

ST. JOHNS COUNTY TDC VISITOR TRACKING REPORT

OCTOBER – DECEMBER 2019



VISITOR JOURNEY

Pre-Visit

- Transportation methods
- Trip planning cycle
- Planning sources
- Reason for visiting
- Primary destination

Travel Party Profile

- Visitor origin
- Travel party size
- Travel party composition
- Areas stayed
- Demographics

Trip Experience

- Number of times visited
- Length of stay
- Visitor activities
- Accommodations
- Travel party expenditures
- Sharing on social media

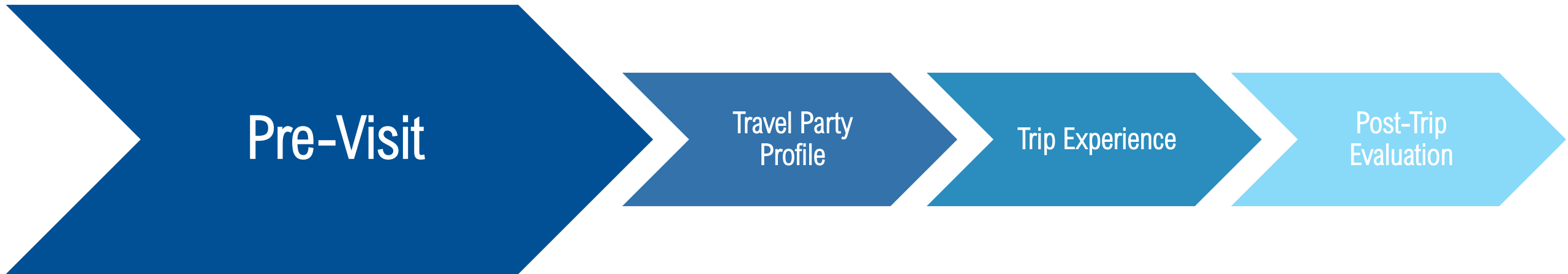
Post-Trip Evaluation

- Destination ratings
- Visitor satisfaction
- Visitor concerns
- Rating destination attributes
- Painting a picture for others

EXECUTIVE SUMMARY



VISITOR JOURNEY



TRANSPORTATION



79% of visitors drove to St. Johns County



20% of visitors flew to St. Johns County



1% of visitors came by boat

TRIP PLANNING

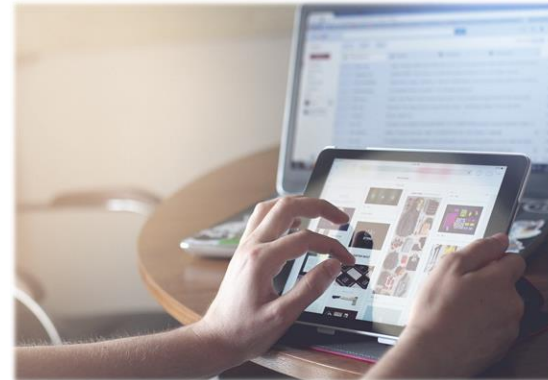
- 17% of visitors planned their trip less than a month in advance
- 58% of visitors planned their trip at least 4 months in advance
- Top trip planning sources:



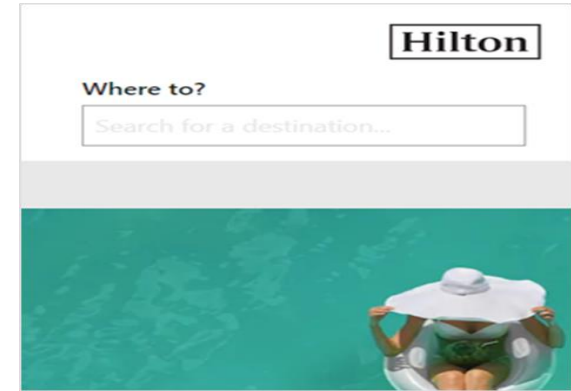
Search on Google
53%



Talk to friends
37%



Use a trip planning app
36%



Go to hotel/resort website
36%

TOP REASONS FOR VISITING¹



Attractions/historical sites
29%



Beach
28%



Special event
26%



Visit friends/relatives
15%



Special occasion
11%

¹Up to 2 responses permitted

PRIMARY DESTINATION



74% of visitors said that St. Johns County was their primary destination on their trip



8% of visitors said their primary destination was Orlando/Disney



5% of visitors said their primary destination was Daytona



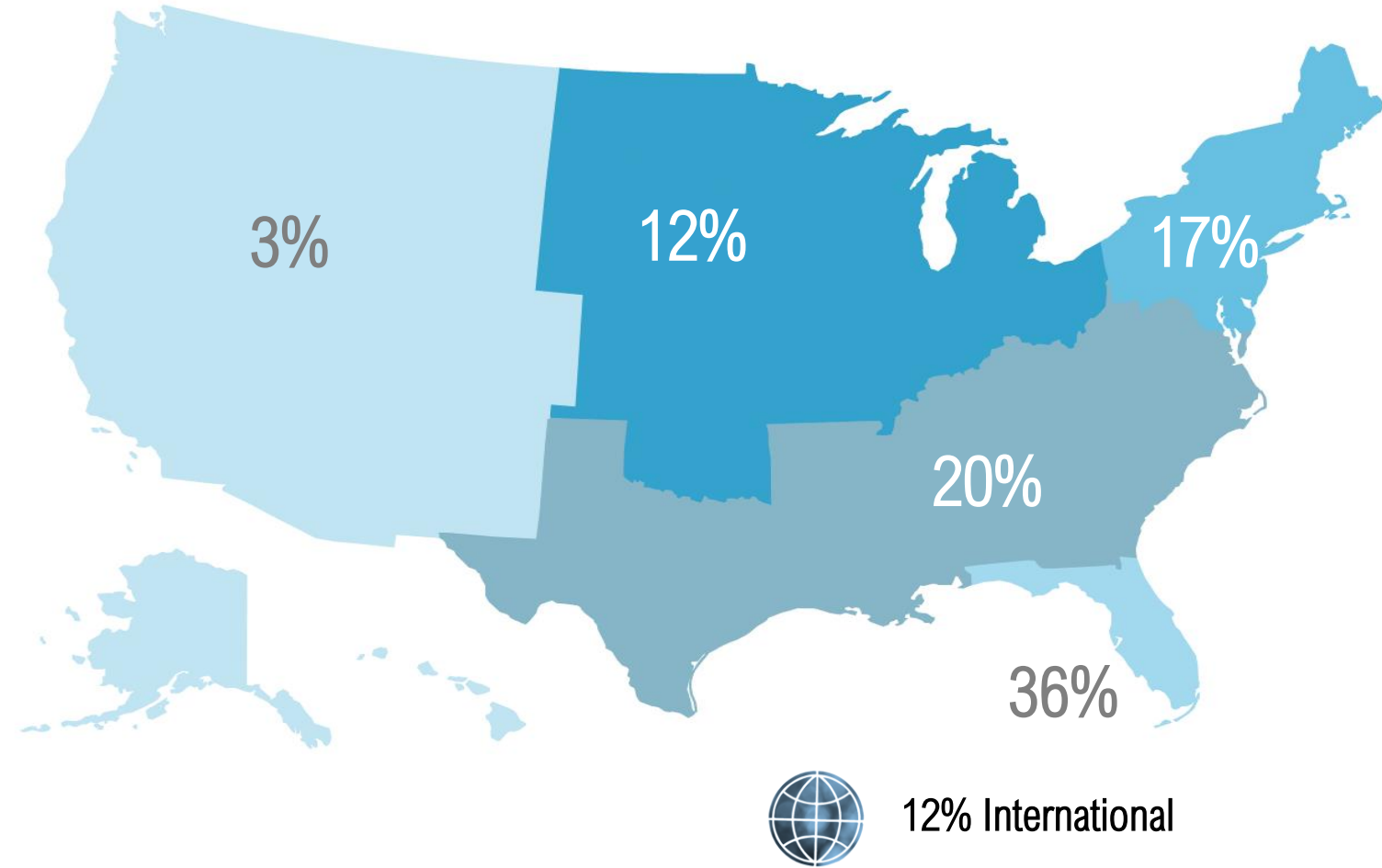
3% of visitors said their primary destination was the Miami/South Florida area

