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## LEON COUNTY Tourist Development Council

Thursday, February 5, 2026, 9:00 a.m.  
Leon County Office of Resource Stewardship  
The Gathering Room  
1907 South Monroe Street, Tallahassee FL 32301

### MEETING AGENDA

- I. Call to Order – **Chair**
- II. Request for Additional Agenda Items – **Chair**
- III. Public Comment
- IV. Items for Consent Approval – **Chair**
  - November 6, 2025, Meeting Minutes (T1)
  - Financial Reports: Division Budget FY 2026 YTD and the YTD Tourism Development Tax Collections and Smith Travel Report (T2)
  - Marketing Communications and Agency Activity, Visitor Services, Meetings & Group Sales, and Sports Sales Staff Reports (T3)
- V. General Business – **Chair**
  - Downs & St. Germain Research Presentation: FY26 Q1 Economic Impact Report (T4)
  - 2026 World Athletics Cross Country Championships Recap Presentation
  - Concert Update
  - Tallahassee Sports Council Update and 2<sup>nd</sup>-Cycle Sports Grants Recommendations
  - COCA Update
- VI. Executive Director's Report – **Kerri Post**
  - Amtrak Office Building Update
  - Legislative Session Status Update
- VII. Additional Business: “For the Good of the Cause” – **Chair**

Next TDC Meeting:

Thursday, May 7, 2026, 9:00 A.M.  
County Commission Chambers



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## LEON COUNTY TOURIST DEVELOPMENT COUNCIL MEETING MINUTES

Thursday, November 6, 2025, 9:00 a.m.  
Leon County Office of Resource Stewardship  
The Gathering Room  
1907 South Monroe Street, Tallahassee FL 32301

The Leon County Tourist Development Council met for a regular meeting with Chairperson Michelle Personette presiding. Council members present were City Commissioner Curtis Richardson, Mayor Pro Tem Dianne Williams-Cox, Russell Daws, Joshua Brock, Emily Johnson-Truitt, Matt Thompson, Carolanne Savage, Liaison Kathleen Spehar, and Liaison Amanda Heidecker. County Commissioner Bill Proctor was absent.

Tourism Staff present: Kerri Post, Jon LaBarre, Scott Lindeman, Genesis Leggett, Taylor Wheaton, Wendy Halleck, Bryan Smith, Janet Roach, Taylor Walker, Bailey Gleason, Shelby Bishop, and Trent Stukes (Intern).

The Chair called the meeting to order at 9:02 a.m.

**Request for Additional Agenda Items:** None

**Public Comment:** None

**Consent:**

Chair Personette entertained a motion for approval for the three items of consent:

1. Meeting Minutes November 6, 2025
2. Financial Reports: Division Budget FY 2025 YTD and the Tourism Development Tax Collection and Smith Travel Report
3. Marketing Communications and Agency Activity, Visitor Services, Meetings & Group Sales, and Sports Sales Staff Reports

***Mayor Pro Tem Williams-Cox moved, seconded by Russell Daws, for approval of the items on Consent. The motion passed unanimously, 7-0.***

**General Business:**

**Downs & St. Germain Research Presentation: FY 2025 Economic Impact Report** – Jordan Turner presented the FY 2025 Economic Impact Report. Visitor spending generated over \$1.4 billion in economic impact to Leon County's economy, up 8.4% from FY2024, dollars visitors spend is up 11.3%, visitor attraction is up 5.4%, room nights are up 6.1%, jobs are down 1.1%, wages are up 7.3% and TDT Collections are up 6.7%. The top visitor markets are Miami-Fort Lauderdale, Atlanta, Orlando, and Tampa. Discussion ensued.

**FY22-26 Tourism Strategic Plan Update – FY Year-end Recap** – Jon LaBarre presented updates on FY 2022 - FY2026 Tourism Strategic Plan including the "Bold Goal" to grow the tourism economic impact by generating \$5 Billion in economic impact over five years. The strategic priority and strategic goals

were achieved in four years with an economic impact of \$5.16B, 103.2% of the Bold Goal. Discussion ensued. As the end of the 5-year Strategic Plan draws near, Tourism Staff will present a timeline for the next Strategic Plan at the upcoming TDC Meeting.

Nominations for FY26 TDC Chair – Chair Personette asked for a nomination for the TDC FY26 Chair. Matt Thompson nominated Michelle Personette, who accepted the nomination and no other nominations were presented.

***Russell Daws moved, seconded by City Commissioner Richardson for approval for the appointment of Michelle Personette as the TDC 2026 Chairperson. The motion passed unanimously, 8-0.***

Proposed FY26 TDC Meeting Dates – Ms. Post presented the proposed TDC FY26 Meeting Dates for the TDC Boards consideration. Discussion ensued about the February meeting location. The Chair entertained a motion to keep the schedule as presented except for the February date being changed from Friday, February 6th to Thursday, February 5th, 2026, and the meeting will be held at the Leon County Office of Resource Stewardship, The Gathering Room since County Chambers will be unavailable.

Emily Johnson-Truitt inquired about the need for the July meeting date and Ms. Post referenced the statutory requirement for the TDC to meet a minimum of four times a year and recommending the July meeting date remain on the schedule with confirmation of the meeting to be determined prior to the July meeting date.

***Mayor Pro Tempore Williams-Cox moved, seconded by Russell Daws for the approval of the Proposed FY2026 TDC Meeting Dates with the February date being changed from February 6th to February 5<sup>th</sup>, 2026, and the meeting to be held at the Leon County Office of Resource Stewardship, The Gathering Room. The motion passed unanimously, 8-0.***

Worlds Athletics Cross Country Championships 2026 Update – 2+ Months to Go! – Taylor Wheaton and Amanda Heidecker presented updates for the January 10, 2026, Worlds Championship event. In October the team hosted World Athletics and technical partners for a readiness site visit and final review of the preparations for the event. So far over 400 athletes from 33+ federations have submitted intent to compete and local marketing activations efforts are ongoing Via the Fun Run, Leon County Schools, Tallahassee Turkey Trot and Jingle Bell Run. The Marketing and Sports Teams activated at Run Disney's event in Orlando as well. Medals designed by Florida State University Athletics Hall of Fame Jumper and 2008 Team USA Olympian, Rafeeq Curry are to be unveiled Monday, November 10th. Mayor Pro Tem Diane Williams-Cox invited Taylor and Amanda to present a WXC26 update at the next City Commission meeting. Local sponsors are being secured including TOC, ASTRO, Ology Brewing, and Publix.

Birmingham, AL Media Activation Recap & Social Media Milestone Highlight – Renee Jones and Janie Henker, (Zimmerman Agency) presented highlights of the Taste of Tallahassee media experience spotlighting the destination through food, storytelling and connection with a goal of generating editorial interest and social media buzz. Leon's at Lake Ella, Black Radish, Hearth & Soul, Lello Co., OLOGY Brewing Co, were all featured as well as Orchard Pond, Bradley's Country Store, Barbs Brittles & Lucky Goat. Also, in attendance were 15 media attendees ranging from regional media to local content creators and staff editors as well as freelancers for mainstream national publications.

Bryan Smith presented several social media highlights, including the Gladys Knight concert video which went viral with 575K + Impressions and 3800 engagements (a rate of 7.1%) marking the highest performing social media post to date.

Concert Update – Ms. Post presented concert updates, highlighting the John Williams Tribute by the

Tallahassee Symphony Orchestra on November 8, 2025, with the presenting sponsor. First Commerce Credit Union, which is celebrating their 85<sup>th</sup> anniversary in Tallahassee. Ms. Post stated the planning for the 2026 concerts is well underway with two concerts so far booked for spring, Toto, and Earth, Wind and Fire more shows in negotiation for fall.

Tallahassee Sports Council (TSC) Update – Amanda Heidecker – Ms. Heidecker thanked Mr. Brock for hosting the Sports Council Meeting at the Holiday Inn. She announced Visit Tallahassee won the Pepsi Bowling Championships bid and events have been secured for 2027, 2029 and 2031, and three Fishing tournaments have also been secured for 2026. She also highlighted several cross-country championship events hosted so far this year. Discussion ensued.

FY 26 COCA Amended Cultural Grant Applications Review – Chair Personette noted Tab 7 included several different memos, the memos explain COCA's funding process history to date as well as addressing several questions raised at the last TDC Council Meeting. Chairperson then asked Ms. Post to walk through the items in Tab 7.

Ms. Post reviewed COCA Grant Program Informational Update memo clarifying the grant application scoring process, scoring trends, and amount of funding disbursed during the 5-year contract between Leon County Division of Tourism/Visit Tallahassee and COCA, and included highlights of the new one-year contract extension assigning the TDC Chair or a designee to COCA's Grant Review Panel and emphasized the continued focus on reporting and alignment with F.S. 125.0104. Also under Tab 7 is a detailed explanation of areas of concern for each application pulled for Eligibility Verification Review and the adjustments to each application to become eligible. Ms. Spehar provided further explanation about the revision process of the grant applications. Discussion ensued.

The County Eligibility Verification Review of the 7 Grant applications pulled for review during the initial approval of the COCA Grant Recommendations at September 11, 2026, meeting were amended and presented for consideration of the TDC's approval. Ms. Post reviewed the following:

#3 Asian Coalition of Tallahassee, Inc. was approved as eligible with no revisions required, therefore, this application was moved forward with the previously FY26 COCA Grants approved in September.

The following four (4) applicants were amended and are now eligible:

#11 Florida State University-Challenger Learning Center  
#14 Institute for Music Business  
#17 Making Light Productions  
#23 Tallahassee Bach Parrley, Inc.

The following two (2) applicants withdrew their applications:

W/D #9 Enhanceability/Able Artist Gallery  
W/D #22 Strikers Youth Arts Project

***Russell Daws moved, seconded by Emily Johnson-Truitt for approval of the amended FY26 COCA Grant Applications The motion passed unanimously, 7-0 with Chair Personette recused.***

COCA Updates – Kathleen Spehar presented highlights for the year including over 2000 events occurring in FY 2025 with 50 events weekly on average. Three (3) different newsletters were published each month achieving a 38% open rate overall, and social media postings increased 17% year over year. The new COCA logo launched this week, and the look of social media and the website have been updated increasing the emphasis on marketing. Ms. Spehar highlighted the upcoming holiday festivals in November and December and announced COCA's 40<sup>th</sup> Anniversary is being celebrated with new sculptures in the downtown area, College Avenue and Adam Street. She also invited the TDC to COCA Fest on November 18<sup>th</sup>, at Goodwood Museum and Gardens.

Executive Director's Report – Ms. Post offered congratulations to COCA for their 40<sup>th</sup> anniversary and to Chair Michelle Personette for her reappointment as Chairperson of the TDC, and liaison to the COCA Board. Amtrak office building repairs are continuing and are anticipated to be completed next summer.

She commended the Tallahassee International Airport Team who are working with three (3) airlines being considered to add service to the Tallahassee Airport-Breeze, Avelo, and Southwest.

The Tallahassee Magazine featured a four-page spread on Worlds Athletics Cross Country Championships complemented by a two-page editorial dedicated to the global event. Additionally, the WXC26 Tallahassee marketing team has launched WXC26 print, radio, etc., and efforts will continue to accelerate as the event approaches.

Ms. Post announced Wendy Halleck's upcoming retirement Director of Visitor Services in early January, commending her as an incredible team member, who was instrumental in clarifying and streamlining the Tourism grants process Wendy has been a tremendous asset to the tourism team and we will miss her.

Additional Business: "For the Good of the Cause" – Chair Personette announced FSU/Doak Campbell Stadium is hosting the Professional Bull Riders tour along with two country music concerts, and the Savannah Bananas will be kicking off their 2026 World Tour at FSU, February 26-28. She shared renovations will be completed at the Turnbull Conference Center in January, which will include a kitchen dining experience with hospitality students preparing meals as guests watch. Also, the new FSU College of Business grand opening will be on December 9<sup>th</sup>.

Russell Daws announced the Tallahassee Museum worked with Ology Brewing Company to create a branded Tallahassee Museum Beer highlighting the Red Wolf.

Chair asked for a motion to Adjourn.

***Mayor Pro Tem Williams-Cox moved, seconded by City Commissioner Richardson for Adjournment of the November 6, 2025, meeting. The motion passed unanimously, 8-0.***

**Chairperson Personette – Meeting Adjourned at 11:02 a.m.**

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Attest: Michelle Personette, Chairperson

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Attest: Shelby Bishop, Witness

<p><u>Next TDC Meeting:</u> <b>Thursday, February 5, 2026, 9:00 A.M.</b> <b>Leon County Office of Stewardship</b> <b>The Gathering Room</b></p>
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**Leon County Tourist Development Council**

Statement of Cash Flow

Period Ending December, 2025

<b>4-Cents Collections</b>		YTD			December		FY 2025/26		% Revenue	
Acct #	REVENUES	Actuals		Actuals		Budget		Received	Variance	
312100	Local Option Tax (4-cents)	\$ 1,987,649.43	\$	\$ 564,079.78	\$	\$ 7,218,100.00		28%	(5,230,451)	
312110	Local Option (1-cent)	\$ 496,932.31	\$	\$ 141,039.89	\$	\$ 1,897,150.00		26%	(1,400,218)	
361320	Tax Collector FS 219.075	\$ 5,198.62	\$	\$ -	\$	\$ -		0%	5,199	
361111	Pooled Interest Allocation	\$ -	\$	\$ -	\$	\$ 236,550.00		0%	(236,550)	
365000	Merchandise Sales	\$ 3,159.77	\$	\$ 381.30	\$	\$ 9,795.00		32%	(6,635)	
366500	Special Event Grant Reimbursements	\$ -	\$	\$ -	\$	\$ 150,000.00		0%	(150,000)	
366930	Other Contributions/Partnerships	\$ -	\$	\$ -	\$	\$ -		0%	-	
361300	Interest Inc/FMV Adjustment	\$ -	\$	\$ -	\$	\$ -		0%	-	
369900	Miscellaneous Revenue	\$ 74,898.49	\$	\$ 56,495.00	\$	\$ 407,550.00		18%	(332,652)	
399900	Appropriated Fund Balance	\$ -	\$	\$ -	\$	\$ 303,197.00		0%	(303,197)	
									-	
	Total Estimated Receipts	\$ 2,232,030.65	\$	\$ 615,602.28		\$ 10,222,342		0%	(5,230,451)	
<b>Acct # EXPENDITURES</b>		YTD			December		FY 2025/26		% Budget	
Acct #	Administration (301)/Marketing (303)	Actuals		Actuals		Adopt. Budget		FY 2025/26	Spent	Under/(Over)
51200	Salaries & Wages	\$ 245,468.01	\$	\$ 75,207.18	\$	\$ 1,016,532.00	\$	\$ 1,010,014.00	24%	\$ 764,546
51250	Regular OPS Salaries & Wages	\$ 22,637.91	\$	\$ 7,479.86	\$	\$ 210,042.00	\$	\$ 189,570.00	12%	166,932
51500	Special Pay	\$ 12.62	\$	\$ 7.57	\$	\$ -	\$	\$ -	0%	(13)
52100	FICA	\$ -	\$	\$ -	\$	\$ 3,600.00	\$	\$ 3,700.00	0%	3,700
52200	Retirement Contributions	\$ 19,435.43	\$	\$ 6,111.84	\$	\$ 91,224.00	\$	\$ 92,614.00	21%	73,179
52210	Deferred Compensation	\$ 44,761.29	\$	\$ 13,693.65	\$	\$ 199,159.00	\$	\$ 198,949.00	22%	154,188
52300	Life & Health Insurance	\$ -	\$	\$ -	\$	\$ 1,566.00	\$	\$ 1,566.00	0%	1,566
52400	Workers Compensation	\$ 41,488.95	\$	\$ 8,512.03	\$	\$ 244,421.00	\$	\$ 242,307.00	17%	200,818
53400	Other Contractual Services	\$ 301,413.26	\$	\$ 203,015.02	\$	\$ 643,711.00	\$	\$ 986,711.00	31%	685,298
54000	Travel & Per Diem	\$ 5,764.53	\$	\$ 3,884.60	\$	\$ 108,890.00	\$	\$ 116,590.00	5%	110,825
54100	Communications Services	\$ 42.90	\$	\$ -	\$	\$ 9,600.00	\$	\$ 9,600.00	0%	9,557
54101	Communications - Phone System	\$ -	\$	\$ -	\$	\$ 102.00	\$	\$ 102.00	0%	102
54200	Postage	\$ -	\$	\$ -	\$	\$ 15,000.00	\$	\$ 15,000.00	0%	15,000
54400	Rental & Leases	\$ 2,135.35	\$	\$ 833.00	\$	\$ 31,090.00	\$	\$ 31,090.00	7%	28,955
54505	Vehicle Coverage	\$ -	\$	\$ -	\$	\$ 747.00	\$	\$ 873.00	0%	873
54600	Repair & Maintenance	\$ -	\$	\$ -	\$	\$ 6,597.00	\$	\$ 6,597.00	0%	6,597
54601	Vehicle Repair	\$ -	\$	\$ -	\$	\$ 1,136.00	\$	\$ 1,125.00	0%	1,125
54700	Printing	\$ 480.86	\$	\$ -	\$	\$ 10,000.00	\$	\$ 30,000.00	2%	29,519
54800	Promotional Activities	\$ 6,887.37	\$	\$ 3,370.02	\$	\$ 41,299.00	\$	\$ 41,299.00	17%	34,412
54860	TDC Direct Sales Promotions	\$ 7,275.00	\$	\$ 2,850.00	\$	\$ 73,958.00	\$	\$ 98,958.00	7%	91,683
54861	TDC Community Relations	\$ -	\$	\$ -	\$	\$ 54,632.00	\$	\$ 94,632.00	0%	94,632
54862	TDC Merchandise	\$ 301.50	\$	\$ -	\$	\$ 41,254.00	\$	\$ 41,254.00	1%	40,953
54900	Other Current Charges	\$ 623,833.63	\$	\$ 211,391.38	\$	\$ 1,609,720.00	\$	\$ 1,930,189.00	32%	1,306,355
54948	Other Current Chrg - Amphitheater	\$ 65,535.41	\$	\$ 22,135.00	\$	\$ 598,780.00	\$	\$ 848,780.00	8%	783,245
55100	Office Supplies	\$ 46.72	\$	\$ -	\$	\$ 16,625.00	\$	\$ 16,625.00	0%	16,578
55200	Operating Supplies	\$ 1,906.75	\$	\$ -	\$	\$ 18,225.00	\$	\$ 18,225.00	10%	16,318
55210	Fuel & Oil	\$ -	\$	\$ -	\$	\$ 498.00	\$	\$ 335.00	0%	335
52250	Uniforms	\$ -	\$	\$ -	\$	\$ 6,000.00	\$	\$ 11,000.00	0%	11,000
55400	Publications, Memberships	\$ 9,374.98	\$	\$ -	\$	\$ 49,296.00	\$	\$ 49,296.00	19%	39,921
55401	Training	\$ -	\$	\$ -	\$	\$ 13,000.00	\$	\$ 13,000.00	0%	13,000
56400	Machinery & Equipment	\$ -	\$	\$ -	\$	\$ -	\$	\$ -	0%	-
58160	TDC Local T&E	\$ 1,931.75	\$	\$ 271.88	\$	\$ 3,500.00	\$	\$ 3,500.00	55%	1,568

