



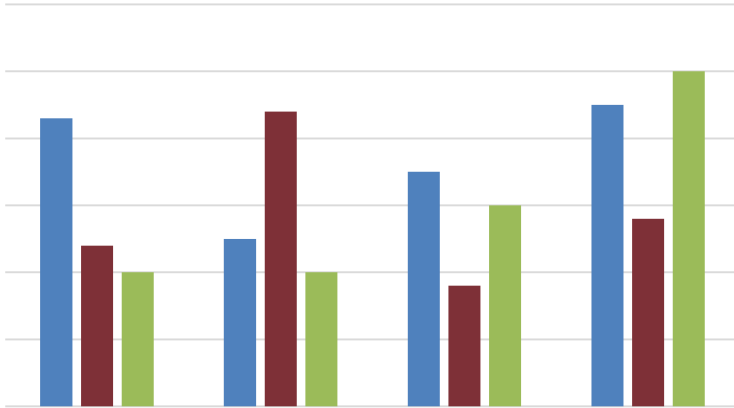
Leon County Division of Tourism/ Visit Tallahassee

Economic Impact of Tourism Report
Fiscal Year 2018 (October 2017 – September 2018)



Purpose of Economic Impact Research

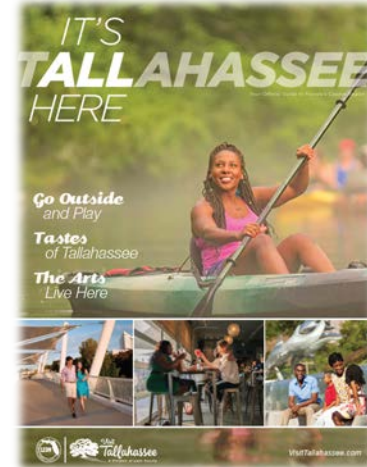
Document



Inspire



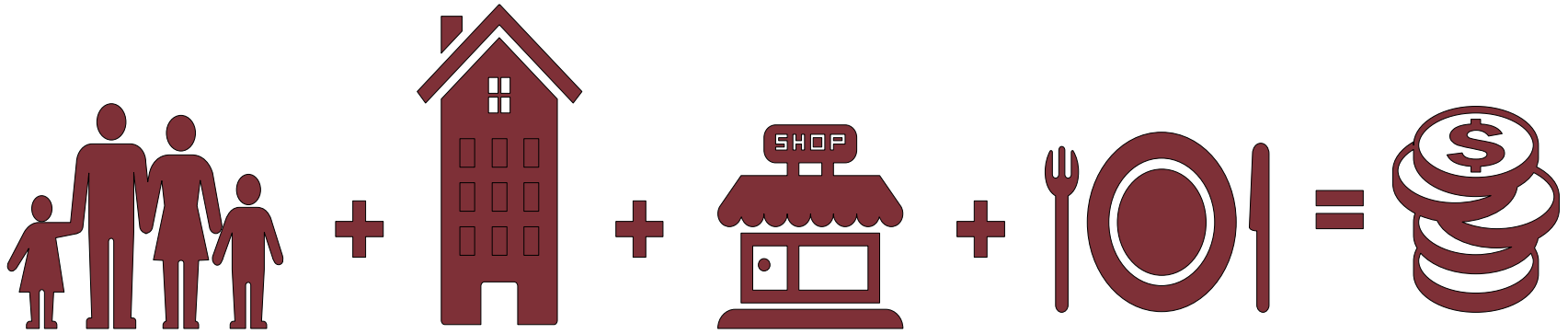
Inform Marketing



Communicate



Tourism Matters to Leon County



\$910,236,600

Economic Impact

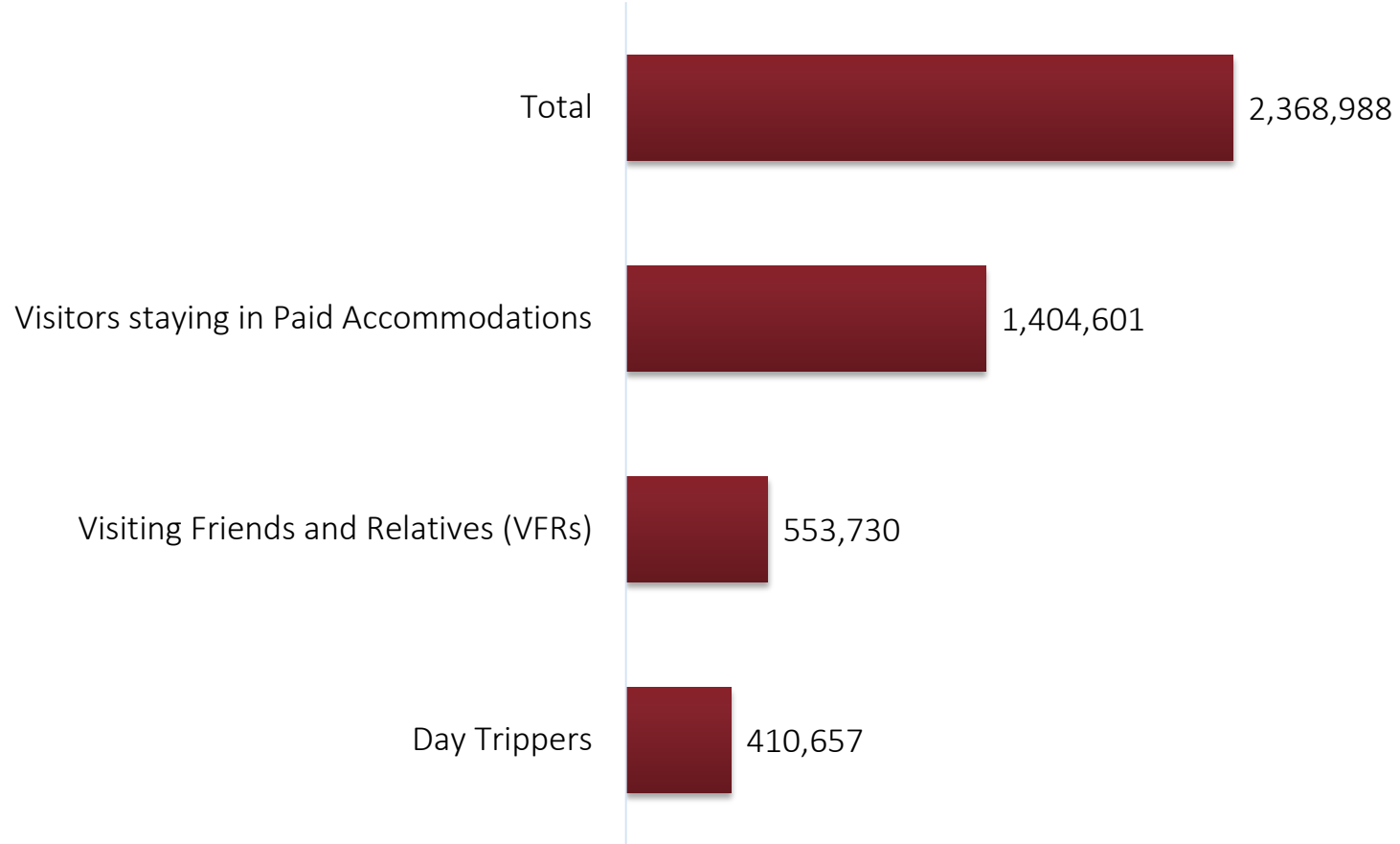


2,368,988 visitors



Visitors to Leon County

6 in 10 visitors stay in paid accommodations



Top Visitor Origin Markets

68% of visitors come from 15 markets

	FY 2018
Miami-Ft. Lauderdale	16%
Atlanta	9%
Orlando	7%
Tampa-Clearwater-St. Petersburg	7%
Jacksonville	6%
Surrounding counties*	4%
Pensacola-Mobile	3%
Sarasota-Bradenton	2%
Naples-Ft. Myers	2%
Panama City-Destin	2%
Washington DC-Baltimore	2%
Gainesville	2%
Lakeland FL	2%
New York City	2%
Charlotte	2%



*Gadsden, Liberty, Wakulla, & Jefferson Counties