VISITOR JOURNEY

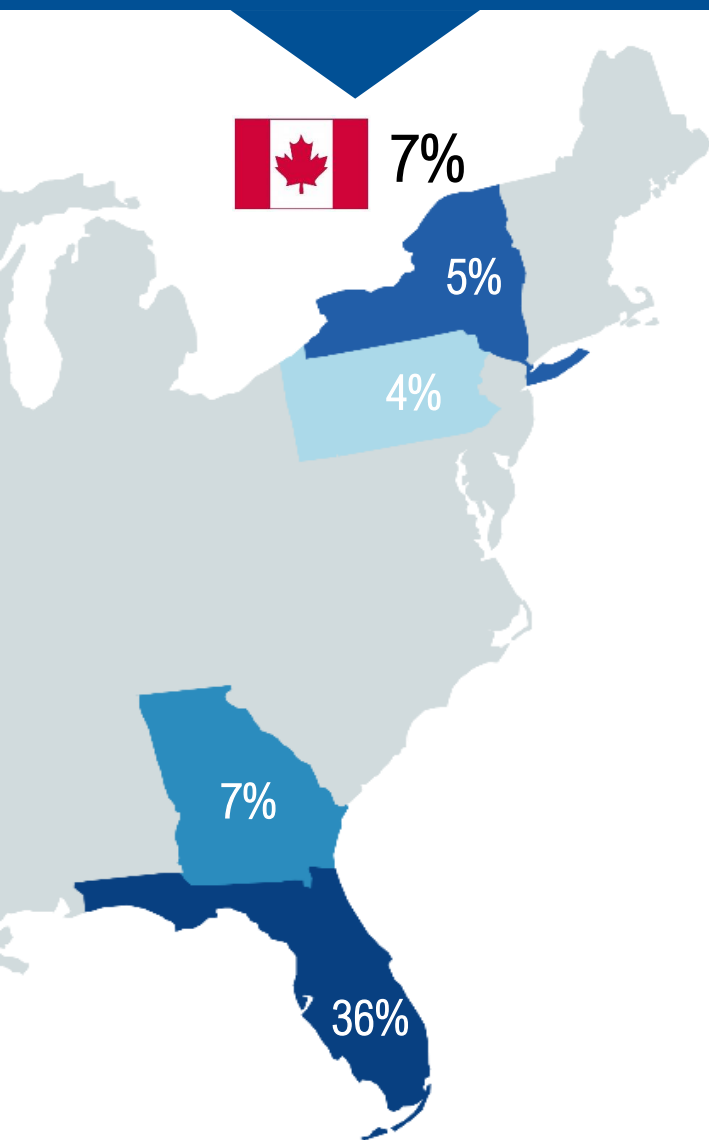


ORIGIN OF VISITORS

- » 36% of visitors were from Florida
- » 7% of visitors to St. Johns County were from Canada, and 5% were from other countries



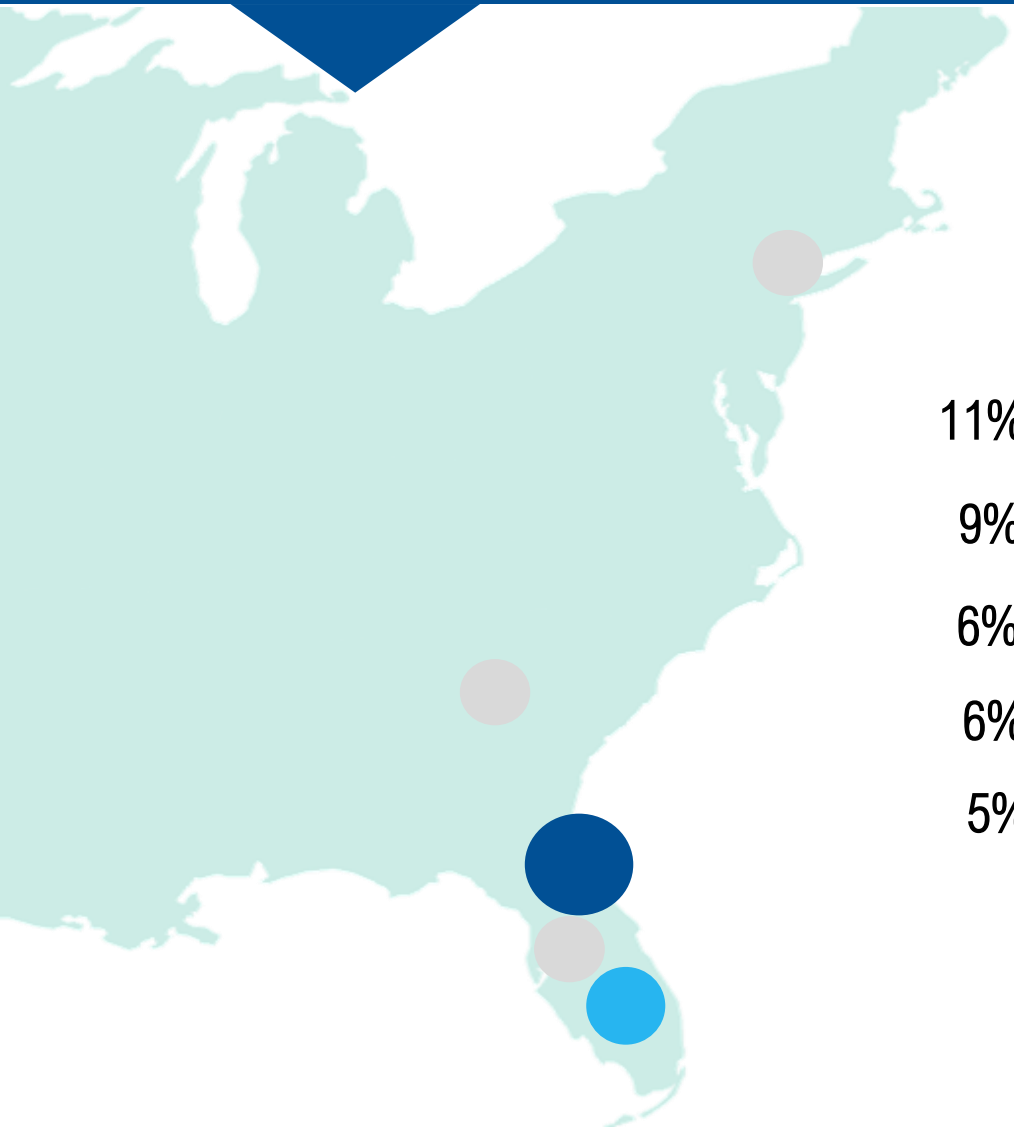
ORIGIN OF VISITORS



- Florida
- Georgia
- Canada
- New York
- Pennsylvania

» **59%** of visitors came from 4 states and Canada

ORIGIN OF VISITORS



- 11% ● Jacksonville
- 9% ● Orlando
- 6% ● Atlanta
- 6% ● New York City*
- 5% ● Ocala

