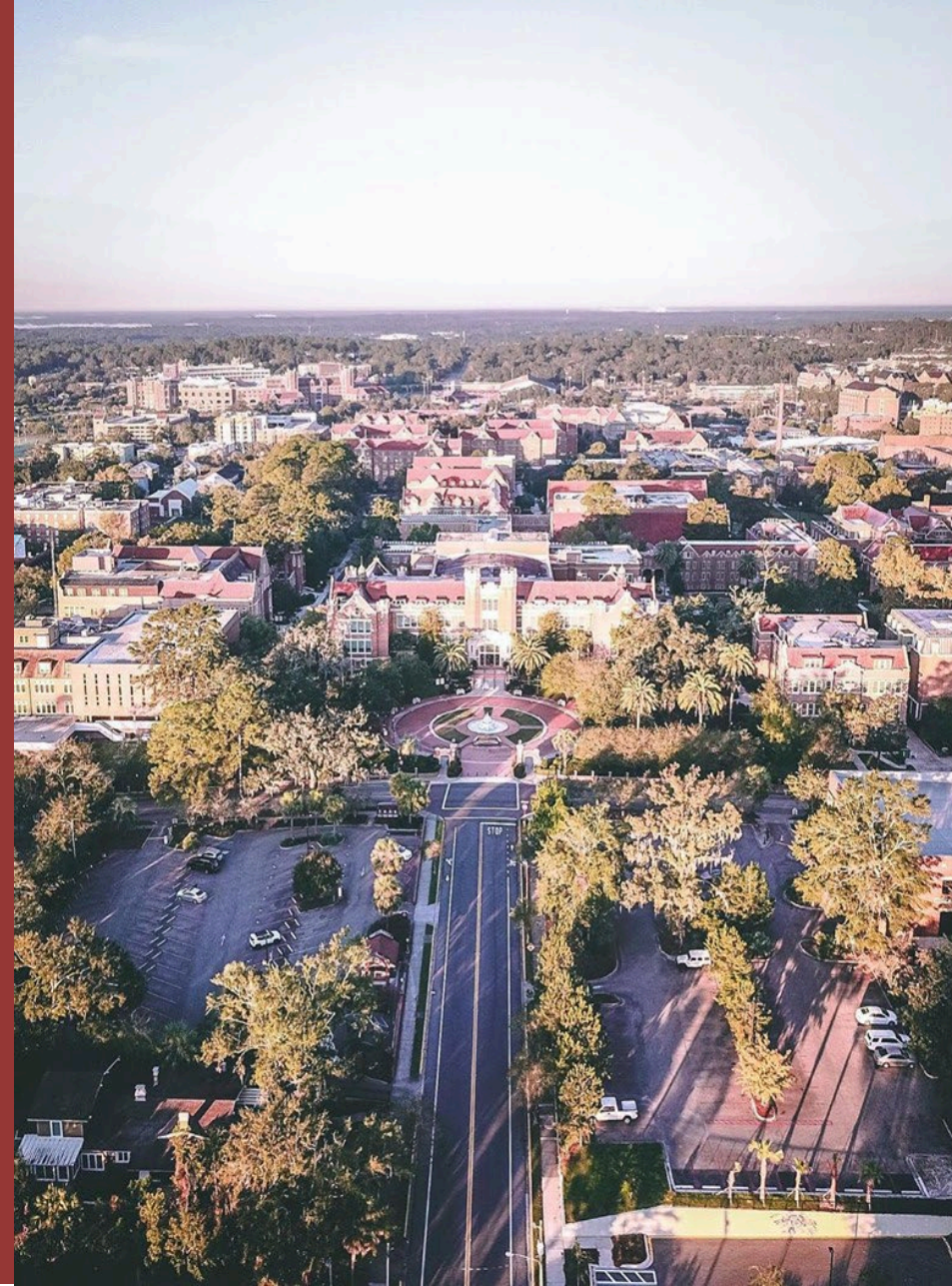


# LEON COUNTY DIVISION OF TOURISM – VISIT TALLAHASSEE

Economic Impact of Tourism Report

Fiscal Year 2022 (October 2021 – September 2022)



Visit  
*Tallahassee*  
A Division of Leon County

DS downs & st. germain  
RESEARCH

# TABLE OF CONTENTS

Methodology..... 3

Executive Summary..... 6

Detailed Findings..... 16

Quarterly Comparisons..... 28

# 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:
  - » 2,040 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 FY2021 TO FY2022

- » Spring events in Tallahassee back to regular scheduling
- » TCC Rock the Roost
- » Six Florida State Home Football Games (-1 games over FY2021)
- » Five FAMU Home Football Games (+4 games over FY2021)





# EXECUTIVE SUMMARY



# TOTAL ECONOMIC IMPACT



\$1,151,771,700

Economic Impact

(+30.4% from FY2021)

# TOTAL DIRECT SPEND

**\$728,969,400**  
**Direct Spending**  
**(+30.4% from FY2021)**





# VISITORS

# 2,333,400 Visitors

(+34.0% from FY2021)