14,573 jobs

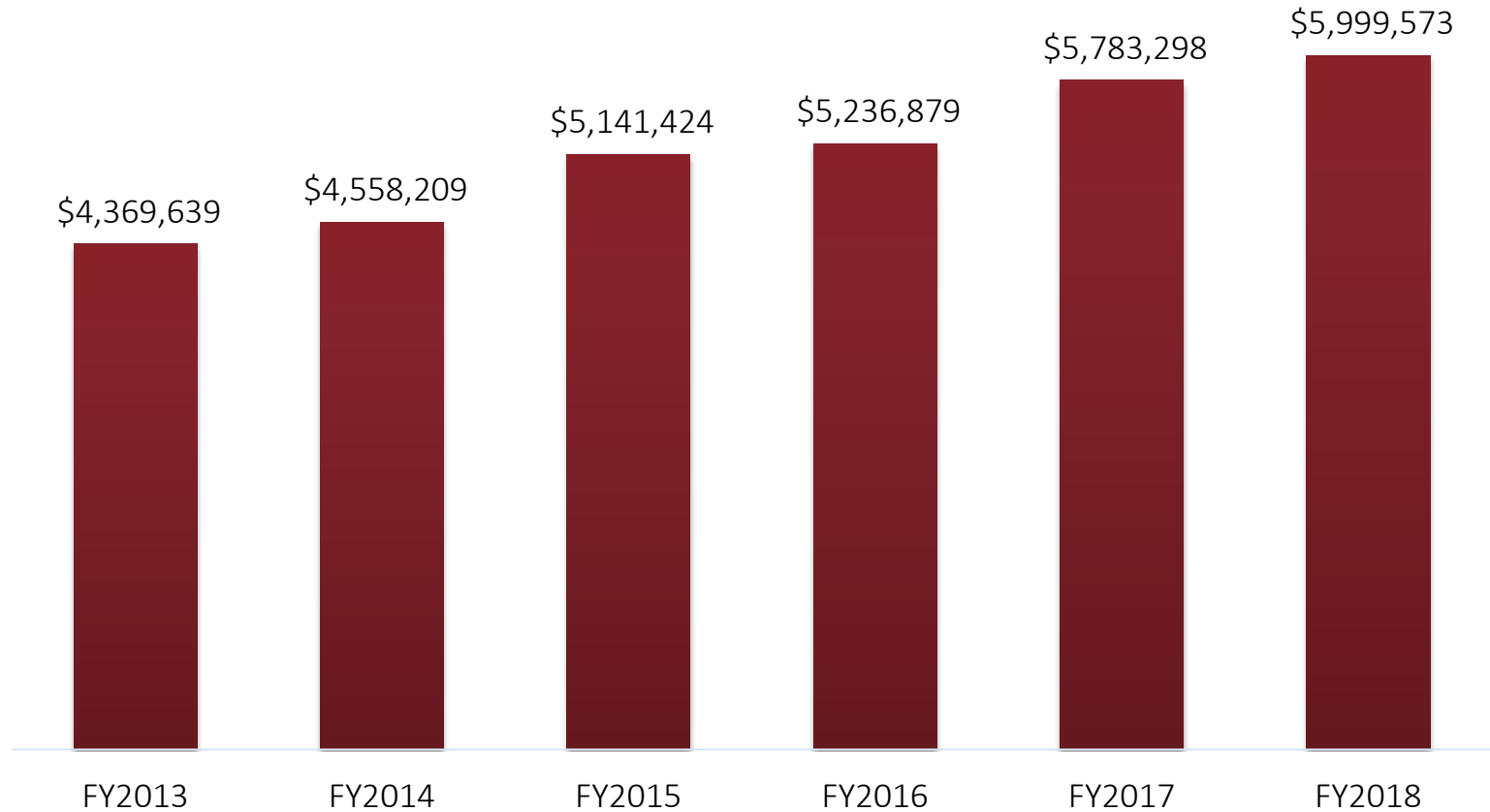


\$366,161,200 in wages



TDT Collections FY2013 – FY2018

TDT collections increased 3.7% due to slight increases in ADR and room inventory



Yearly Comparisons

Economic Indicators	FY 2017	FY 2018	% Change
Visitors	2,358,833	2,368,988	+0.4%
Direct expenditures	\$566,982,300	\$576,099,100	+1.6%
Total economic impact	\$895,832,000	\$910,236,600	+1.6%
Room nights generated	1,368,160	1,369,756	+0.1%
Jobs created	14,354	14,573	+1.5%
Tourist Development Tax	\$5,783,298	\$5,999,573	+3.7%
Occupancy	67.4%	66.9%	-0.7%
Room Rates	\$101.30	\$102.96	+1.6%
RevPAR	\$68.28	\$68.90	+0.9%





Detailed Findings



Key Performance Indicators

Economic Indicators	FY 2018
Visitors	2,368,988
Direct expenditures	\$576,099,100
Total economic impact	\$910,236,600
Room nights generated	1,369,756
Jobs created	14,573
Wages paid	\$366,161,200
Taxes paid ¹	\$60,894,800
Tourist Development Tax	\$5,999,574

¹Sales, use, and property taxes.



