



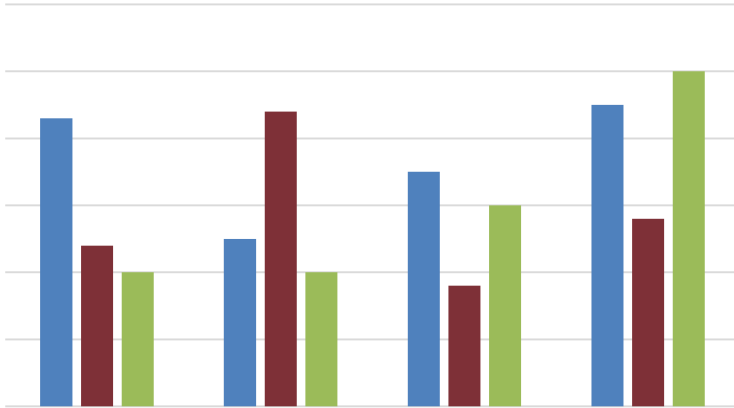
# Leon County Division of Tourism Development/Visit Tallahassee

Economic Impact of Tourism Report  
Fiscal Year 2017 (October 2016 – September 2017)



# Purpose of Economic Impact Research

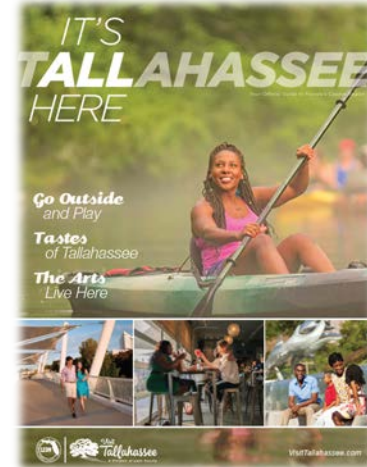
## Document



## Inspire



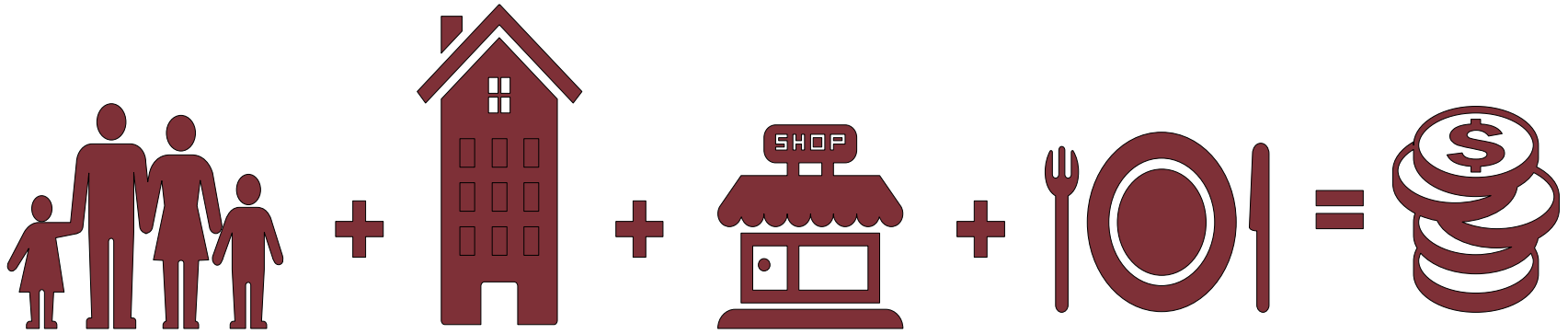
## Inform Marketing



## Communicate



# Tourism Matters to Leon County



\$895,832,000

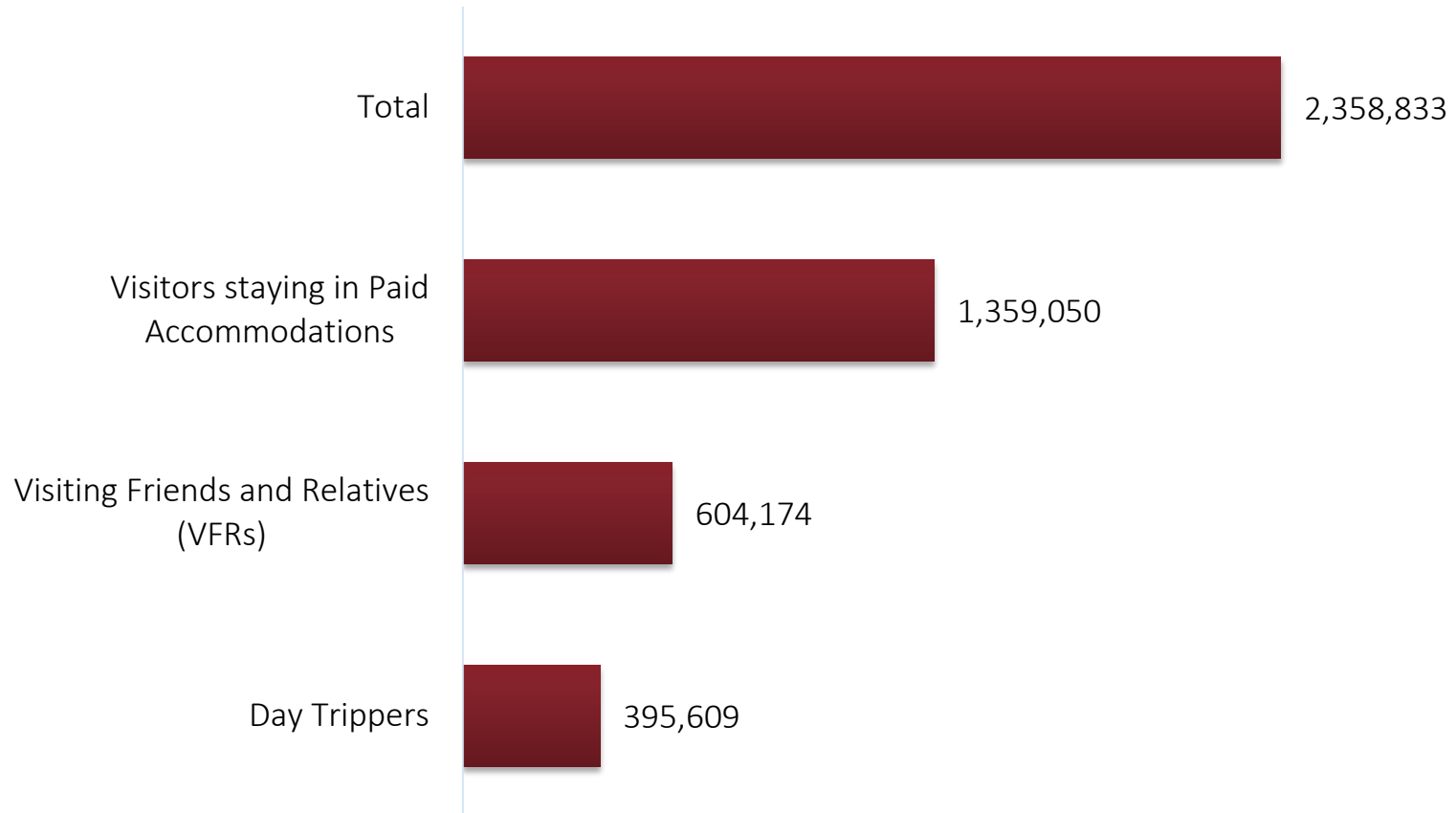
Economic Impact



2,358,833  
visitors



# Visitors to Leon County



# Top Visitor Origin Markets

	FY 2017
Miami-Ft. Lauderdale	19%
Tampa-Clearwater-St. Petersburg	10%
Atlanta	9%
Orlando	9%
