685,411
Occupancy	63.5%
Room Rates	\$92.17
RevPAR	\$58.53
Travel party size	2.4
Nights spent	2.4
Will return	95%
Rating of experience	8.1 <sup>1</sup>

# KPIs – July-Sept 2016 (Q4)

Visitor Profile	July-Sept 2016 (Q4)
Visitors	515,801
Direct Expenditures	\$109,837,215
Economic Impact	\$173,542,800
Occupancy	65.9%
Room Rates	\$89.50
RevPAR	\$58.98
Travel party size	2.4
Nights spent	2.5
Will return	99%
Rating of experience	8.1 <sup>1</sup>

# Visitors by Quarter

Total: 2,312,120



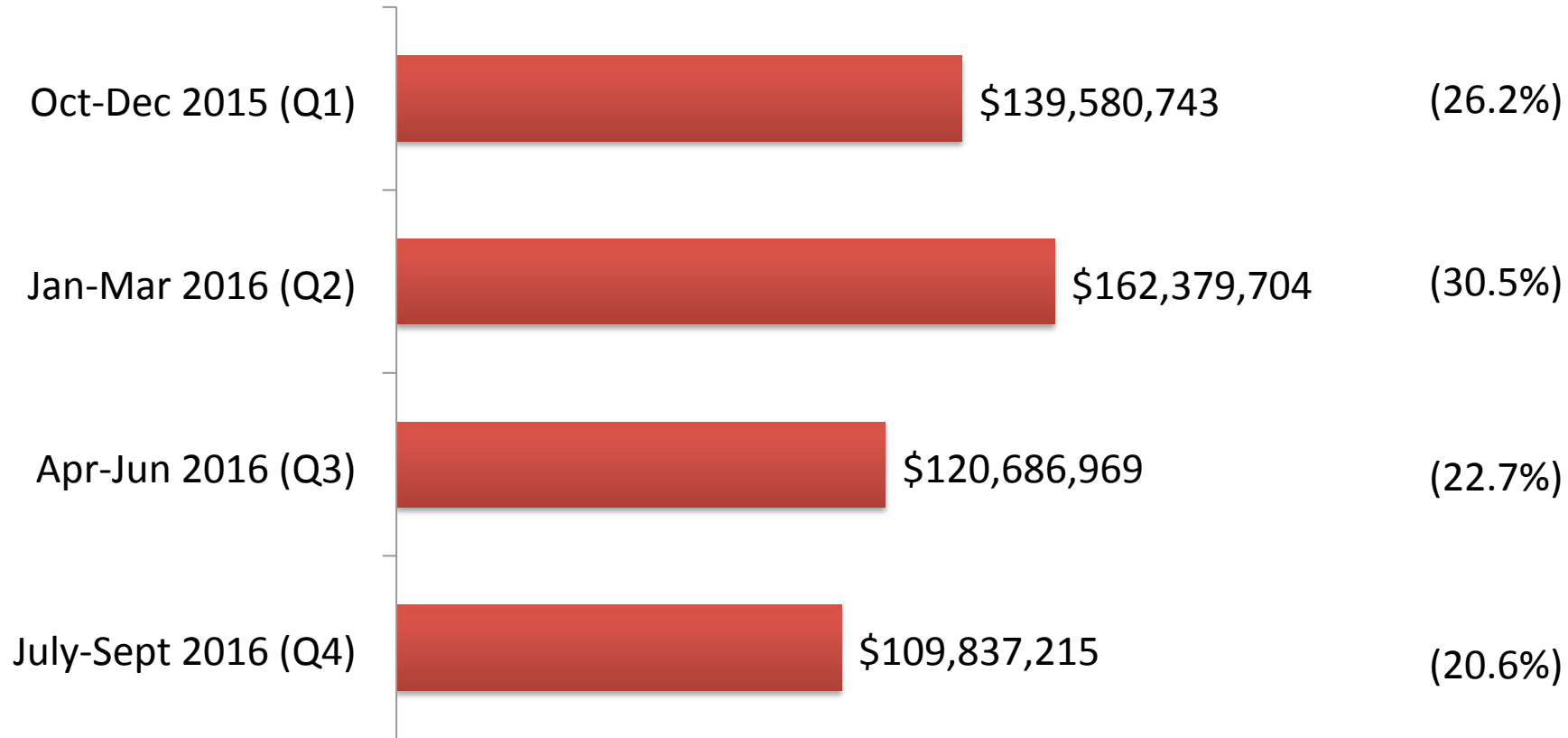