Acct #	EXPENDITURES	YTD		December		FY 2025/26		FY 2025/26		% Budget Spent	Under/ (Over)
		Actuals	Actuals	Actuals	Actuals	Adopt. Budget	Adj. Budget	Actuals	Actuals		
58320	Sponsorship & Contributions	\$ 11,575.00	\$ -	\$ 86,431.00	\$ 86,431.00	\$ 86,431.00	\$ 86,431.00	13%	74,856		
<b><u>Advertising/Public Relations (302)</u></b>											
53400	Other Contractual Services	\$ 275,663.67	\$ 100,232.57	\$ 1,500,000.00	\$ 2,365,000.00	\$ 2,365,000.00	\$ 2,365,000.00	12%	\$ 2,089,336		
54900	Other Current Charges & Obligations	\$ 9,003.04	\$ 6,603.04	\$ -	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	36%	\$ 15,997		
55408	Machinery and Equip 1,000-19,999	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	\$ -		
<b><u>Special Events/Grants (304)</u></b>											
58300	Grants & Aids	\$ 4,887.40	\$ 4,887.40	\$ 800,000.00	\$ 800,000.00	\$ 800,000.00	\$ 800,000.00	1%	795,113		
<b><u>Welcome Center CIP (086065)</u></b>											
56200	Building	\$ -	\$ -	\$ 208,101.00	\$ 208,101.00	\$ 208,101.00	\$ 208,101.00	0%	208,101		
56410	Infrastructure Less Than 200,000	\$ -	\$ -	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	0%	50,000		
<b><u>Countywide Automation (470)</u></b>											
54110	Com-net Communications	\$ -	\$ -	\$ -	\$ 11,958.00	\$ 11,958.00	\$ 11,958.00	0%	11,958		
54600	Repairs and Maintenance	\$ -	\$ -	\$ -	\$ 7,015.00	\$ 7,015.00	\$ 7,015.00	0%	7,015		
<b><u>Risk Allocations (495)</u></b>											
54500	Insurance	\$ -	\$ -	\$ -	\$ 12,924.00	\$ 12,924.00	\$ 12,924.00	0%	12,924		
54506	Property Insurance	\$ -	\$ -	\$ -	\$ 7,171.00	\$ 7,171.00	\$ 7,171.00	0%	7,171		
<b><u>Indirect Cost (499)</u></b>											
54900	Indirect Cost Charges	\$ -	\$ -	\$ -	\$ 374,000.00	\$ 374,000.00	\$ 374,000.00	0%	374,000		
<b><u>Line Item Funding - (888)</u></b>											
58214	Cultural Facilities Grant Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		-		
58215	Local Arts Agency Program	\$ -	\$ -	\$ 1,679,693.00	\$ 1,897,150.00	\$ 1,897,150.00	\$ 1,897,150.00	0%	1,897,150		
<b><u>Transfers (950)</u></b>											
591220	Transfer to Fund 220	\$ 2,579.92	\$ -	\$ -	\$ 30,959.00	\$ 30,959.00	\$ 30,959.00	-	28,379		
591001	Transfer to Fund 001	\$ 39,166.67	\$ -	\$ -	\$ 470,000.00	\$ 470,000.00	\$ 470,000.00	-	430,833		
<b><u>Salary Contingency (990)</u></b>											
59900	Other Non-operating Uses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		-		
	Reserve for Fund Balance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		-		
	Total Expenditures	\$ 1,743,609.92	\$ 670,486.04	\$ 9,444,429	\$ 12,449,210	\$ 12,449,210	\$ 12,449,210	14%	(10,705,600)		

Acct #	EXPENDITURES (305)	YTD		December		FY 2025/26		FY 2025/26		% Budget Spent	Under/ (Over)
		Actuals	Actuals	Actuals	Actuals	Adopt. Budget	Adj. Budget	Actuals	Actuals		
58100	Aids to Government Agencies	\$ -	\$ -	\$ -	\$ -	\$ 547,561.00	\$ 547,561.00	\$ 547,561.00	\$ 547,561.00	0%	547,561
	Total Expenditures	\$ -	\$ -	\$ -	\$ -	\$ 547,561.00	\$ 547,561.00	\$ 547,561.00	\$ 547,561.00	0%	547,561

## NOTES TO THE FINANCIAL STATEMENT

As of December 31, 2025

### REVENUES

<sup>1</sup> - Revenue for the 4-cent collections \$ 1,987,649.43 Collections are on track to budget and are down to FY25 by (11%) through Q1 FY26

<sup>2</sup> - Revenue for the 1-cent collections \$ 496,932.31

<sup>3</sup> - Revenue collected in Advance \$ 74,898.54

### EXPENSES

Worlds Expenses increased significantly during Q1 FY26 as expected and are reflected in Other Contractual Services (302-53400 and 303-53400) and Other Current Charges (303-54900).

**Leon County Tourist Development Council  
Local Option Tourist Development Tax Collections  
(Bed Tax Revenues)**

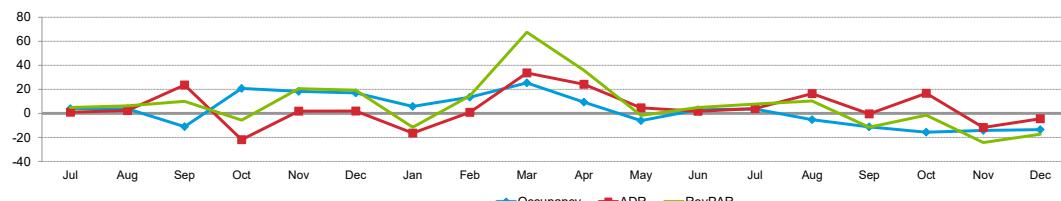
Tab 2 - Trend Leon County, FL

Currency: USD - US Dollar

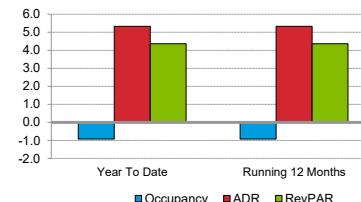
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For the Month of December 2025

## Monthly Percent Change



## Overall Percent Change



Occupancy (%)	2024						2025												Year To Date			Running 12 Months			
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023	2024	2025	2023	2024	2025	
This Year	57.7	68.1	62.2	74.7	69.5	60.1	61.3	73.3	76.2	67.0	61.4	67.8	59.7	64.6	55.2	63.0	59.6	52.0	61.6	64.0	63.4	61.6	61.6	64.0	
Last Year	55.5	65.6	62.9	61.9	58.7	51.4	58.0	64.6	60.8	61.3	65.3	65.8	57.7	68.1	62.2	74.7	69.5	60.1	61.3	61.6	64.0	61.3	61.6	64.0	
Percent Change	4.0	3.8	-11.0	20.8	18.3	17.0	5.8	13.5	25.4	9.4	-6.0	3.1	3.6	-5.2	-11.2	-15.7	-14.2	-13.5	0.5	3.8	-0.9	0.5	3.8	-0.9	
ADR	2024						2025												Year To Date			Running 12 Months			
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023	2024	2025	2023	2024	2025	
This Year	100.20	125.81	150.01	137.73	149.37	113.92	114.05	133.18	155.53	138.52	140.13	111.79	104.21	146.46	149.41	160.79	131.90	108.83	126.69	126.87	133.63	126.69	126.87	133.63	
Last Year	99.26	122.86	121.32	176.28	146.58	111.76	136.37	132.01	116.36	111.54	133.96	109.86	100.20	125.81	150.01	137.73	149.37	113.92	117.63	126.69	126.87	117.63	126.69	126.87	
Percent Change	0.9	2.4	23.6	-21.9	1.9	1.9	-16.4	0.9	33.7	24.2	4.6	1.8	4.0	16.4	-0.4	-16.7	-11.7	-4.5	7.7	0.1	5.3	8.2	4.0	4.4	
RevPAR	2024						2025												Year To Date			Running 12 Months			
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023	2024	2025	2023	2024	2025	
This Year	57.77	85.71	93.35	102.90	103.74	68.49	69.95	97.66	118.56	92.82	85.98	75.84	62.26	94.55	82.53	101.32	78.58	56.59	78.06	81.16	84.70	78.06	81.16	84.70	
Last Year	55.04	80.60	84.84	109.05	86.03	57.41	79.07	85.26	70.75	68.33	87.44	72.30	57.77	85.71	93.35	102.90	103.74	68.49	72.14	78.06	81.16	72.14	78.06	81.16	
Percent Change	5.0	6.3	10.0	-5.6	20.6	19.3	-11.5	14.5	67.6	35.8	-1.7	4.9	7.8	10.3	-11.6	-1.5	-24.3	-17.4	8.2	4.0	4.4	8.2	4.0	4.4	
Supply	2024						2025												Year To Date			Running 12 Months			
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023	2024	2025	2023	2024	2025	
This Year	201,376	203,763	197,190	199,578	191,700	198,090	198,090	178,920	199,950	193,500	199,950	193,500	199,950	193,500	199,950	193,500	194,990	2,338,384	2,379,996	2,345,750	2,338,384	2,379,996	2,345,750		
Last Year	198,152	198,152	191,760	198,059	191,670	203,639	183,932	203,639	197,070	203,639	196,380	201,376	203,639	197,190	199,578	191,700	198,090	2,360,501	2,338,384	2,379,996	1,447,659	1,440,882	1,522,535		
Percent Change	1.6	2.8	2.8	0.8	0.0	-2.7	-2.7	-1.8	-1.8	-1.8	-1.5	-0.7	-1.9	0.2	0.9	-1.6	-14.9	-0.9	1.8	-1.4	-0.5	5.7	-2.3	-2.3	
Demand	2024						2025												Year To Date			Running 12 Months			
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023	2024	2025	2023	2024	2025	
This Year	116,115	138,811	122,713	149,111	133,143	119,083	121,501	131,207	152,419	129,654	122,682	131,267	119,450	129,081	106,884	125,996	115,272	101,391	1,440,882	1,522,535	1,486,804	1,440,882	1,522,535	1,486,804	
Last Year	109,886	129,990	134,103	122,526	112,488	104,610	118,072	118,798	123,819	120,717	132,916	129,237	116,115	138,811	122,713	149,111	133,143	119,083	1,447,659	1,440,882	1,522,535	1,447,659	1,440,882	1,522,535	
Percent Change	5.7	6.8	-8.5	21.7	18.4	13.8	2.9	10.4	23.1	7.4	-7.7	1.6	2.9	-7.0	-12.9	-15.5	-13.4	-14.9	-0.5	5.7	-2.3	-0.5	5.7	-2.3	-2.3
Revenue	2024						2025												Year To Date			Running 12 Months			
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023	2024	2025	2023	2024	2025	
This Year	11,634,403	17,464,142	18,407,722	20,536,822	19,887,756	13,566,524	13,857,328	17,473,749	23,706,423	17,959,838	17,191,691	14,674,297	12,448,118	18,905,062	15,969,974	20,258,724	15,204,819	11,034,829	182,545,447	193,156,904	198,684,853	182,545,447	193,156,904	198,684,853	
Last Year	10,906,787	15,971,075	16,269,697	21,598,724	16,488,663	11,691,302	16,101,166	15,682,498	14,407,200	13,464,900	17,805,531	14,198,241	11,634,403	17,464,142	18,407,722	20,536,822	19,887,756	13,566,524	170,282,357	182,545,447	193,156,904	170,282,357	182,545,447	193,156,904	
Percent Change	6.7	9.3	13.1	-4.9	20.6	16.0	-13.9	11.4	64.5	33.4	-3.4	3.4	7.0	8.3	-13.2	-1.4	-23.5	-18.7	7.2	5.8	2.9	7.2	5.8	2.9	
Census %	2024						2025												Year To Date			Running 12 Months			
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023	2024	2025	2023	2024	2025	
Census Props	67	68	68	67	66	66	66	67	67	67	67	67	67	67	67	67	67	66	67	67	67	67	67	67	66
Census Rooms	6496	6573	6573	6438	6390	6390	6390	6450	6450	6450	6450	6450	6450	6450	6450	6450	6450	6450	6290	6290	6290	6290	6290	6290	6290
% Rooms Participants	94.1	92.6	92.6	92.5	92.3	92.3	92.3	92.4	92.4	92.4	92.4	92.4	92.4	92.4	92.4	92.4	92.4	92.4	94.8	94.8	94.8	94.8	94.8	94.8	94.8

A blank row indicates insufficient data.

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## AT A GLANCE



**FY 2026 Media Value**  
YTD: \$130,000.

Media Value Oct. - Dec.  
\$130,000.



**FY 2025 Earned Media Stories**  
YTD: 32

Media Stories Oct. - Dec.: 32



**Social Media Followers**  
Facebook: 128,791  
Instagram: 38,760



**Consumer E-Newsletters**  
Sent: 5 YTD: 5



VT Marketing partnered with Leon County Community & Media Relations to "dress the town," activating Tallahassee as a **World Championship Community**.

# MARKETING COMMUNICATIONS

## October-December 2025

Scott Lindeman, Senior Marketing Director  
Genesis Leggett, Marketing Communications Director  
Bryan Smith, Digital Content Director  
Renee Jones, PR/Marketing Specialist

## HIGHLIGHTS

### OCTOBER

- Executed the **Taste of Tallahassee** activation in Birmingham, AL, with support from six local partners. The immersive experience highlighted Tallahassee's unique dining, shopping, arts, and culture scene for national and regional journalists and content creators.
- Finalized partnership with accessibility focused media outlet **Wheel the World** to enhance promotion of Tallahassee-Leon County as an accessible travel destination.
- Launched a three-day activation at the **runDisney Health & Fitness Expo**, reaching 38,000+ runners and driving engagement and registrations for WXC Tallahassee 26. The activation featured a 360° VR experience showcasing Apalachee Regional Park and positioning Tallahassee as a premier sports and outdoor destination.



- Staff represented the Division at the **FAMU Economic Brunch**.
- Presented marketing progress to the World Athletics team during the WXC Tallahassee 26 readiness site visit.
- Staff led the Hospitality World at **World of Work** in partnership with Tallahassee Chamber, TSC, Lively Technical College and local economic and workforce development partners. Tourism staff participated in introducing area high-school students to potential career paths in the tourism industry.
- Staff attended collaboration launch featuring partners **Ology Brewing Co.** and the **Tallahassee Museum**.
- The Division supported seven-time GRAMMY Award winner, **Gladys Knight**, during her concert performance at the Adderley Amphitheater.



## HIGHLIGHTS

### NOVEMBER

- Supported A **John Williams Cinematic Celebration** with the **Tallahassee Symphony Orchestra** at the Adderley Amphitheater. John Williams, one of the most iconic film composers in history, is known for creating the soundtracks for films such as Star Wars, Jurassic Park, E.T., Indiana Jones, Harry Potter, Jaws, and Superman.
- Staff teamed up with **Zimmerman PR** to hand deliver WXC promotional baskets to local media outlets to support the WXC Tallahassee 26 medal reveal.
- Staff executed an activation at the annual **Tallahassee Turkey Trot**, reaching over 5,600 runners and families, driving registration and engagement for WXC Tallahassee 26.

### DECEMBER

- Staff executed an activation at the **Tallahassee Chamber Professional Women's Forum** to promote local corporate participation in WXC Tallahassee 26, engaging potential runners and businesses.
- Visited **Earley's Kitchen** to experience their dinner offerings and to observe the latest renovations to the restaurant.
- As a result of the Birmingham activation, the team quickly secured and executed an editorial feature in **Good Grit magazine**, which featured a cover shot and features on multiple Tallahassee restaurants.
- Hosted content creator **@TheMillennialSAHM (Kermelia White)** as a result of the Taste of Tallahassee activation in Birmingham, Al.
- Staff filmed Team **USA Olympic runner Graham Blank** to highlight the cross country course at Apalachee Regional Park and promote Tallahassee as a cross country destination.
- Marketing staff participated in the **BioChar Project** in conjunction with the Leon County Sustainability Department, providing 500 biochar shoe insert gifts for WXC Tallahassee 26 volunteers.
- The Division supported the **WXC Tallahassee 26 official Volunteer Meeting** and training, ensuring volunteers were well-equipped to support visitors and staff as ambassadors for WXC Tallahassee 26.
- Staff executed the **"Countdown at Cascades"** New Year's Eve event at Cascades Park, which included an activation promoting the World Cross Country Championships.



### ON THE HORIZON

- World Athletics Cross Country Championships Recap
- 2026 Visit Tallahassee Visitor Guide Launch
- Destination's International Marketing Summit
- **Spring Concerts** at The Adderley Amphitheater
  - TOTO, February 26
  - Lake Street Drive, April 23
  - Earth, Wind & Fire, April 24
  - Alabama Shakes, April 28



# Digital Marketing Highlights



## Gladys Knight at The Adderley Amphitheater

Highlighting the legendary Gladys Knight's performance, the Reel achieved historic metrics, becoming the destination's highest-performing social media video to date. The post generated over 636,000 impressions and garnered more than 41,500 engagements, garnering a remarkable 7% engagement rate. The piece resonated deeply with a dedicated Facebook audience, driving widespread shares and overwhelmingly positive sentiment.