Jacksonville	5%
Pensacola-Mobile	5%
Surrounding areas*	3%
Panama City-Destin	3%
Naples-Ft. Myers	3%
Charlotte	2%
Sarasota-Bradenton	2%
Gainesville	2%

\*Gadsden, Liberty, Wakulla, & Jefferson Counties





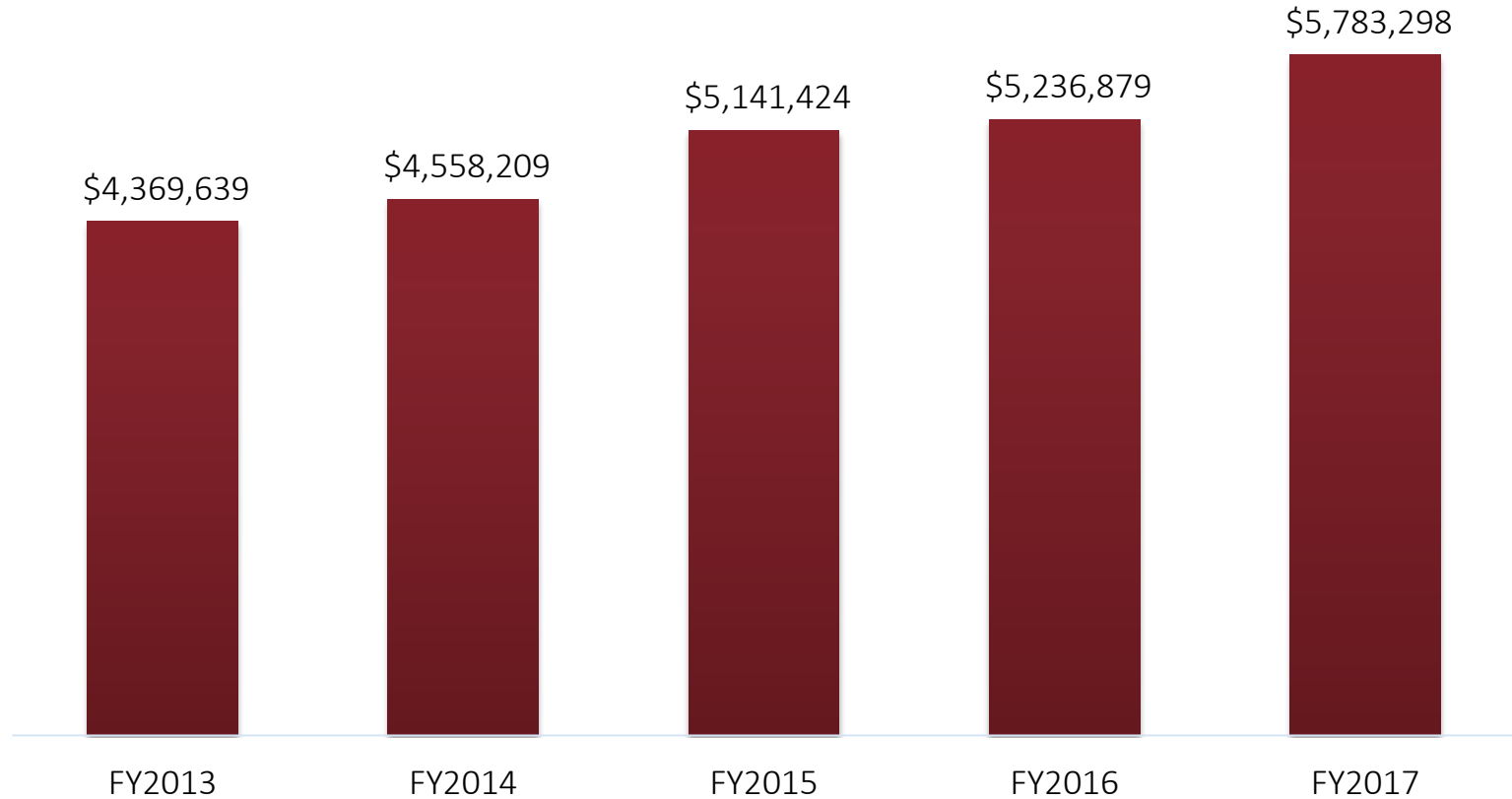
# 14,354 jobs



# \$351,673,000 in wages



# TDT Collections FY2013 – FY2017





# Yearly Comparisons

Economic Indicators	FY 2016	FY 2017	% Change
Visitors	2,312,120	2,358,833	+2.0%
Direct expenditures	\$532,484,600	\$566,982,300	+6.5%
Total economic impact	\$841,325,700	\$895,832,000	+6.5%
Room nights generated	1,304,257	1,368,160	+4.9%
Jobs created	13,702	14,354	+4.8%
Tourist Development Tax	\$5,236,879	\$5,783,298	+10.4%



