

LEON COUNTY DIVISION OF TOURISM – VISIT TALLAHASSEE

Fiscal Year 2024
Economic Impact Report



Visit
Tallahassee
Pretty. Unexpected.

DS downs & st. germain
RESEARCH



Visitor Tracking Study

- » The economic impact of tourism for the Leon County Division of Tourism/Visit Tallahassee was based on data from the following sources:
 - » 2,148 interviews conducted by Downs & St. Germain Research with visitors to Leon County
 - » Twelve (12) monthly STR Reports
 - » Florida Department of Business and Professional Regulation (DBPR)
 - » Key Data (via Zartico)
 - » 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

A long, narrow swimming pool with clear blue water, reflecting the sky and surrounding tropical trees. The pool is flanked by lush green grass and dense foliage, including palm trees and cypresses. The sky is bright blue with scattered white clouds. The overall scene is serene and tropical.

EXECUTIVE SUMMARY

FY2024 ECONOMIC IMPACT

Visitor spending generated

\$1,324,598,900

in economic impact to Leon County's
economy, up 6.1% from FY2023



FY2024 TOTAL DIRECT SPEND

Visitors to Leon County spent

\$807,682,200

throughout the county in FY2024 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up 6.9% from FY2023



FY2024 VISITORS

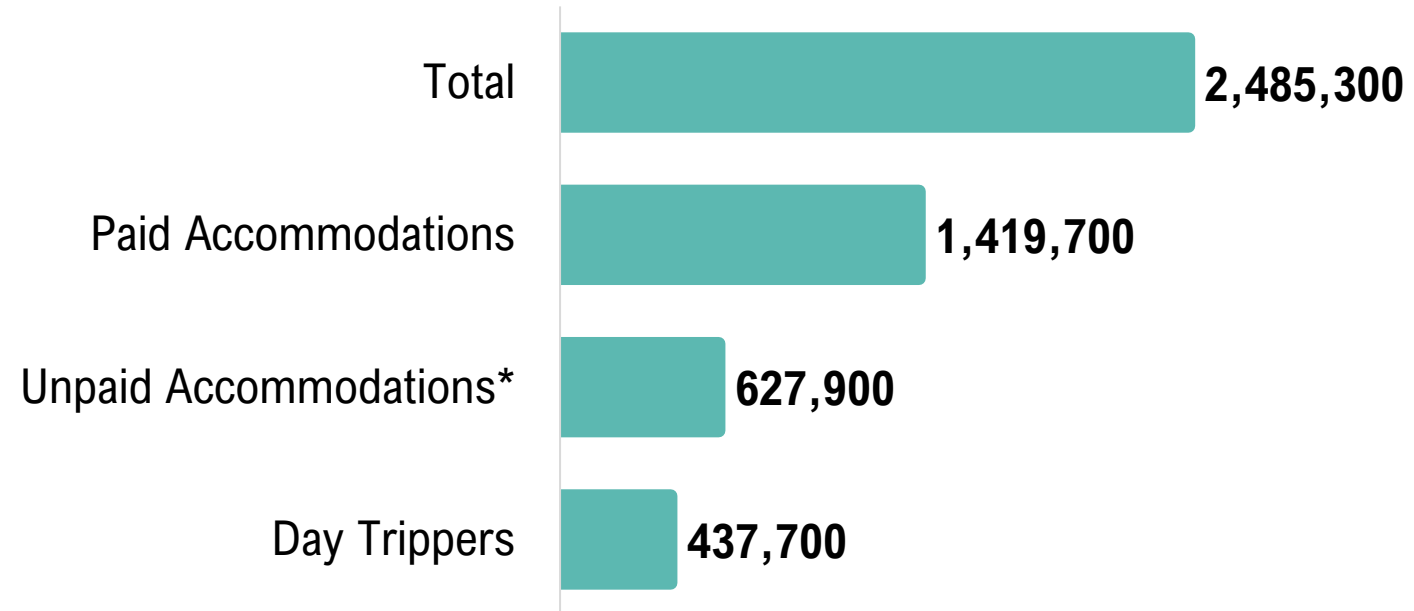
Leon County attracted

2,485,300

visitors in FY2024, up 4.0% from
FY2023



FY2024 VISITORS BY TYPE



*Visitors staying in personal second homes or with friends/relatives.