## Downtown Holiday Lights Feature

A seasonal Reel highlighting the holiday light display at McCarty Park served as a powerful visual showcase for Downtown Tallahassee. By emphasizing the "twinkling wonderland" atmosphere and promoting it as a free family-friendly attraction, the video amassed 520,000 total views and 11,500 engagements. The content resonated strongly on Instagram, achieving a remarkable 9.5% engagement rate, underscoring the high demand for accessible, family-friendly seasonal experiences.



## Major Event Amplification (Savannah Bananas & PBR)

A timely reshare of the Savannah Bananas - Banana Ball tour stop at FSU generated viral momentum on Facebook, earning 253,000 views and 16,000 interactions with a robust 6.4% engagement rate. Similarly, a reshare of the PBR (Professional Bull Riders) music lineup at Doak Campbell garnered 127,000 views and nearly 6,000 engagements. These posts demonstrate the high ROI of joining the conversation and successfully positioning the destination as a hub for national-level entertainment.

### DIGITAL MARKETING KPI

2025/2026 GOALS	ANNUAL GOAL	QUARTERLY RESULT	% OF GOAL
Maintain an average open rate of over 35% for consumer email campaigns.	35%	39%	N/A
Net increase annual Facebook followers by 25,000	25,000	5,379	22%
Net increase annual Instagram followers by 2,500	2,500	1,695	68%
Increase annual Mobile App downloads by 1,000	1,000	392	39%

# Public Relations Visit Tallahassee

- Executed the Taste of Tallahassee activation in Birmingham with key local restaurants and business partners – hosting top-tier writers and creators including, but not limited to, **Country Living, Southern Lady, Good Grit, Garden & Gun** and more.
- Secured dedicated features within **Wherever Family, Flamingo** and across **Good Grit Magazine**'s social channels.
- Coordinated a drive market radio promotion with **WEAT-FM** – the No. 1 overall station in West Palm Beach – spreading awareness for WXC Tallahassee 26, valued at \$30,000.
- As a result of the Birmingham Media Mission, hosted content creator **Kermilia White** of **@TheMillennialSAHM**, a Birmingham-based lifestyle blogger reaching 45K+ combined followers - resulting in a blog post titled, "48 Hours in Tallahassee -Complete Weekend Itinerary: Food, Fun, and Culture," along with 49 social media posts, featuring 15+ local partners.

## WHEREVER FAMILY



Can't get enough of Hallmark's holiday movie collection? Bring your family on a trip this season to one of these small towns that feel like you're living out a Christmas movie.



**Tallahassee, Florida**  
Christmastime in Tallahassee is known for its blend of history and holiday cheer. The city hosts many popular seasonal celebrations from holiday markets and light shows to *The Nutcracker* performances and tree lightings.

## WXC Tallahassee 26 Advertising & Public Relations

### WXC TALLAHASSEE 26 COVERAGE AT A GLANCE

Combined Potential Reach



Domestic Earned Media Value  
**\$16.8 MILLION**



Organic Articles  
**250 and counting**

- Partnering with The Zimmerman Agency, we were able to execute a comprehensive national advertising campaign to promote awareness, ticket sales and fun-run registrations. Through targeted digital campaigns, we successfully attracted attendees **from all 50 states and 14 countries**.
- Produced :15 & :30 second commercials that ran on digital platforms across the country, generating millions of impressions.
- Partnered with influential content creators for both event destination promotion through hosted experiences with The Stride Report and **@BelowAverageRunning**.
- Generated excitement for the Championships through nationwide press release distributions promoting ticket sales, medal reveal, and course highlights that were picked up by news outlets all across the country, securing placements within **Yahoo Sports, Athletics Weekly, Newsbreak, Tallahassee Democrat, The Stride Report, WCTV, WTXL, Live in Tallahassee and more**.
- Coordinated and executed numerous local and national media interviews, podcasts and streaming media services including.
- Domestic PR efforts led to over 250 earned media placements reaching a potential audience of over 2 Billion with an estimated media value of nearly \$17 million.**

# WXC Tallahassee 26 Advertising Samples



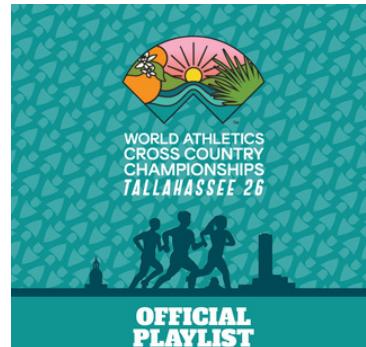
Digital Ads



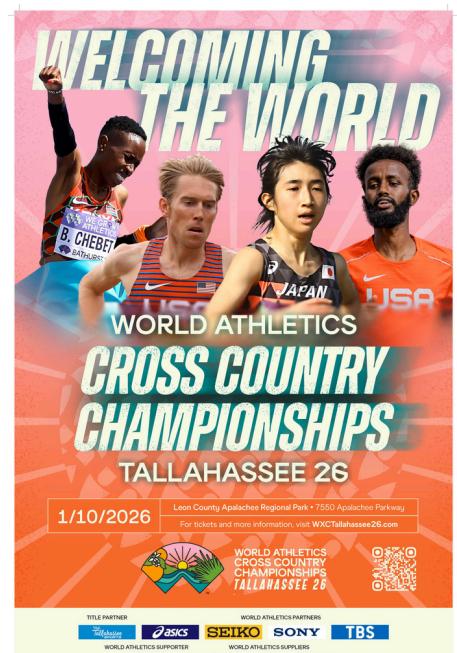
Billboards



Street Signs



Spotify Streaming Radio



Print Advertising



Television Commercials



## AT A GLANCE

### 2025-2026 Grant Program

**18 Legacy, Special & Sports events**

**held**

**1 Special event forfeited**

**8 Post Event Reports processed**

.6% of grant budget paid to grantees

(\$4,887 paid of \$792,290 grant budget)



## Visitor Services

**October - December 2025**

**Visitor Guides Distributed: 3,027**

### Group Services and Welcome Bags

**12 requests servicing 1,004 visitors**

Visitor Center Walk-Ins: 652

Visitor Center Calls: 234



### **Gift Shop Sales:**

**\$5,267.18**

# **VISITOR SERVICE & GRANT MANAGEMENT**

October - December 2025

Wendy Halleck, Visitor Services Director

Julie Trezek, Grants & Contracts Manager

## MISSION STATEMENT

Enrich the destination experience for visitor, engage the local community, and increase knowledge of Tallahassee/Leon County as a tourism destination.

## HIGHLIGHTS

- Promoted the World Athletics Cross Country Championships by displaying promotional signage for two months and distributing free stickers to visitors.
- Assisted patrons making travel plans to attend WXC Tallahassee 26 with information on accommodations, tickets, dining and shopping options.
- Collaborated with local, regional and state agencies to add new brochures to the Visitor Information Center.
- Added new locally made products to the Visitor Center Gift Shop including stickers, beeswax wraps, glass art decorations, state outline shot glasses, locally produced jellies and jams, Christmas ornaments from FSU, FAMU and local artists.
- Held first of two Grant Implementation Workshops for FY26 grantees.



## ON THE HORIZON

- Grant Implementation Workshop #2 for FY2025/26 Grantees.
- Expand Visitor Center retail offerings with a wider variety of apparel, postcards, and locally made food items such as hot sauces and jams.
- Begin bi-monthly testing of the Redwire alarm system, conducted every odd-numbered month.
- Participate in community events by hosting Visit Tallahassee booth or table at events including Springtime Tallahassee, Chain of Parks Art Festival, Word of South, and Pridefest.
- Begin search for new Visitor Services Director upon the retirement of Wendy Halleck in January.



Visit  
**Tallahassee**  
Pretty. Unexpected.

## GOAL AT A GLANCE

Meetings & Groups FY 2026

Room Nights Goal:

**14,000**

Meetings & Groups

YTD Room Nights: 1,425

## ON THE HORIZON



Janet Roach will be exhibiting and participating at several upcoming meeting planner events to promote the Capital City.

**SGMP Meeting** - February 17

**Rendezvous South** - March 2-5

**Destinations of Florida** - March 24

**FSAE Women's Summit** - March 25

**FSAE Roundtable** - March 31



## MEETINGS & GROUP SALES

October-December 2025

Janet Roach, Meetings & Group Sales Director

## MISSION STATEMENT

Promoting meetings, conventions, and group travel through strategic engagement with planners, decision makers, and targeted audience segments, while collaborating with local industry partners to create memorable experiences for group visitors to positively impact the local economy.

## HIGHLIGHTS

- Attended the **StayAPT Suites Tallahassee-Capitol's** Grand Opening and Ribbon Cutting, marking the brand's third Florida property. This rapidly expanding extended-stay brand offers apartment-style suites with full kitchens and separate bedrooms, delivering a true "home-away-from-home" experience.
- Actively developing opportunities for Visit Tallahassee to **expand visibility in the travel trade segment**, including tour operators and travel advisors. Engaging with the North Florida Chapter of the American Society of Travel Advisors and participating in Florida Huddle to build relationships and promote Tallahassee to international and domestic travelers.
- Exhibited at the **Florida Society of Association Executives (FSAE) Education Expo** on October 7 alongside the Tucker Center team and other industry partners top-of-mind destination for future meetings and conventions.
- Serving as staff lead for eight social functions associated with the World Athletics Championships, coordinating pre-event planning and logistics for events designed for VIPs, sponsors, athletes, and officials.
- Represented the division at the **North Florida Worlds of Work** event, coordinating a "Plan a Day in Tallahassee" activity to build awareness of tourism and hospitality career pathways for the over 3,000 ninth grade students.
- Managed menu selection, vendor coordination, and onsite logistics for the **Gladys Knight pre-concert reception**.



## GOAL AT A GLANCE

**FY 2025-2026**

**Room Nights Goal:**

**25,000**

**YTD Room Nights:**

**14,972**



Hosted the 2025 NAIA Cross Country National Championships and Experience banquet.



Sports and Marketing teamed up to promote WXC Tallahassee 26 at 2025 Fall Run Disney Expo.



## **SPORTS**

**October-December 2025**

Taylor Wheaton, Senior Sports Director

Taylor Walker, Sports Director

Bailey Geason, Assistant Sports Director

## HIGHLIGHTS

- October 14<sup>th</sup> - 17<sup>th</sup>: Hosted **World Athletics** for the final readiness site visit for the **World Cross Country Championships** in January.
- October, Taylor Walker attended the **United States Bowling Congress** annual meeting where we were awarded the **2027, 2029, & 2031 Youth Bowling Championships**.
- Taylor Wheaton attended the **Compete Sports Network: Women's Sports Leadership & Business Summit** a two-day education conference hosted in Tampa, FL for the advancement of women in sports.
- Closed out the Fall Cross Country season by hosting a full slate of premier events, including the HOKA Nights of Thunder XC Festival, FSU Seminole Invite, NJCAA Regional Championships, FSU Invitational Pre-State, SWAC Cross Country Championships, NAIA Cross Country National Championships, and rounded out Fall 2025 with the FHSAA XC State Championships for the **14th consecutive year**.
- November 21<sup>st</sup> -23<sup>rd</sup> : Supported the **SWAC Volleyball Conference Championship**.



- Staff participated in multiple speaking engagements for classes with the **FSU Deadman College of Hospitality** on Sports Tourism and the Customer Service Experience.
- Participating for the second year, the VT Sports team joined the **2025 Sport Management Conference at FSU** for the Networking Fair.
- In December, Bailey Geason attended the **US Sports Congress**, a four-day conference where she solicited new business, attended education sessions, and networked with our peers across the country.

# LEON COUNTY DIVISION OF TOURISM – VISIT TALLAHASSEE

October-December 2025  
(FY2026 Q1)  
Visitor Tracking Study



# METHODOLOGY



## Data Collection:

From October 1, 2025, to December 31, 2025, **536** visitors\* were interviewed in person at various locations including the airport, Cascades Park, the Tallahassee Museum, and special events.

## Economic Impact:

Economic impact figures are based on all visitor types, including those staying in paid accommodations, unpaid accommodations, and day trippers.

*Note: The sampling error for a sample size of 536 is  $\pm 4.23\%$  points given a 95% confidence level. That is, we are very certain (95%) that the results in our Visitor Profile Study are within 4.23% points of the “true” value on a quarterly basis.*

\*Tallahassee attracts distinct visitor profiles each quarter; this data represents the typical Q1 visitor, whose travel patterns are influenced by football season.

# WHAT HAPPENED IN TALLAHASSEE FY26 Q1



FAMU Homecoming

4 FSU Home Football Games

3 FAMU Home Football Games

6 Cross Country Events

ASG Academy Cup

Market Days

2 Fall Concerts



Visit  
**Tallahassee**  
Pretty. Unexpected.



# ECONOMIC IMPACT SUMMARY

# KEY PERFORMANCE INDICATORS FY26 Q1\*

A 9.8% YOY decrease in overnight visitors staying in paid accommodations led to decreases in occupancy and room nights in FY26 Q1. However, increases in unpaid overnight visitors and day trippers buffered these changes, resulting in 1.4% decreases in total visitors and in spending.



701,100

**Total  
Visitors**

- 1.4% from FY25



358,500

**Room  
Nights**

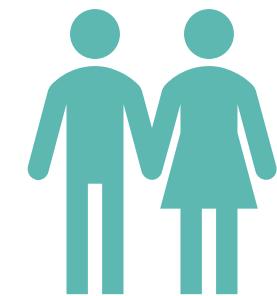
- 14.0% from FY25



\$240,144,400

**Direct  
Spending**

- 1.4% from FY25



56.6%

**Occupancy Rate**

- 14.3% from FY25



Visit  
**Tallahassee**  
Pretty. Unexpected.

\*Sources: Smith Travel Research, Key Data (via Zartico), and DSG Visitor Tracking Study

# LODGING METRICS FY26 Q1

## COMBINED

	56.6%		\$138.30		6,874		\$2,484,661.52
<b>Occupancy</b>		<b>Average Daily Rate</b>		<b>Available Units</b>		<b>TDT Collections</b>	
- 14.3% from FY25		- 3.0% from FY25		+ 0.3% from FY25		- 10.5% from FY25	

## HOTELS<sup>1</sup>

	57.9%		\$133.11		6,563
<b>Occupancy</b>		<b>Average Daily Rate</b>		<b>Available Units</b>	
- 14.4% from FY25		+ 0.2% from FY25		- 0.6% from FY25	

## VACATION RENTALS<sup>2,3</sup>

	29.6%		\$248.00		311
<b>Occupancy</b>		<b>Average Daily Rate</b>		<b>Available Units</b>	
+ 18.5% from FY25		+ 44.2% from FY25		+ 23.1% from FY25	

<sup>1</sup> Hotel source: Smith Travel Research

<sup>2</sup> Vacation rental source: Key Data (via Zartico)

<sup>3</sup> Vacation rental metric changes have limited impact overall due to their much smaller unit share.



Visit  
**Tallahassee**  
Pretty. Unexpected.



# VISITOR PROFILE SUMMARY

# MAIN REASONS FOR VISITING FY26 Q1\*

## What was your main reason for taking this trip to the area?



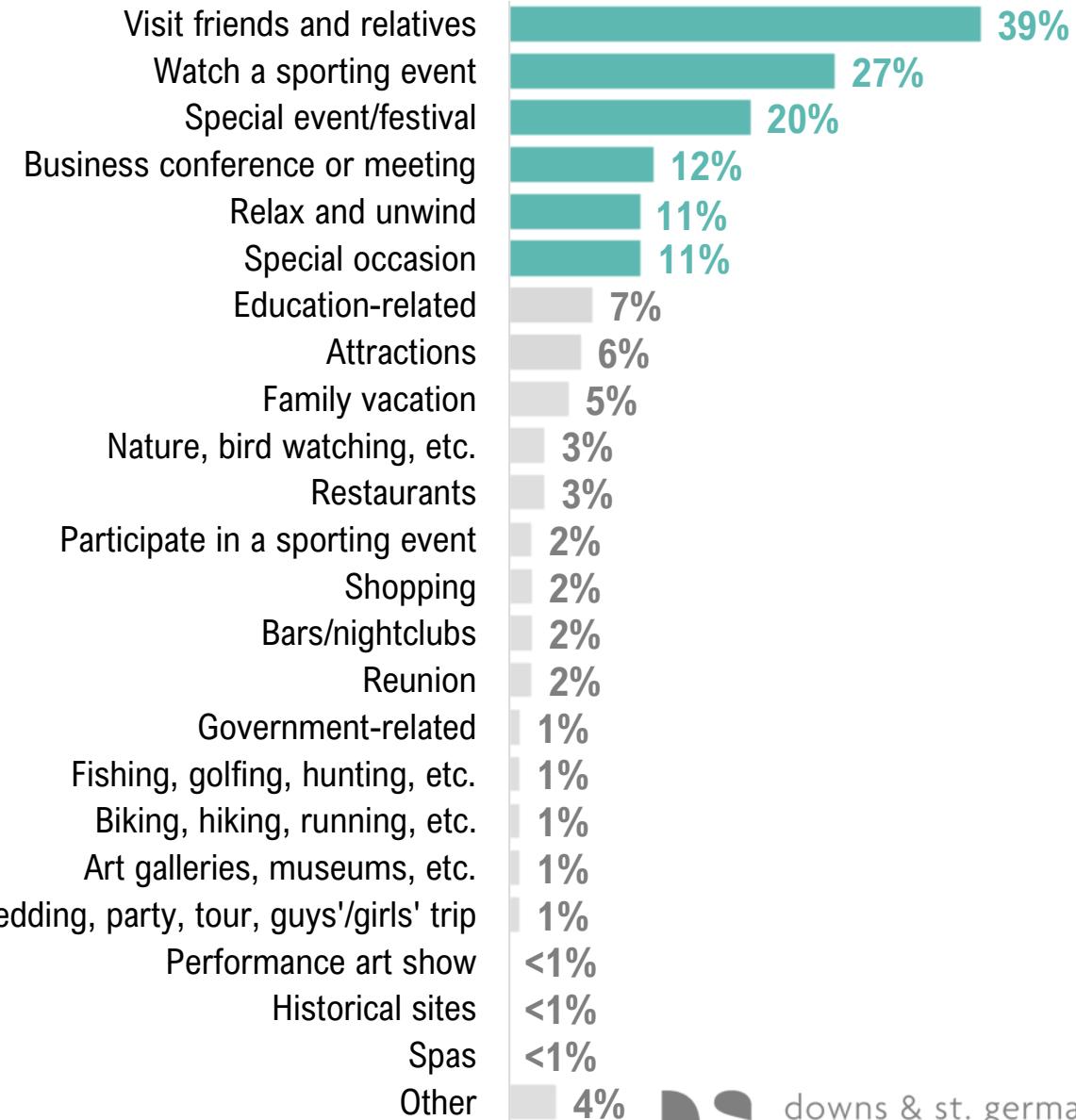
**Insight:** Visitors coming to see friends or relatives account for the highest share, and about the same share, of Tallahassee's visitors each quarter.