» **37%** of visitors came from 5 U.S. markets

TRAVEL PARTY SIZE AND COMPOSITION

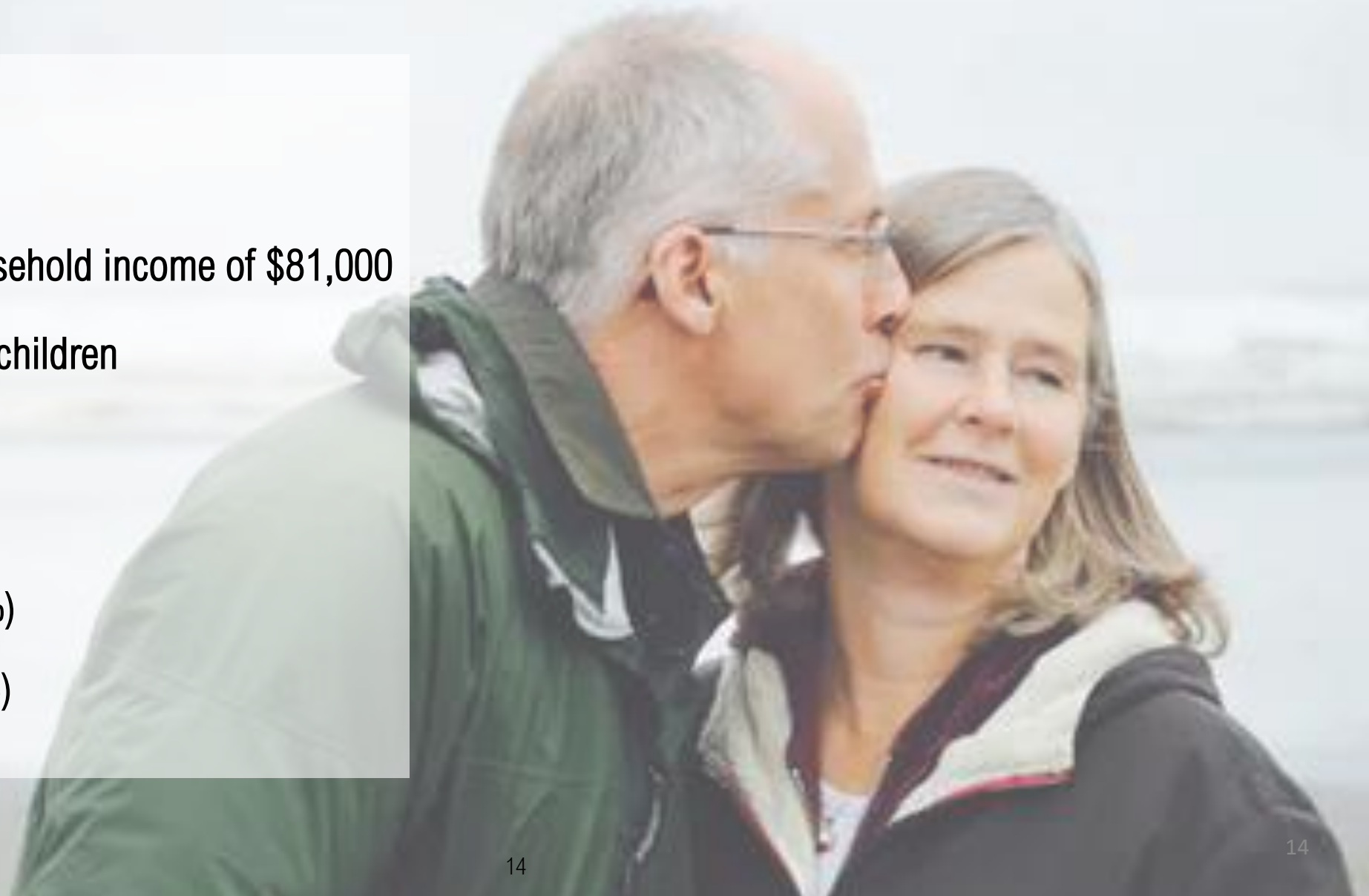
- » The average visitor traveled in a party composed of **2.9** people
- » **15%** traveled with at least one person under the age of 20



TYPICAL ST. JOHNS COUNTY VISITOR

- The typical Visitor:

- Was 55 years old
- Had a median household income of \$81,000
- 15% traveled with children
- Was from:
 - Florida (36%)
 - Southeast (20%)
 - Northeast (17%)



TYPICAL DAY TRIP VISITOR

○ The typical Day Trip Visitor:

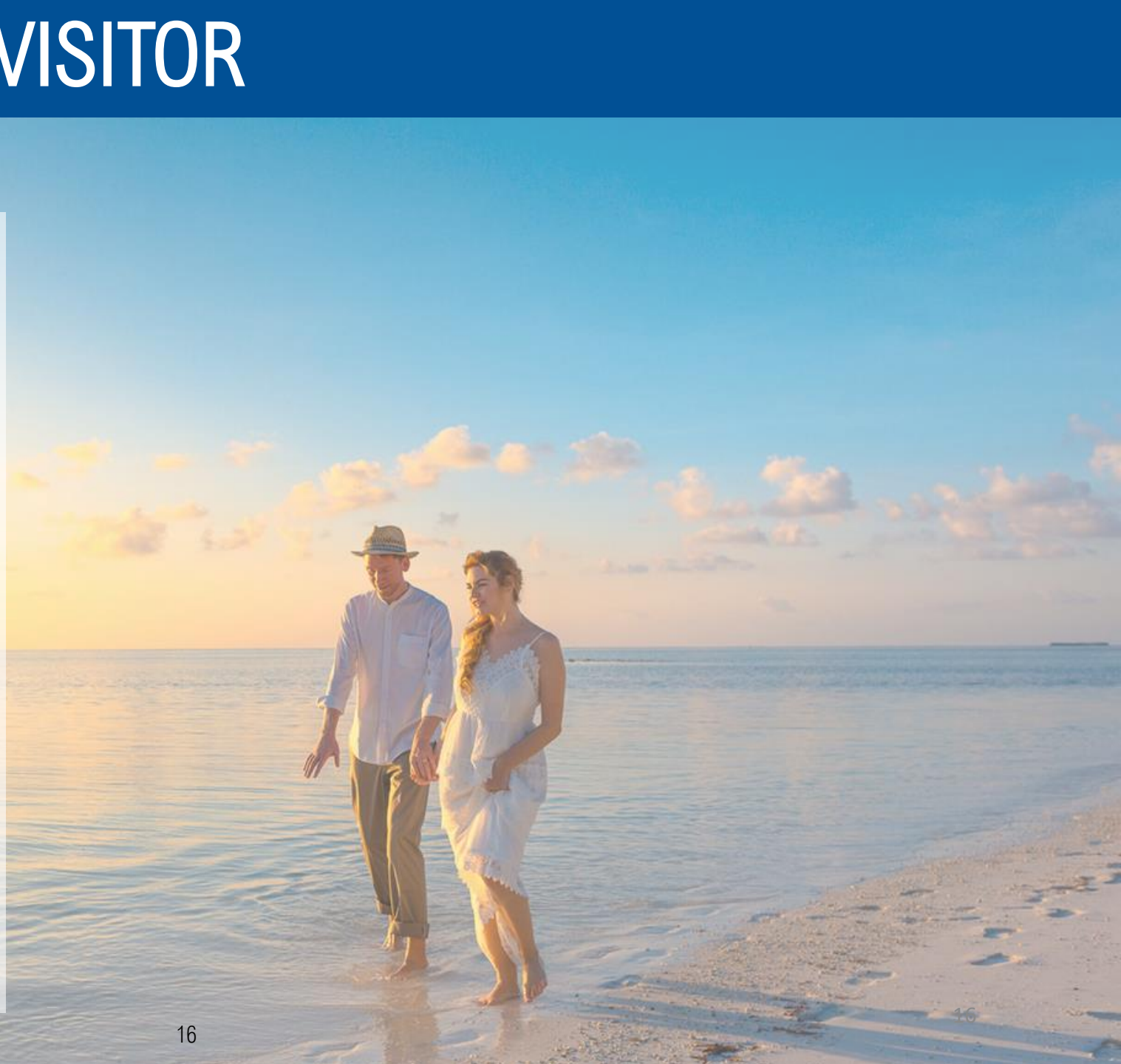
- Was 55 years old
- Had a median household income of \$72,300
- 14% traveled with children
- Was from:
 - Jacksonville (29%)
 - Orlando (13%)
 - International (12%)



TYPICAL VACATIONER¹ VISITOR

- The typical Vacationer¹ Visitor:
 - Was 52 years old
 - Had a median household income of \$92,400
 - 13% traveled with children
 - Was from:
 - Florida (36%)
 - Southeast (24%)

¹Travel parties who stayed 1-5 nights.