FY2024 TOTAL ROOM NIGHTS

Visitors to Leon County generated

1,509,300

nights in county accommodations throughout FY2024, up 3.7% from FY2023



FY2024 JOBS SUPPORTED

Visitors to Leon County supported

12,200

jobs throughout the county in
FY2024, down 4.6% from FY2023



FY2024 WAGES GENERATED

Visitors to Leon County supported
\$407,860,400
in wages paid to employees who
live in Leon County in FY2024, up
1.2% from FY2023



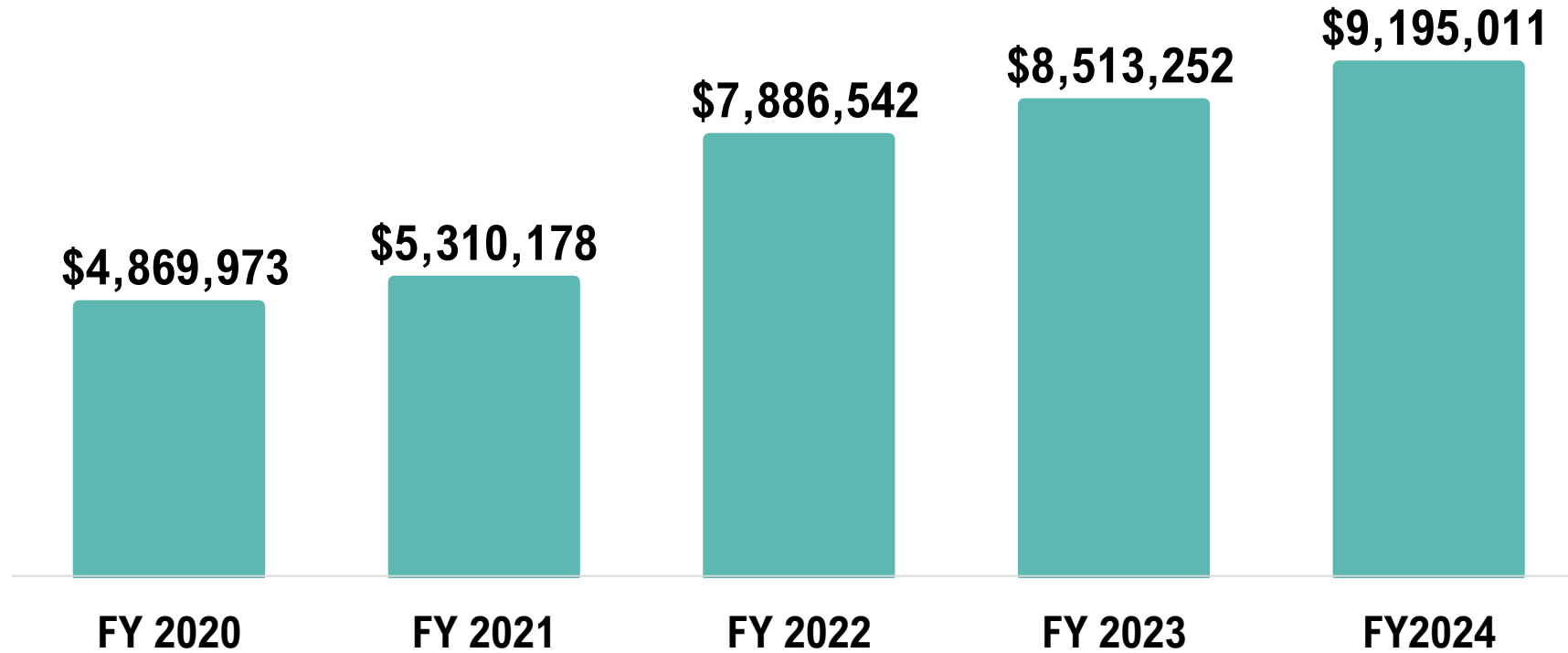
FY2024 VISITORS SUPPORT JOBS

Every
204

visitors supports a new job in Leon
County



TDT COLLECTIONS FY2020 – FY2024



FY2024 TOP MARKETS OF ORIGIN

Market	FY2023	FY2024
Surrounding Areas ¹	8%	11%
Miami-Ft. Lauderdale	6%	8%
Orlando Area	6%	8%
Atlanta	6%	7%
Tampa-St. Petersburg	6%	7%
Jacksonville	5%	6%
Panama City	3%	5%
Pensacola-Mobile	3%	4%
West Palm Beach-Ft. Pierce	2%	3%
Dallas-Fort Worth	2%	2%
Gainesville	2%	2%
New York ²	3%	2%
Sarasota	1%	2%
Washington, DC-Hagerstown ³	3%	2%

¹Includes counties surrounding Tallahassee and Thomasville.