Key Performance Indicators

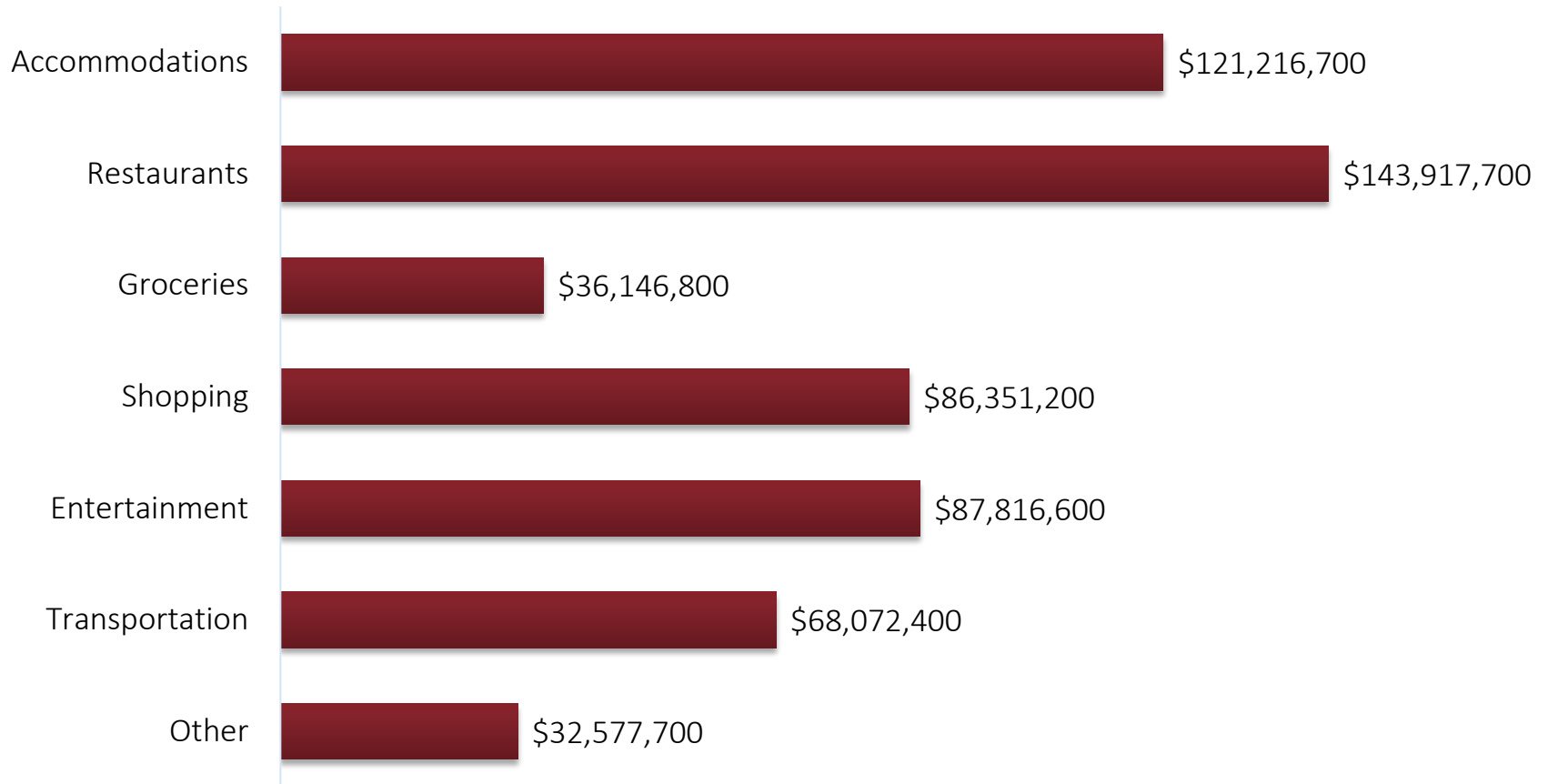
Visitor Profile	FY 2018
Visitors	2,368,988
Occupancy	66.9%
Room rates	\$102.96
RevPAR	\$68.90
Travel party size	2.8
Nights spent	3.1
Will return	83%
Rating of experience	8.1 ¹

¹On a 10-point scale.



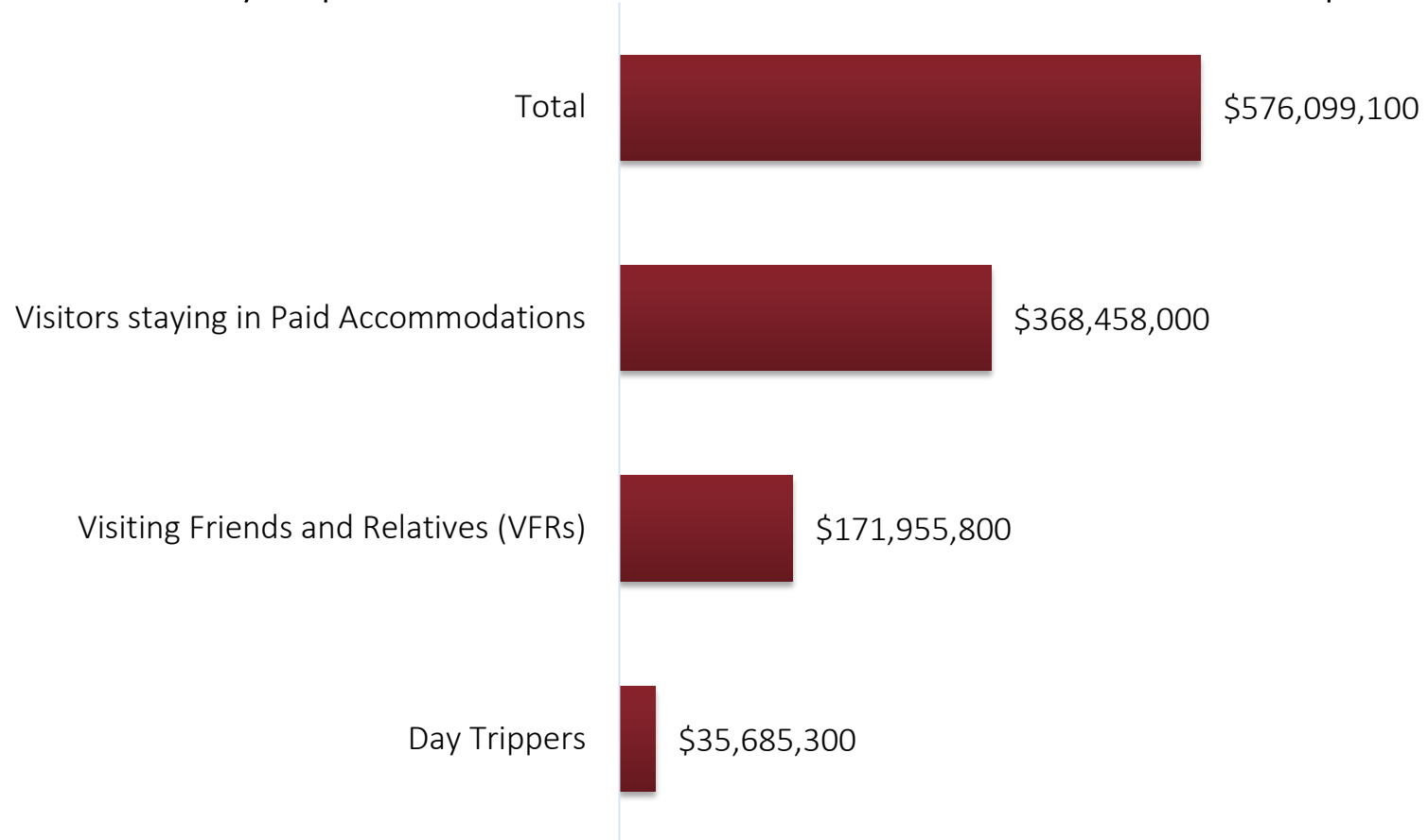
Visitors' Direct Spending

Leon County Visitors Spent **\$576,099,100** in FY 2018



Direct Spending by Visitor Type

Visitors who stay in paid accommodations account for 64% of visitor spending



KPIs– Oct-Dec 2017 (Q1)