**Insight:** In Q1, sporting event visitors make up the second-largest percentage of Tallahassee's market.



**Insight:** Special event visitor share increased significantly YOY.



\*Multiple responses permitted.

# VISITOR PROFILE FY26 Q1



**43**

**Median Age**

(-5 years from FY25 Q1)

**17%**

**First-Time Visitor**

(+1% point from FY25 Q1)

**\$89,100**

**Median Household Income**

(+\$3,400 from FY25 Q1)

**86%**

**Drove (vs Flew)**

(-1% point from FY25 Q1)

**2.5**

**Travel Party Size**

(same as FY25 Q1)

**2.7**

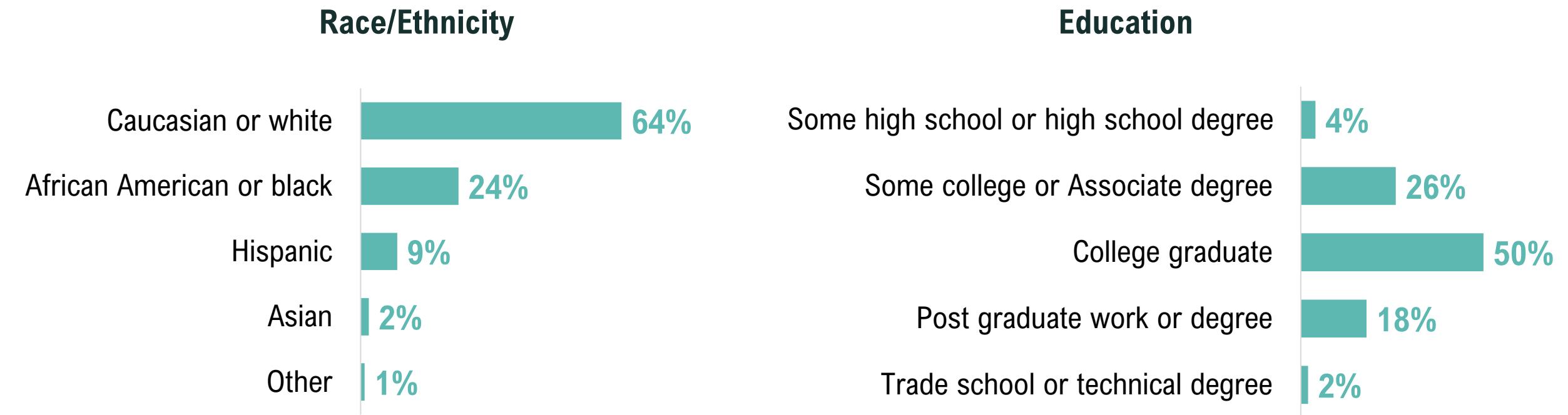
**Length Of Stay**

(-0.3 days from FY25 Q1)



**Visit**  
**Tallahassee**  
*Pretty. Unexpected.*

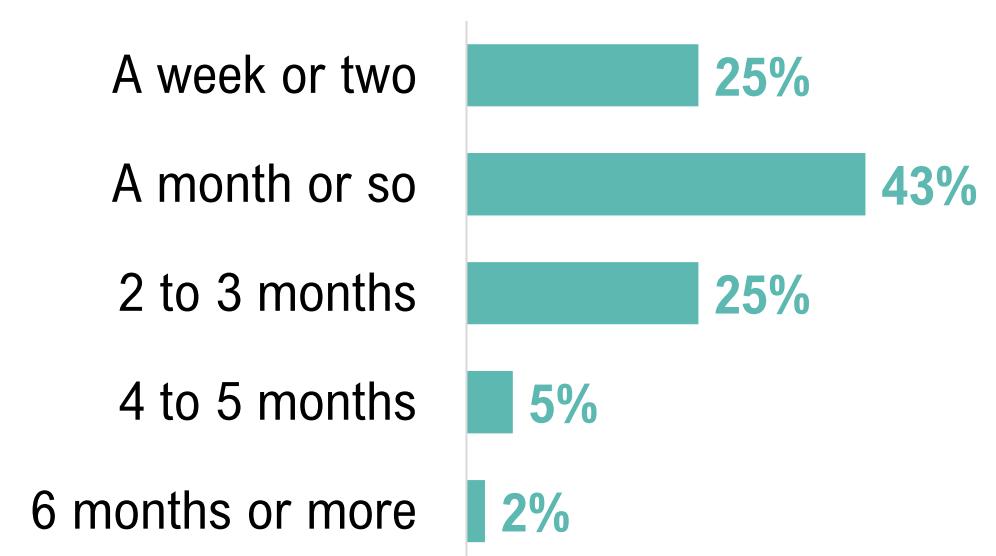
# VISITOR PROFILE (CONT'D) FY26 Q1



# TRIP PLANNING CYCLE (FY26 1st Quarter)



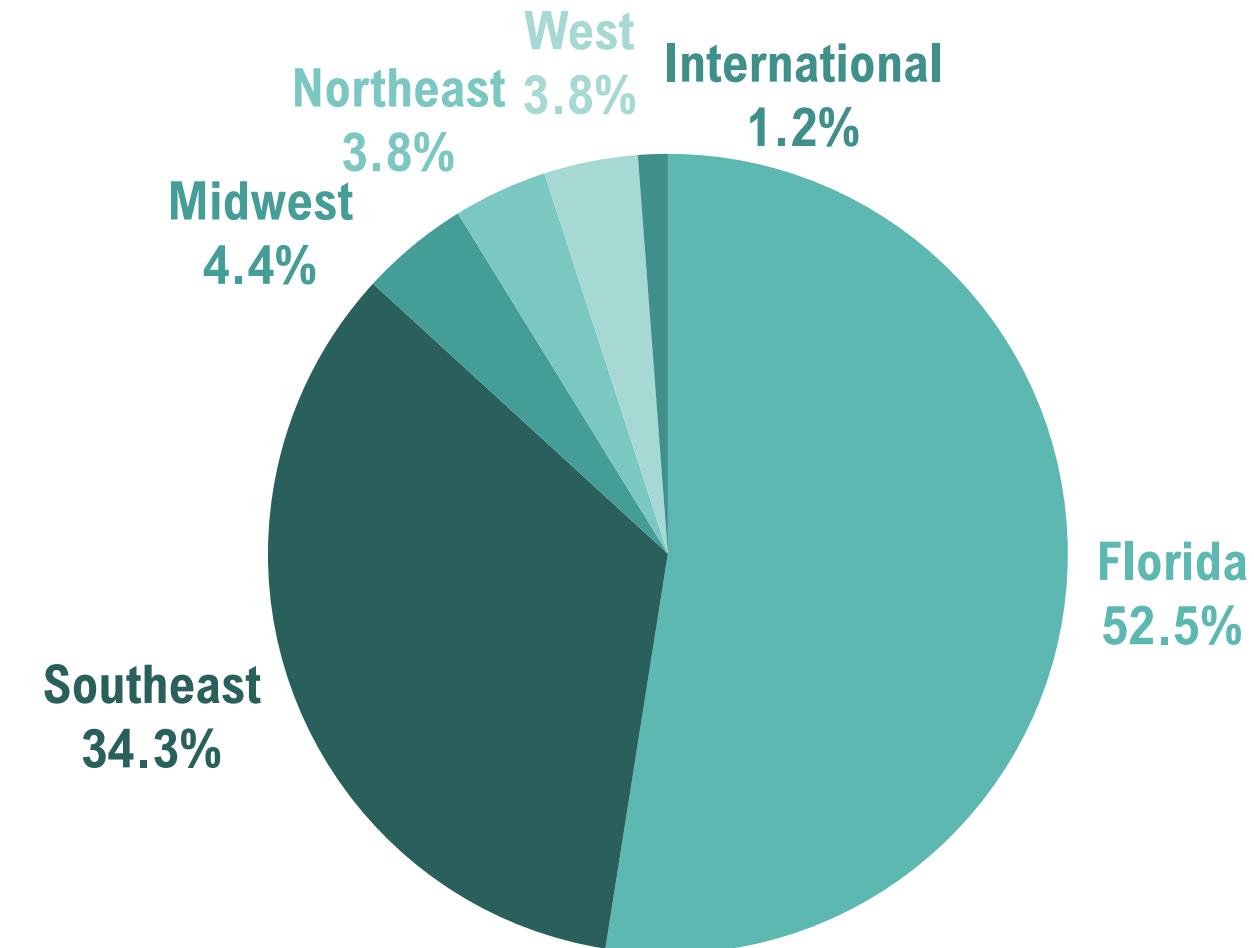
**Insight:** Trip planning cycle increased by 3 days compared to Q1 FY25.



# REGION OF ORIGIN FY26 Q1



**Insight:** This quarter continues a local trend of fewer visitors coming to Tallahassee from elsewhere in Florida (-6% points) and more from elsewhere in the Southeast (+8% points).



Southeast: TX, AR, LA, TN, MS, AL, NC, SC, GA

Northeast: VA, MD, DE, PA, NJ, NY, CT, RI, MA, VT, NH, ME

Midwest: WV, KY, OH, IN, MI, WI, IL, MN, IA, MO, ND, SD, NE, KS, OK

West: WA, OR, CA, NV, ID, MT, WY, CO, UT, AZ, NM, AK, HI



Visit  
**Tallahassee**  
*Pretty. Unexpected.*

# VISITOR ORIGINS FY26 Q1

**Insight:** Tallahassee's share of visitors from Miami has returned to around its 2023 level (9.4%)

**Insight:** Panama City has trended up in Q1 for the past 3 years, while the share from Tampa-St. Petersburg has trended down

Market	October-December 2024*	October-December 2025
Miami-Fort Lauderdale	12.3%	9.5%
Tampa-St. Petersburg	9.0%	8.8%
Orlando-Daytona Beach-Melbourne	8.5%	8.7%
Panama City	6.1%	7.6%
Surrounding Areas**	6.8%	6.7%
Jacksonville	5.8%	6.5%
Atlanta	6.7%	6.2%
Mobile-Pensacola	2.9%	4.0%
Gainesville	5.0%	3.7%
Dallas-Fort Worth	3.6%	2.6%
Sarasota-Bradenton	1.0%	2.0%
West Palm Beach-Ft. Pierce	1.2%	1.9%
Charlotte	2.7%	1.8%

\*Updated to show data to one decimal place for more precision.

\*\*Includes counties surrounding Tallahassee and Thomasville.

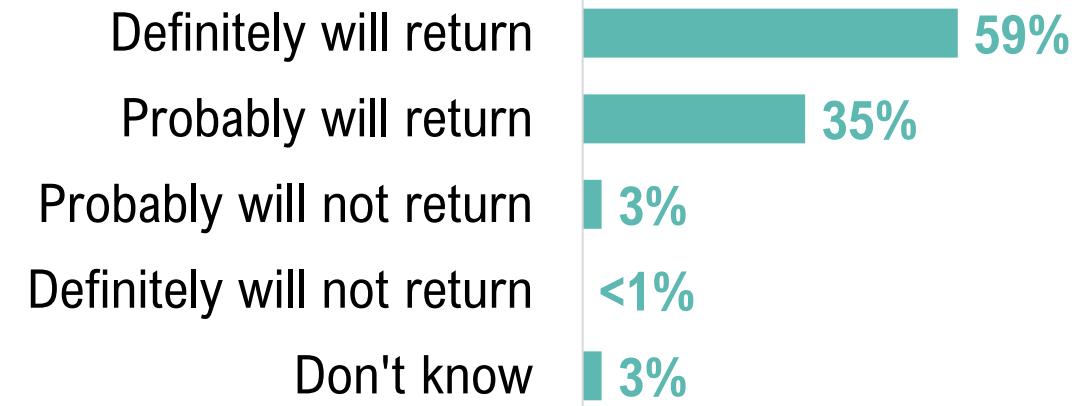


# SATISFACTION STATISTICS FY26 Q1

## Rating of Tallahassee as a Destination\*



## Likelihood of Returning to Tallahassee



\*Rated on a scale of 1 to 10, where 1 is poor and 10 is excellent.



# VISITOR DESCRIPTIONS OF TALLAHASSEE FY26 Q1\*



- ▶ “It’s a well-rounded city – good food, outdoor activities, and events.”
- ▶ “Tallahassee has very lively crowds at football games and fun bars.”
- ▶ “This is a great time of year to get outdoors in Tallahassee! Perfect weather.”
- ▶ “The landscape is different from elsewhere in Florida, and it’s a refreshing change!”





# DETAILED FINDINGS

# STUDY OBJECTIVES: VISITOR JOURNEY



# TOURISM SNAPSHOT: KEY METRICS FY26 VS FY25

	Oct-Dec 2024	Oct-Dec 2025	Percent Change
Visitors <sup>1</sup>	710,700	701,100	- 1.4%
Direct Expenditures <sup>2</sup>	\$243,633,400	\$240,144,400	- 1.4%
Total Economic Impact <sup>3</sup>	\$399,558,800	\$384,231,000	- 3.8%

	Oct-Dec 2024	Oct-Dec 2025	Percent Change
Occupancy <sup>4</sup>	66.1%	56.6%	- 14.3%
Room Rates <sup>4</sup>	\$134.23	\$138.30	+ 3.0%
Room Nights <sup>4</sup>	421,600	358,500	- 14.0%
TDT Collections <sup>5</sup>	\$2,777,413.71	\$2,484,661.52	- 10.5%

<sup>1</sup>Visitor number and spending decreased less than occupancy and room nights due to an increase in unpaid overnight visitors and day trippers.

<sup>2</sup>Includes spending for: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

<sup>3</sup>IMPLAN multiplier updated from 1.64 to 1.60. Subject to change with model and underlying data source updates.

<sup>4</sup>From STR, DBPR, and Key Data (via Zartico).

<sup>5</sup>From Leon County Tax Collector.



# TOURISM SNAPSHOT: KEY METRICS YEAR TO DATE

	FY25 YTD <sup>1</sup>	FY26 YTD <sup>1</sup>	Percent Change
Visitors	710,700	701,100	- 1.4%
Direct Expenditures <sup>2</sup>	\$243,633,400	\$240,144,400	- 1.4%
Total Economic Impact <sup>3,4</sup>	\$399,558,800	\$384,231,000	- 3.8%
Room Nights <sup>5</sup>	421,600	358,500	- 14.0%
TDT Collections <sup>6</sup>	\$2,777,414	\$2,484,661.52	- 10.5%

<sup>1</sup>Year to Date data includes October-December of the given fiscal year.

<sup>2</sup>Includes spending for accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

<sup>3</sup>FY IMPLAN multiplier updated from 1.64 to 1.60.

<sup>4</sup>Subject to change with model and underlying data source updates.

<sup>5</sup>From STR, DBPR, and Key Data (via Zartico).

<sup>6</sup>From Leon County Tax Collector.



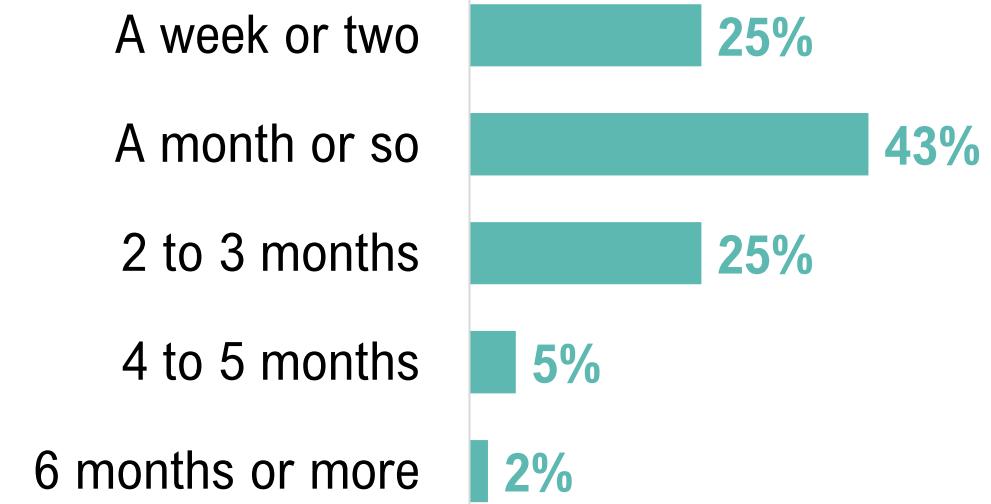
# TRIP PLANNING CYCLE (FY26 1st Quarter)



Visitors to Tallahassee have a short planning window, as nearly **7 in 10** plan their trip **a month or less in advance**