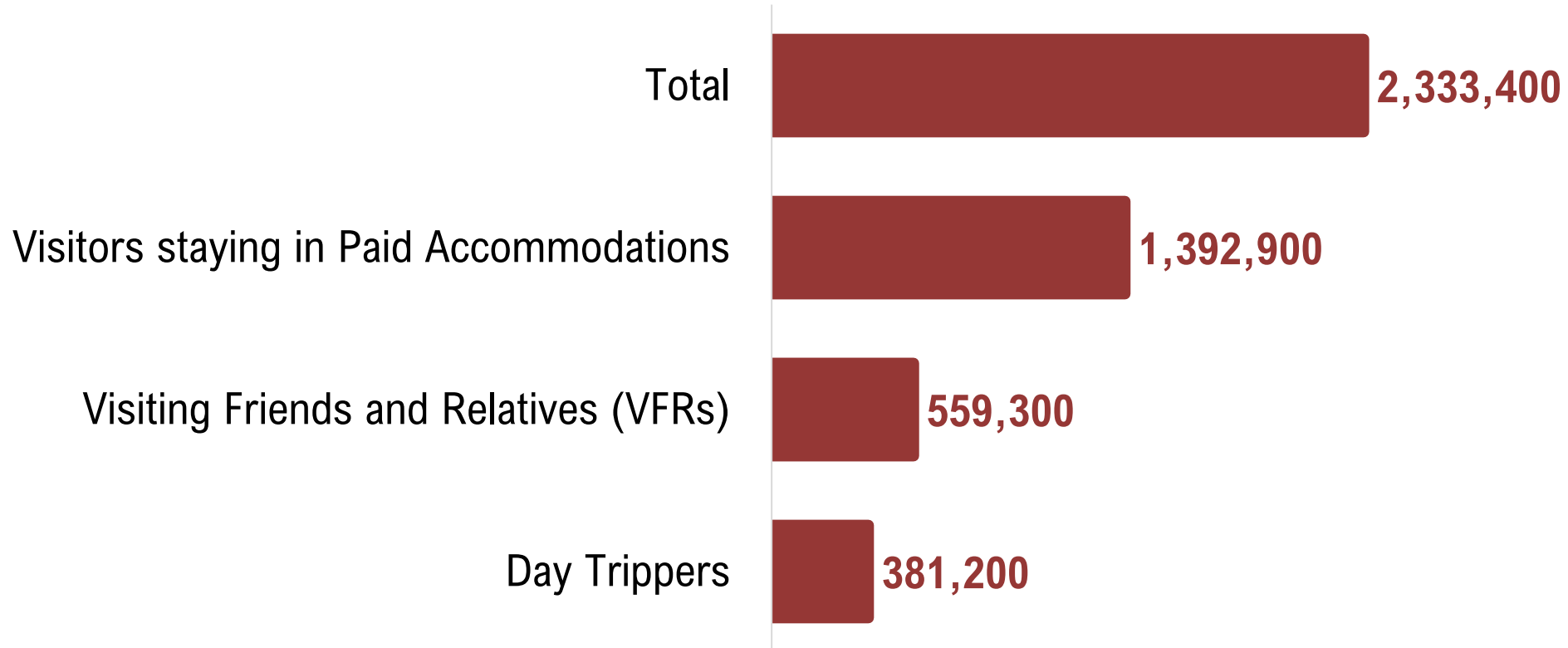
# TOTAL ROOM NIGHTS

1,442,543  
Room nights  
(+16.0% from FY2021)



# VISITORS TO LEON COUNTY

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





# TOP MARKETS OF ORIGIN

 **55%** of Leon County visitors lived in **12** markets

Market	FY 2021	FY 2021
Miami – Ft. Lauderdale	13%	9%
Atlanta	7%	8%
Surrounding areas	2%	8%
Tampa Bay area	6%	6%
Jacksonville	6%	5%
Orlando	5%	5%
Pensacola – Mobile	4%	3%
Panama City	1%	3%
Washington DC – Baltimore	2%	2%
Chicago	1%	2%
West Palm Beach – Ft. Pierce	<1%	2%
Dallas-Fort Worth	1%	2%

# JOB CREATION

**14,708 Jobs**  
(+14.3% from FY2021)

**\$414,123,500 in wages**  
(+21.2% from FY2021)

# NET BENEFIT\*

Visitors in FY2022 generated a net benefit  
of  
**\$24,653,600**  
to Leon County government



\*Leon County government revenue generated by visitors minus the cost to Leon County government for servicing visitors.