Visitor Profile	Oct-Dec 2017 (Q1)
Visitors	529,474
Direct Expenditures	\$140,151,400
Economic Impact	\$221,439,200
Occupancy	64.8%
Room Rates	\$107.16
RevPAR	\$69.44
Travel party size	2.9
Nights spent	2.6
Will return	86%
Rating of experience	8.3 ¹

¹On a 10-point scale.



KPIs – Jan-Mar 2018 (Q2)

Visitor Profile	Jan-Mar 2018 (Q2)
Visitors	700,206
Direct Expenditures	\$168,613,200
Economic Impact	\$266,408,900
Occupancy	71.1%
Room Rates	\$104.36
RevPAR	\$74.20
Travel party size	2.8
Nights spent	3.5
Will return	86%
Rating of experience	7.9 ¹

¹On a 10-point scale.



KPIs – Apr-Jun 2018 (Q3)

Visitor Profile	Apr-Jun 2018 (Q3)
Visitors	613,312
Direct Expenditures	\$136,279,300
Economic Impact	\$215,321,300
Occupancy	67.2%
Room Rates	\$98.56
RevPAR	\$66.23
Travel party size	2.6
Nights spent	2.7
Will return	86%
Rating of experience	8.1 ¹

¹On a 10-point scale.



KPIs – July-Sept 2018 (Q4)

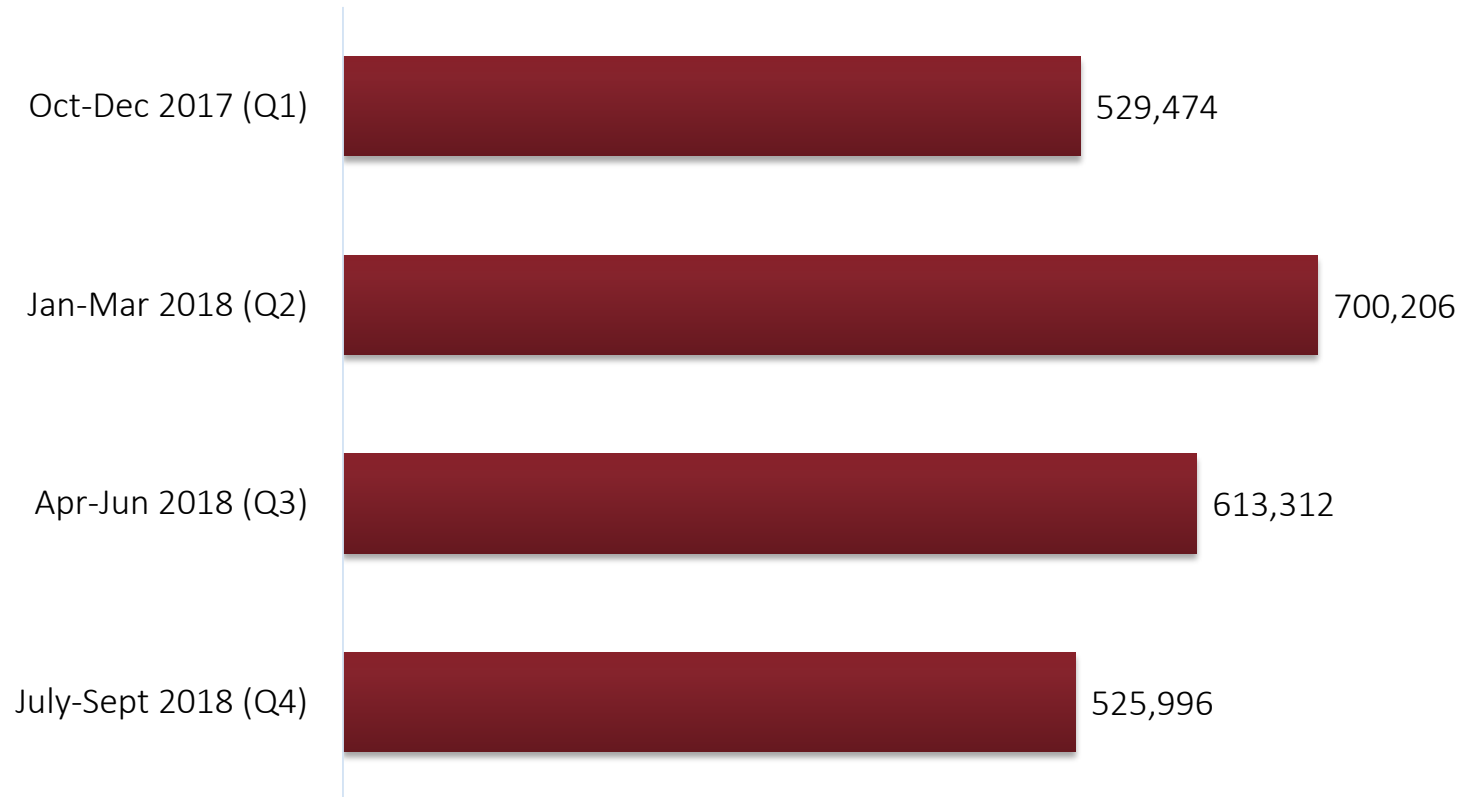
Visitor Profile	July-Sept 2018 (Q4)
Visitors	525,996
Direct Expenditures	\$131,055,200
Economic Impact	\$207,067,200
Occupancy	64.6%
Room Rates	\$101.74
RevPAR	\$65.72
Travel party size	2.9
Nights spent	3.3
Will return	76%
Rating of experience	7.8 ¹

¹On a 10-point scale.