# Yearly Comparisons

Visitor Profile	FY 2016	FY 2017	% Change
Occupancy	62.8%	67.4%	+7.3%
Room Rates	\$96.23	\$101.30	+5.3%
RevPAR	\$60.43	\$68.28	+13.0%
Travel Party Size	2.6	2.5	-
Nights spent	2.6	2.7	-
Will Return	95%	95%	-
Rating of experience	8.1 <sup>1</sup>	8.3 <sup>1</sup>	-

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





# Detailed Findings



# Key Performance Indicators

Economic Indicators	FY 2017
Visitors	2,358,833
Direct expenditures	\$566,982,300
Total economic impact	\$895,832,000
Room nights generated	1,368,160
Jobs created	14,354
Wages paid	\$351,673,000
Taxes paid <sup>1</sup>	\$60,723,800
Tourist Development Tax	\$5,783,298

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



# Key Performance Indicators

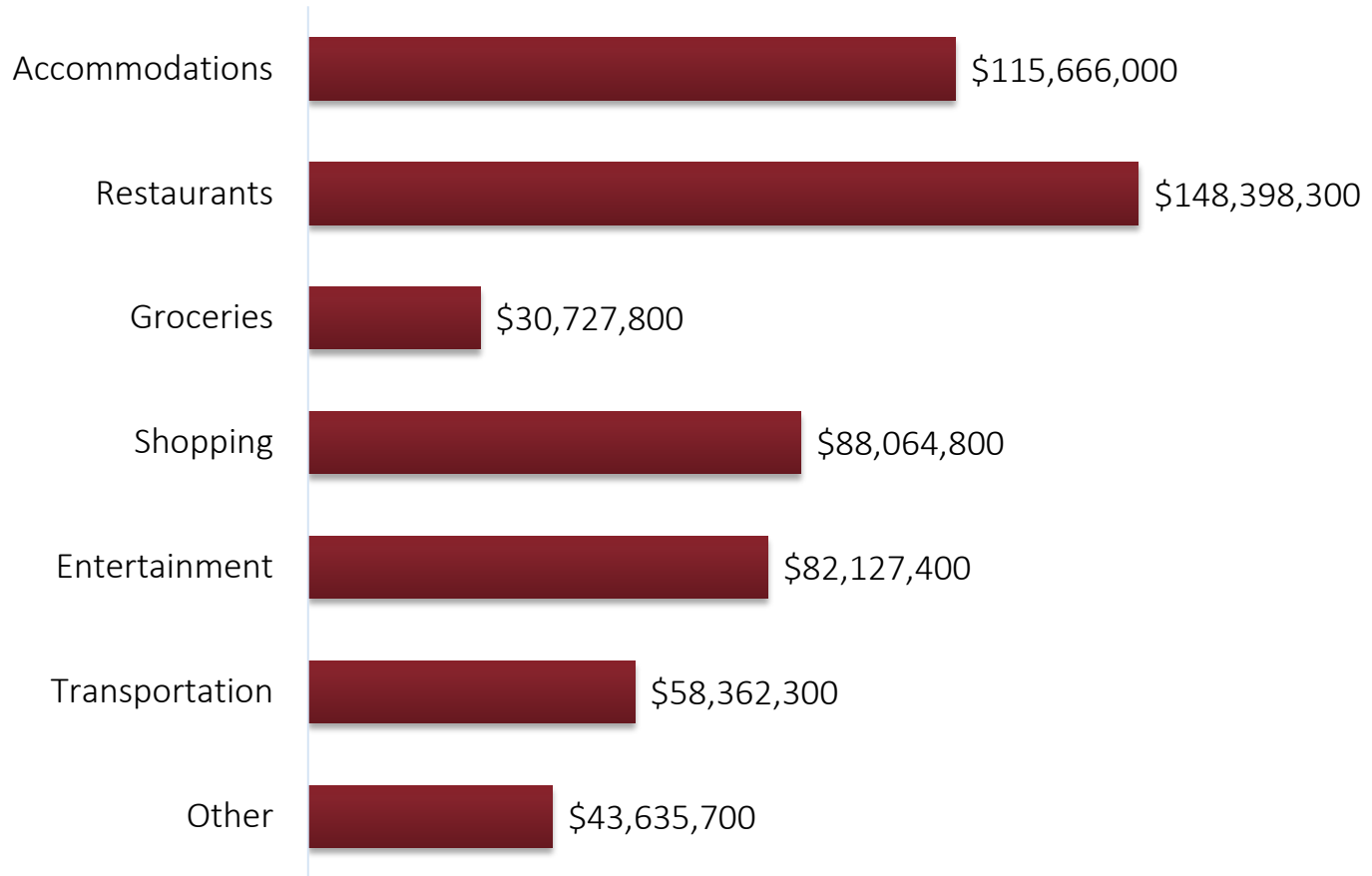
Visitor Profile	FY 2017
Visitors	2,358,833
Occupancy	67.4%
Room rates	\$101.30
RevPAR	\$68.28
Travel party size	2.5
Nights spent	2.7
Will return	95%
Rating of experience	8.3 <sup>1</sup>