The **average trip planning window** was **38 days, 3 days longer** than 2024



# TRIP PLANNING SOURCES\* (FY26 1st Quarter)



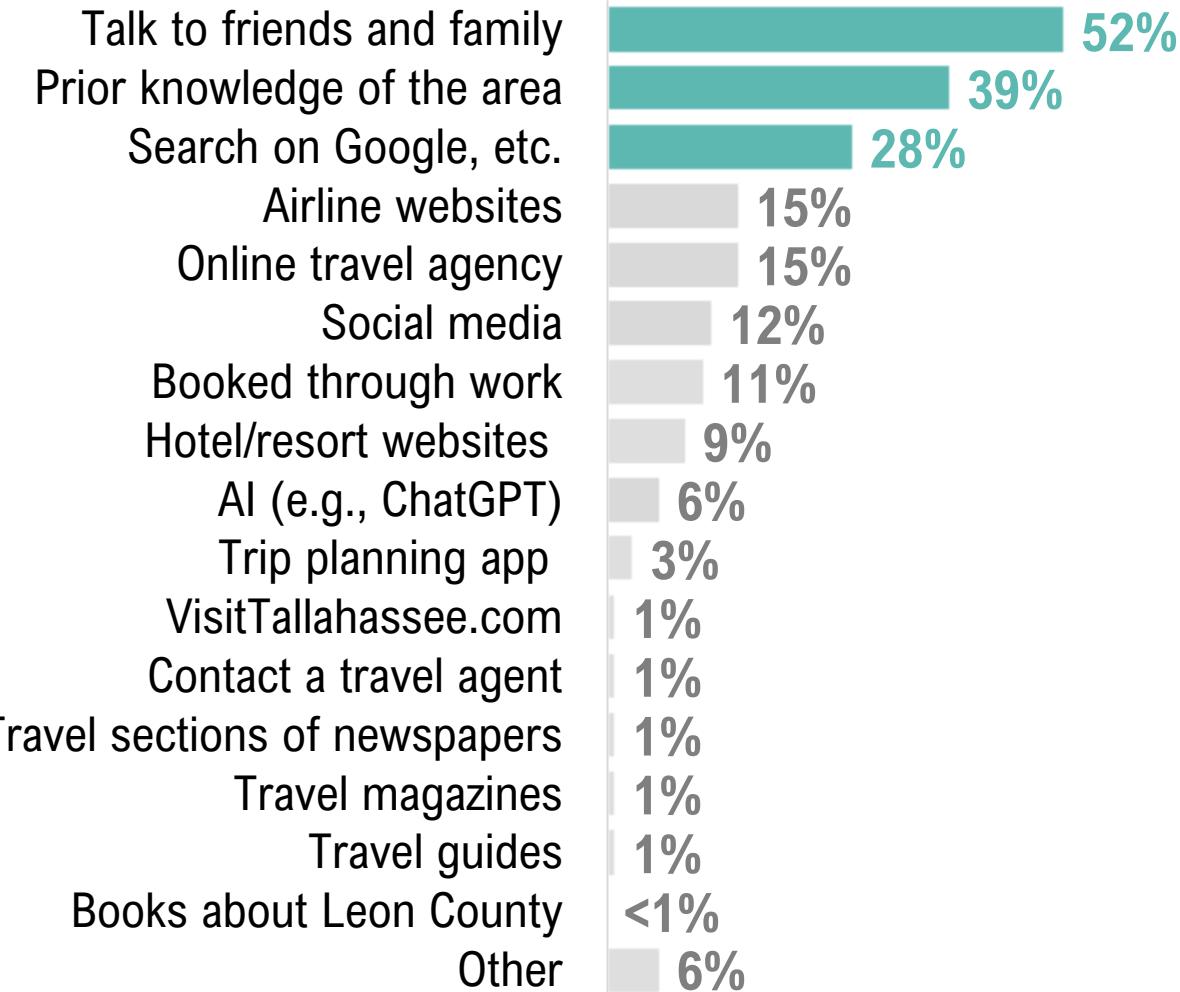
Over **half** of visitors talked to friends and family to plan their trip



Another nearly **2 in 5** used prior knowledge of the area in their trip planning



Nearly **3 in 10** searched for information on Google



\*Multiple responses permitted.



Visit  
**Tallahassee**  
Pretty. Unexpected.

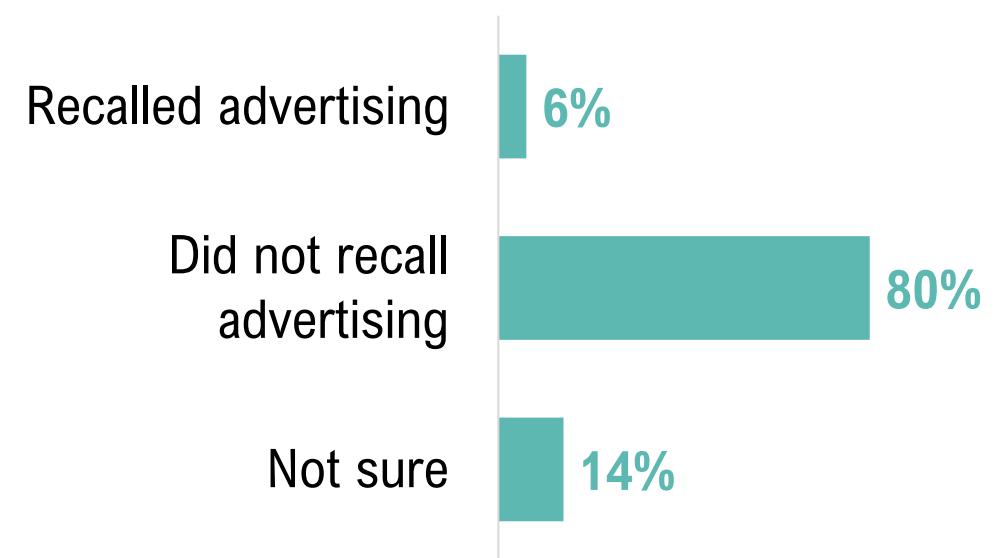
# ADVERTISING RECALL (FY26 1st Quarter)



6% of visitors to Tallahassee recalled seeing advertising for the area prior to their trip, **-5% points** from 2024

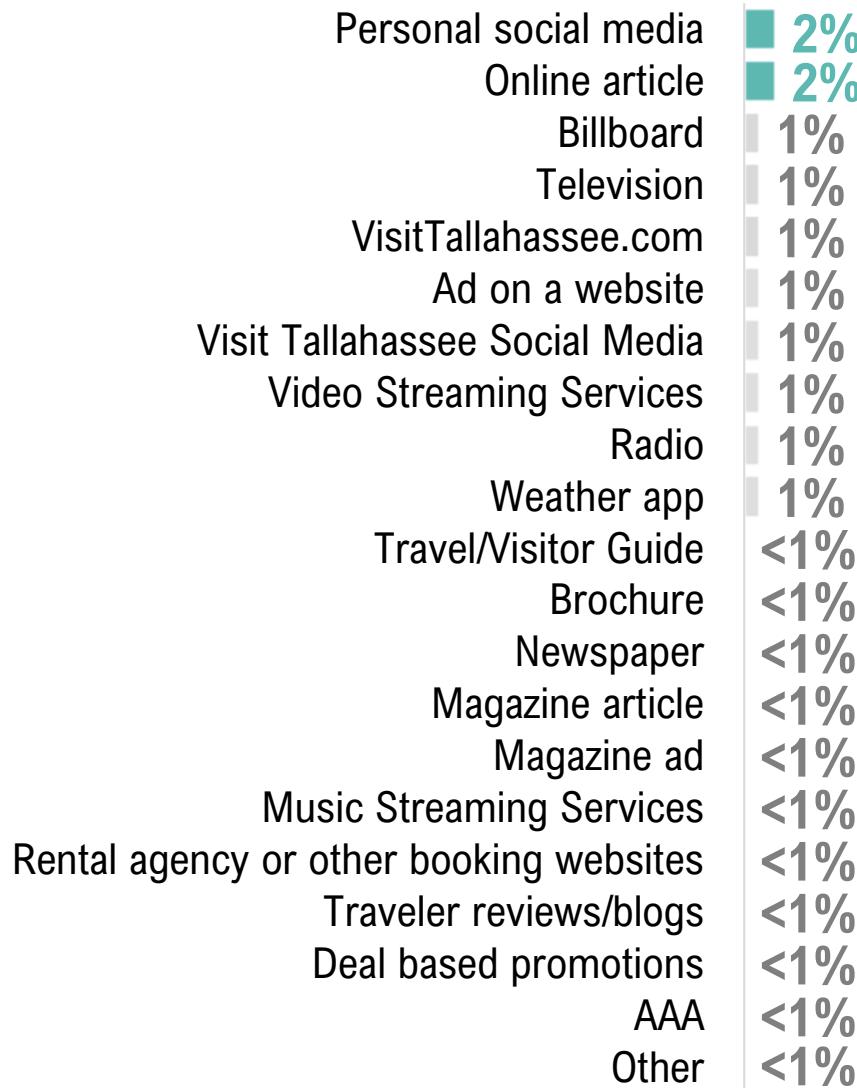


This information influenced **2% of all** visitors to come to the Tallahassee area, **-1% point** from 2024



# ADVERTISING RECALL SOURCES<sup>1</sup> (FY26 1st Quarter)

» The top sources of recalled advertising were **personal social media** and **online articles**, each noted by **2%** of all<sup>2</sup> visitors



<sup>1</sup>Multiple responses permitted.

<sup>2</sup>Based on all visitors, including those who did not recall seeing advertising for Tallahassee.



# REASONS FOR VISITING\* (FY26 1st Quarter)



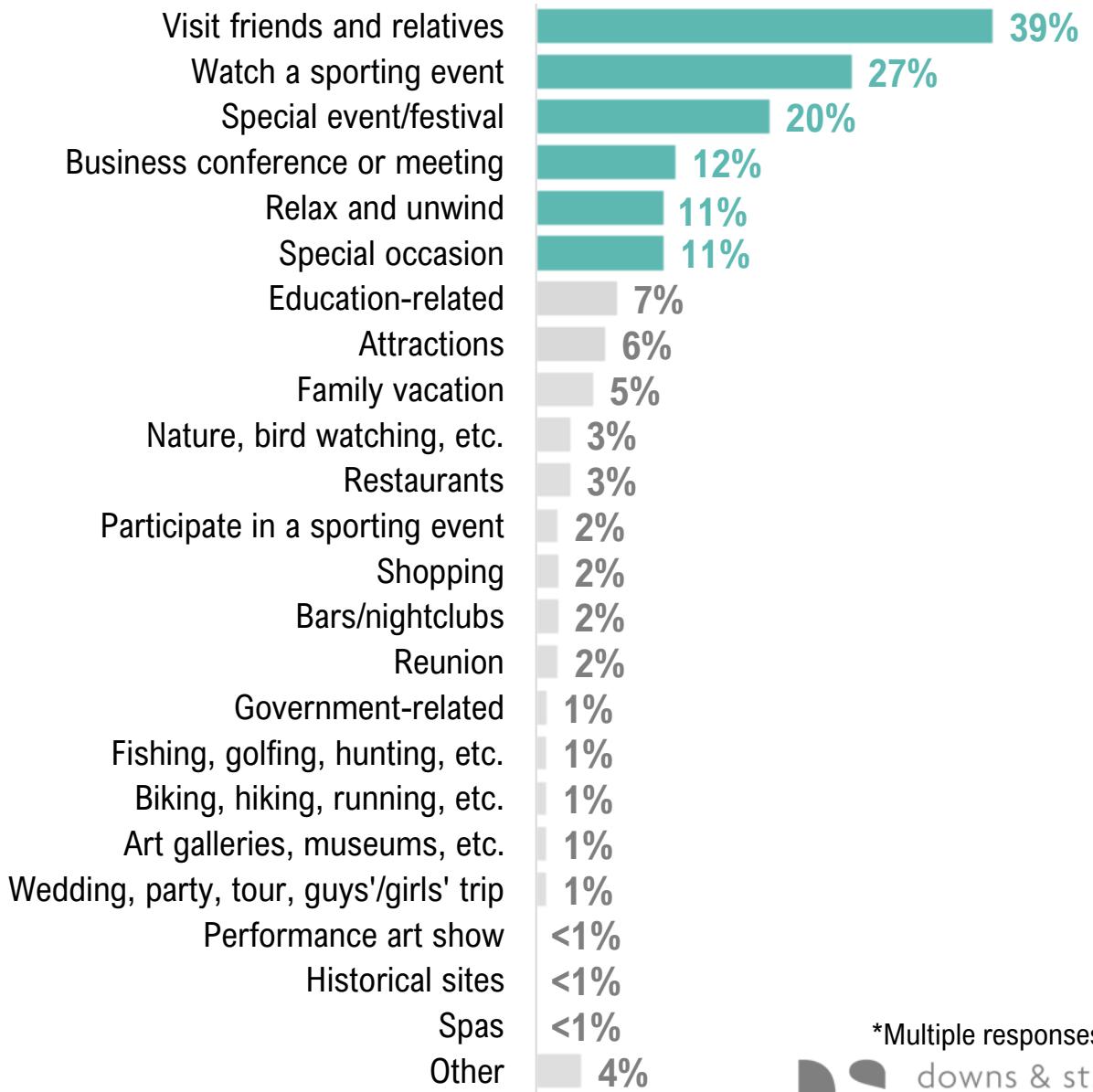
Nearly **2 in 5** visitors came to Leon County to visit friends and family



Over **1 in 4** came to watch a sporting event



**1 in 5** came for a special event or festival



\*Multiple responses permitted.



Visit  
**Tallahassee**  
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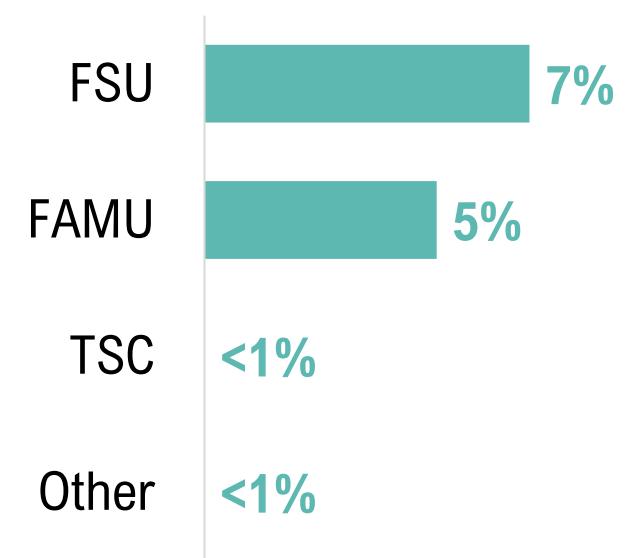
# EDUCATION-RELATED VISITS\* (FY26 1st Quarter)



7% of all visitors to Tallahassee came to the area for activities related to FSU



5% of all visitors came to the area for activities related to FAMU



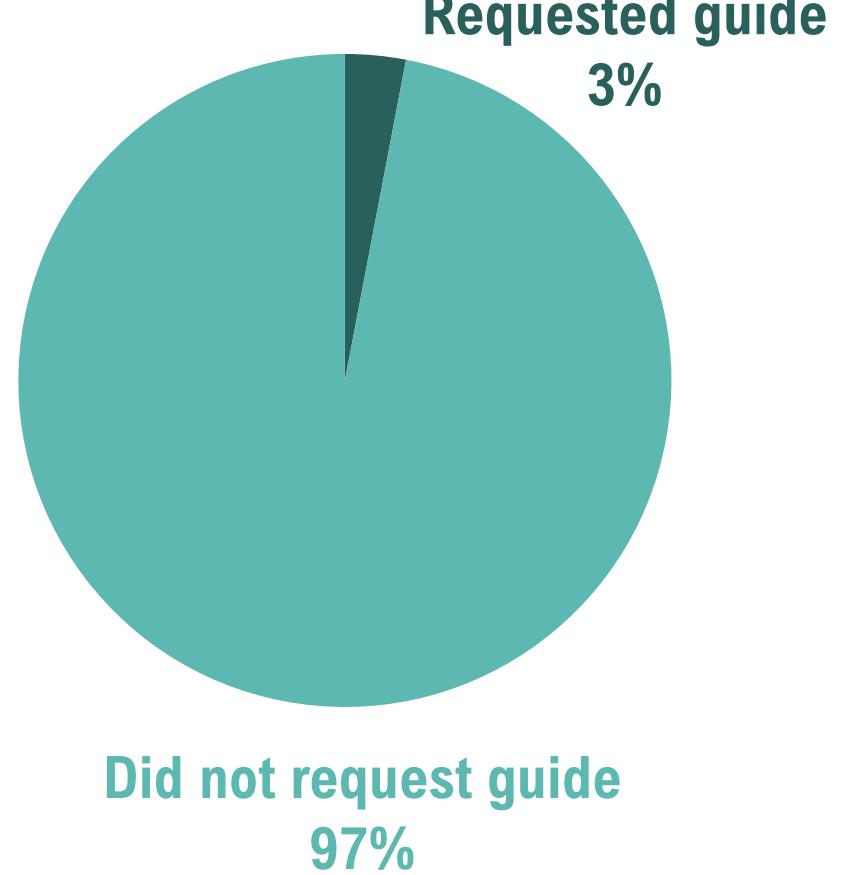
# VISITORS GUIDE (FY26 1st Quarter)



3% of visitors requested a Visitors Guide prior to their trip to Leon County



Those who requested a Visitors Guide gave it a rating of 8.1\*



\*Rated on a scale of 1 to 10, where 1 is poor and 10 is excellent.