# Room Nights by Quarter

Total: 1,304,257



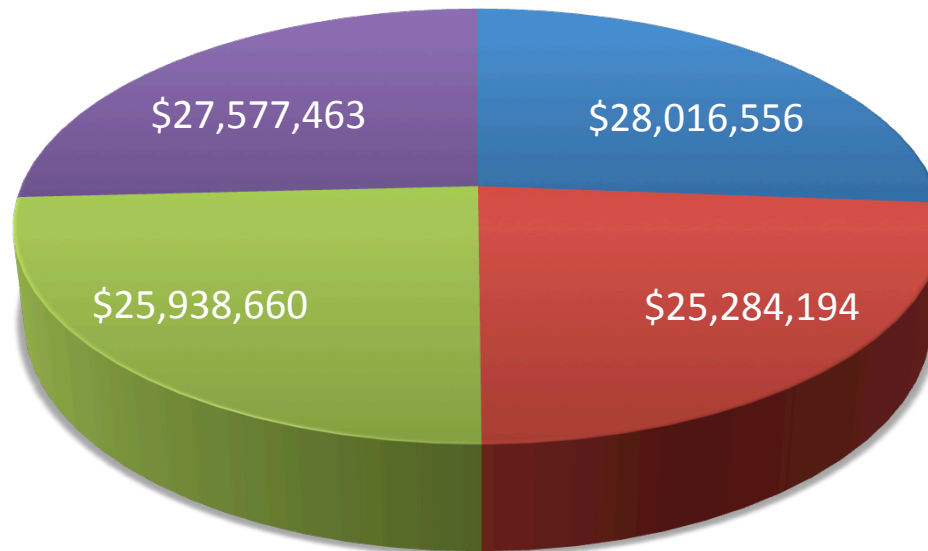
# Visitors' Direct Spending by Quarter

Total: \$532,484,631



# Accommodation Spending by Quarter

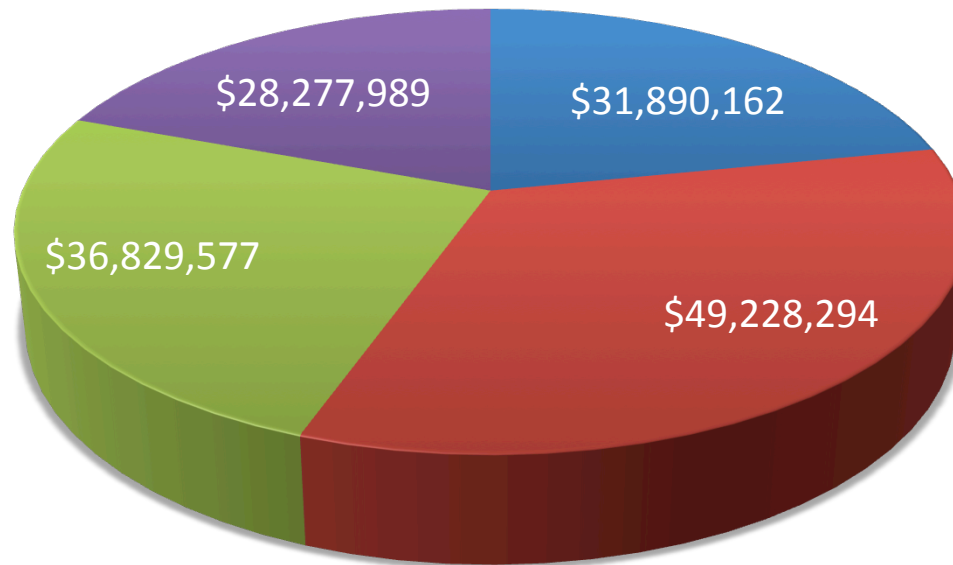
Total: \$106,816,873



■ Oct-Dec 2015 (Q1) ■ Jan-Mar 2016 (Q2) ■ Apr-Jun 2016 (Q3) ■ July-Sept 2016 (Q4)

# Restaurant Spending by Quarter

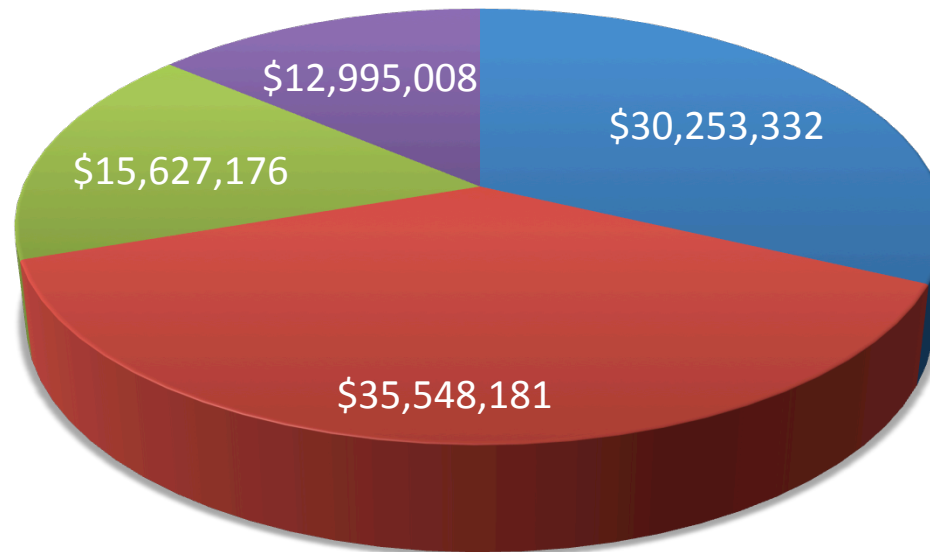
Total: \$146,226,022



■ Oct-Dec 2015 (Q1) ■ Jan-Mar 2016 (Q2) ■ Apr-Jun 2016 (Q3) ■ July-Sept 2016 (Q4)