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



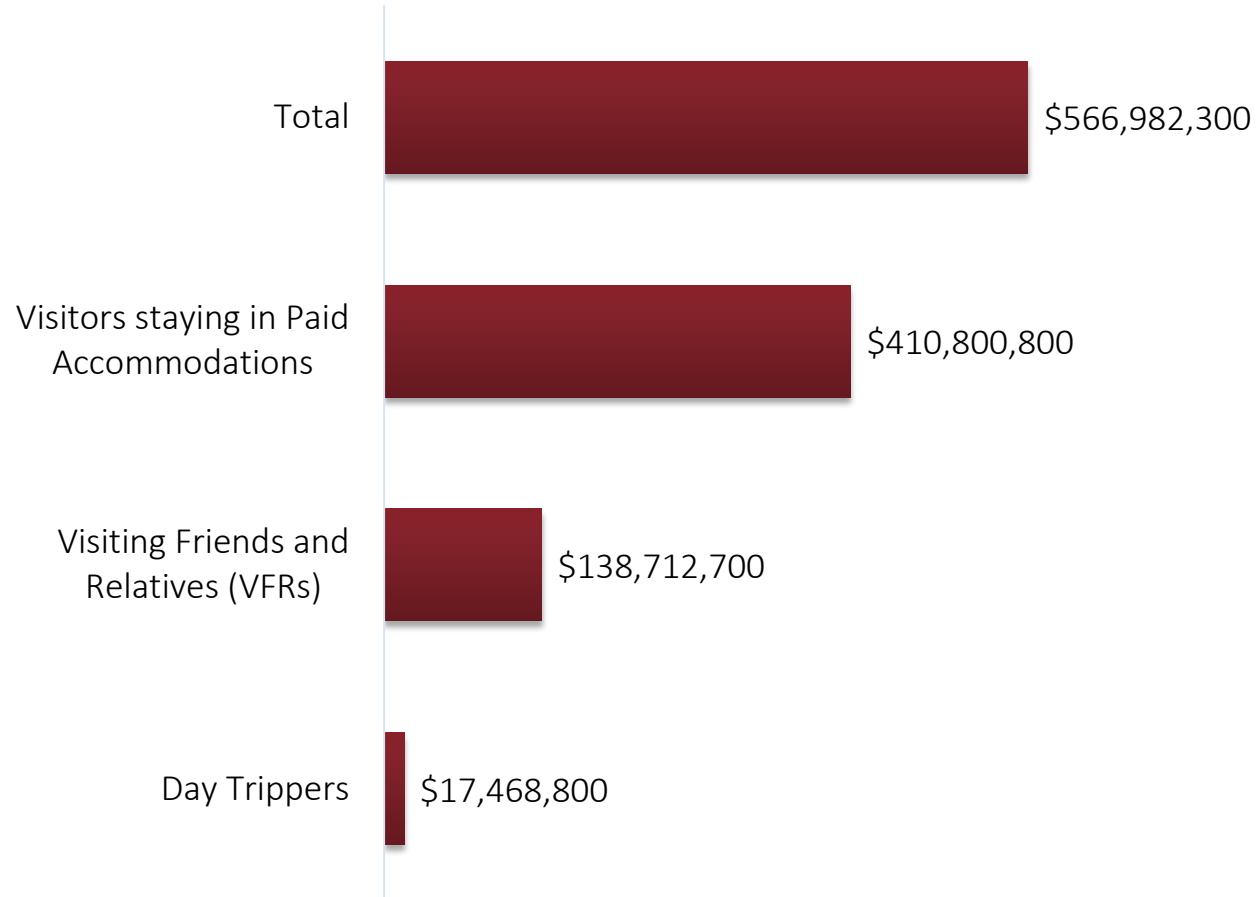
# Visitors' Direct Spending

Leon County Visitors Spent **\$566,982,300** in FY 2017





# Direct Spending by Visitor Type



# KPIs— Oct-Dec 2016 (Q1)

Visitor Profile	Oct-Dec 2016 (Q1)
Visitors	540,981
Direct Expenditures	\$150,983,500
Economic Impact	\$238,553,900
Occupancy	64.6%
Room Rates	\$108.42
RevPAR	\$70.05
Travel party size	2.6
Nights spent	2.8
Will return	75%
Rating of experience	8.3 <sup>1</sup>

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



# KPIs – Jan-Mar 2017 (Q2)

Visitor Profile	Jan-Mar 2017 (Q2)
Visitors	664,752
Direct Expenditures	\$157,624,100
Economic Impact	\$249,046,100
Occupancy	68.3%
Room Rates	\$101.33
RevPAR	\$69.20
Travel party size	2.7
Nights spent	2.7
Will return	97%
Rating of experience	8.3 <sup>1</sup>

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



# KPIs – Apr-Jun 2017 (Q3)

Visitor Profile	Apr-Jun 2017 (Q3)
Visitors	633,319
Direct Expenditures	\$141,740,000
Economic Impact	\$223,949,200
Occupancy	68.9%
Room Rates	\$100.32
RevPAR	\$69.03
Travel party size	2.4
Nights spent	2.8
Will return	95%
Rating of experience	8.4 <sup>1</sup>

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



# KPIs – July-Sept 2017 (Q4)

Visitor Profile	July-Sept 2017 (Q4)
Visitors	519,781
Direct Expenditures	\$116,634,700
Economic Impact	\$184,282,800
Occupancy	68.0%
Room Rates	\$93.40
RevPAR	\$63.52
Travel party size	2.3
Nights spent	2.4
Will return	84%
Rating of experience	8.6 <sup>1</sup>