Visit  
*Tallahassee*  
A Division of Leon County

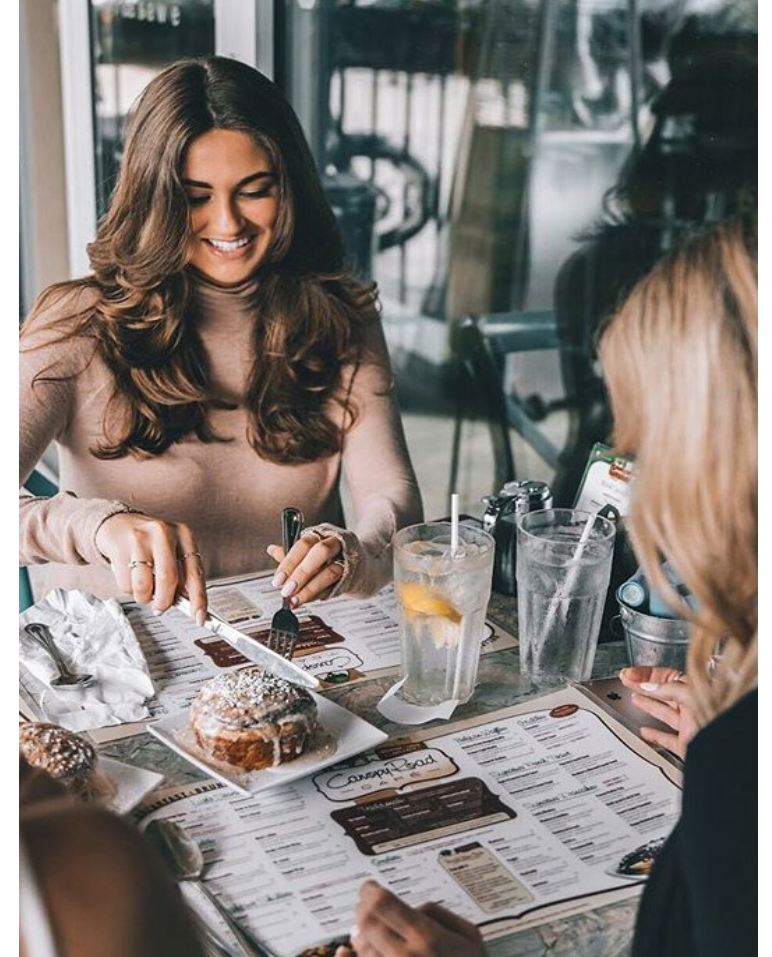


# VISITORS CREATE JOBS

An additional Leon County job is supported by every

159

visitors



# HOUSEHOLD SAVINGS

Visitors to Leon County save local residents

**\$771**

per household every year in taxes



# MARKETING SPENDING\*

Every dollar spent by Visit Tallahassee on marketing is associated with

\$114

in visitor spending within Leon County



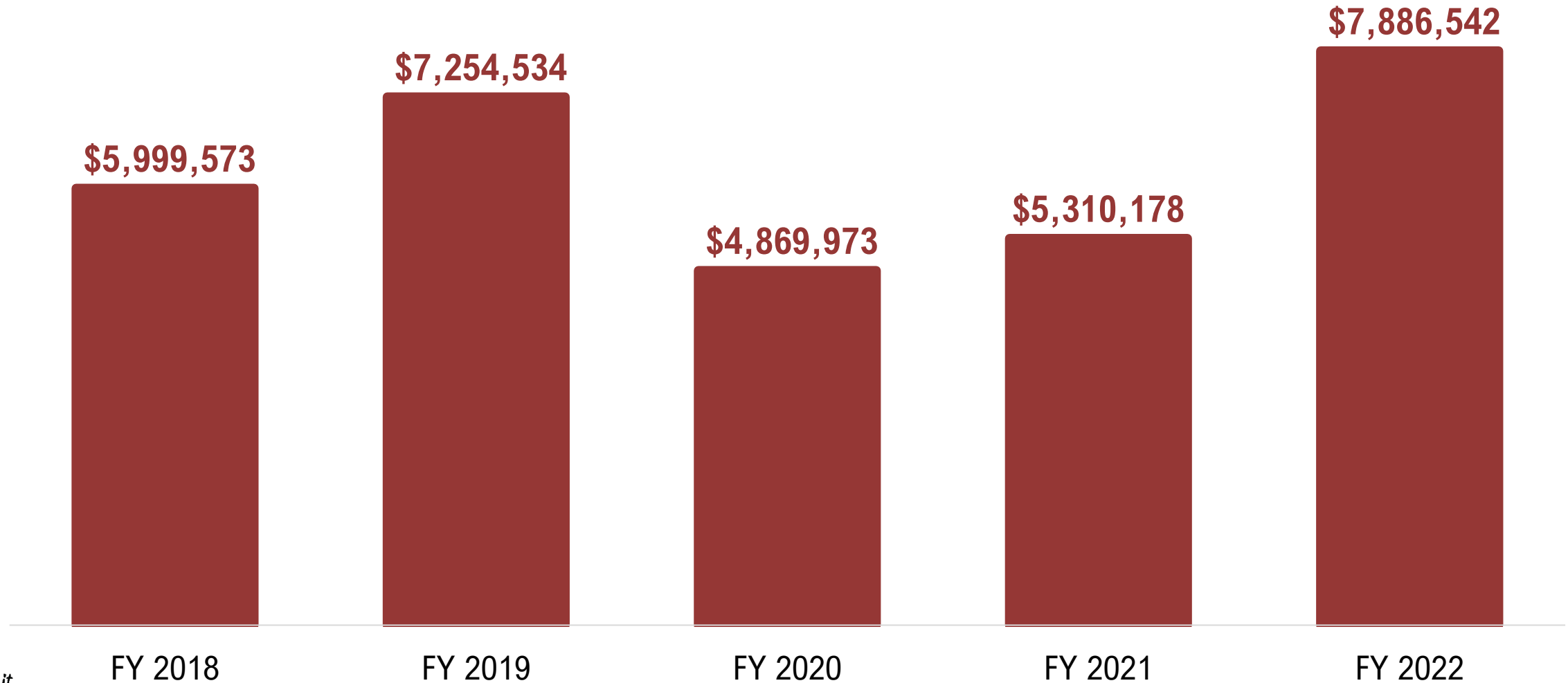
\*Methodology has been updated to represent spend associated with visitors who were influenced by advertising.





# TDT COLLECTIONS FY2018 – FY2022

» TDT collections increased 48.5% in FY2022



# DETAILED FINDINGS



# KEY PERFORMANCE INDICATORS

Economic Indicators	FY 2021	FY 2022	% Change
Visitors	1,740,900	2,333,400	+34.0%
Direct expenditures	\$559,099,200	\$728,969,400	+30.4%
Total economic impact	\$883,376,800	\$1,151,771,700	+30.4%
Room nights generated	1,243,480	1,442,543	+16.0%
Jobs created	12,868	14,708	+14.3%
Wages paid	\$341,647,100	\$414,123,500	+21.2%
Taxes paid	\$62,159,100	\$89,874,900	+44.6%
Tourist Development Tax	\$5,310,178	\$7,886,542	+48.5%



# KEY PERFORMANCE INDICATORS

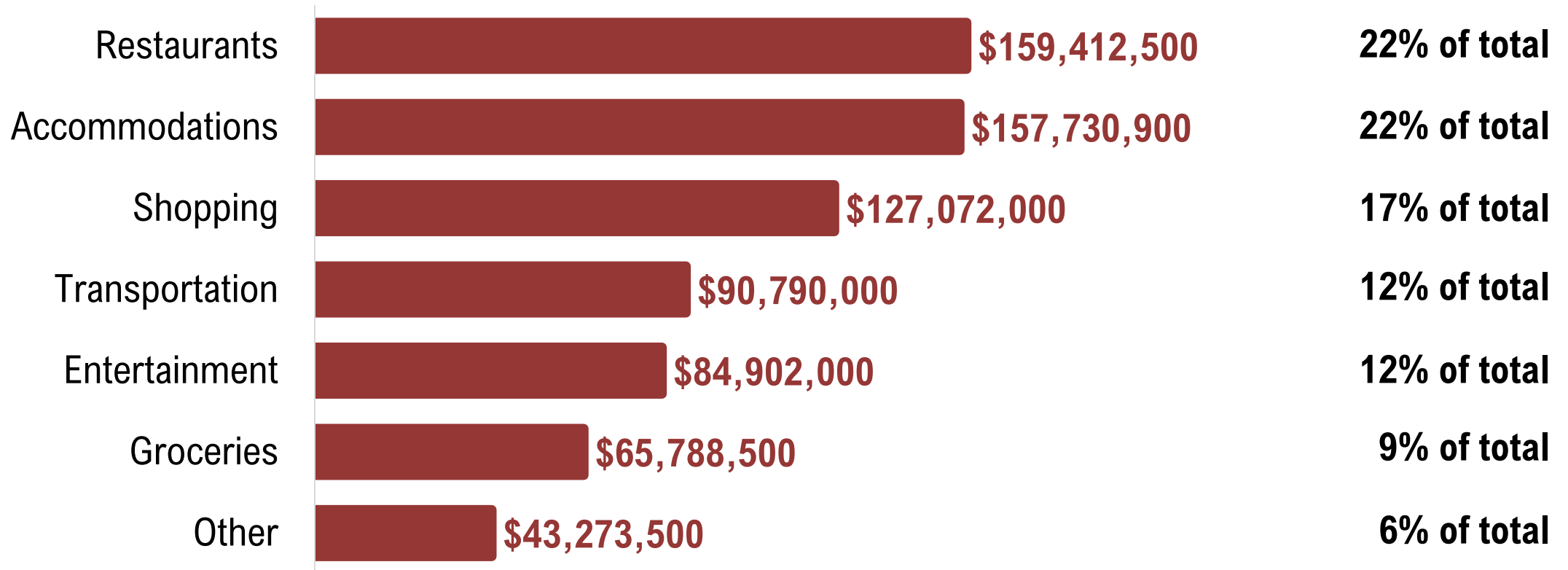
Economic Indicators	FY 2021	FY 2022	% Change
Visitors	1,740,900	2,333,400	+34.0%
Occupancy	53.4%	61.2%	+14.6%
Room rates	\$94.44	\$116.22	+23.1%
RevPAR	\$50.43	\$71.13	+41.0%
Travel party size	2.5	3.0	
Nights spent	3.4	3.3	
Will return	93%	91%	
Rating of experience	8.0 <sup>1</sup>	8.2 <sup>1</sup>	