TYPICAL LONG-TERM¹ VISITOR

- The typical Long-Term¹ Visitor:
 - Was 58 years old
 - Had a median household income of \$75,200
 - 20% traveled with children
 - Was from
 - Northeast (24%)
 - Southeast (24%)
 - Midwest (22%)

¹Travel parties who stayed 6 nights or more.



VISITOR JOURNEY



FIRST TIME AND EXPERIENCED VISITORS

- » Almost 1 in 3 were first time visitors
- » 35% had visited more than 10 times



LENGTH OF STAY

- » 32% of visitors to St. Johns County were day trippers, while 68% stayed overnight
- » The average visitor spent about 5.4 nights in St. Johns County



TOP ACTIVITIES DURING VISIT¹



Restaurants
81%



Beach
69%



Attractions, historical sites
65%



Trolley/walking/ghost tour
47%



Shopping, antiquing
44%

¹Multiple responses permitted

VISITORS' ACCOMMODATIONS



35%
Hotel/motel/resort



32%
Day trippers



15%
Rental house/condo/Airbnb

TRAVEL PARTY SPENDING

- » Visiting travel parties spent **\$501** a day and **\$2,705** on their trip



SOCIAL MEDIA

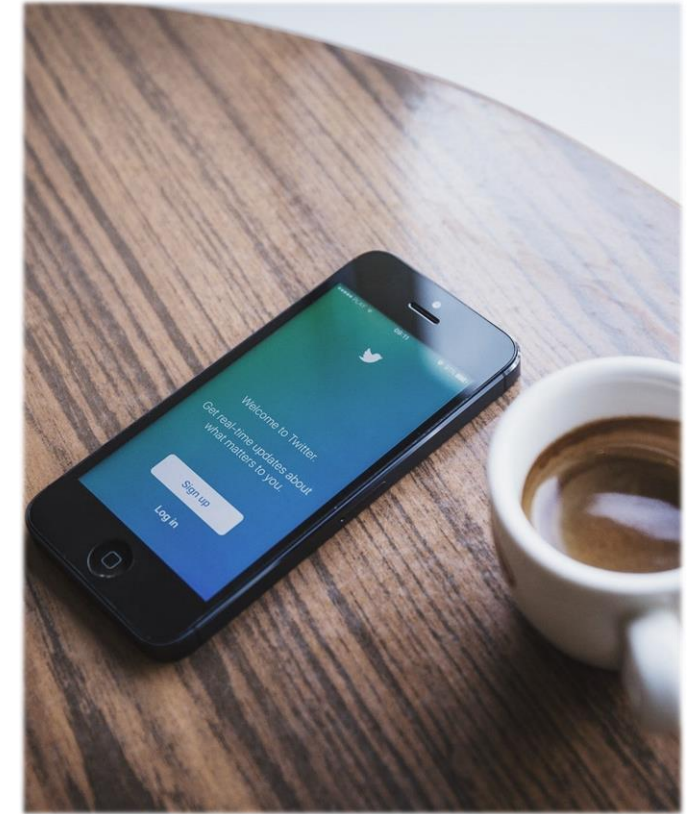
» 64% of visitors planned to share their trip experiences on social media



Facebook
57%



Instagram
27%



Twitter
12%

AREA STAYED

» 3 in 4 visitors stayed in St. Augustine



St. Augustine
76%



Ponte Vedra
10%



Other
13%

VISITOR JOURNEY



ST. JOHNS COUNTY RATINGS¹

	Average Visitor Rating
Plenty to see and do	4.9
A safe destination	4.8
A “family” atmosphere	4.8
Convenient location	4.8
Peaceful/relaxing	4.7
Open space, green space, natural areas	4.7
Food/restaurants	4.7
White sandy beaches	4.7
Value for your travel dollar	4.6
Access to amenities	4.0

¹Visitors rated their experience in St. Johns county on a 5 point scale, where 5 is excellent and 1 is poor.

VISITOR SATISFACTION

- » 94% of visitors would recommend St. Johns County
- » 94% will come back
- » Visitors gave St. Johns County a 9.4¹ rating as an overall place to visit



¹10=Excellent; 1=Poor.

MAKING ST. JOHNS COUNTY A BETTER PLACE TO VISIT

» 1 in 2 visitors said that additional public parking would make St. Johns County a better place to visit



More public parking
53%



Less crowded
19%



More public restrooms
15%



WHAT DO YOU DO AND SEE IN ST. JOHNS COUNTY THAT YOU CAN'T DO OR SEE AT HOME?

Beach/Ocean (62%)



“Breathtaking historical city with perfect beaches. The weather is outstanding for this time of year.”

History/Culture (54%)



“Really pretty historical district with lots of restaurants and shopping. It looks like an old European town.”

Attractions (39%)



“A definite MUST SEE! So much to offer! You’ll need a long weekend to fully experience St. Augustine.”

Great Food (23%)



“Breathtaking historical city with phenomenal local seafood and great BBQ. O’Steen’s restaurant has the best seafood on Earth!”

IF YOU WERE TALKING TO A FRIEND WHO HAD NEVER VISITED, HOW WOULD YOU DESCRIBE ST. JOHNS COUNTY AS A PLACE TO VISIT OR VACATION?

Historical (43%)



"You'll fall in love with the old city charm, historic buildings, culture, and beautiful, white sandy beach."



Best Beaches (35%)



"One of the best beaches we've ever stepped foot on in AND out of the US!"



Great Place to Vacation (25%)



"St. Augustine is the perfect place to vacation or live in. Such a beautiful city!"



Beautiful (22%)



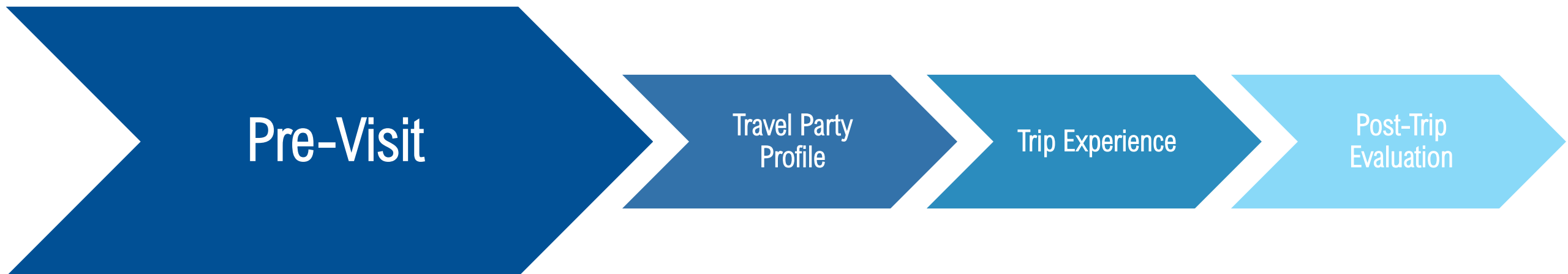
"Beautiful city, beautiful beach, great place to live."