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

# Visitors by Quarter

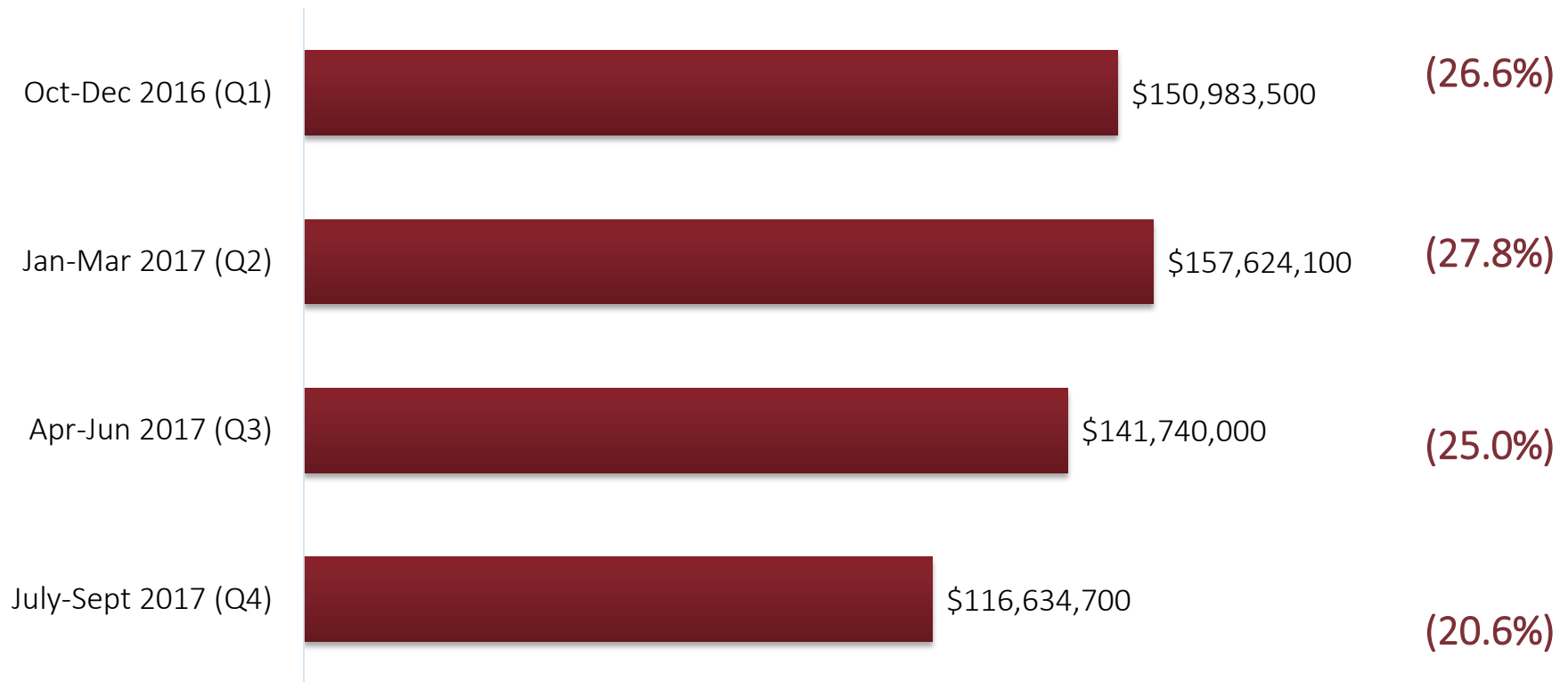
Total: 2,358,833





# Visitors' Direct Spending by Quarter

Total: **\$566,982,300**



# Room Nights by Quarter

Total: 1,368,160





# 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*	540,981	664,752	633,319	519,781
Occupancy	64.6%	68.3%	68.9%	68.0%
Median age	44	43	48	56
Median household income	\$89,800	\$90,300	\$94,700	\$105,600
From Southeast	90%	92%	89%	86%
From Florida	64%	70%	71%	68%
Travel party size	2.6	2.7	2.4	2.3
Drove	77%	78%	77%	80%
Length of stay	2.8	2.7	2.8	2.4
1 <sup>st</sup> time visitor	24%	28%	26%	30%

\* 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*	8.3	8.3	8.4	8.6
Likelihood of returning	75%	97%	98%	84%
Spending per travel party	\$930	\$1,042	\$692	\$740
Used VisitTallahassee.com	11%	14%	7%	10%
Used hotel website	11%	20%	16%	24%
Used smartphone on trip	66%	70%	79%	72%
Married	58%	63%	73%	63%
Has college degree	66%	72%	79%	78%

\* 10 point scale





# GIS Maps



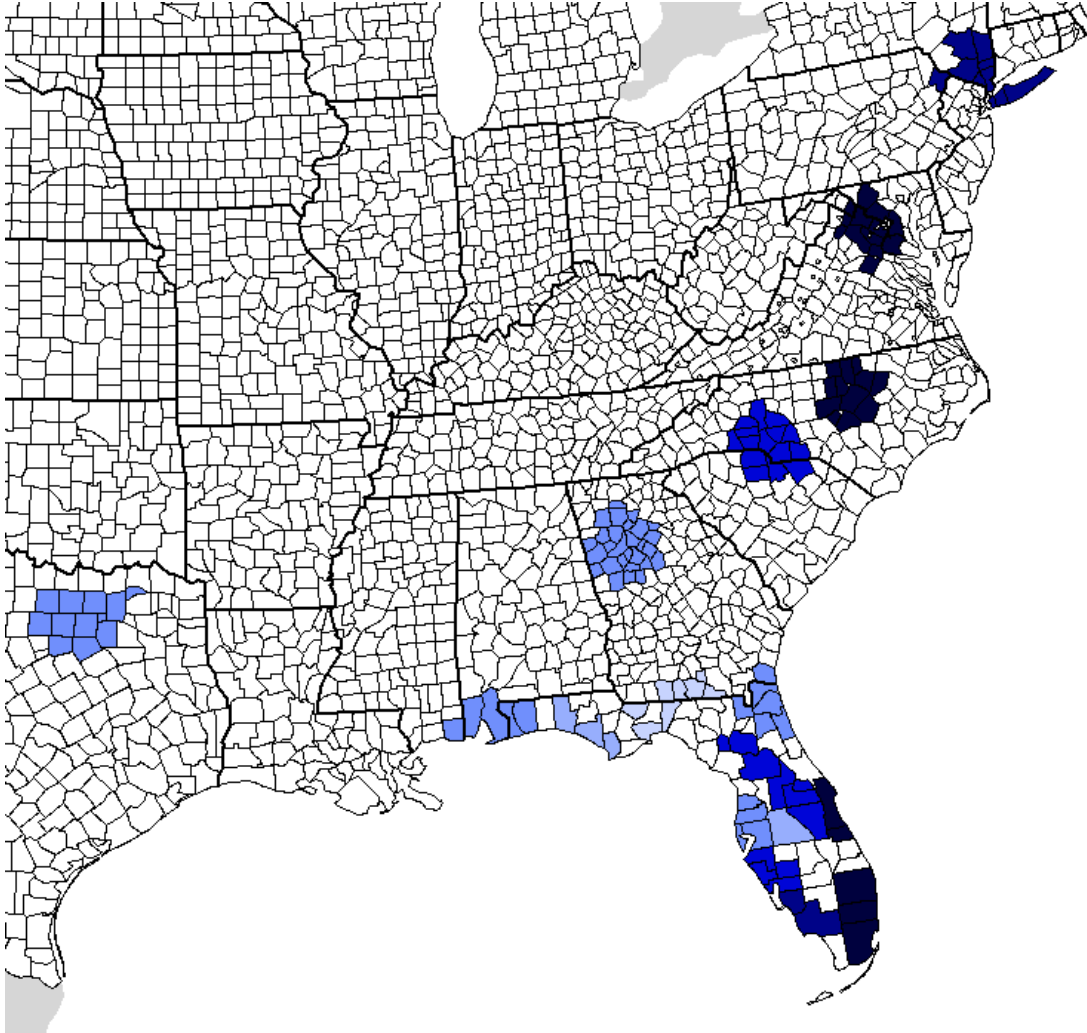


# GIS Maps

- Utilizing self-report data from 3,447 visitors to Leon County from October 2016 through September 2017, 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.