# Shopping Spending by Quarter

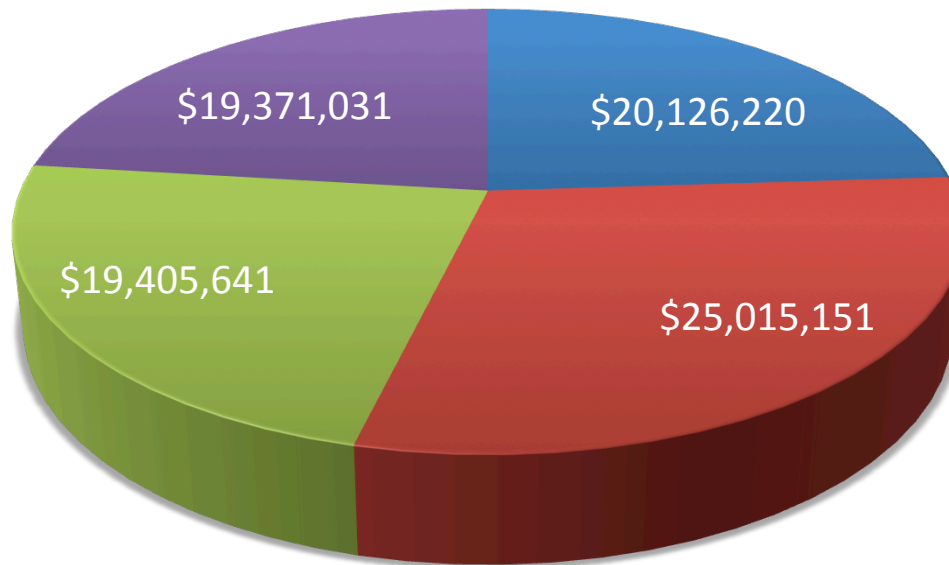
Total: \$94,423,697



■ Oct-Dec 2015 (Q1) ■ Jan-Mar 2016 (Q2) ■ Apr-Jun 2016 (Q3) ■ July-Sept 2016 (Q4)

# Entertainment Spending by Quarter

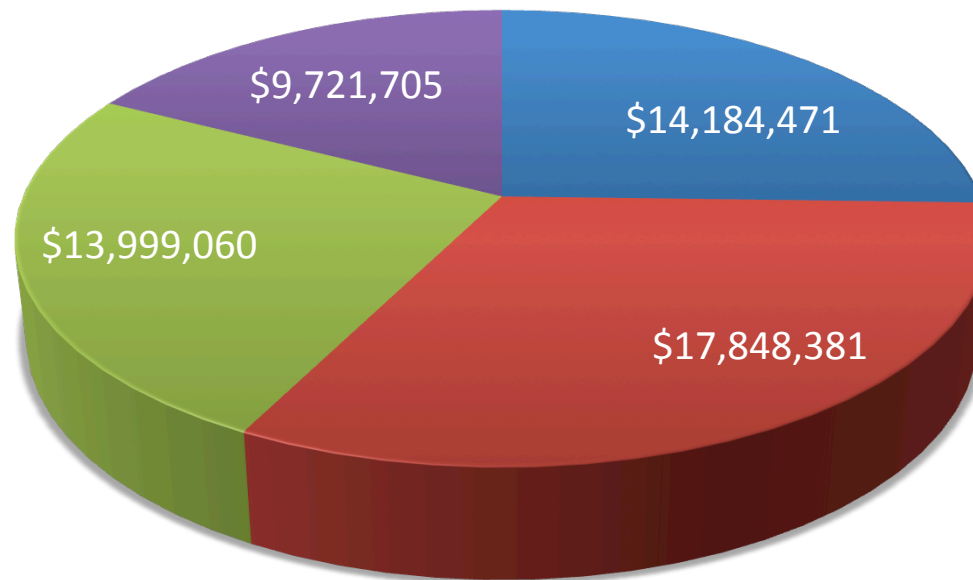
Total: \$83,918,043



■ Oct-Dec 2015 (Q1) ■ Jan-Mar 2016 (Q2) ■ Apr-Jun 2016 (Q3) ■ July-Sept 2016 (Q4)