²Includes parts of New York, New Jersey, & Connecticut.

³Includes parts of Maryland, Virginia, & West Virginia.



DETAILED FINDINGS

FY2024 KEY PERFORMANCE INDICATORS

	FY2023	FY2024	% Change
Visitors	2,390,100	2,485,300	+4.0%
Direct Expenditures ¹	\$755,581,900	\$807,682,200	+6.9%
Total Economic Impact ²	\$1,248,651,900	\$1,324,598,900	+6.1%
Room Nights Generated	1,455,300 ³	1,509,300 ⁴	+3.7%
Jobs Supported	12,790	12,200	-4.6%
Wages Paid	\$403,216,500	\$407,860,400	+1.2%
Local Taxes Paid ⁵	\$43,307,801	\$45,763,387	+ 5.7%
Tourist Development Tax ⁶	\$8,513,252	\$9,195,011	+8.0%

¹Includes spending for: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

²Multiplier for FY2024 updated to 1.64 from 1.65 in FY2023.

³From STR.

⁴From STR, DBPR, and Key Data (via Zartico).

⁵Local tax collections in Leon County attributable to tourism.

⁶From Leon County Tax Collector.



FY2024 KEY PERFORMANCE INDICATORS

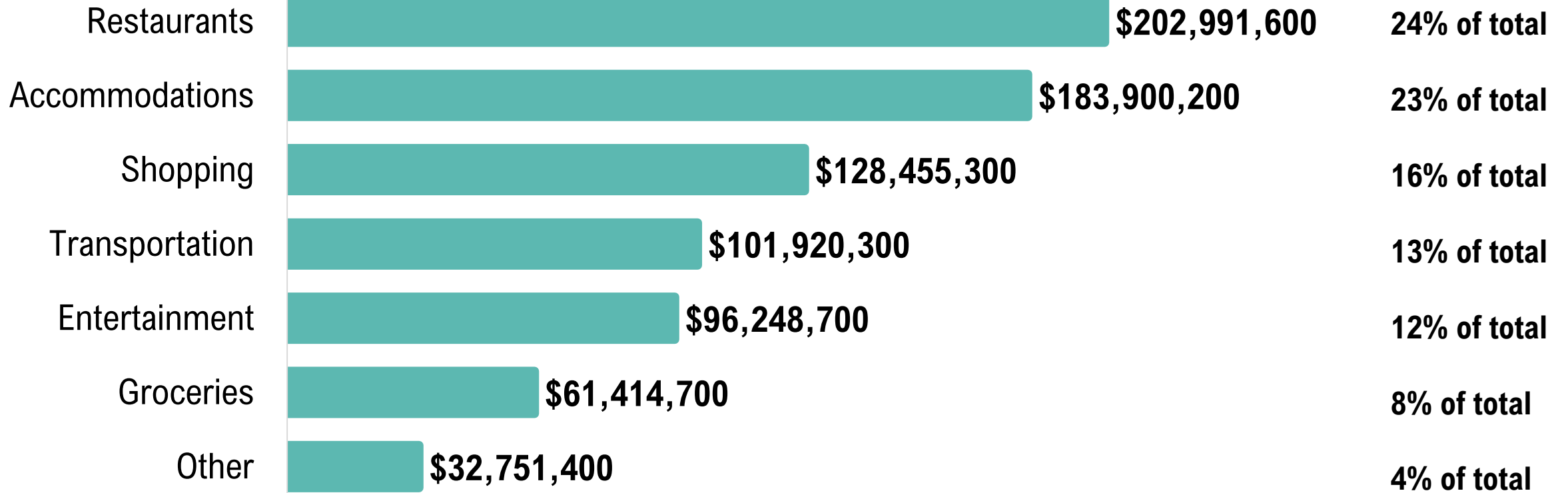
	FY2023	FY2024	% Change
Occupancy	62.2%	60.7%	-2.5%
Room rates	\$121.32	\$129.83	+7.0%
Travel party size	2.7	2.7	-
Nights spent	3.3	3.1	-0.2
Will return	92%	92%	-
Rating of experience ¹	8.0	8.0	-



¹On a 10-point scale.