DETAILED FINDINGS

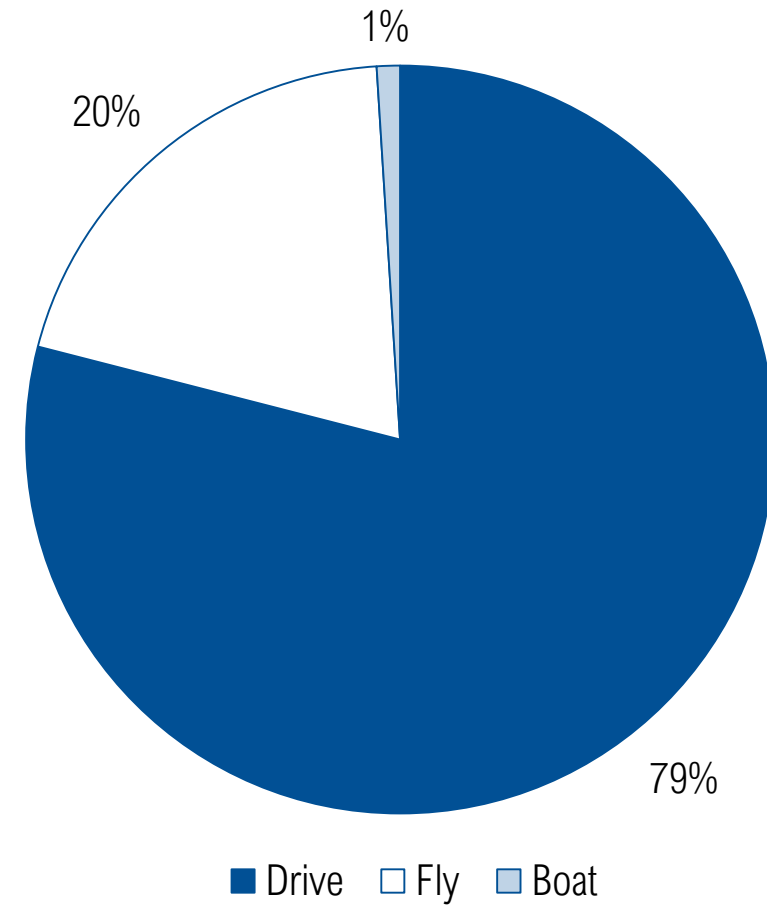


VISITOR JOURNEY



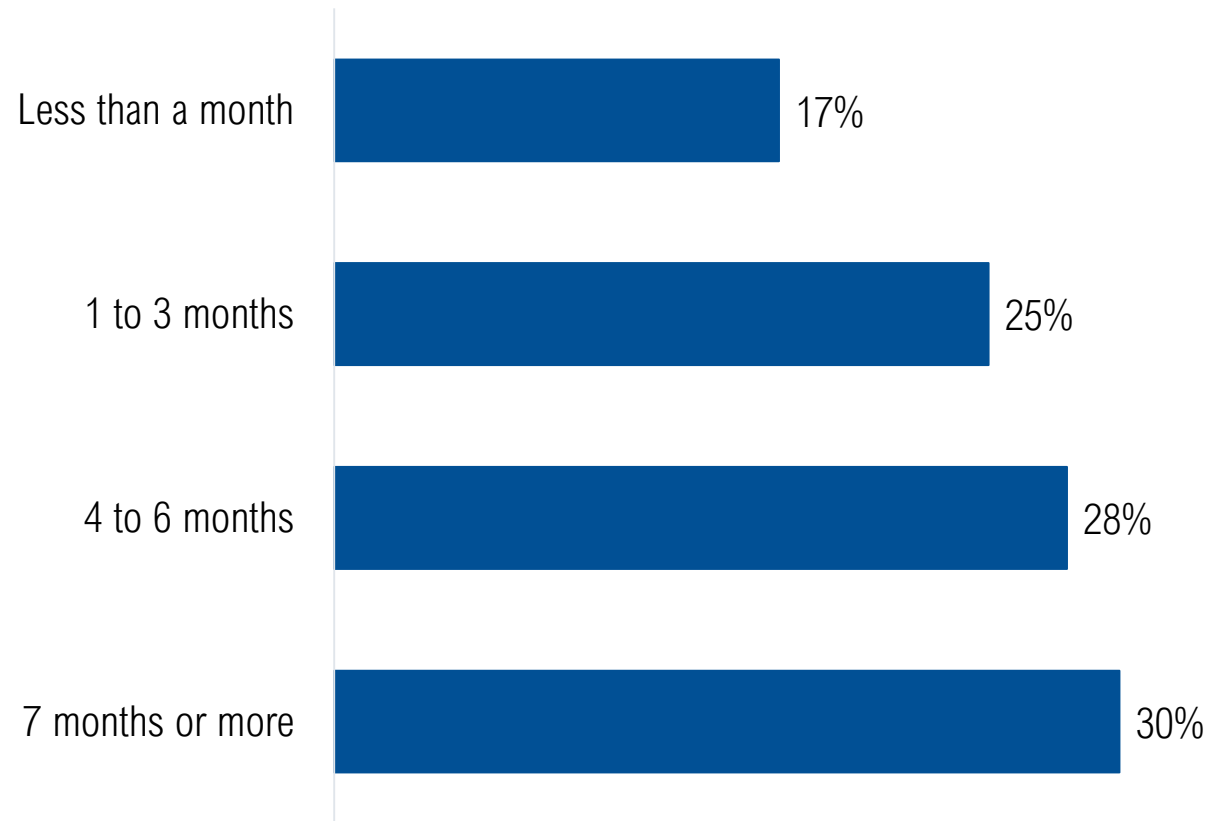
VISITOR TRANSPORTATION

→ 8 in 10 visitors drove to St. Johns County



TRIP PLANNING CYCLE

→ **Almost 3 in 5** visitors planned their trip 4 months or more in advance

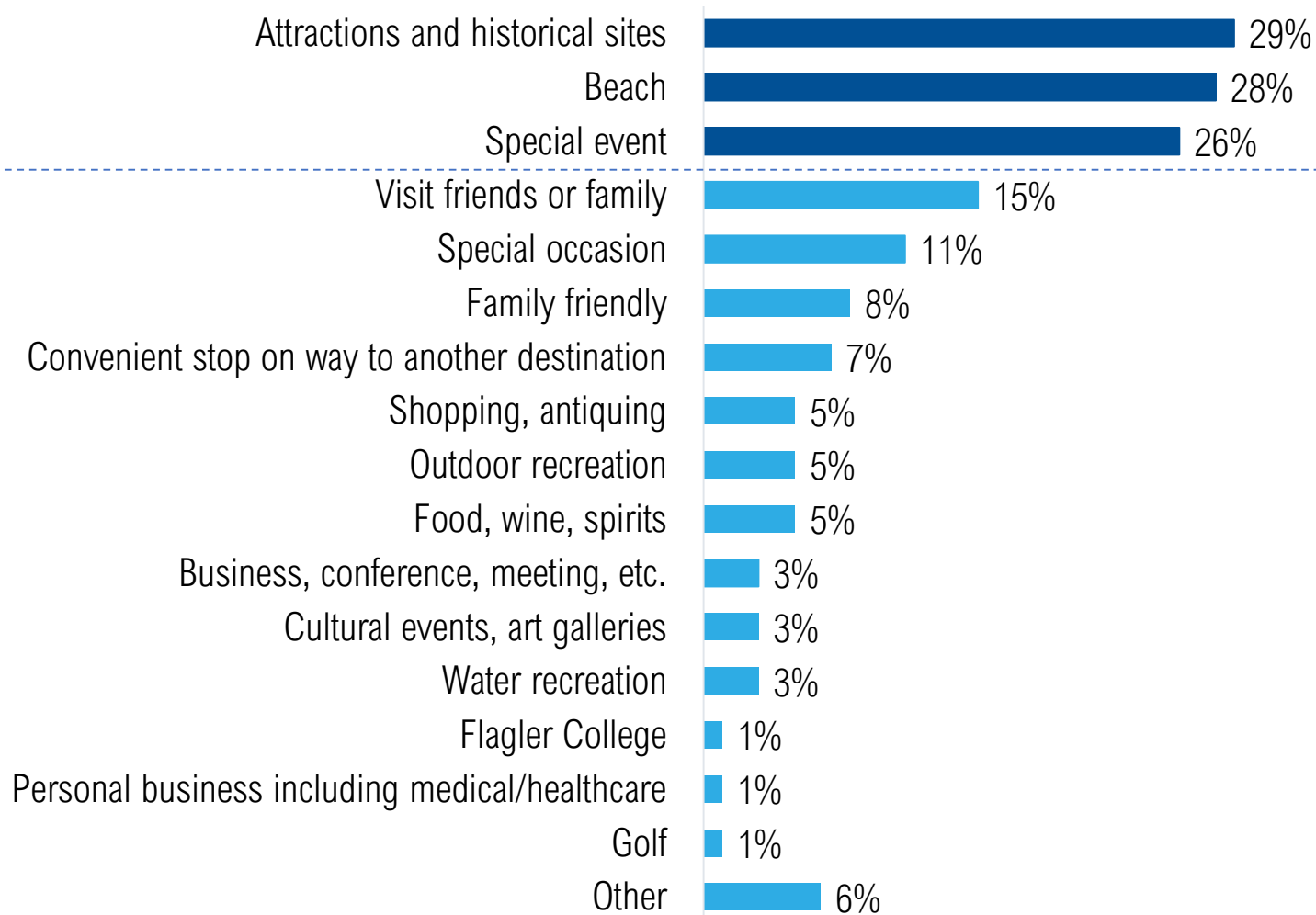


TRIP PLANNING SOURCES¹

Trip Planning Source	
Search on Google, Yahoo, etc.	53%
Talk to friends	37%
Use a trip planning app	36%
Go to a hotel/resort website	36%
Destination social media	28%
Go to VisitStAugustine.com	27%
Deal-based promotion	17%
Personal social media	12%
Use an online travel agency such as Priceline, Expedia, etc.	11%
Go to FloridasHistoricCoast.com or HistoricCoastCulture.com	11%
Read travel guides	5%
Contact a travel agent	5%
Go to an airline website	4%
Look at travel magazines	4%
Look in travel sections of newspapers	3%
Other	15%
None	6%

¹Multiple responses permitted.