Visit  
**Tallahassee**  
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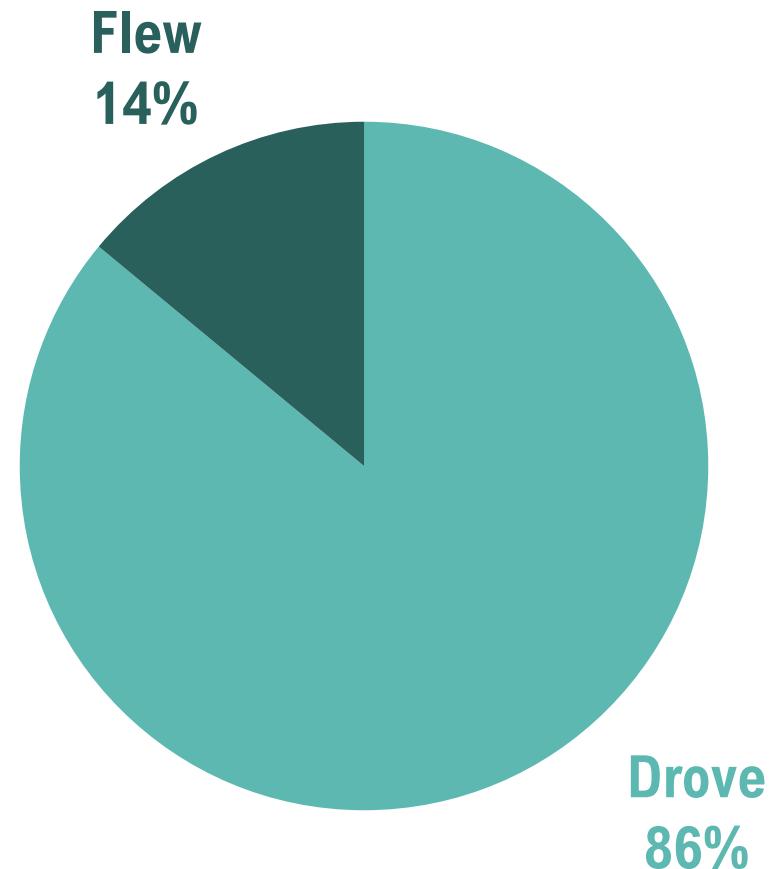
# TRANSPORTATION (FY26 1st Quarter)



Nearly **9 in 10** visitors drove to Leon County



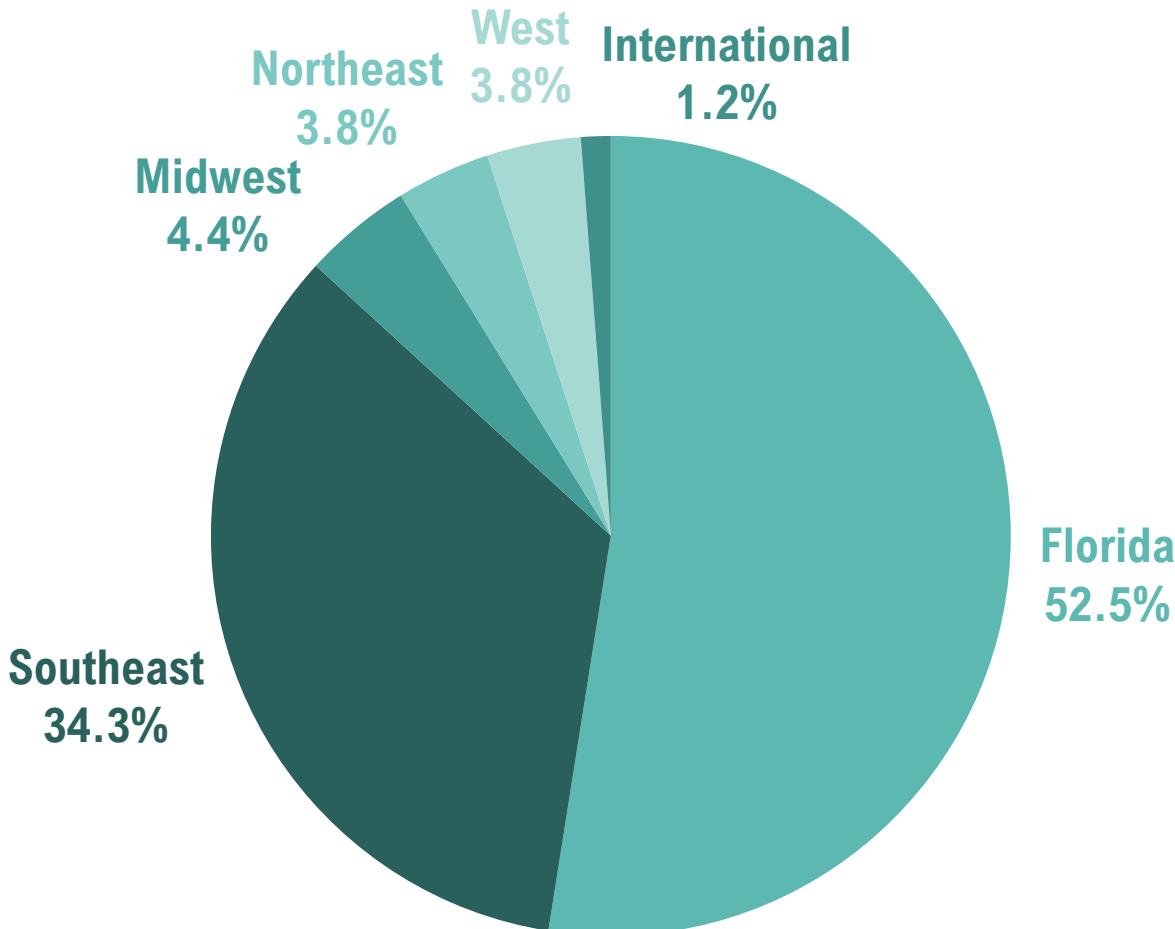
**93%** of visitors indicated that Leon County was the primary destination for their trip



# STUDY OBJECTIVES: VISITOR JOURNEY



# REGION OF ORIGIN (FY26 1st Quarter)



Southeast: TX, AR, LA, TN, MS, AL, NC, SC, GA

Northeast: VA, MD, DE, PA, NJ, NY, CT, RI, MA, VT, NH, ME

Midwest: WV, KY, OH, IN, MI, WI, IL, MN, IA, MO, ND, SD, NE, KS, OK

West: WA, OR, CA, NV, ID, MT, WY, CO, UT, AZ, NM, AK, HI



Visit  
**Tallahassee**  
Pretty. Unexpected.

# TOP MARKETS OF ORIGIN (FY26 1st Quarter)

 70% of Leon County visitors came from 13 markets

Market	October-December 2024*	October-December 2025
Miami-Fort Lauderdale	12.3%	9.5%
Tampa-St. Petersburg-Sarasota	9.0%	8.8%
Orlando-Daytona Beach-Melbourne	8.5%	8.7%
Panama City	6.1%	7.6%
Surrounding Areas**	6.8%	6.7%
Jacksonville	5.8%	6.5%
Atlanta	6.7%	6.2%
Mobile-Pensacola	2.9%	4.0%
Gainesville	5.0%	3.7%
Dallas-Fort Worth	3.6%	2.6%
Sarasota	1.0%	2.0%
West Palm Beach-Ft. Pierce	1.2%	1.9%
Charlotte	2.7%	1.8%

\*Updated to show data to one decimal place for more precision.

\*\*Includes counties surrounding Tallahassee and Thomasville.



Visit  
**Tallahassee**  
Pretty. Unexpected.

# TRAVEL PARTIES (FY26 1st Quarter)

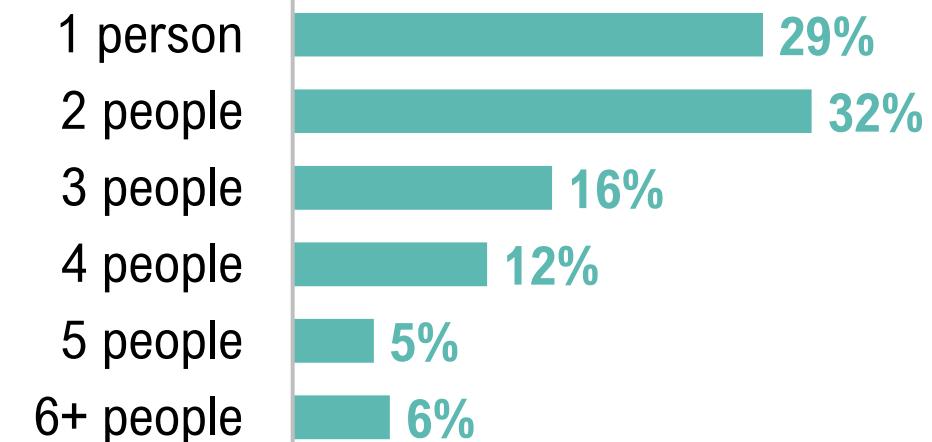


Typical visitors traveled in a party of **2.5** people



**27%** of visitors traveled with children aged 20 or younger, while **18%** traveled with children aged 12 or younger

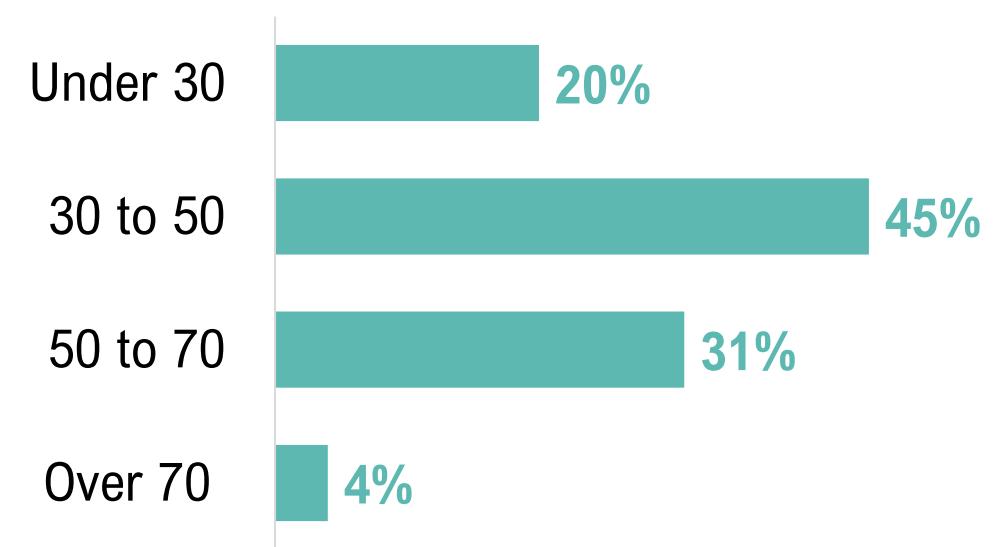
**Travel Party Size**



# AGE OF VISITORS (FY26 1st Quarter)



Typical visitors to Leon County were **43** years old



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**Tallahassee**  
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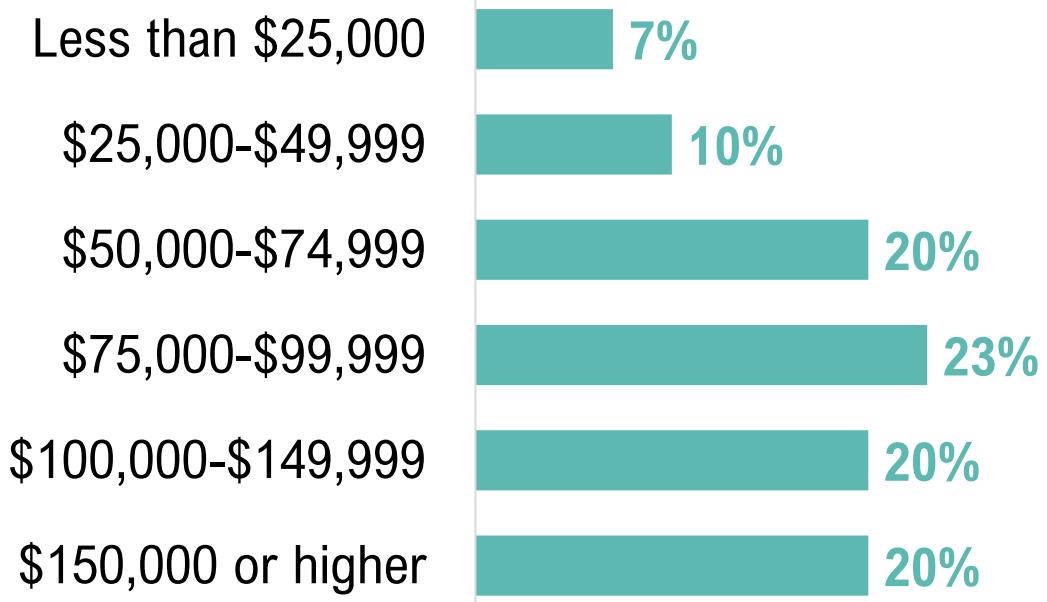
# HOUSEHOLD INCOME OF VISITORS (FY26 1st Quarter)



Typical visitors to Leon County had a median household income of **\$89,100** per year



**1 in 5** visitors earned over **\$150,000** per year



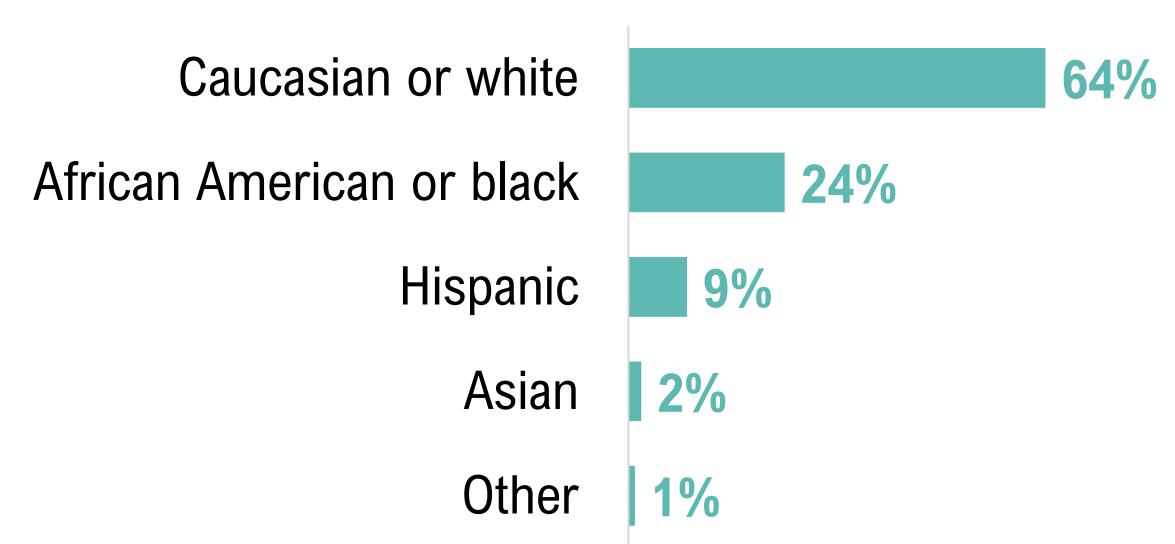
# RACE/ETHNICITY OF VISITORS (FY26 1st Quarter)



Nearly **2 in 3** visitors to Leon County were Caucasian



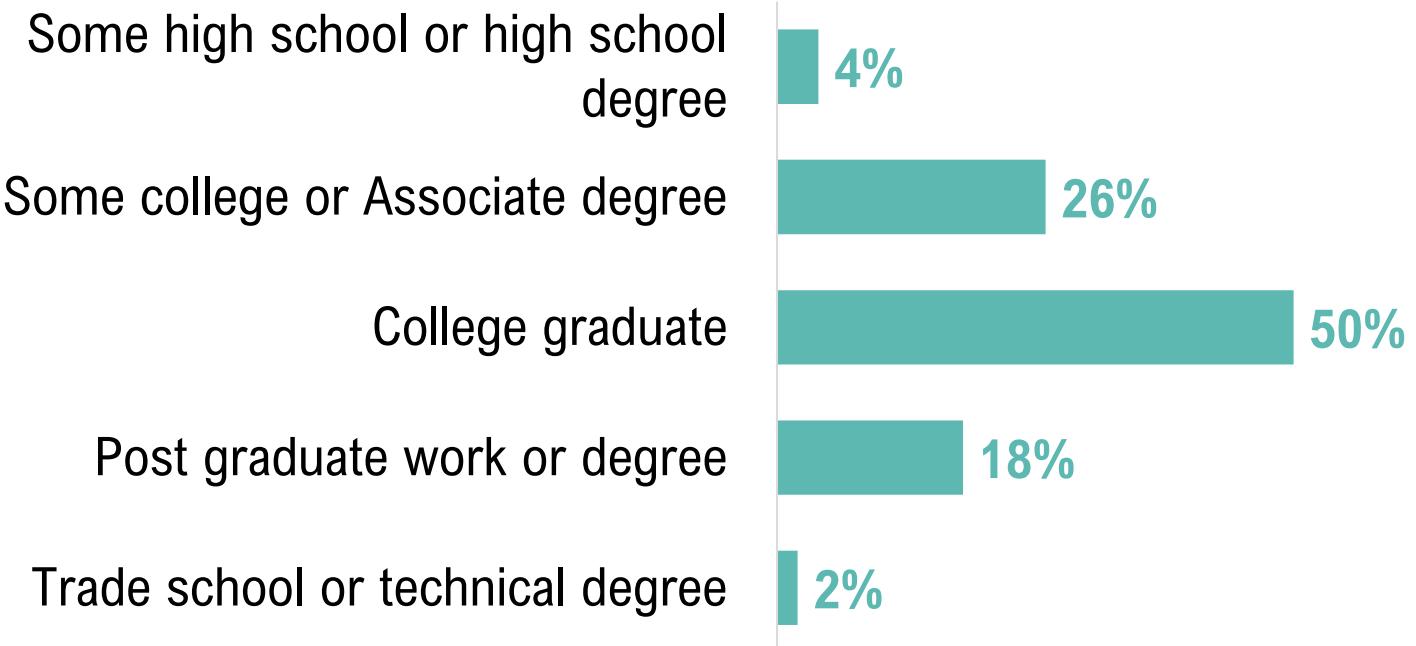
Nearly **1 in 4** visitors to Leon County were African American/Black



# EDUCATIONAL ATTAINMENT OF VISITORS (FY26 1st Quarter)



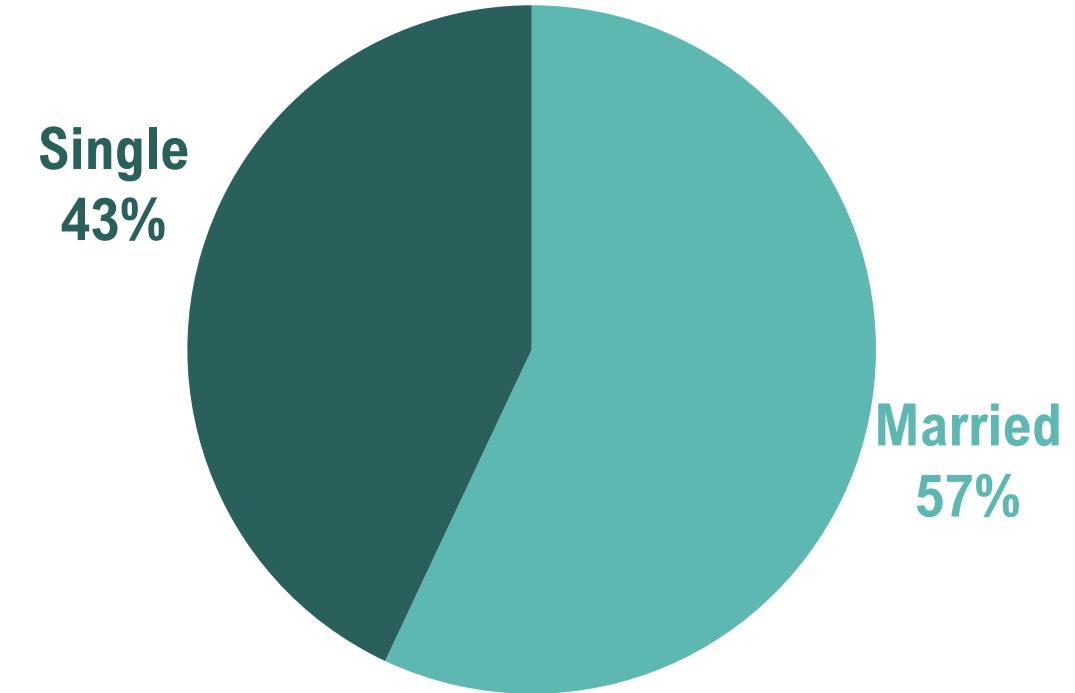
Nearly **7 in 10** visitors to Leon County had a bachelor's degree or higher