# Transportation Spending by Quarter

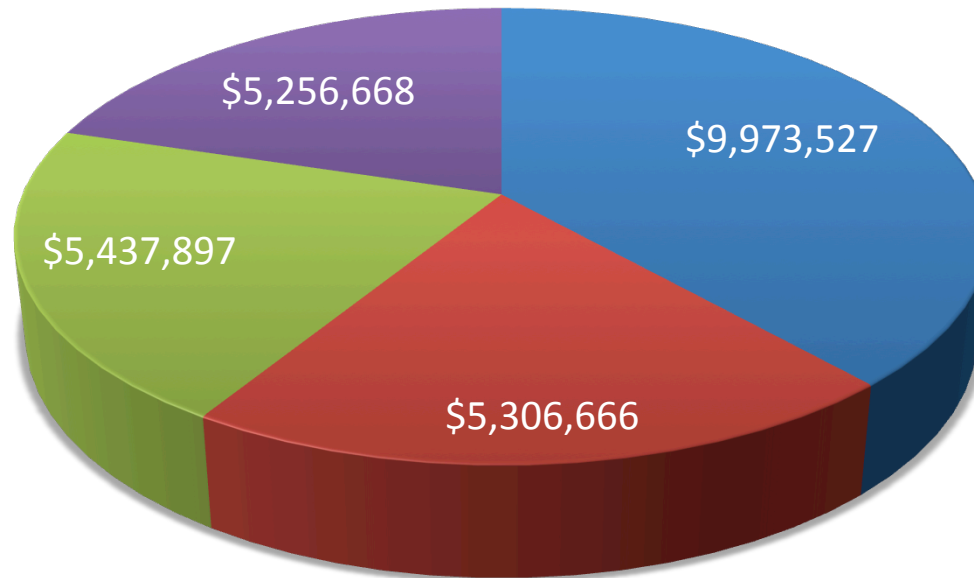
Total: \$55,753,617



■ Oct-Dec 2015 (Q1) ■ Jan-Mar 2016 (Q2) ■ Apr-Jun 2016 (Q3) ■ July-Sept 2016 (Q4)

# Grocery Spending by Quarter

Total: \$25,974,758



■ Oct-Dec 2015 (Q1) ■ Jan-Mar 2016 (Q2) ■ Apr-Jun 2016 (Q3) ■ July-Sept 2016 (Q4)

# Quarterly Comparisons

# Quarterly Comparisons:

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Visitors*	503,580	692,211	600,528	515,801
Occupancy	57.0%	65.5%	63.5%	65.9%
Median age	49	45	43	44
Median household income	\$78,900	\$80,900	\$90,000	\$82,500
From Southeast	93%	87%	89%	89%
From Florida	69%	63%	61%	62%
Travel party size	2.6	3.1	2.4	2.4
Drove	80%	87%	81%	82%
Length of stay	2.7	2.9	2.4	2.5
1 <sup>st</sup> time visitor	25%	22%	28%	28%

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

# Quarterly Comparisons

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Rating of Leon County*	8.2	8.0	8.1	8.1
Likelihood of returning	80%	96%	95%	96%
Spending per travel party	\$917	\$1,044	\$559	\$720
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
Used VisitTallahassee.com	8%	11%	10%	11%
Used hotel website	22%	35%	28%	25%
Used smartphone on trip	62%	71%	70%	64%
Married	61%	60%	58%	56%
Has college degree	76%	68%	63%	67%

\* 10 point scale

# Yearly Comparisons

# Yearly Comparisons

Economic Indicators	FY2015	FY2016	% Change
Visitors	2,326,769	2,312,120	-0.6%
Direct expenditures	\$531,668,275	\$532,484,631	+0.2%
Total economic impact	\$840,035,875	\$841,325,717	+0.2%
Room nights generated	1,276,784	1,304,257	+2.2%
Jobs created	13,659	13,702	+0.3%
Tourist Development Tax	\$5,141,424	\$5,236,879	+1.9%

# Yearly Comparisons

Visitor Profile	FY2015	FY2016	% Change
Occupancy	61.7%	62.8%	+1.8%
Room Rates	\$94.40	\$96.23	+1.9%
RevPAR	\$58.24	\$60.43	+3.8%
Travel Party Size	2.7	2.6	-
Nights spent	2.6	2.6	-
Will Return	92%	95%	-
Rating of experience	7.6 <sup>1</sup>	8.1 <sup>1</sup>	-

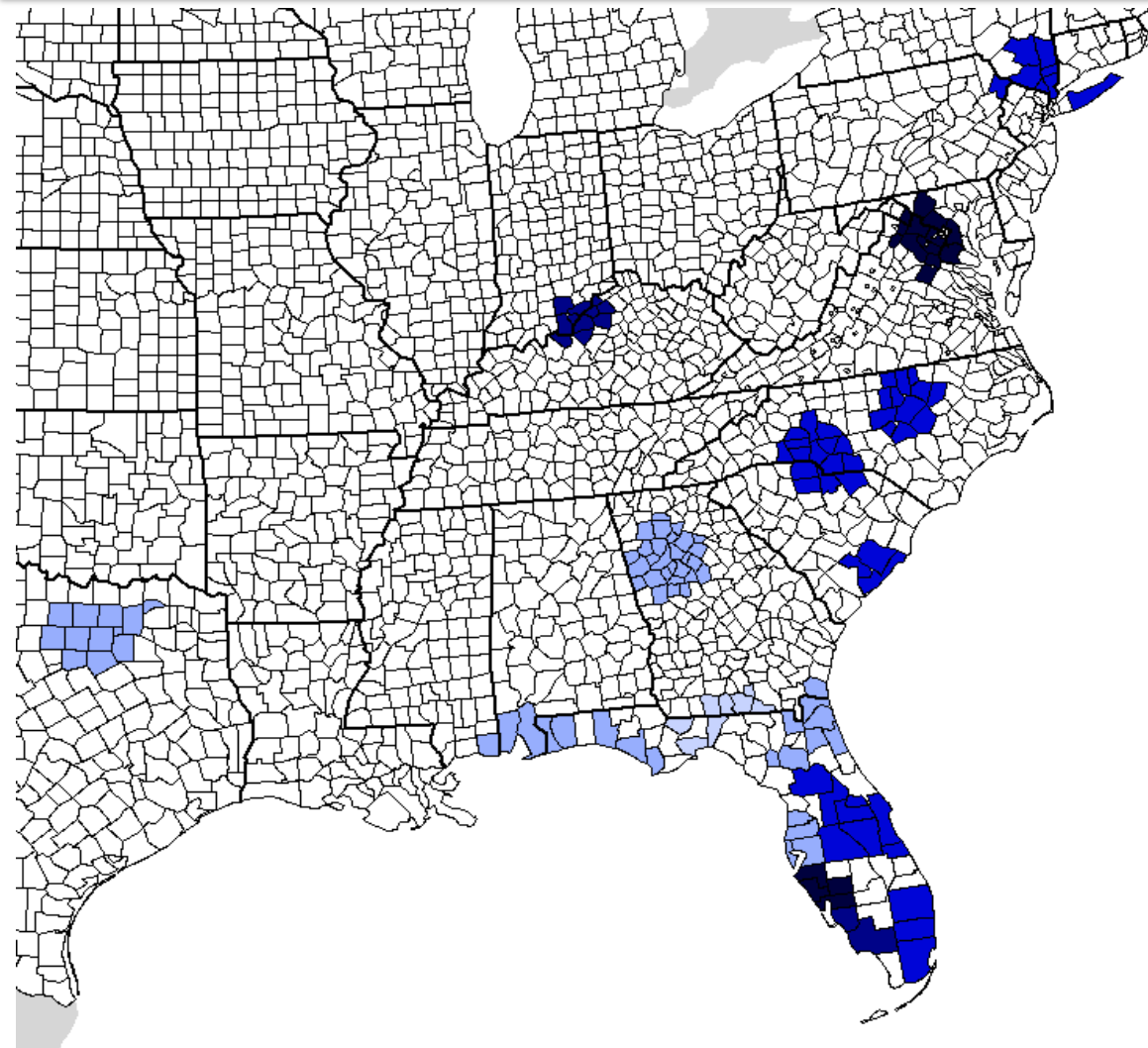
<sup>1</sup>On a 10-point scale.