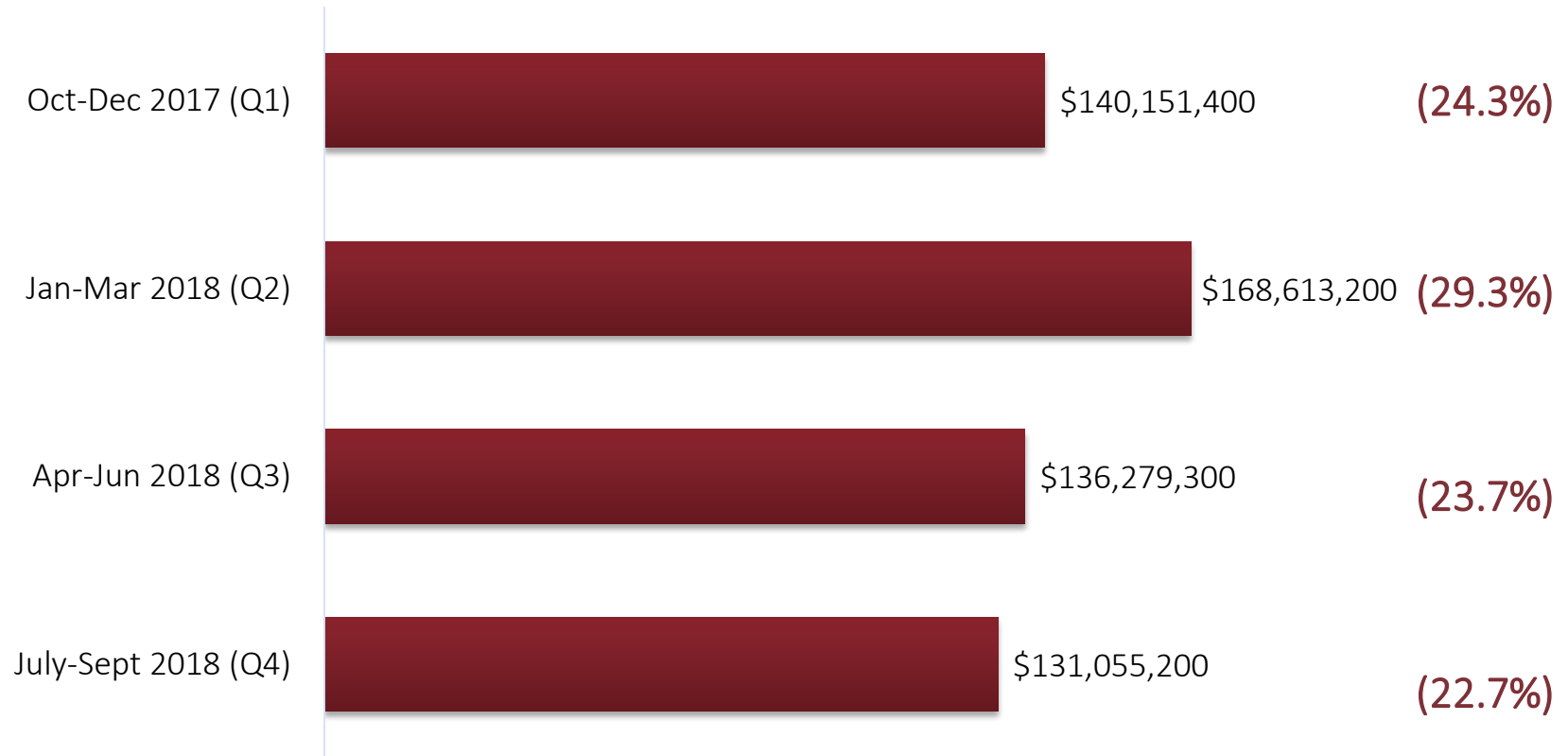
Visitors by Quarter

Total: 2,368,988



Visitors' Direct Spending by Quarter

Total: **\$576,099,100**



Room Nights by Quarter

Total: 1,369,756





Quarterly Comparisons



Quarterly Comparisons:

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Visitors*	529,474	700,206	613,312	525,996
Occupancy	64.8%	71.1%	67.2%	64.6%
Median age	44	51	41	42
Median household income	\$100,200	\$102,000	\$99,100	\$92,700
From Southeast	82%	75%	82%	87%
From Florida	59%	52%	57%	63%
Travel party size	2.9	2.8	2.6	2.9
Drove	72%	76%	94%	89%
Length of stay	2.6	3.5	2.7	3.3
1 st time visitor	22%	28%	32%	31%

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



Quarterly Comparisons

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Rating of Leon County*	8.3	7.9	8.1	7.8
Likelihood of returning	86%	86%	86%	76%
Spending per travel party	\$822	\$1,169	\$654	\$1,068
Used VisitTallahassee.com	2%	6%	14%	5%
Used hotel website	24%	38%	19%	14%
Used smartphone on trip	70%	76%	85%	74%
Married	70%	69%	70%	64%
Has college degree	75%	75%	70%	68%