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



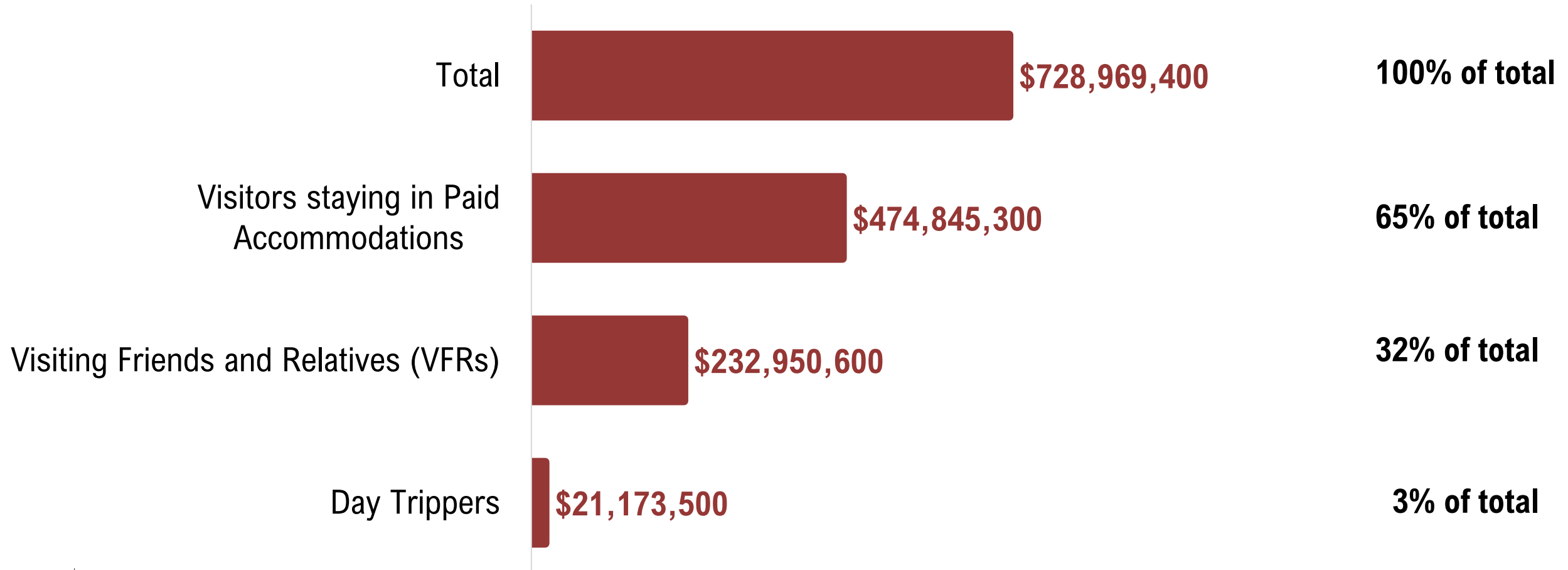
# VISITORS DIRECT SPENDING

» Leon County Visitors spent **\$728,969,400** in FY2022



# DIRECT SPENDING BY VISITOR TYPE

- » Visitors who stay in paid accommodations account for **65%** of visitor spending





# KPIs – OCT-DEC 2021 (Q1)

Economic Indicators	Oct-Dec 2020 (Q1)	Oct-Dec 2021 (Q1)	% Change
Visitors	358,900	525,900	+28.1%
Direct Expenditures	\$116,407,000	\$186,572,000	+60.3%
Economic Impact	\$183,923,100	\$294,783,800	+60.3%
Occupancy	43.7%	57.0%	+30.4%
Room Rates	\$82.35	\$121.63	+47.7%
RevPAR	\$35.99	\$69.33	+92.6%
Travel party size	2.5	2.9	
Nights spent	3.5	3.4	
Will return	94%	88%	
Rating of experience	8.0 <sup>1</sup>	8.2 <sup>1</sup>	

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



# KPIs – JAN-MAR 2022 (Q2)

Economic Indicators	Jan-Mar 2021 (Q2)	Jan-Mar 2022 (Q2)	% Change
Visitors	391,600	592,900	+51.4%
Direct Expenditures	\$127,710,800	\$164,335,600	+28.7%
Economic Impact	\$201,783,100	\$259,650,300	+28.7%
Occupancy	52.7%	63.5%	+20.5%
Room Rates	\$83.22	\$113.96	+36.9%
RevPAR	\$43.86	\$72.36	+65.0%
Travel party size	2.8	3.0	
Nights spent	3.7	3.3	
Will return	92%	90%	
Rating of experience	7.9 <sup>1</sup>	7.9 <sup>1</sup>	