# GIS Maps

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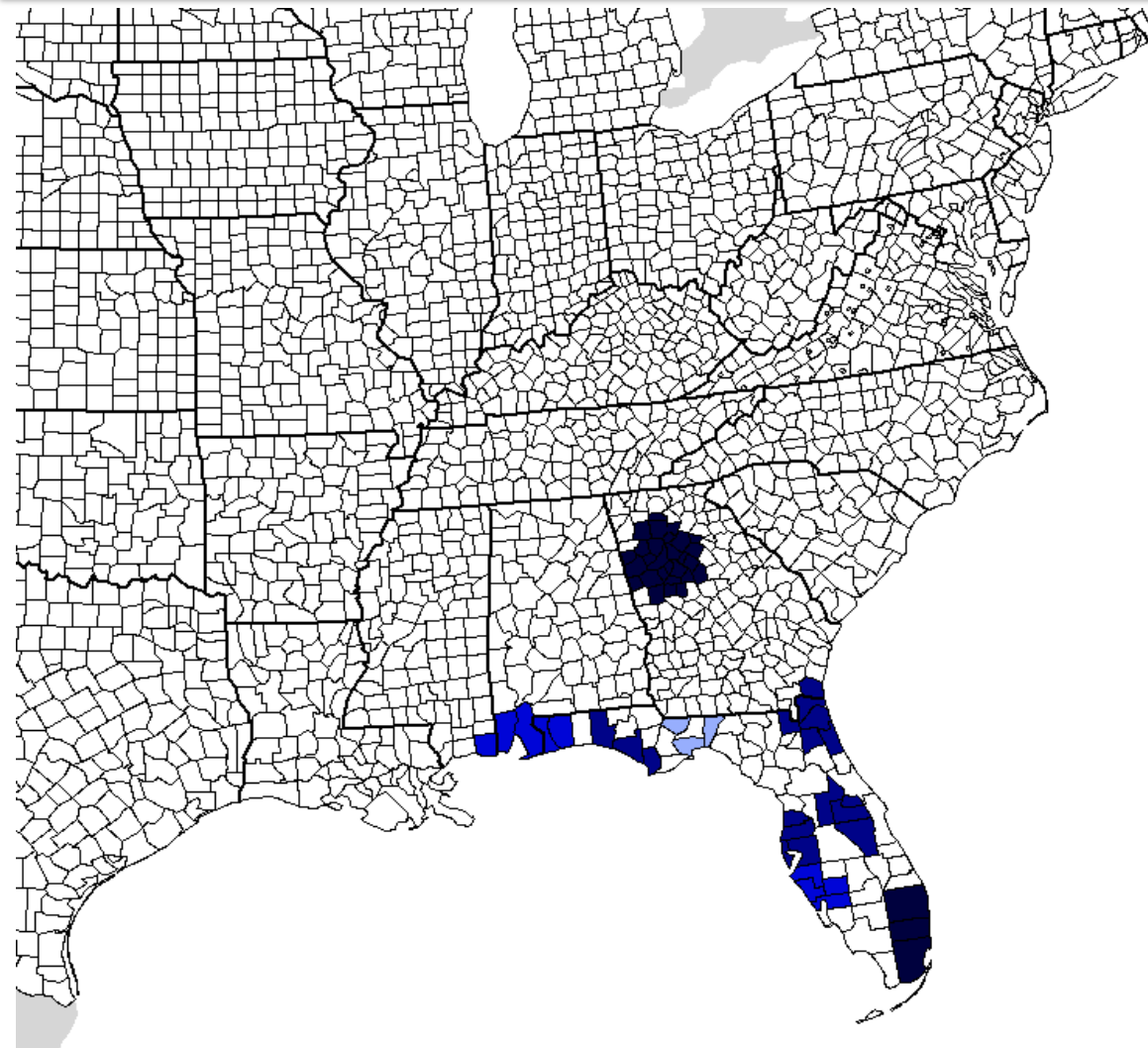
- Utilizing self-report data from 3,984 visitors to Leon County from October 2015 through September 2016, Downs & St. Germain Research created GIS Maps displaying the following data by market:
  - Spending per party
  - First time visitation
  - Traveled with children
  - Income
  - Flew to destination
- 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