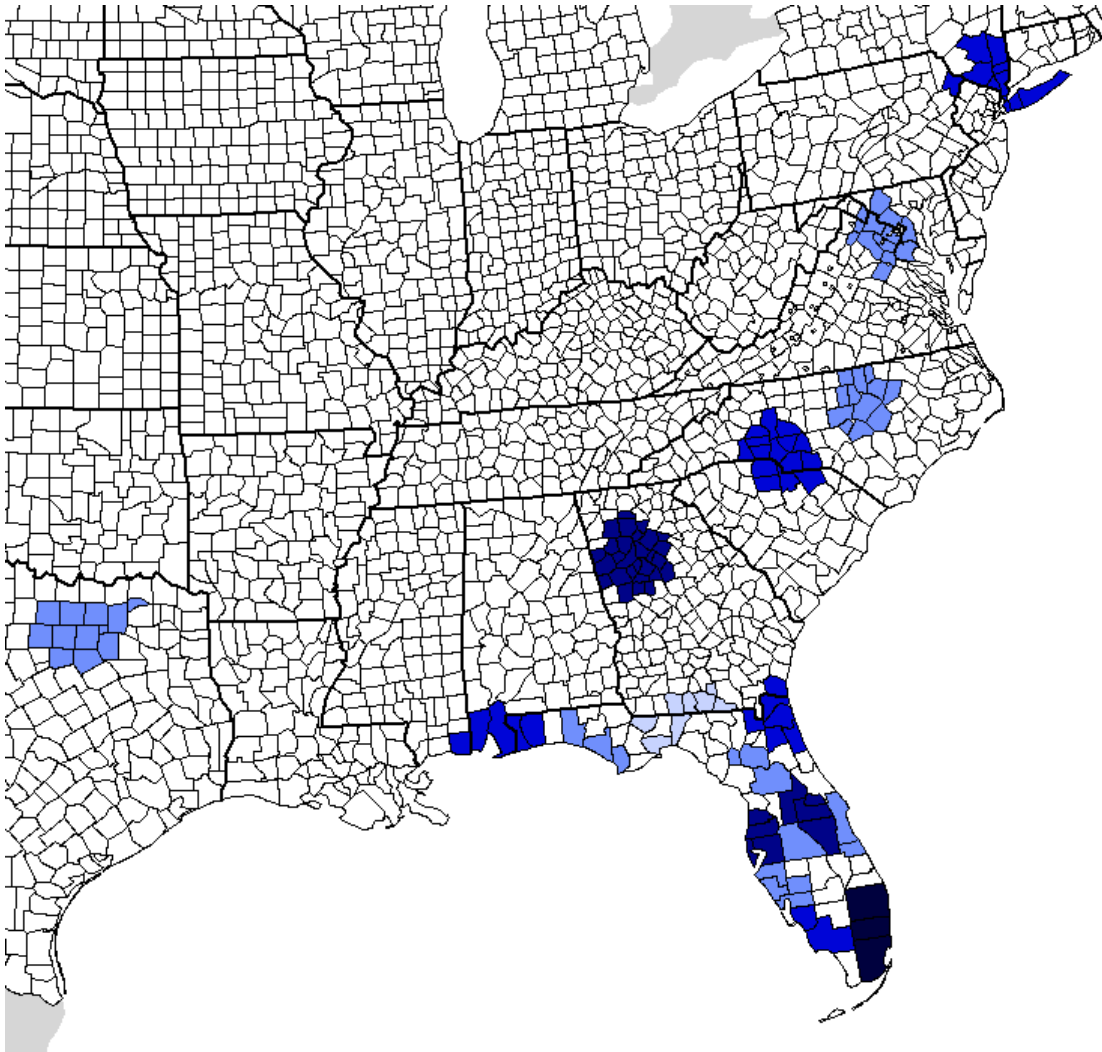


# Spending per Party by Market



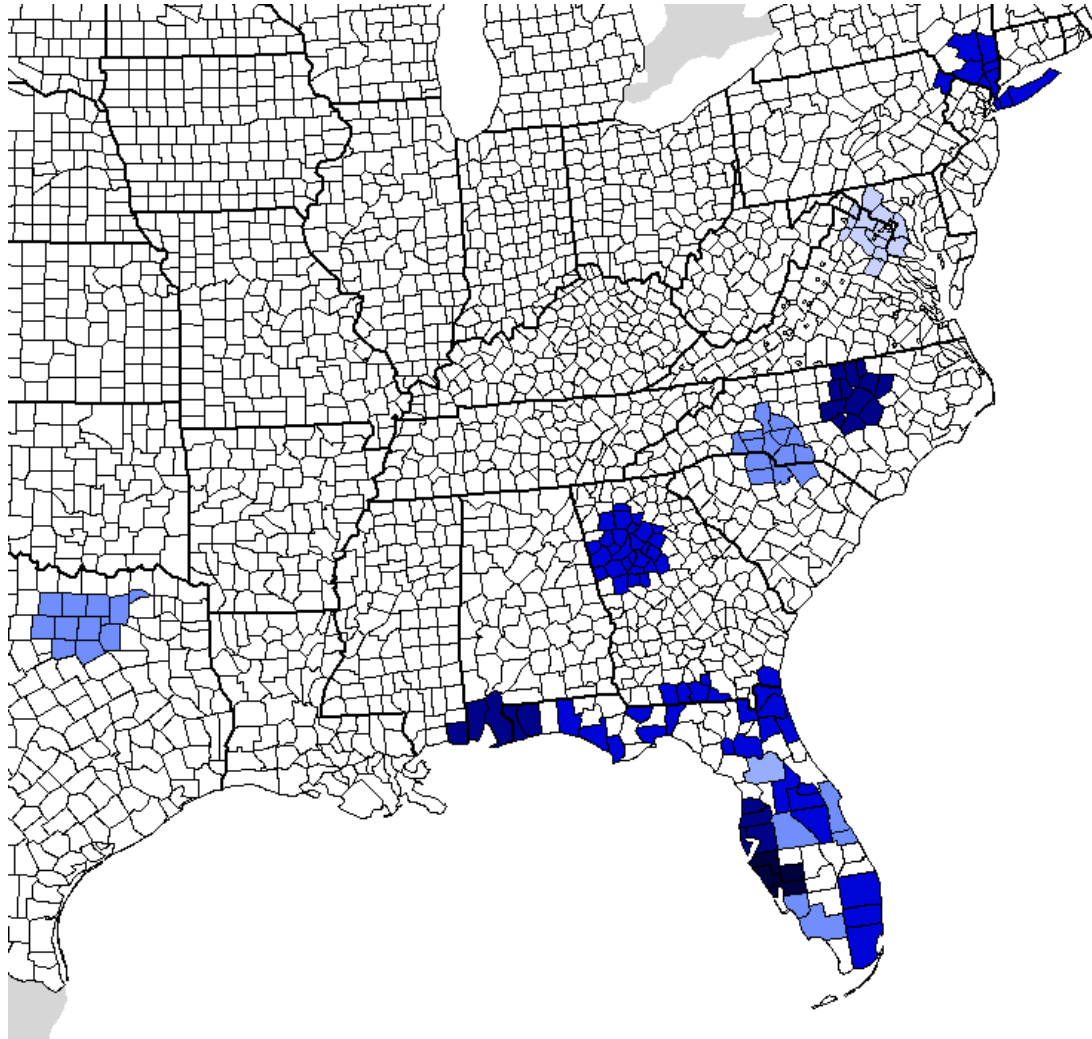
Market	Mean
Miami-Ft. Lauderdale	\$1,040
Melbourne-Vero Beach	\$1,020
Washington DC-Baltimore	\$1,000
Raleigh-Durham NC	\$1,000
Naples-Ft. Myers	\$940
New York City	\$920
Orlando	\$750
Charlotte	\$750
Ocala	\$740
Gainesville	\$700
Sarasota-Bradenton	\$700
Jacksonville	\$690
Tampa-Clearwater-St. Petersburg	\$680
Atlanta	\$670
Pensacola-Mobile	\$665
Dallas-Ft Worth	\$610
Lakeland FL	\$490
Panama City-Destin	\$450
Surrounding areas	\$175