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



# KPIs – APR-JUN 2022 (Q3)

Economic Indicators	Apr-Jun 2021 (Q3)	Apr-Jun 2022 (Q3)	% Change
Visitors	520,000	665,900	+28.2%
Direct Expenditures	\$156,174,500	\$188,602,900	+20.8%
Economic Impact	\$246,755,700	\$297,992,600	+20.8%
Occupancy	58.3%	63.1%	+8.2%
Room Rates	\$100.39	\$111.40	+11.0%
RevPAR	\$58.53	\$70.29	+20.1%
Travel party size	2.4	2.9	
Nights spent	3.3	3.1	
Will return	93%	90%	
Rating of experience	8.0 <sup>1</sup>	8.2 <sup>1</sup>	

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





# KPIs – JULY-SEPT 2022 (Q4)

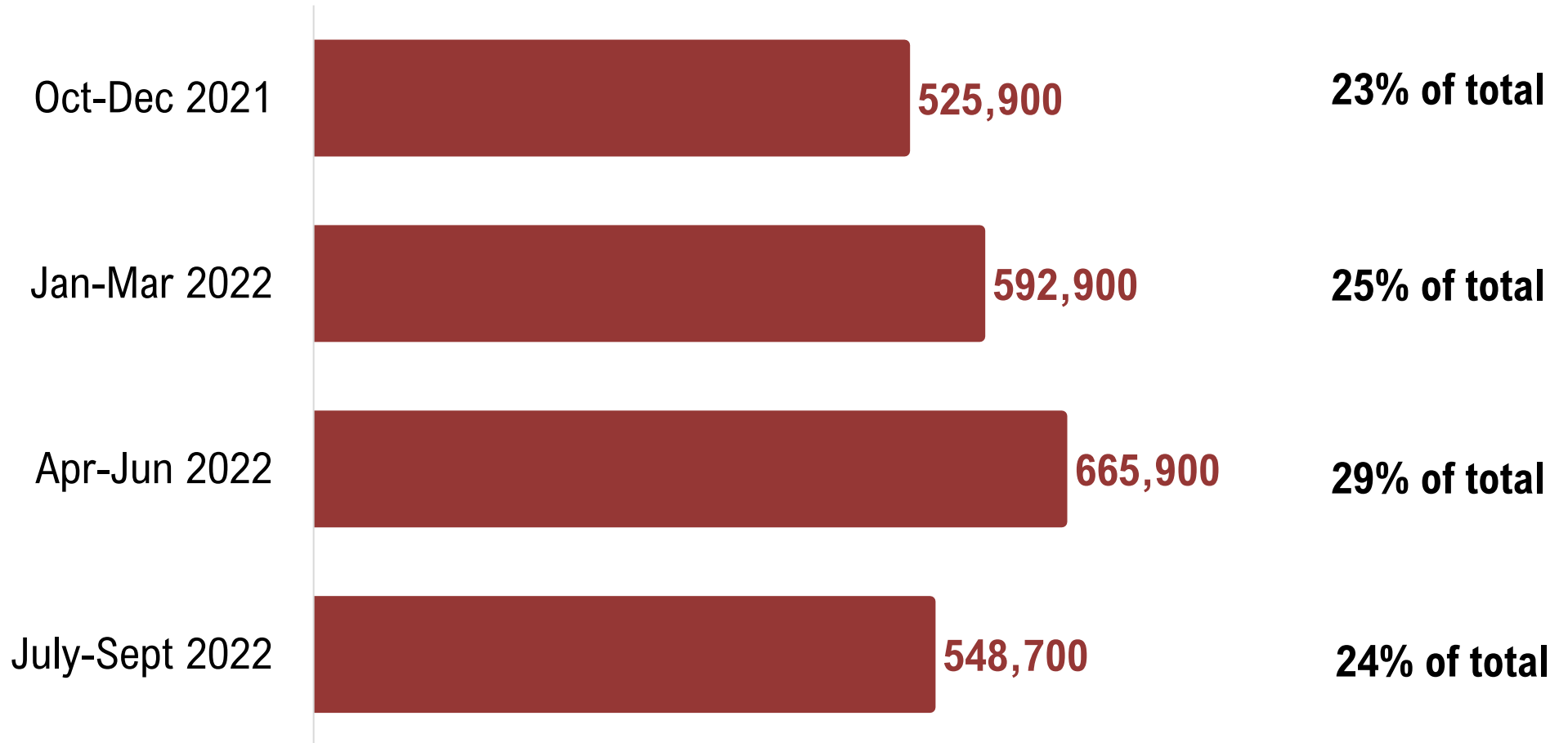
Economic Indicators	July-Sept 2021 (Q4)	July-Sept 2022 (Q4)	% Change
Visitors	470,400	548,700	+16.6%
Direct Expenditures	\$158,806,900	\$189,458,900	+19.3%
Economic Impact	\$250,914,900	\$299,345,100	+19.3%
Occupancy	58.9%	61.2%	+3.9%
Room Rates	\$111.78	\$117.88	+5.5%
RevPAR	\$65.84	\$72.14	+9.6%
Travel party size	2.6	2.9	
Nights spent	3.5	3.2	
Will return	93%	93%	
Rating of experience	8.1 <sup>1</sup>	8.3 <sup>1</sup>	