FY2024 DIRECT SPENDING BY CATEGORY

Total FY2024 Direct Spend: **\$807,682,200**



FY2024 VISITORS BY QUARTER

Total FY2024 Visitors: 2,485,300



FY2024 DIRECT SPENDING BY QUARTER

Total FY2024 Direct Spend: \$807,682,200



FY2024 ROOM NIGHTS BY QUARTER*

Total FY2024 Room Nights: **1,509,300**



*From STR.

**From STR, DBPR, and Key Data (via Zartico).

FY2024 QUARTERLY COMPARISONS

	Oct-Dec 2023 (Q1)	Jan-Mar 2024 (Q2)	Apr-Jun 2024 (Q3)	July-Sept 2024 (Q4)
Visitors	661,600	579,200	642,200	602,300
Occupancy	57.3%	61.2%	62.7%	61.2%
Travel Party Size	2.8	2.7	2.6	2.5
Mean Nights Stayed	3.1	3.2	3.1	3.1
Median Age	48	46	43	43
Median HH Income	\$90,500	\$92,000	\$86,300	\$81,300
From Southeast*	25%	26%	28%	31%
From Florida	59%	51%	49%	47%
Drove	83%	73%	78%	85%
First-Time Visitor	18%	25%	25%	28%



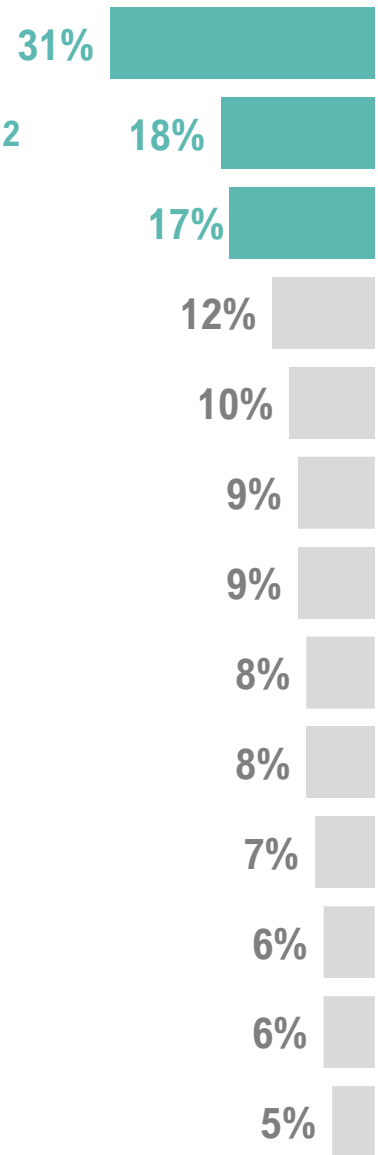
FY2024 QUARTERLY COMPARISONS

	Oct-Dec 2023 (Q1)	Jan-Mar 2024 (Q2)	Apr-Jun 2024 (Q3)	July-Sept 2024 (Q4)
Rating of Leon County ¹	8.5	7.9	7.8	7.6
Likelihood of Returning	92%	93%	89%	93%
Travel Party Spend Per Trip	\$936	\$1,062	\$775	\$869
Used VisitTallahassee.com ²	6%	6%	8%	2%
Married	58%	60%	58%	59%
Has Bachelor's Degree	65%	68%	70%	68%



FY2024 REASONS FOR VISITING VS. VISITOR ACTIVITIES¹

Reasons for Visiting²



Visit friends and relatives

Watch a sporting event

Business conference or meeting

Relax and unwind

Education-related

Family vacation

Special event

Special occasion

Restaurants

Participate in a sporting event

Attractions

Shopping

Government-related

46%

22%

17%

40%

16%

27%

18%

9%

56%

7%

17%

26%

8%

Visitor Activities²

Key Motivations

Trip Enhancers

¹Top 13 reasons for visiting and corresponding activity data shown.
²Multiple responses permitted.



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Fiscal Year 2024 Economic Impact Report

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