# First Time Visitors by Market



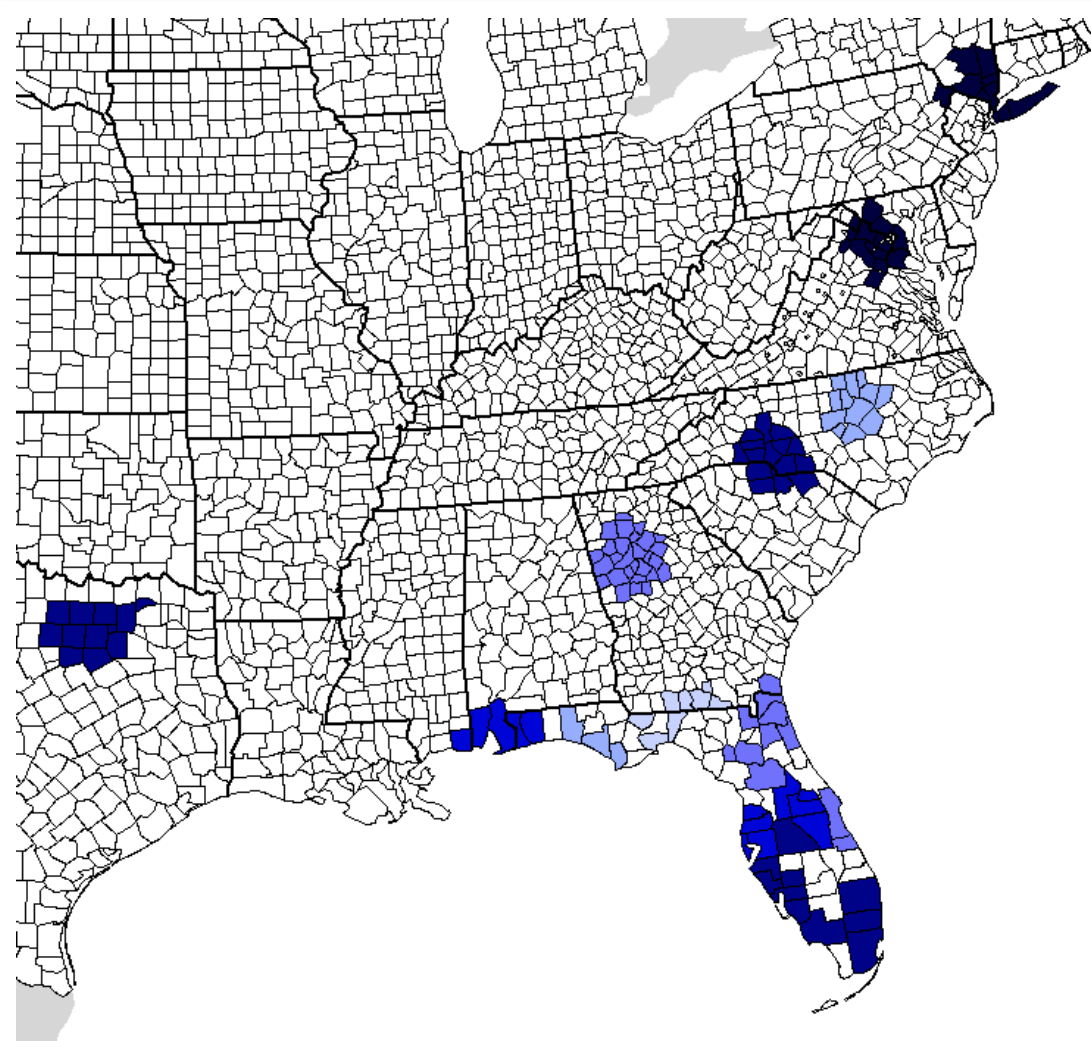
Market	1st Time Visitors
Miami-Ft. Lauderdale	36%
Tampa-Clearwater-St. Petersburg	19%
Atlanta	18%
Orlando	18%
Pensacola-Mobile	9%
Jacksonville	7%
Naples-Ft. Myers	6%
Charlotte	5%
New York City	5%
Raleigh-Durham NC	4%
Washington DC-Baltimore	4%
Sarasota-Bradenton	3%
Dallas-Ft. Worth	2%
Gainesville	2%
Ocala	2%
Lakeland FL	1%
Melbourne-Vero Beach	1%
Panama City-Destin	1%
Surrounding areas	0%

# Traveled with Children by Market



Market	% Traveled with Children
Sarasota-Bradenton	78%
Pensacola-Mobile	67%
Raleigh-Durham NC	67%
Tampa-Clearwater-St. Petersburg	60%
Surrounding areas	59%
Panama City-Destin	57%
Atlanta	56%
Jacksonville	56%
Gainesville	53%
Miami-Ft. Lauderdale	51%
New York City	50%
Orlando	49%
Lakeland FL	43%
Melbourne-Vero Beach	40%
Charlotte	37%
Dallas-Ft. Worth	33%
Naples-Ft. Myers	33%
Ocala	17%
Washington DC-Baltimore	0%