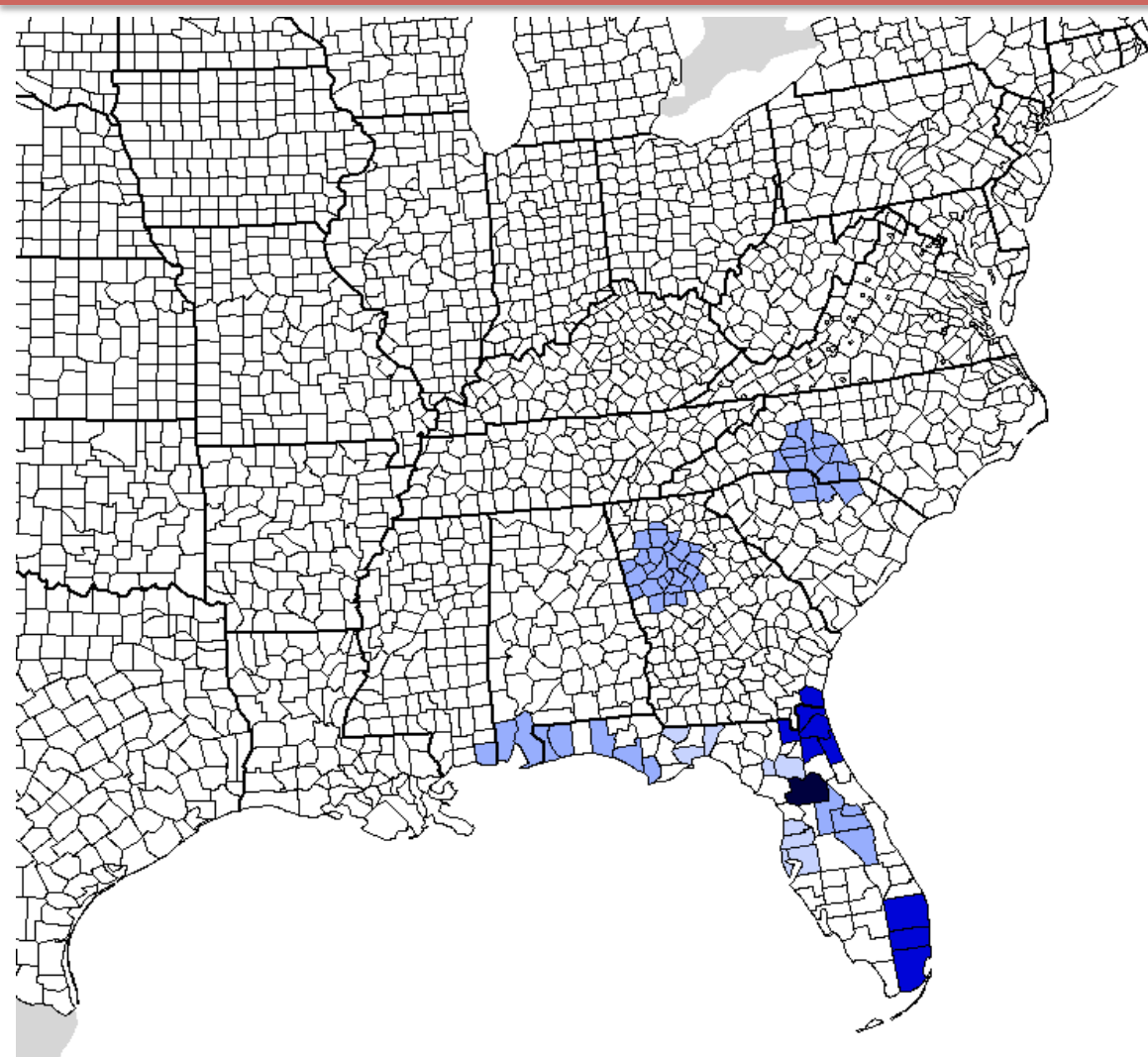
Market	Mean
Sarasota-Bradenton	\$ 1,258
Washington DC-Baltimore	\$ 1,066
Louisville	\$ 853
Naples-Ft. Myers	\$ 753
Raleigh-Durham NC	\$ 703
Melbourne-Vero Beach	\$ 697
Lakeland FL	\$ 689
Miami-Ft. Lauderdale	\$ 686
Charlotte	\$ 624
Charleston SC	\$ 593
New York City	\$ 587
Orlando	\$ 509
Ocala	\$ 505
Tampa-Clearwater-St. Petersburg	\$ 499
Gainesville	\$ 490
Atlanta	\$ 459
Dallas-Ft. Worth	\$ 443
Jacksonville	\$ 442
Pensacola-Mobile	\$ 438
Panama City-Destin	\$ 343
Surrounding Counties	\$ 132
Thomasville-Valdosta	\$ 121