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



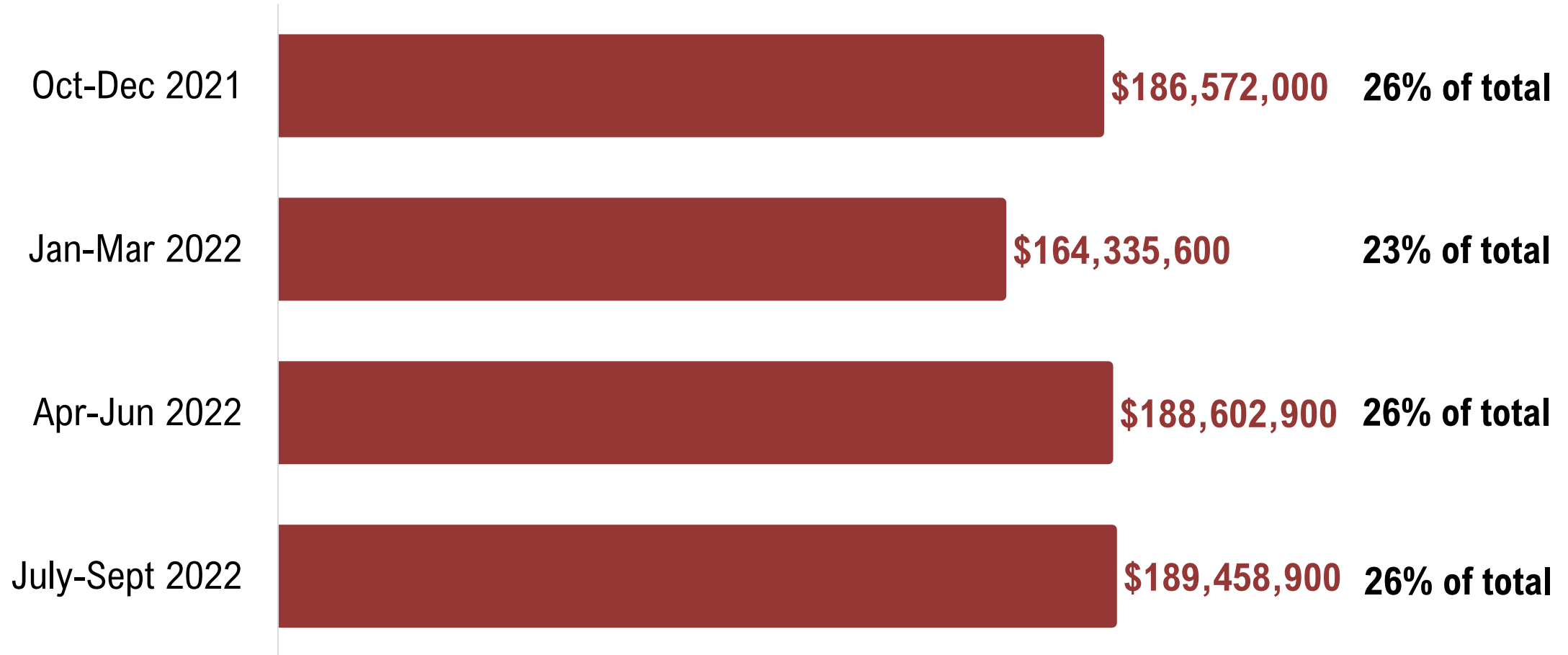
# VISITORS BY QUARTER

Total Visitors: **2,333,400**



# VISITORS DIRECT SPENDING BY QUARTER

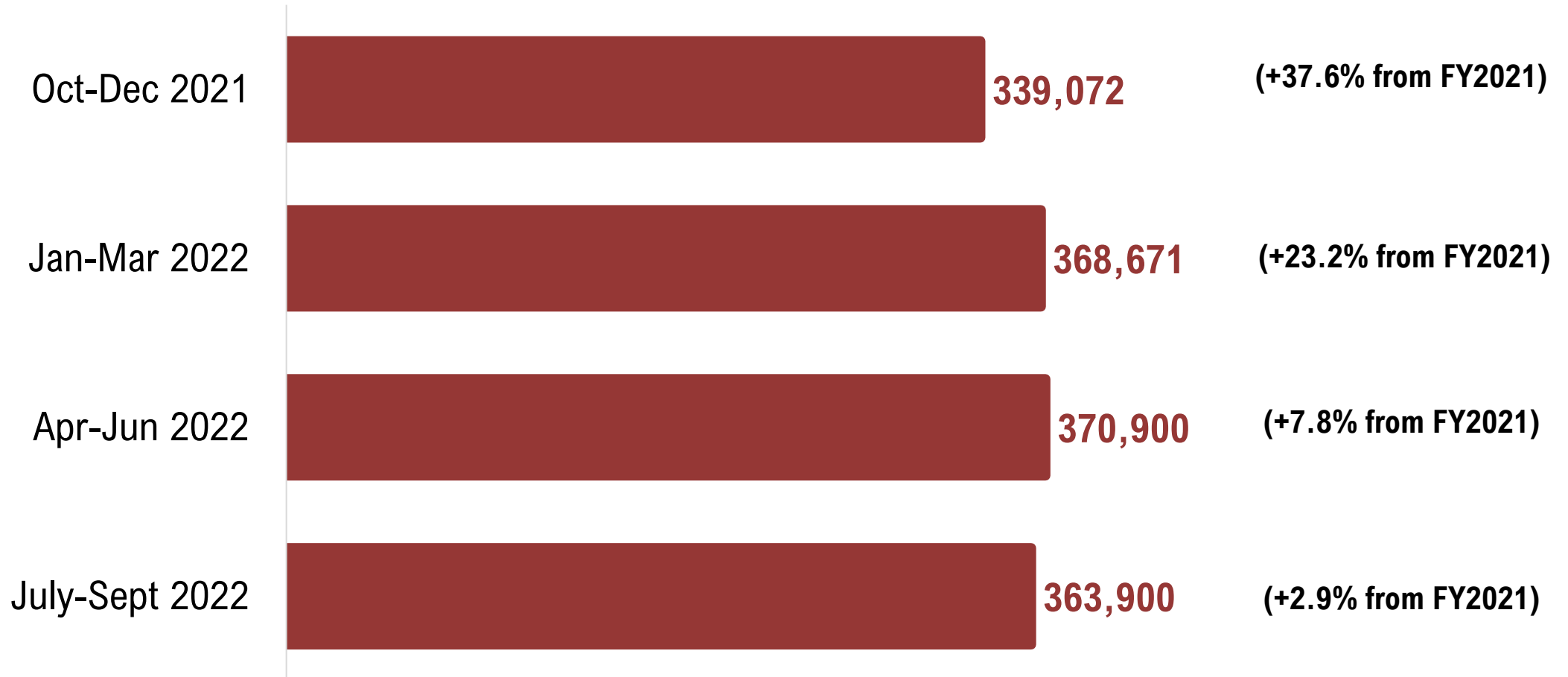
Total Direct Spend: **\$728,969,400**





# ROOM NIGHTS BY QUARTER

Total Room Nights: **1,442,543**



# FISCAL YEAR 2022: VISITOR TRACKING



# QUARTERLY COMPARISONS

Economic Indicators	Oct-Dec 2021 (Q1)	Jan-Mar 2022 (Q2)	Apr-Jun 2022 (Q3)	July-Sept 2022 (Q4)
Visitors*	525,900	592,900	665,900	548,700
Occupancy	57.0%	63.5%	63.1%	61.2%
Median age	44	44	43	42
Median HH income	\$94,400	\$95,700	\$83,300	\$95,700
From Southeast**	25%	34%	31%	32%
From Florida	47%	43%	40%	37%
Travel party size	2.9	3.0	2.9	2.9
Drove	78%	76%	76%	78%
Length of stay	3.4	3.3	3.1	3.2
1st time visitor	17%	29%	21%	30%