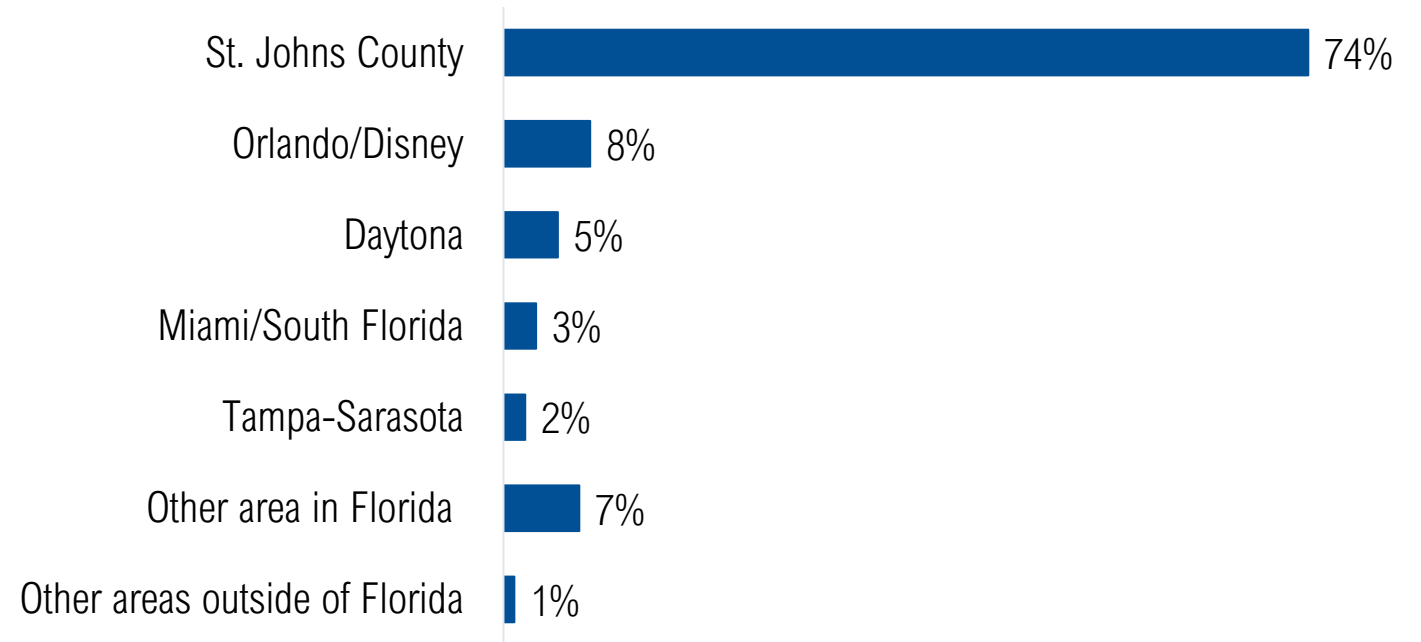
REASONS FOR VISITING¹



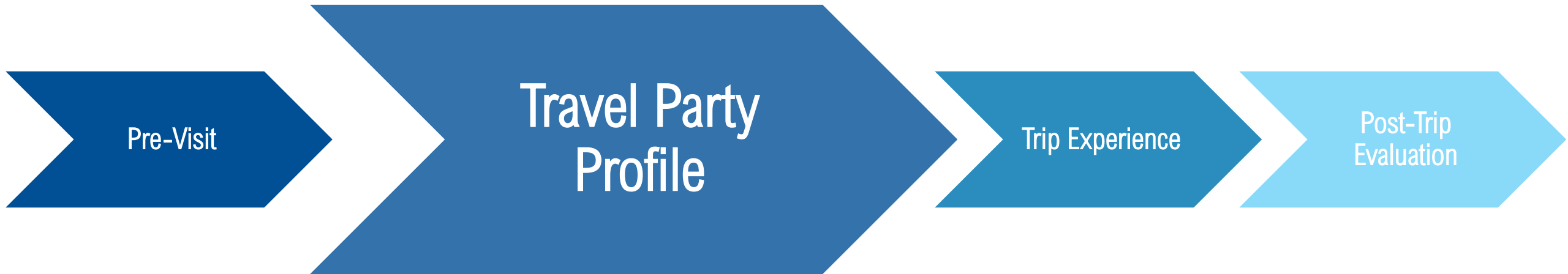
¹Up to 2 responses permitted

PRIMARY DESTINATION