# First Time Visitors by Market



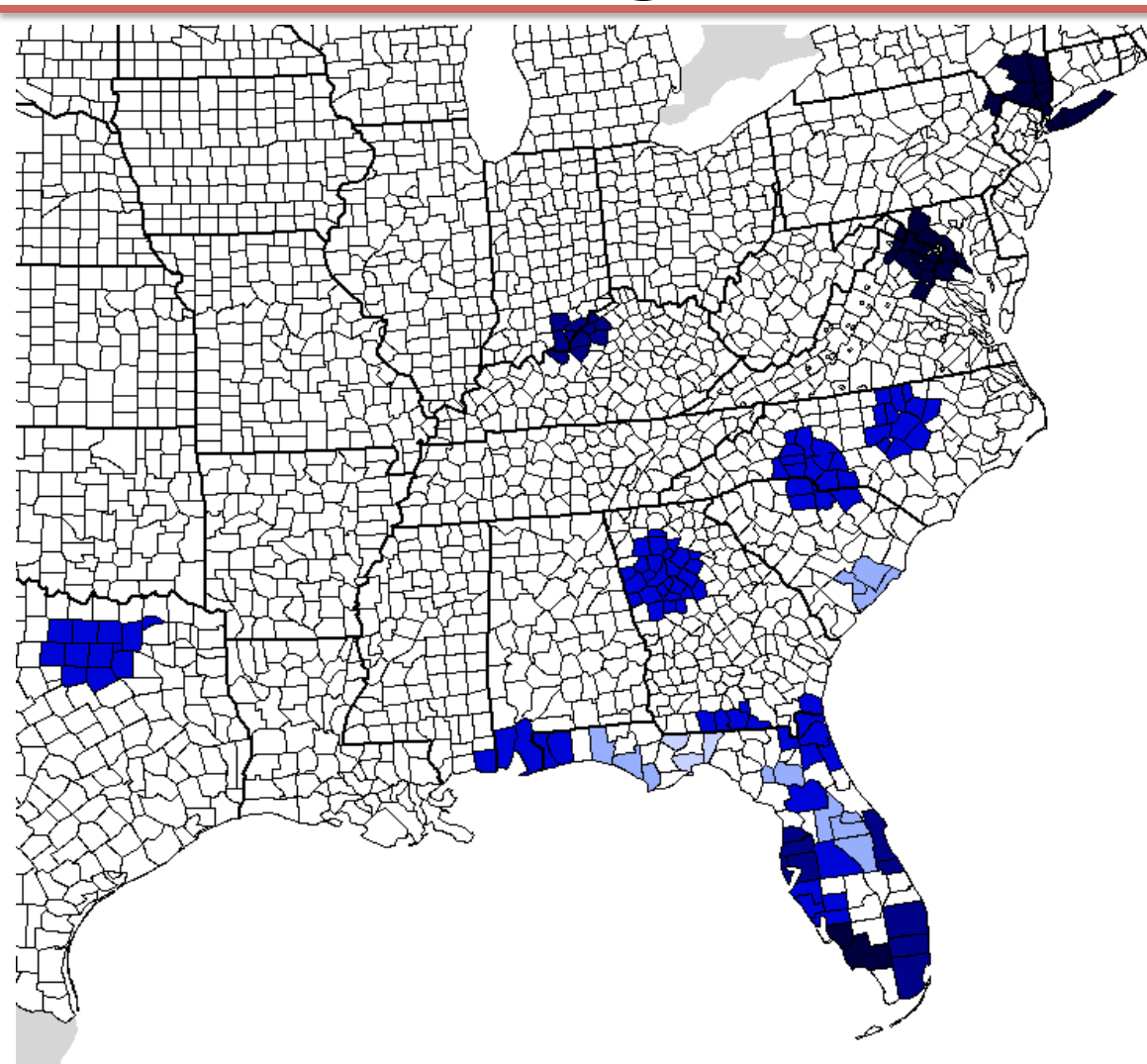
Market	1st Time Visitors
Atlanta	22%
Miami-Ft. Lauderdale	22%
Panama City-Destin	20%
Orlando	19%
Jacksonville	19%
Tampa-Clearwater-St. Petersburg	18%
Pensacola-Mobile	14%
Sarasota-Bradenton	13%
Surrounding Counties	0%