* 10 point scale





GIS Maps

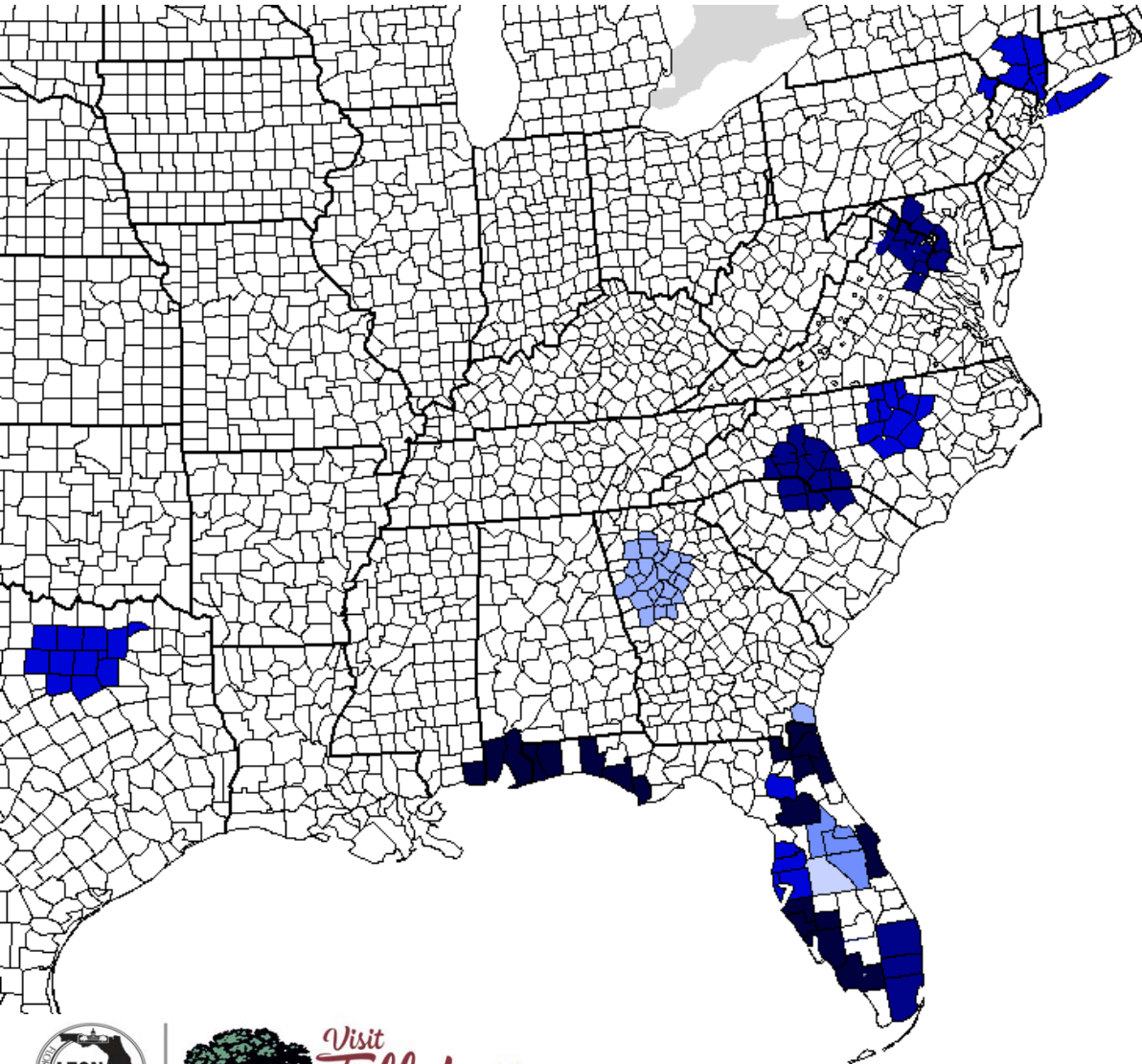


GIS Maps

- Utilizing self-report data from 1,890 visitors to Leon County from October 2017 through September 2018, 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.

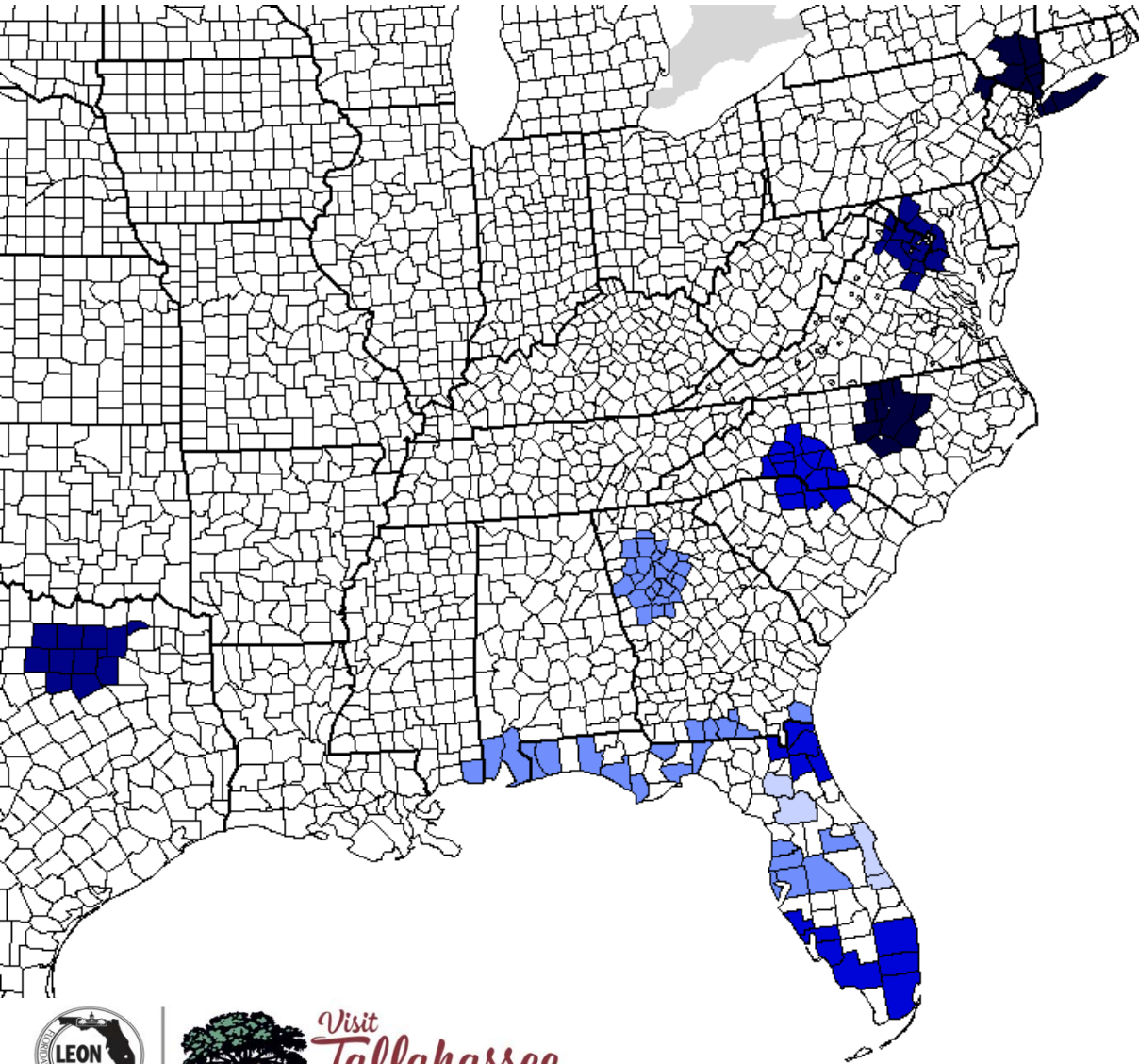


Spending per Party by Market



Market	Mean
Melbourne-Vero Beach	\$1,518
Naples-Ft. Myers	\$1,397
Ocala	\$1,387
Pensacola-Mobile	\$1,197
Sarasota-Bradenton	\$1,148
Jacksonville	\$1,129
Panama City-Destin	\$1,120
Miami-Ft. Lauderdale	\$1,098
Washington DC-Baltimore	\$1,014
Charlotte	\$929
Tampa-Clearwater-St. Petersburg	\$883
New York City	\$876
Raleigh-Durham	\$848
Gainesville	\$809
Dallas-Ft. Worth	\$807
Orlando	\$722
Atlanta	\$619
Lakeland	\$592
Surrounding areas	\$524