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

\*\* Southeast excluding Florida



# QUARTERLY COMPARISONS

Economic Indicators	Oct-Dec 2021 (Q1)	Jan-Mar 2022 (Q2)	Apr-Jun 2022 (Q3)	July-Sept 2022 (Q4)
Rating of Leon County*	8.2	7.9	8.2	8.3
Likelihood of returning	88%	90%	90%	93%
Spending per travel party	\$1,176	\$1,115	\$936	\$1,126
Used VisitTallahassee.com	6%	6%	13%	11%
Used Google	32%	31%	32%	29%
Married	56%	65%	60%	61%
Has college degree	73%	68%	61%	75%

\* Using a 10-point scale



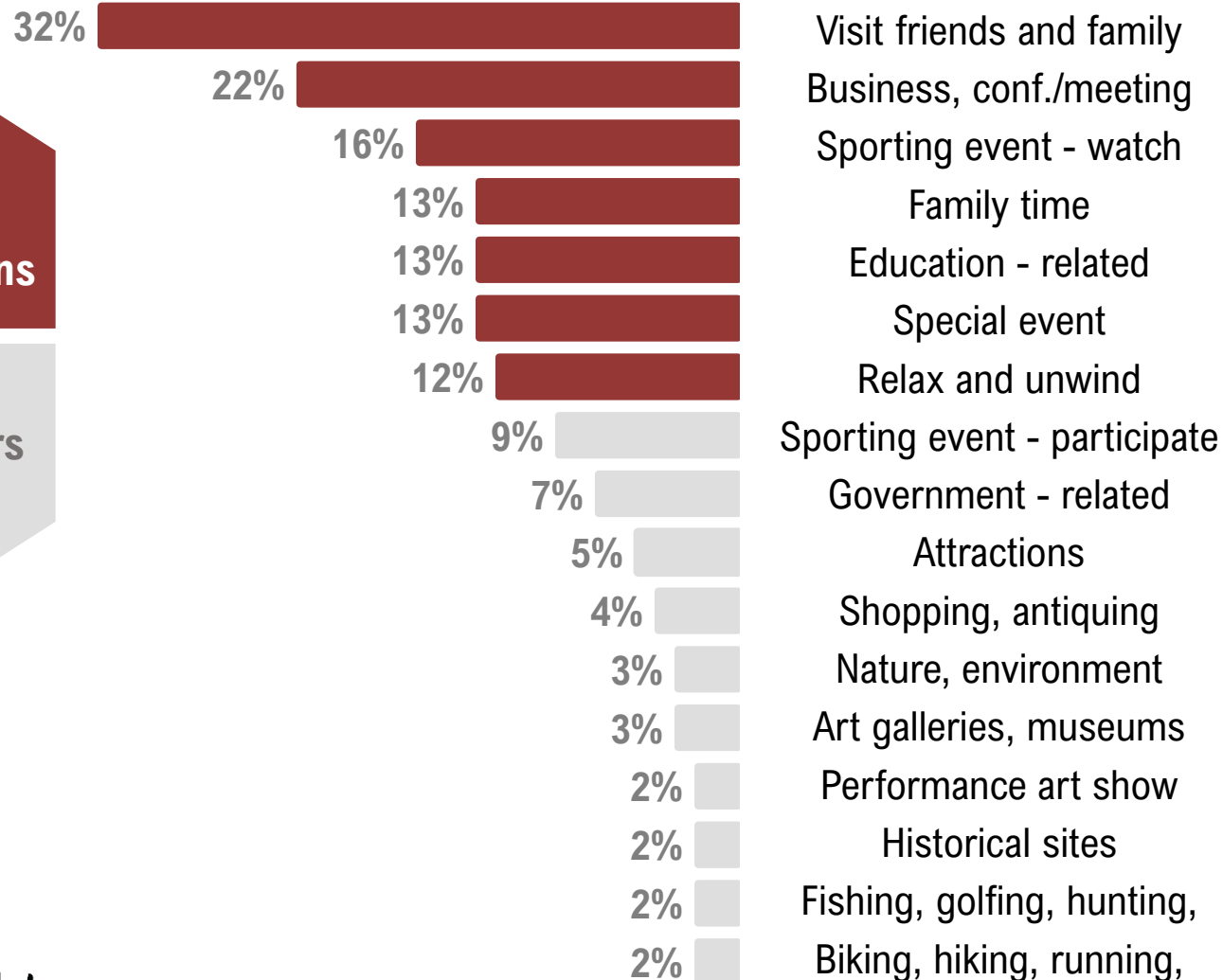


# FY 2022 REASONS FOR VISITING VS. VISITOR ACTIVITIES

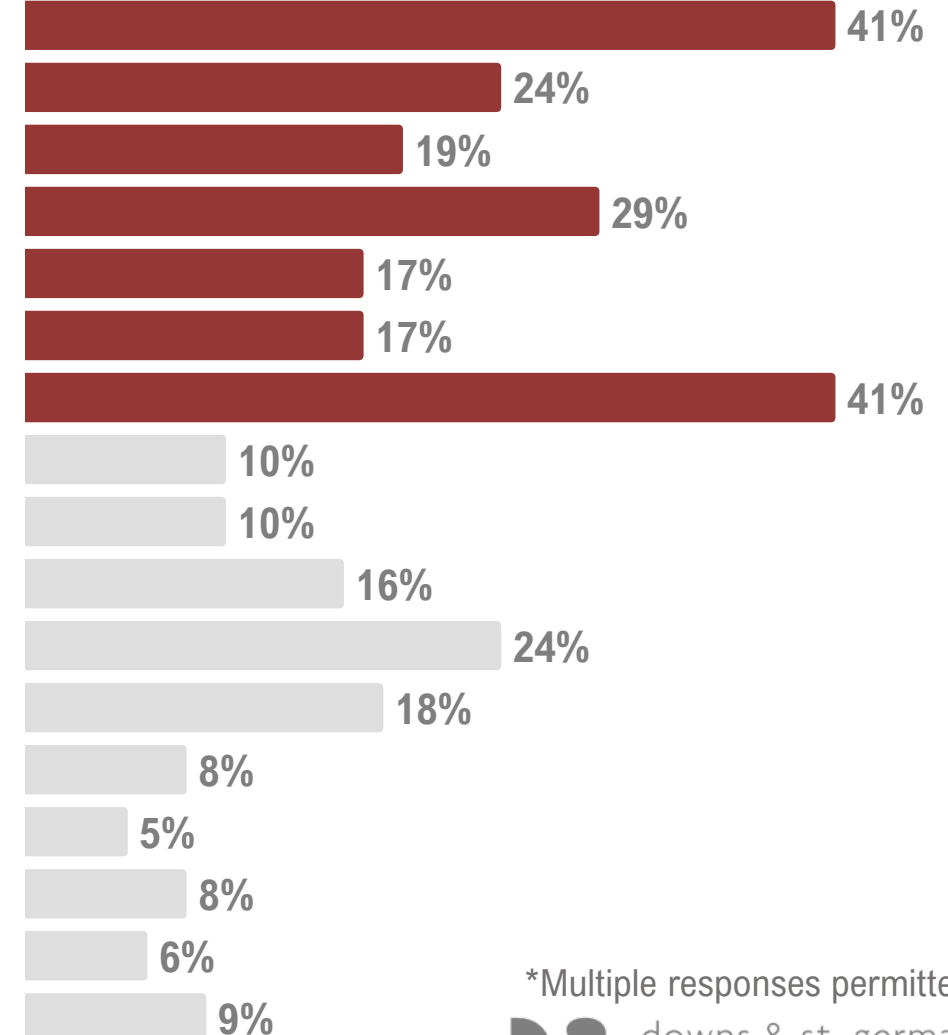
## Key Motivations

## Trip Enhancers

### Reasons for Visiting\*



### Visitor Activities\*



\*Multiple responses permitted.

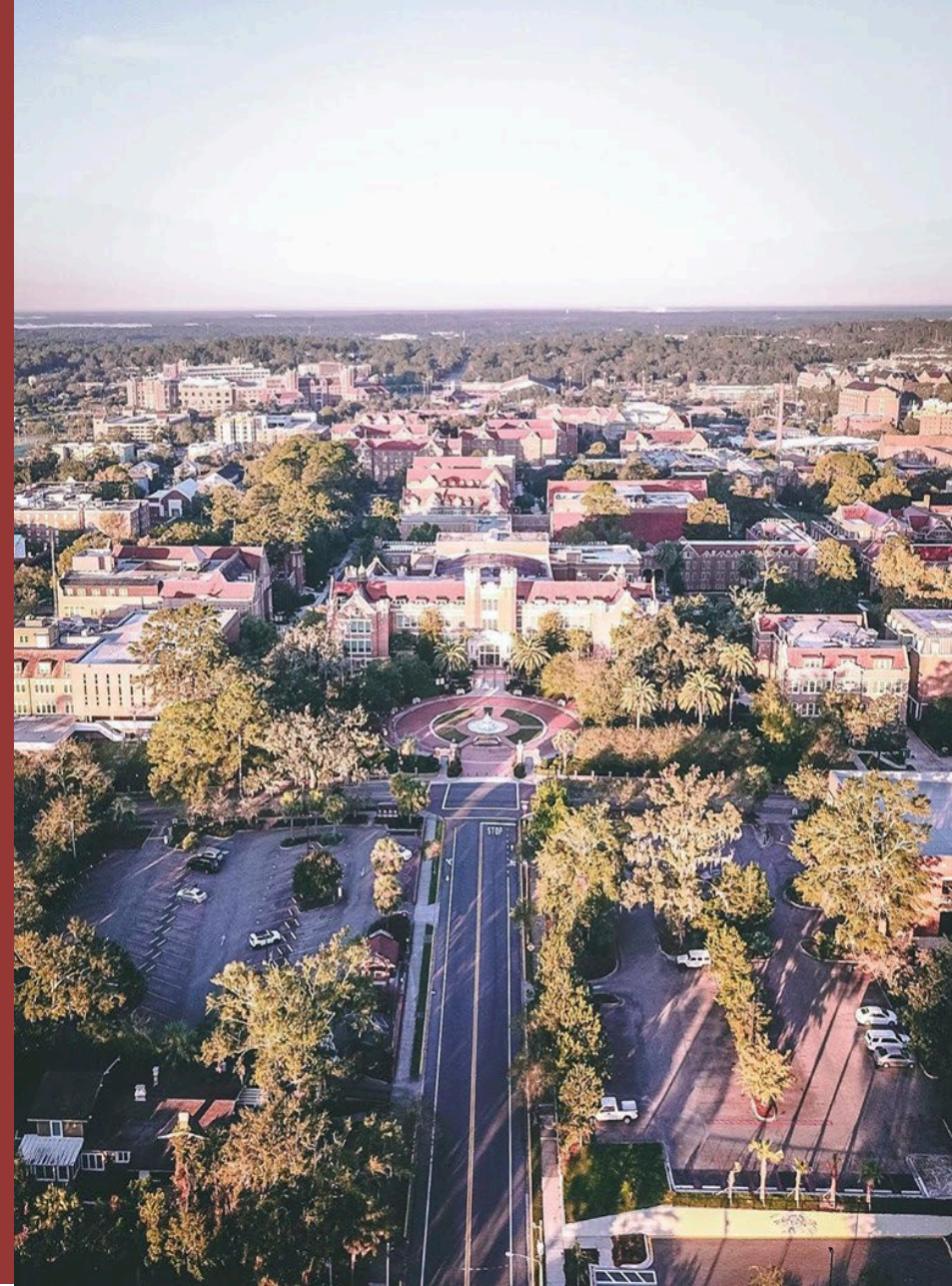
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Kerri Post

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