# Traveled with Children by Market



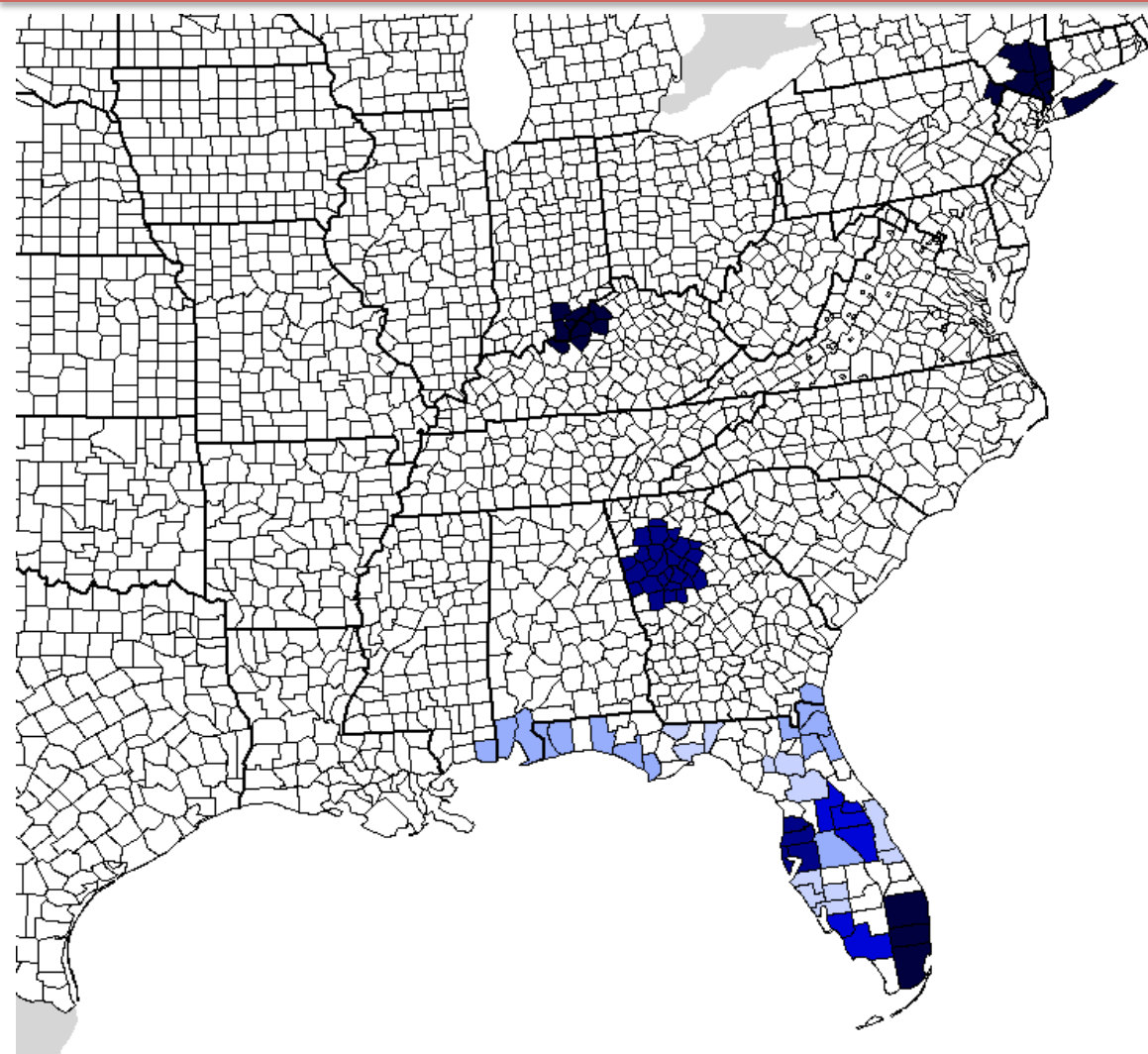
Market	% with Children
Ocala	60%
Miami-Ft. Lauderdale	52%
Jacksonville	50%
Pensacola-Mobile	49%
Orlando	48%
Charlotte	44%
Panama City-Destin	44%
Atlanta	41%
Gainesville	39%
Tampa-Clearwater-St. Petersburg	37%
Surrounding Counties	31%

# Average Income by Market



Market	Mean
Naples-Ft. Myers	\$ 137,500
Washington DC-Baltimore	\$ 110,625
New York City	\$ 103,523
Melbourne-Vero Beach	\$ 98,500
Miami-Ft. Lauderdale	\$ 98,008
Tampa-Clearwater-St. Petersburg	\$ 94,202
Louisville	\$ 93,088
Jacksonville	\$ 87,869
Charlotte	\$ 87,727
Sarasota-Bradenton	\$ 85,786
Atlanta	\$ 84,593
Lakeland FL	\$ 81,964
Pensacola-Mobile	\$ 81,782
Thomasville-Valdosta	\$ 81,346
Raleigh-Durham NC	\$ 81,300
Dallas-Ft. Worth	\$ 81,071
Ocala	\$ 80,924
Orlando	\$ 79,922
Charleston SC	\$ 76,842
Gainesville	\$ 75,242
Panama City-Destin	\$ 72,696
Surrounding Counties	\$ 68,737

# Percent who Flew by Market



Market	Fly %
New York City	73%
Louisville	33%
Miami-Ft. Lauderdale	32%
Atlanta	29%
Tampa-Clearwater-St. Petersburg	28%
Naples-Ft. Myers	20%
Orlando	13%
Pensacola-Mobile	1%
Lakeland FL	1%
Jacksonville	1%
Panama City-Destin	1%
Surrounding Counties	0%
Melbourne-Vero Beach	0%
Ocala	0%
Sarasota-Bradenton	0%
Gainesville	0%

# Visit Tallahassee Economic Impact of Tourism Study

## Fiscal Year 2016

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Visit Tallahassee

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