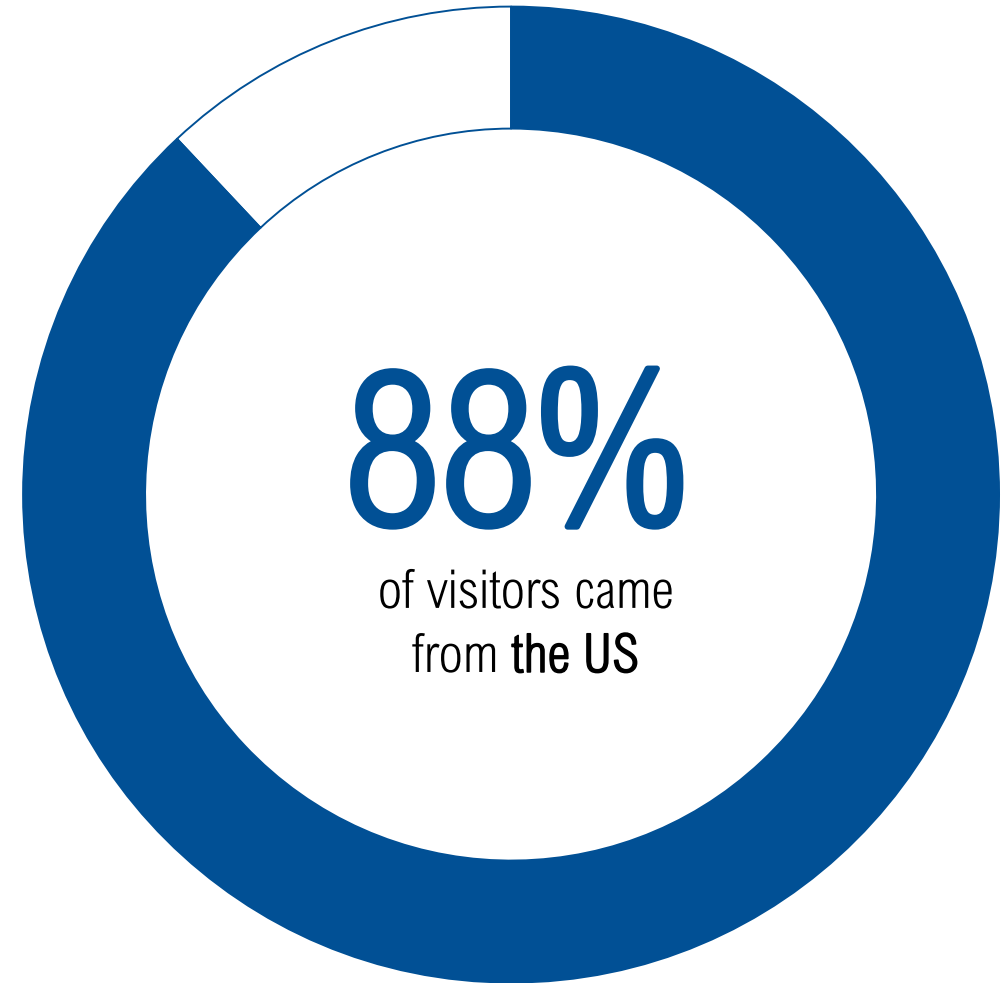
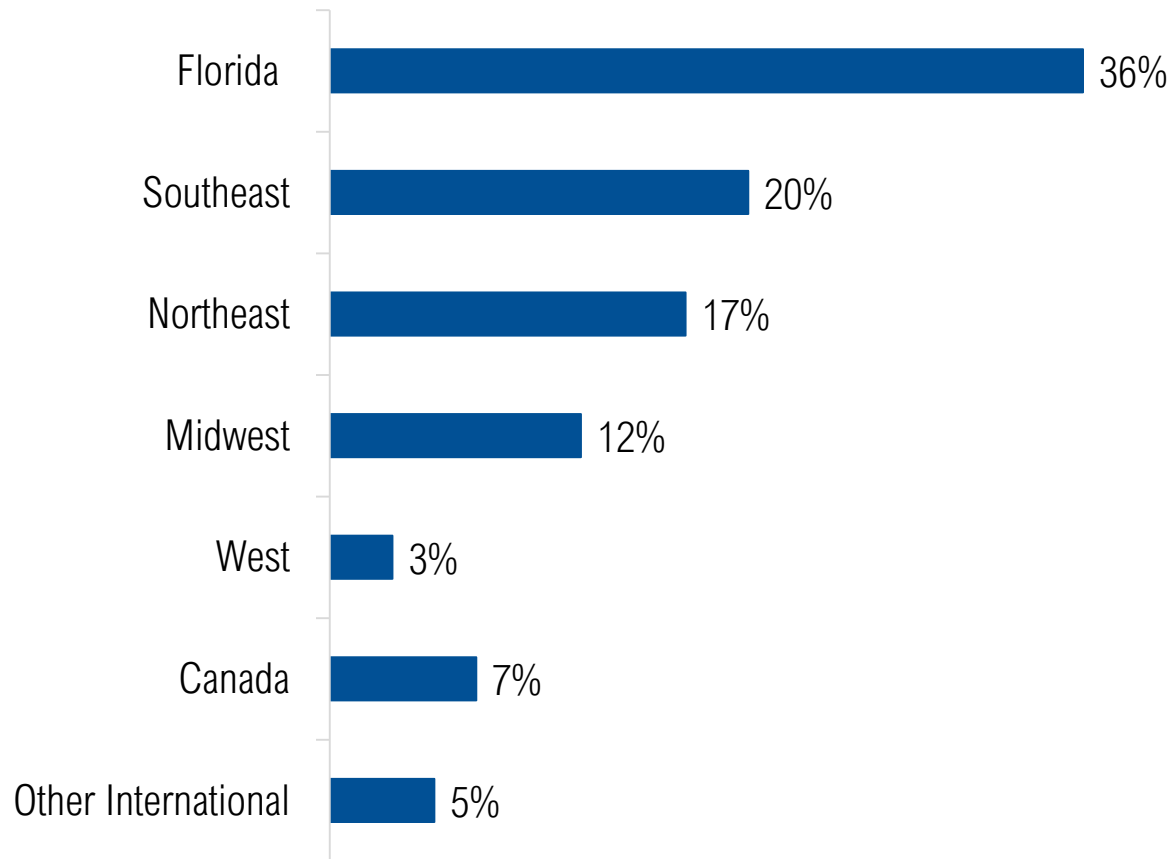
→ **74%** of visitors said that St. Johns County was the primary destination on their trip