# MARITAL STATUS OF VISITORS (FY26 1st Quarter)



Nearly **3 in 5** visitors to Leon County were married

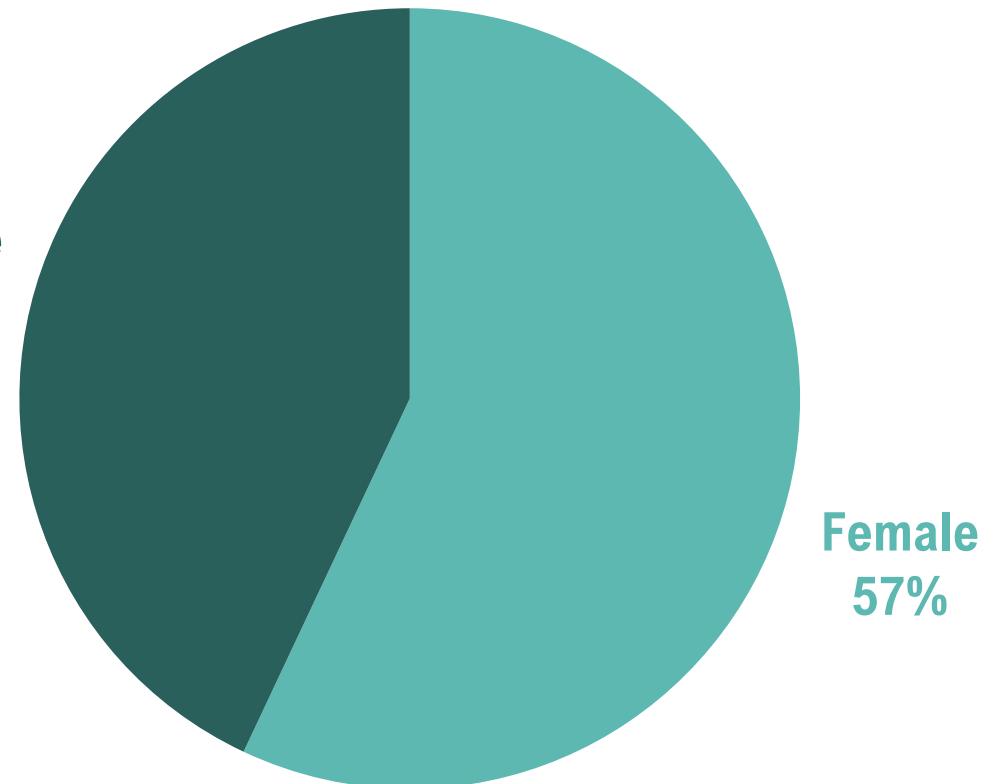


# GENDER OF VISITORS\* (FY26 1st Quarter)



57% of visitors to Leon County were female

Transgender/non-binary  
<1%



\*Gender of member of travel party surveyed. May be influenced by visitors' willingness to take a survey.

# STUDY OBJECTIVES: VISITOR JOURNEY



# ACCOMMODATIONS (FY26 1st Quarter)



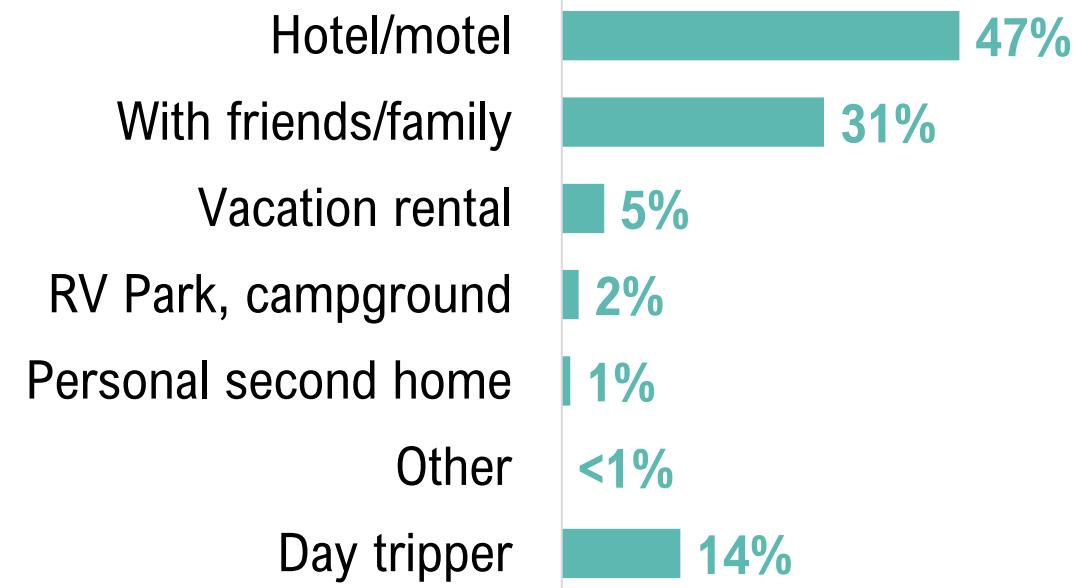
Nearly **half** of visitors stayed in a hotel



Over **3 in 10** stayed with friends or relatives



Over **1 in 8** came to the area just for the day



# TRAVEL PARTY SPENDING\* (FY26 1st Quarter)

	Spending per Day	Spending per Trip
Accommodations	\$75	\$202
Restaurants	\$83	\$223
Groceries	\$24	\$65
Shopping	\$42	\$113
Entertainment	\$45	\$121
Transportation	\$42	\$113
Other	\$5	\$13
<b>Total</b>	<b>\$316</b>	<b>\$850</b>

\* Across visitors staying in paid accommodations, unpaid accommodations, and day trippers.



Visit  
**Tallahassee**  
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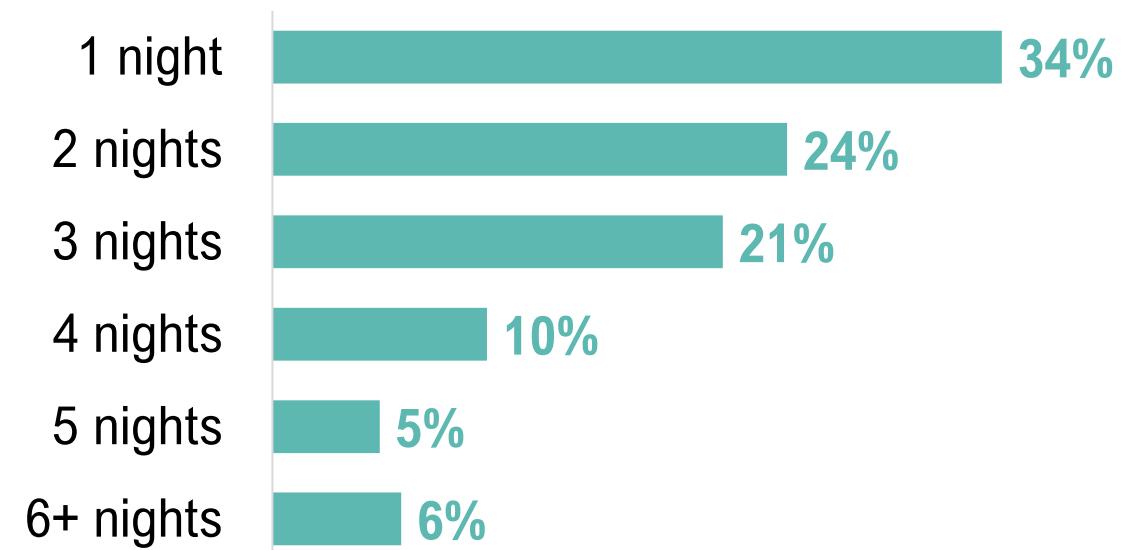
# OVERNIGHT VISITORS (FY26 1st Quarter)



Typical visitors stayed **2.7** nights in Leon County



Over **1 in 3** visitors stayed only one night in Leon County



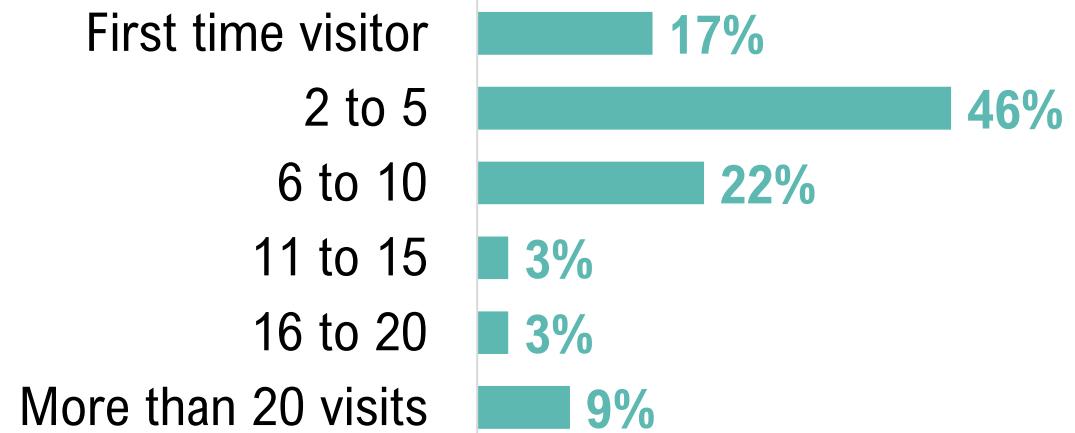
# VISITS TO TALLAHASSEE – LEON COUNTY (FY26 1st Quarter)



Over **1 in 6** visitors were visiting Leon County for the first time



**15%** had previously visited Leon County more than 10 times



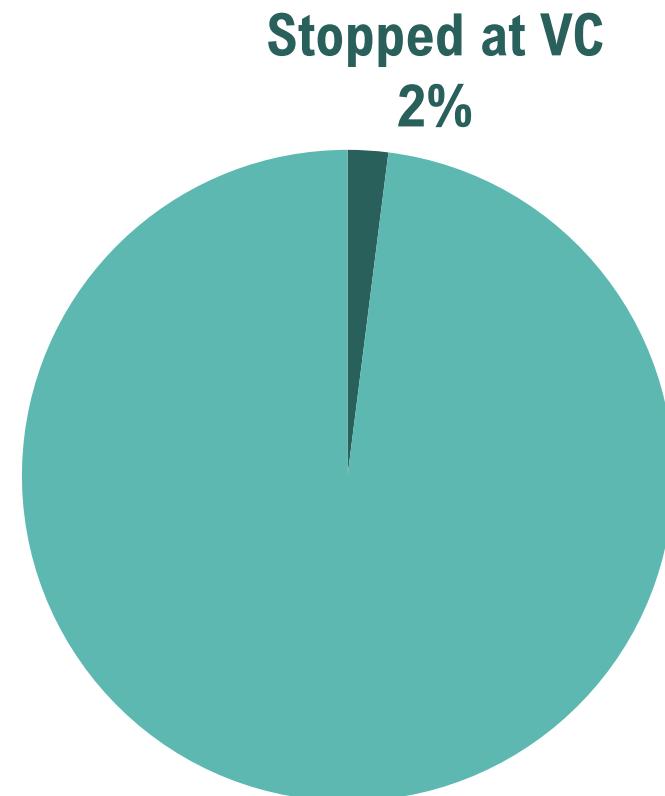
# VISITOR CENTER (FY26 1st Quarter)



**2%** of visitors stopped at the Visitor Center\*



Those who went to the Visitor Center gave it a rating of **8.3**\*\*



**Did not stop at VC**  
**98%**

\*Refers to the Visit Tallahassee Visitor Center in Cascades Park, as the Railroad Square Visitor Center was closed this quarter from storm damage.

\*\* Rated on a scale of 1 to 10, where 1 is poor and 10 is excellent.



Visit  
**Tallahassee**  
Pretty. Unexpected.

# ACTIVITIES DURING VISIT\* (FY26 1st Quarter)



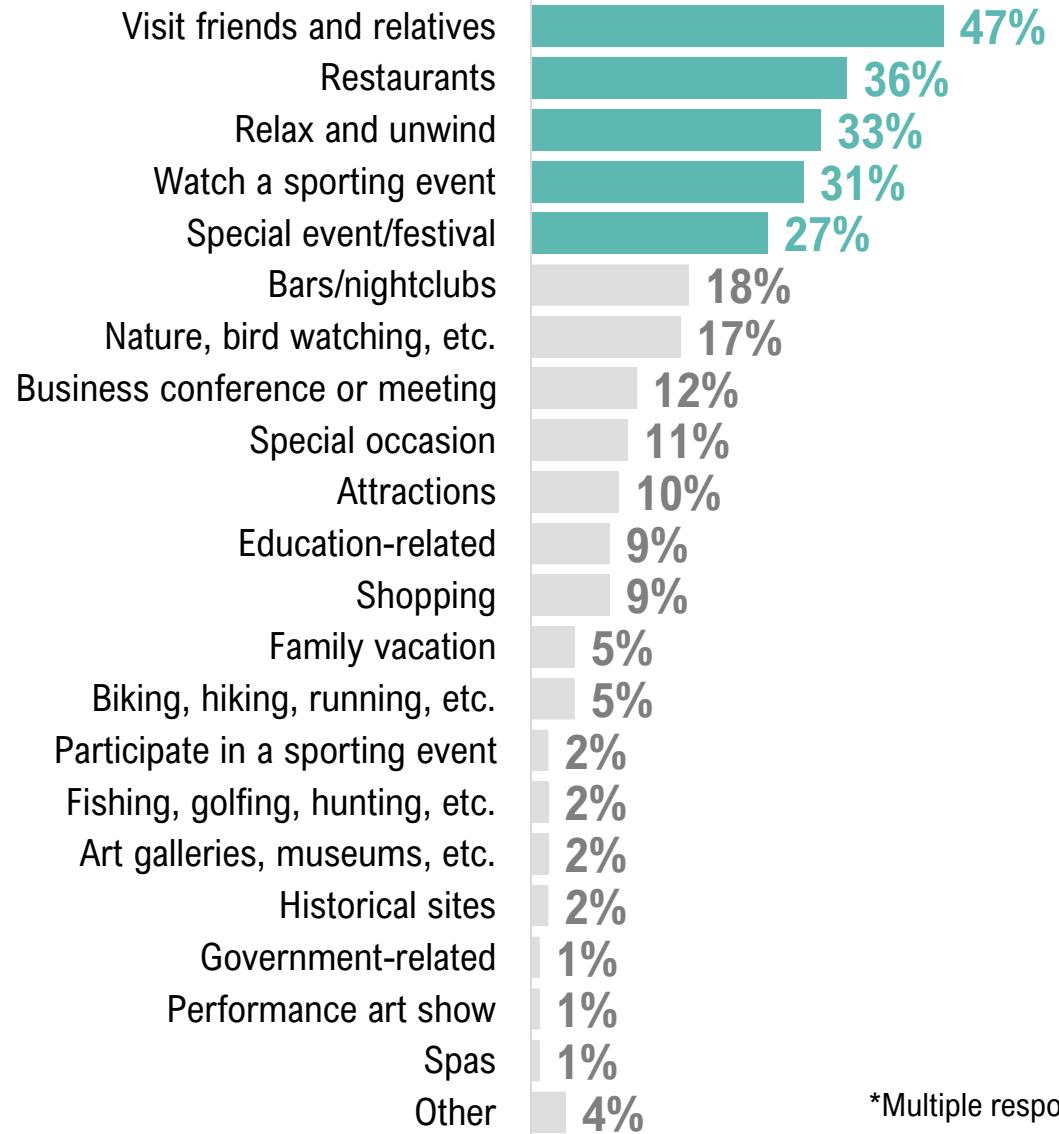
Nearly **half** of visitors enjoyed visiting friends and family while in Tallahassee



Around **1 in 3** spent time dining at restaurants, relaxing and unwinding, or watching sports



Another nearly **3 in 10** went to a special event or festival while in Tallahassee