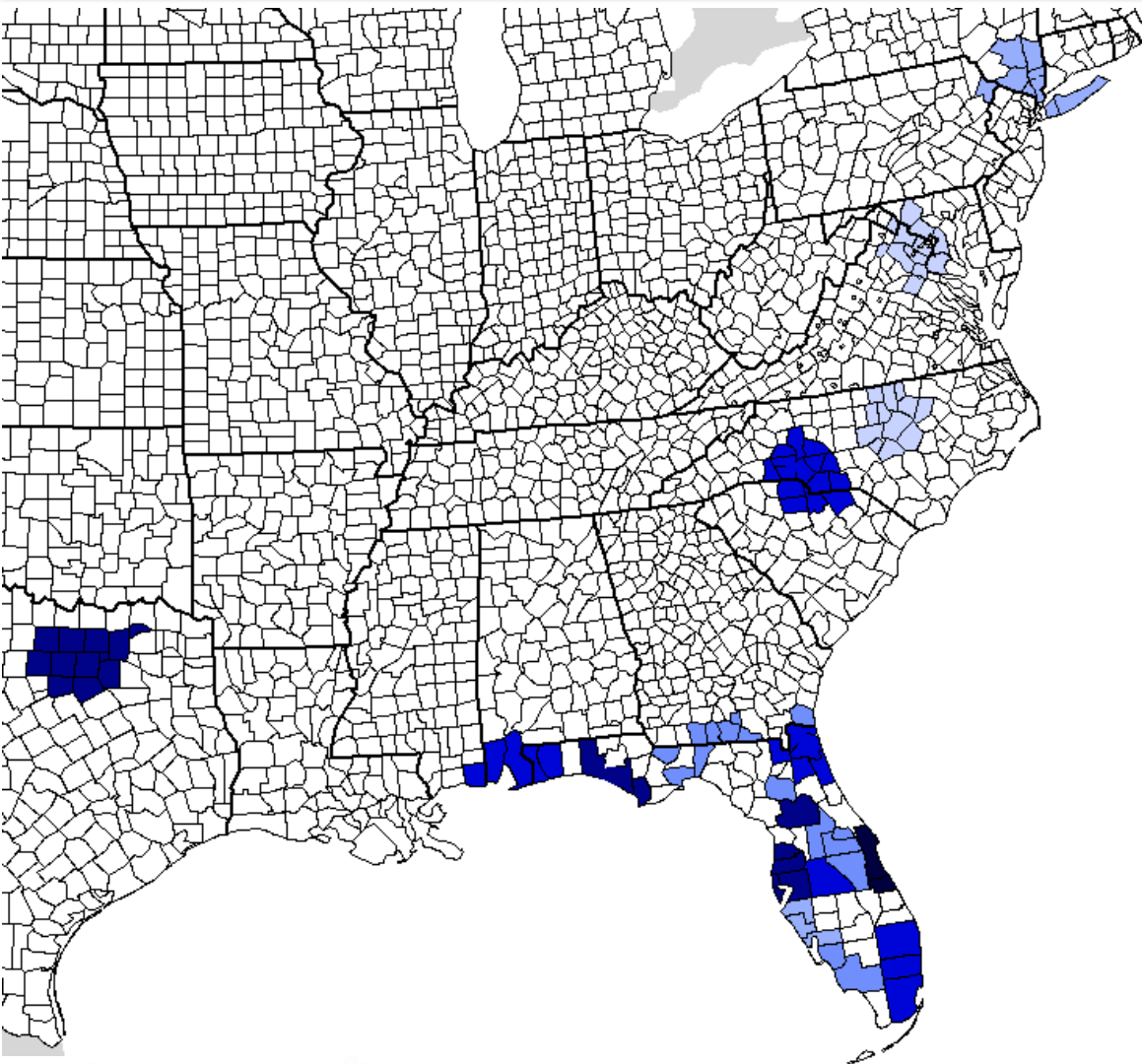
First Time Visitors by Market



Market	1st Time Visitors
Raleigh-Durham	83%
New York City	72%
Washington DC-Baltimore	57%
Dallas-Ft. Worth	40%
Charlotte	33%
Naples-Ft. Myers	33%
Sarasota-Bradenton	25%
Miami-Ft. Lauderdale	23%
Jacksonville	22%
Lakeland	17%
Tampa-Clearwater-St. Petersburg	14%
Atlanta	13%
Panama City-Destin	9%
Orlando	7%
Pensacola-Mobile	7%
Surrounding areas	6%
Gainesville	0%
Melbourne-Vero Beach	0%
Ocala	0%