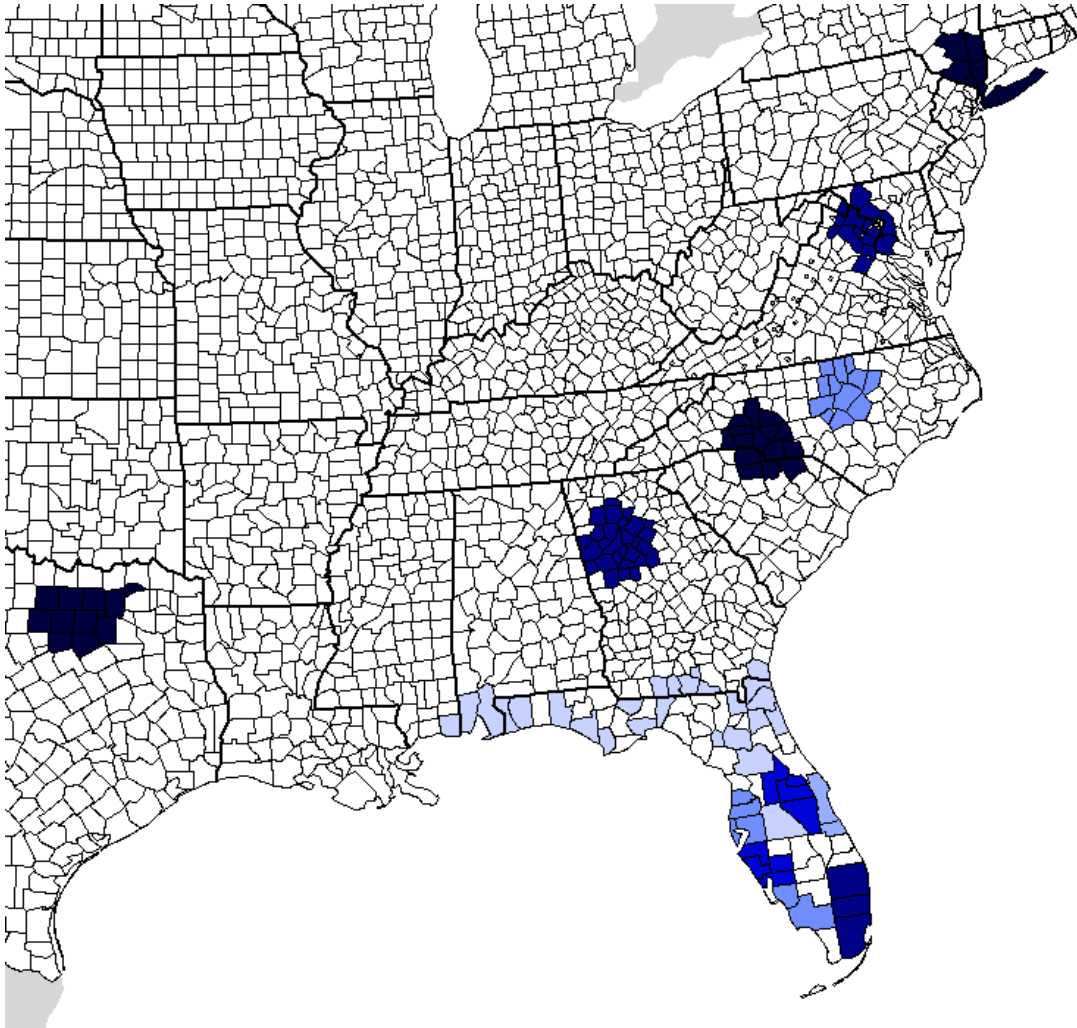
# Average Income by Market



Market	Mean
New York City	\$135,250
Washington DC-Baltimore	\$132,375
Sarasota-Bradenton	\$128,625
Dallas-Ft. Worth	\$126,500
Miami-Ft. Lauderdale	\$125,000
Naples-Ft. Myers	\$124,500
Lakeland FL	\$122,750
Charlotte	\$121,750
Orlando	\$119,750
Pensacola-Mobile	\$116,250
Tampa-Clearwater-St. Petersburg	\$111,250
Melbourne-Vero Beach	\$107,500
Jacksonville	\$105,625
Atlanta	\$103,250
Ocala	\$100,000
Gainesville	\$96,125
Raleigh-Durham NC	\$84,625
Panama City-Destin	\$82,000
Surrounding areas	\$68,625



# Percent who Flew by Market



Market	Fly %
New York City	75%
Dallas-Ft Worth	67%
Charlotte	60%
Miami-Ft. Lauderdale	50%
Washington DC-Baltimore	44%
Atlanta	43%
Sarasota-Bradenton	36%
Orlando	30%
Tampa-Clearwater-St. Petersburg	28%
Raleigh-Durham NC	25%
Naples-Ft. Myers	20%
Melbourne-Vero Beach	8%
Jacksonville	3%
Panama City-Destin	0%
Ocala	0%
Gainesville	0%
Lakeland	0%
Pensacola-Mobile	0%
Surrounding areas	0%



# Study Methods

- Economic impact of tourism for Leon County Division of Tourism Development/Visit Tallahassee was based on data from the following sources:
  - 3,447 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



# Economic Impact of Tourism Study Fiscal Year 2017

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Kerri Post – Executive Director,  
Leon County Division of Tourism Development/  
Visit Tallahassee  
850-606-2313, [PostK@leoncountyfl.gov](mailto:PostK@leoncountyfl.gov)

Joseph St. Germain, Ph.D., President, [joseph@dsg-research.com](mailto:joseph@dsg-research.com)  
Phillip Downs, Ph.D., Senior Partner, [pd@dsg-research.com](mailto:pd@dsg-research.com)  
Rachael Anglin, Senior Project Director, [rachael@dsg-research.com](mailto:rachael@dsg-research.com)  
Hope Wiggins, Project Director, [hope@dsg-research.com](mailto:hope@dsg-research.com)  
Downs & St. Germain Research  
850-906-3111: [www.dsg-research.com](http://www.dsg-research.com)