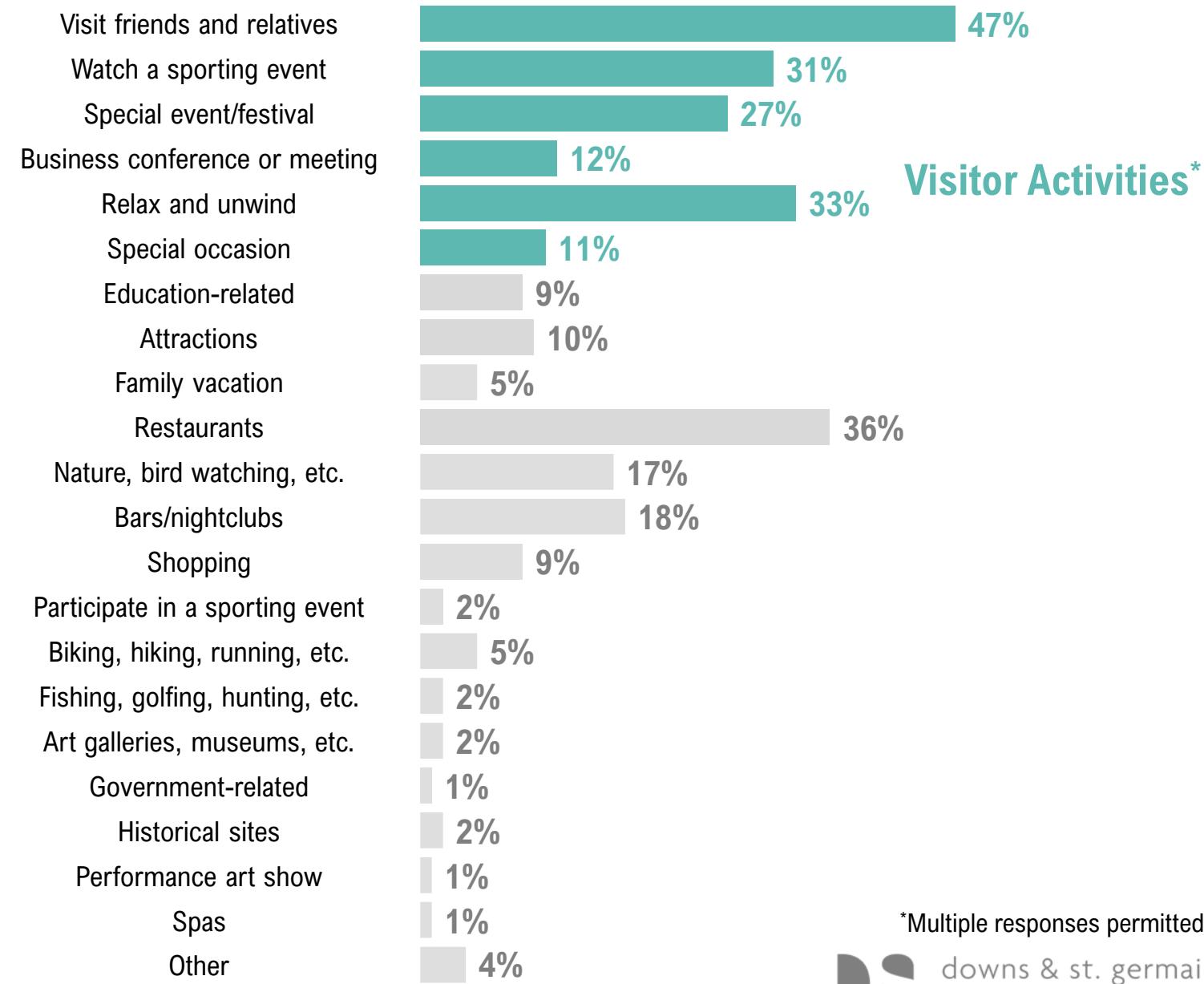
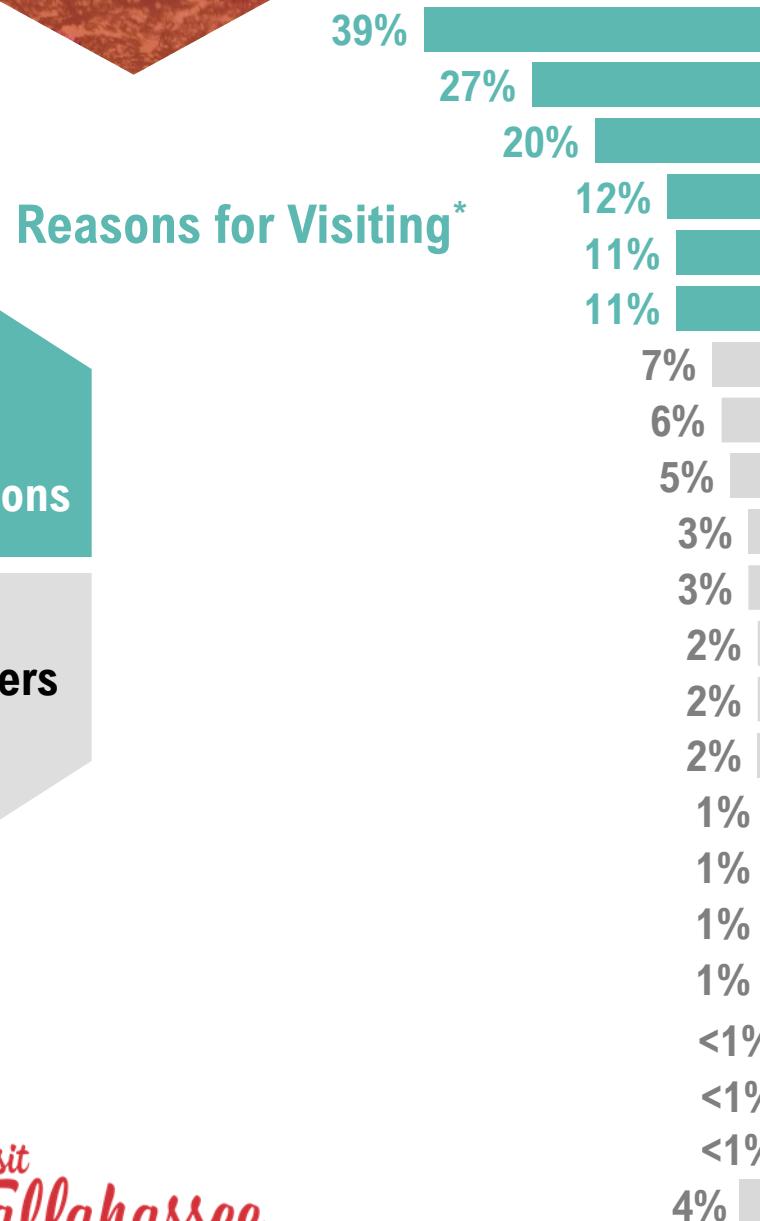


\*Multiple responses permitted.



Visit  
**Tallahassee**  
Pretty. Unexpected.

# REASONS FOR VISITING VS. VISITOR ACTIVITIES (FY26 1st Quarter)



\*Multiple responses permitted.



Visit  
**Tallahassee**  
Pretty. Unexpected.

**ds** downs & st. germain  
RESEARCH

# STUDY OBJECTIVES: VISITOR JOURNEY



# VISITOR SATISFACTION (FY26 1st Quarter)



Visitors gave Leon County an average rating of **8.2\*** as a place to visit



**94%** of visitors will return (**59%** will definitely return) to Leon County for a future visit or vacation

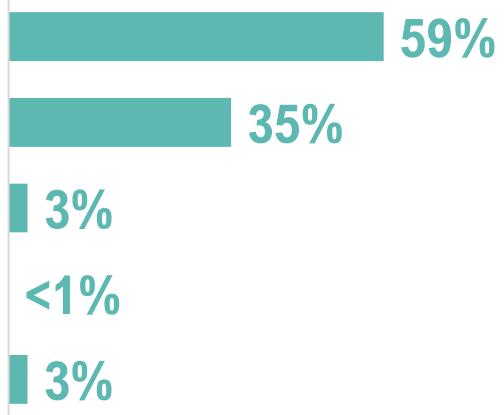
Definitely will return

Probably will return

Probably will not return\*\*

Definitely will not return\*\*

Don't know\*\*



\*Rated on a scale of 1 to 10, where 1 is poor and 10 is excellent.

\*\*6% of visitors may not return for the following reasons: Event/occasion for visit is over, accommodations were not good, prefer variety in vacation spots, or too crowded.



Visit  
**Tallahassee**  
Pretty. Unexpected.

# RATING EXPERIENCES IN TALLAHASSEE\* (FY26 1st Quarter)



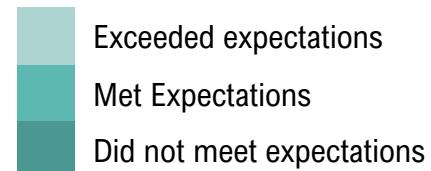
Leon County's **attractions/events** exceeded the expectations of nearly **3 in 5** visitors



Leon County's **hospitality** exceeded the expectations of over **half** of visitors



**Customer service, food quality, and shopping** in Leon County were least likely to exceed visitors' expectations



Attractions, events, etc.

Hospitality

Environment, atmosphere

Quality of hotel

Entertainment

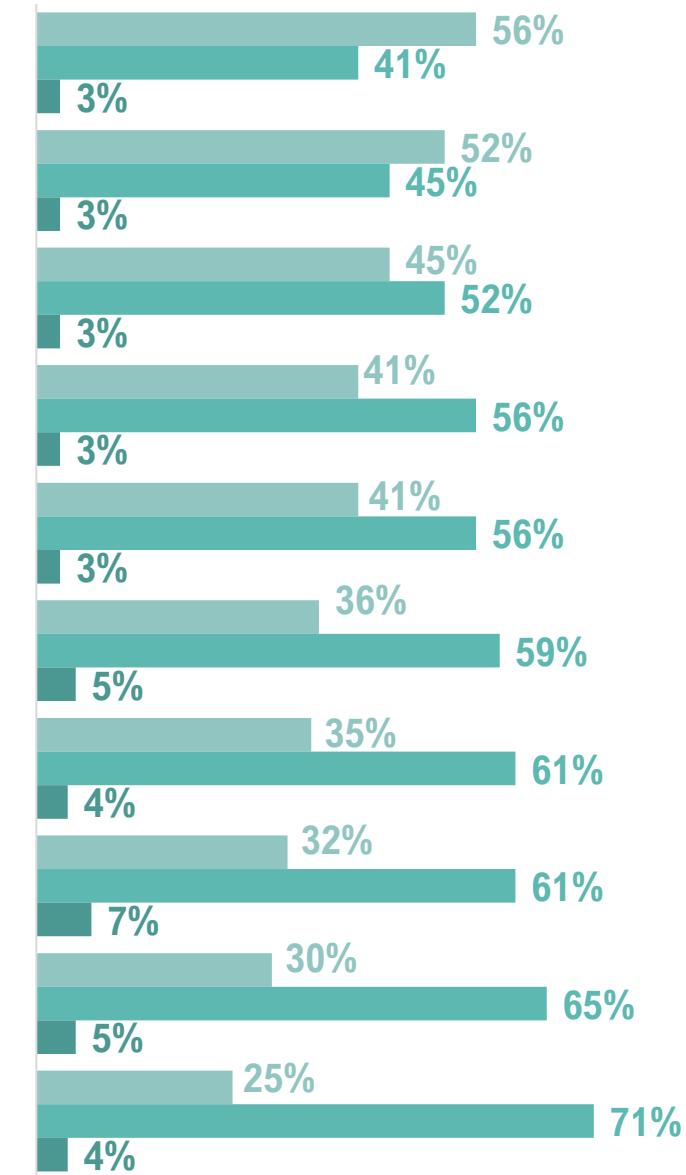
Nightlife

Service at hotel

Shopping

Food quality

Customer service



\*Based on small samples; results should be interpreted with caution.

# PERCEPTIONS: “LOTS TO DO” (FY26 1st Quarter)



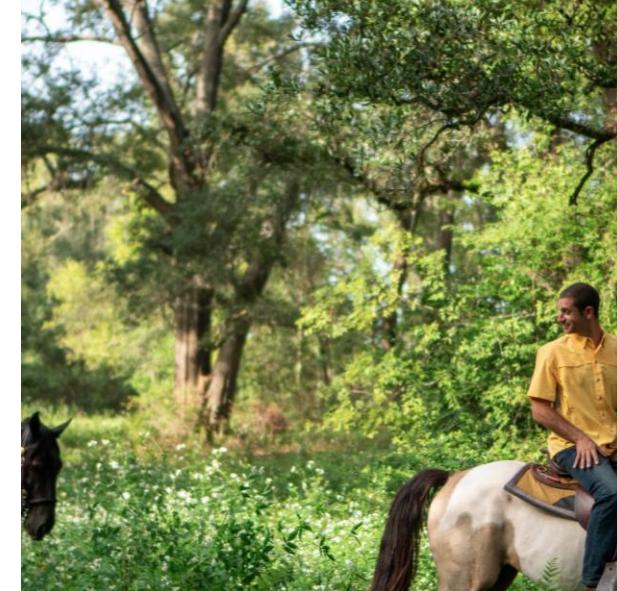
“We visited for the mix of Southern history and outdoor fun!”



“Very lively crowds at football games and fun bars.”



“We were here for Black Friday and would recommend the shopping in Tallahassee!”



“It’s a well-rounded city - good food, outdoor activities, and events.”



# PERCEPTIONS: “PEACEFUL” (FY26 1st Quarter)



It's a peaceful town – good for families.”



“Fewer tourists – much easier to get places than elsewhere in Florida.”



“Everyone seems to be so friendly here!”



“Tallahassee has that Southern charm that makes it feel like coming home.”



Visit  
**Tallahassee**  
Pretty. Unexpected.

# PERCEPTIONS: “SCENIC” (FY26 1st Quarter)



“Beautiful nature. We especially love Cascades Park!”



“This is a great time of year to get outdoors. Perfect weather.”



“It’s a pleasant city with rolling hills and so many trees!”



“The landscape is different from elsewhere in Florida, and it’s a refreshing change.”



A scenic view of a long, narrow swimming pool reflecting the surrounding lush greenery and palm trees under a bright blue sky with scattered clouds.

# YEAR OVER YEAR COMPARISONS

# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Trip Planning Cycle	October – December 2024	October – December 2025
Tallahassee was primary destination	90%	93%
A week or two in advance	33%	25%
A month or so in advance	42%	43%
2 to 3 months in advance	18%	25%
4 to 5 months in advance	4%	5%
6 months or more in advance	3%	2%

Top Trip Planning Sources	October – December 2024	October – December 2025
Talk to friends and family	47%	52%
Prior knowledge of the area	38%	39%
Search on Google, etc.	21%	28%



# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Advertising Recall	October – December 2024	October – December 2025
Recalled ads for Tallahassee	11%	6%
Influenced to visit by ads	3%	2%
Top Reasons for Visiting	October – December 2024	October – December 2025
Visit friends and relatives	41%	39%
Watch a sporting event	19%	27%
Special event/festival	9%	20%
Pre-Visit	October – December 2024	October – December 2025
Requested a Visitors Guide	3%	3%
Drove to Tallahassee	87%	86%
Flew to Tallahassee	13%	14%



# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Market of Origin	October – December 2024*	October – December 2025
Miami-Fort Lauderdale	12.3%	9.5%
Tampa-St. Petersburg	9.0%	8.8%
Orlando-Daytona Beach-Melbourne	8.5%	8.7%
Panama City	6.1%	7.6%
Surrounding Areas**	6.8%	6.7%
Jacksonville	5.8%	6.5%
Atlanta	6.7%	6.2%

Region of Origin	October – December 2024*	October – December 2025
Florida	58.0%	52.5%
Southeast (other than Florida)	26.3%	34.3%
Midwest	6.4%	4.4%
Northeast	3.7%	3.8%
West	3.4%	3.8%
International	2.1%	1.2%

\*Updated to show data to one decimal place for more precision.

\*\*Includes counties surrounding Tallahassee and Thomasville.



Visit  
**Tallahassee**  
Pretty. Unexpected.

# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Travel Parties	October – December 2024	October – December 2025
Travel Party Size	2.5	2.5
Traveled with Other Visitors	72%	71%
Traveled with Children under 20	22%	27%
Traveled with Children under 12	14%	18%
Visitor Profile	October – December 2024	October – December 2025
Median Age	48	43
Gender (Female)	56%	57%
Median Household Income	\$85,700	\$89,100
Bachelor's Degree or Higher	72%	68%
White/Caucasian	63%	64%
African American	27%	24%
Married	60%	57%



# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Accommodations	October – December 2024	October – December 2025
Hotel/motel	50%	47%
Friend/family home	27%	31%
Vacation rental	6%	5%
RV Park, campground	3%	2%
Personal second home	1%	1%
Other	<1%	<1%
Day tripper	13%	14%

Trips Experience	October – December 2024	October – December 2025
Average Nights Stayed	3.0	2.7
1st Time Visitor	16%	17%
10+ Prior Visits to Leon County	20%	15%
Stopped at Visitor Center*	3%	2%



Visit  
**Tallahassee**  
Pretty. Unexpected.

\*Refers to the Visit Tallahassee Visitor Center in Cascades Park.

# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Average Daily Spending	October – December 2024	October – December 2025
Accommodations <sup>1</sup>	\$80	\$75
Restaurants	\$73	\$83
Groceries	\$20	\$24
Shopping	\$42	\$42
Entertainment	\$34	\$45
Transportation	\$37	\$42
Other	\$9	\$5
<b>Total</b>	<b>\$295</b>	<b>\$316</b>
Average Total Trip Spending	October – December 2024	October – December 2025
Accommodations <sup>1</sup>	\$240	\$202
Restaurants	\$219	\$223
Groceries	\$60	\$65
Shopping	\$126	\$113
Entertainment	\$102	\$121
Transportation	\$111	\$113
Other	\$27	\$13
<b>Total</b>	<b>\$885</b>	<b>\$850</b>

<sup>1</sup>Includes room rate, taxes, parking, and other services for which accommodations charge.

# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Top Activities	October – December 2024	October – December 2025
Visit friends and relatives	55%	47%
Restaurants	39%	36%
Relax and unwind	32%	33%
Watch a sporting event	26%	31%
Special event/festival	25%	27%
Bars/nightclubs	13%	18%
Nature, bird watching, etc.	13%	17%
Business conference or meeting	18%	12%
Special occasion	12%	11%
Attractions	7%	10%
Education-related	9%	9%
Shopping	15%	9%



# YEAR OVER YEAR COMPARISONS (FY26 1st Quarter)

Post Trip Evaluation	October – December 2024	October – December 2025
Overall Rating	8.2	8.2
Will return to Leon County	97%	94%
Exceed + Met Expectations: Attractions/events	95%	97%
Exceed + Met Expectations: Hospitality	97%	97%
Exceed + Met Expectations: Atmosphere	97%	97%
Exceed + Met Expectations: Quality of hotel	96%	97%
Exceed + Met Expectations: Entertainment	96%	97%
Exceed + Met Expectations: Service at hotel	95%	96%
Exceed + Met Expectations: Customer service	96%	96%
Exceed + Met Expectations: Nightlife	96%	95%
Exceed + Met Expectations: Food quality	96%	95%
Exceed + Met Expectations: Shopping	95%	93%



# LEON COUNTY DIVISION OF TOURISM – VISIT TALLAHASSEE

October-December 2025  
(FY2026 Q1)  
Visitor Tracking Study

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