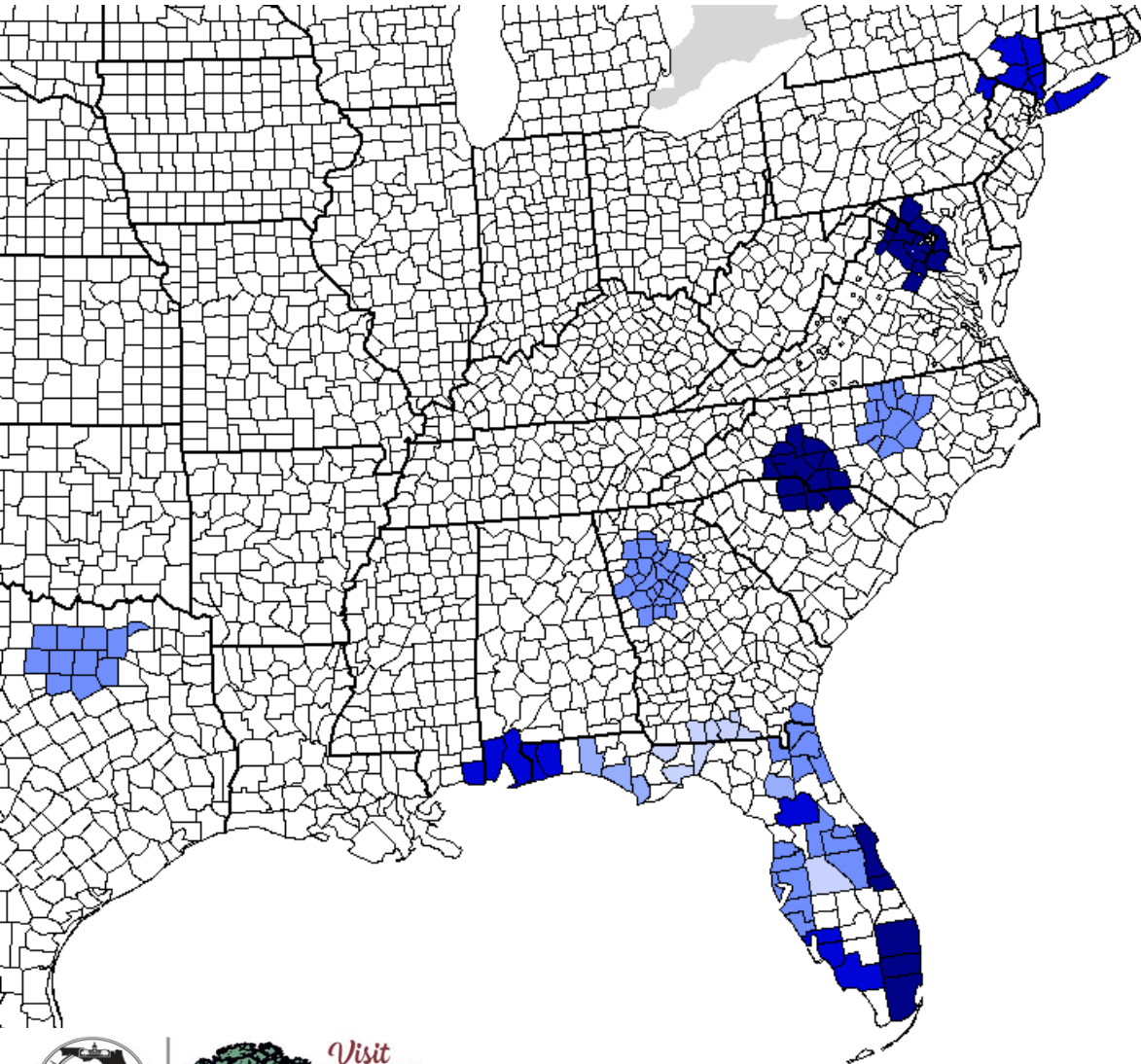
Traveled with Children by Market



Market	% Traveling with Children
Melbourne-Vero Beach	80%
Dallas-Ft. Worth	67%
Ocala	67%
Tampa-Clearwater-St. Petersburg	63%
Panama City-Destin	60%
Jacksonville	59%
Charlotte	57%
Lakeland	56%
Miami-Ft. Lauderdale	56%
Pensacola-Mobile	50%
Orlando	48%
Naples-Ft. Myers	45%
Atlanta	44%
Gainesville	36%
Surrounding areas	35%
Sarasota-Bradenton	22%
New York City	17%
Raleigh-Durham	0%
Washington DC-Baltimore	0%



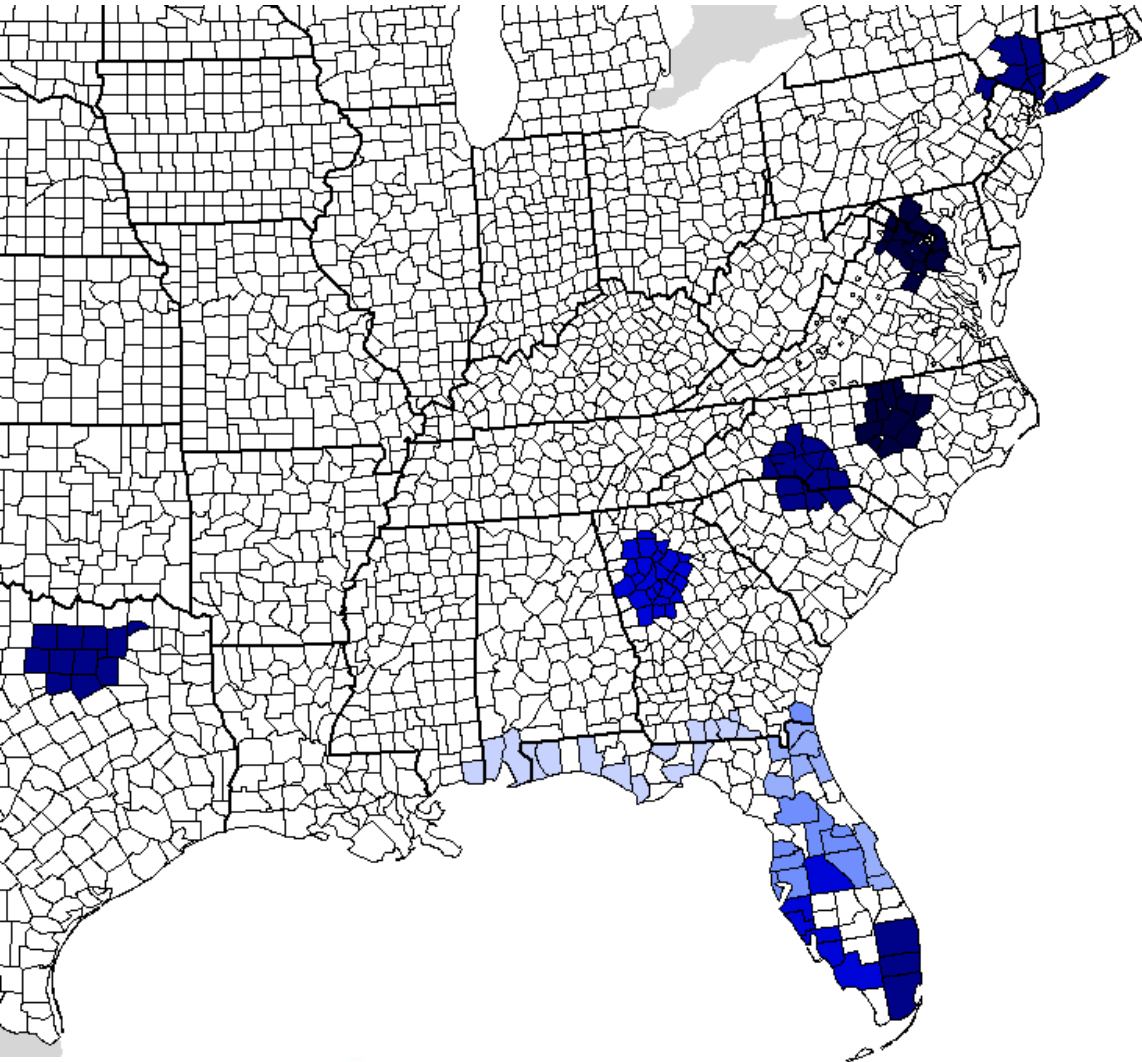
Median Income by Market



Market	Median
Washington DC-Baltimore	\$125,900
Melbourne-Vero Beach	\$119,000
Charlotte	\$115,400
Miami-Ft. Lauderdale	\$113,000
Pensacola-Mobile	\$109,100
Naples-Ft. Myers	\$106,800
New York City	\$103,900
Ocala	\$101,500
Orlando	\$97,600
Jacksonville	\$96,900
Atlanta	\$95,500
Tampa-Clearwater-St. Petersburg	\$94,600
Sarasota-Bradenton	\$92,700
Raleigh-Durham	\$91,700
Dallas-Ft. Worth	\$91,000
Gainesville	\$88,500
Panama City-Destin	\$81,800
Lakeland	\$77,100
Surrounding areas	\$74,200



Percent who Flew by Market



Market	Fly %
Raleigh-Durham	100%
Washington DC-Baltimore	92%
Charlotte	78%
New York City	69%
Miami-Ft. Lauderdale	63%
Dallas-Ft. Worth	57%
Sarasota-Bradenton	46%
Lakeland	36%
Atlanta	34%
Naples-Ft. Myers	30%
Orlando	22%
Tampa-Clearwater-St. Petersburg	20%
Ocala	14%
Gainesville	9%
Melbourne-Vero Beach	8%
Jacksonville	4%
Panama City-Destin	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:
 - 1,890 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 2018

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

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