VISITOR JOURNEY

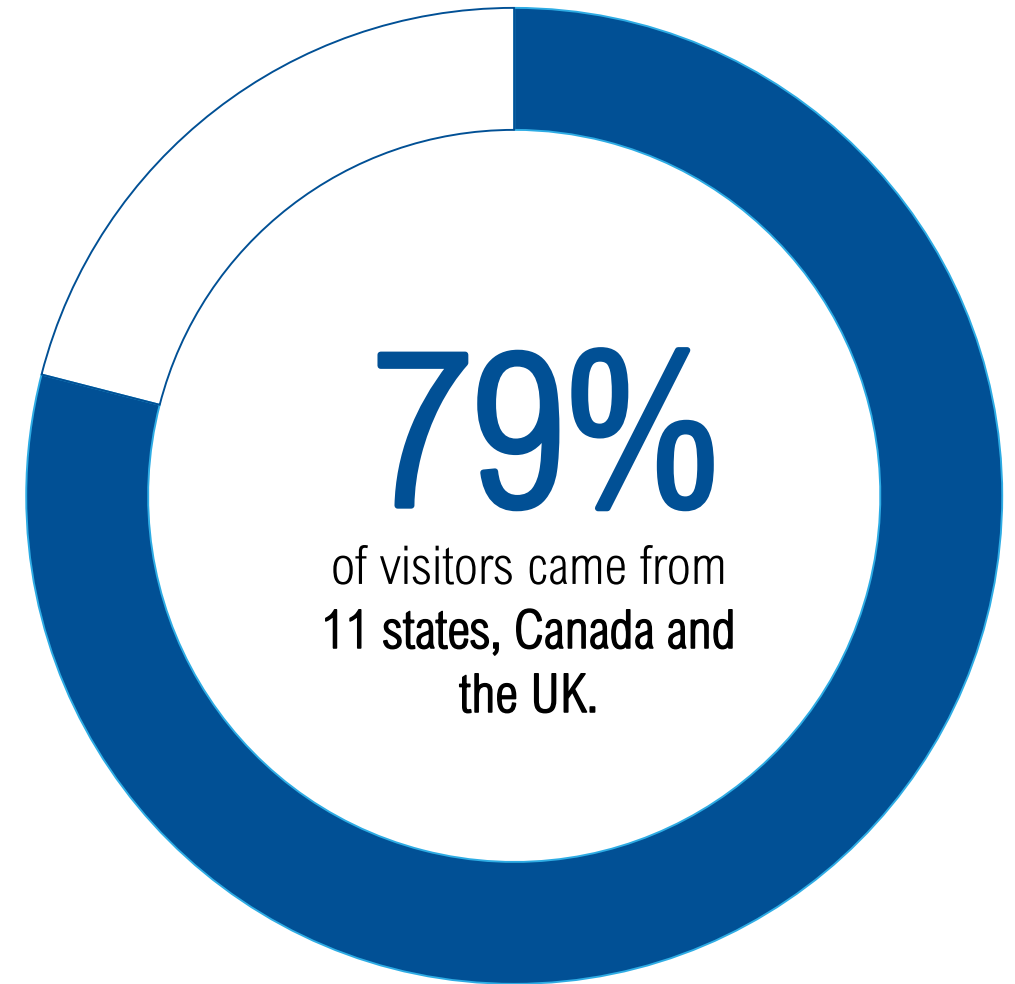


ORIGIN OF VISITORS: REGIONS



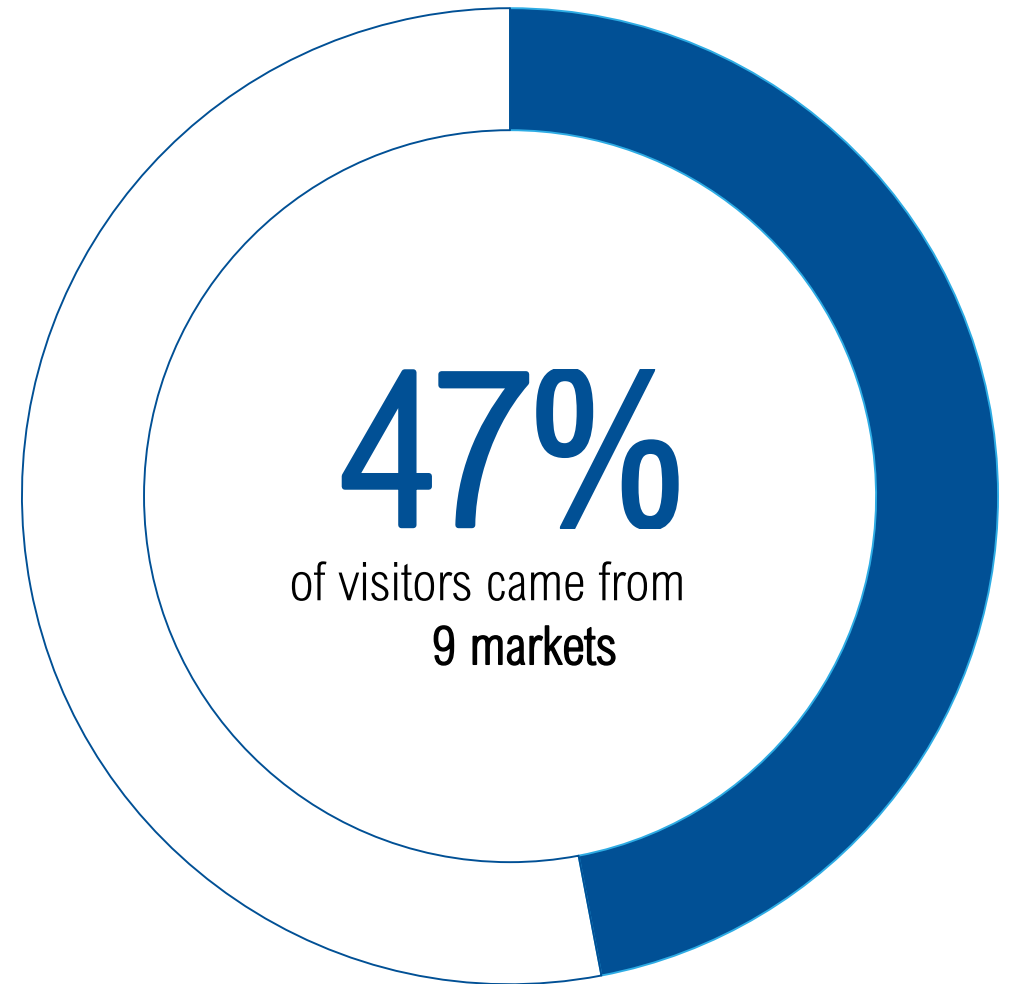
ORIGIN OF VISITORS: STATES & COUNTRIES

Origin	Percentage of Visitors
Florida	36%
Georgia	7%
Canada	7%
New York	5%
Pennsylvania	4%
South Carolina	3%
Ohio	3%
New Jersey	3%
Tennessee	3%
Illinois	2%
Virginia	2%
Michigan	2%
United Kingdom	2%



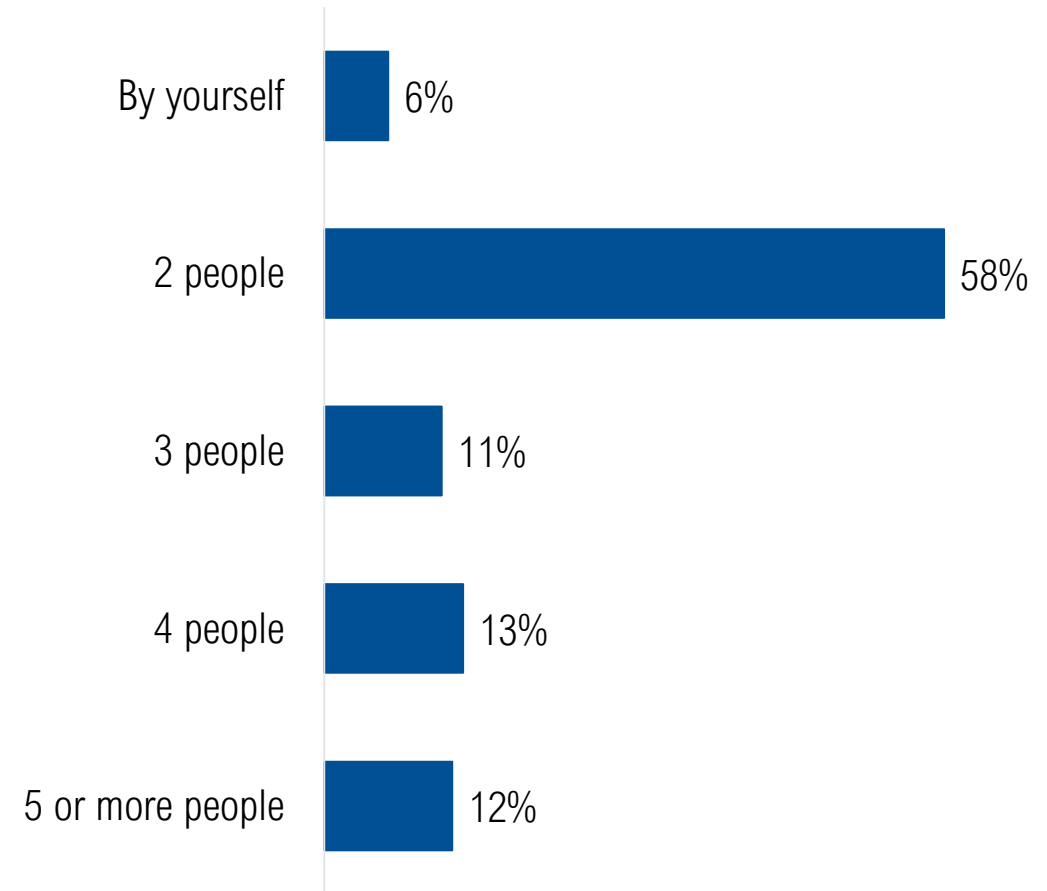
ORIGIN OF VISITORS: MARKETS

Market	% of Visitors
Jacksonville	11%
Orlando	9%
Atlanta	6%
New York City*	6%
Ocala	5%
Miami-Ft. Lauderdale	3%
Tampa-Clearwater-St. Petersburg	3%
Gainesville	2%
Washington D.C. - Baltimore	2%



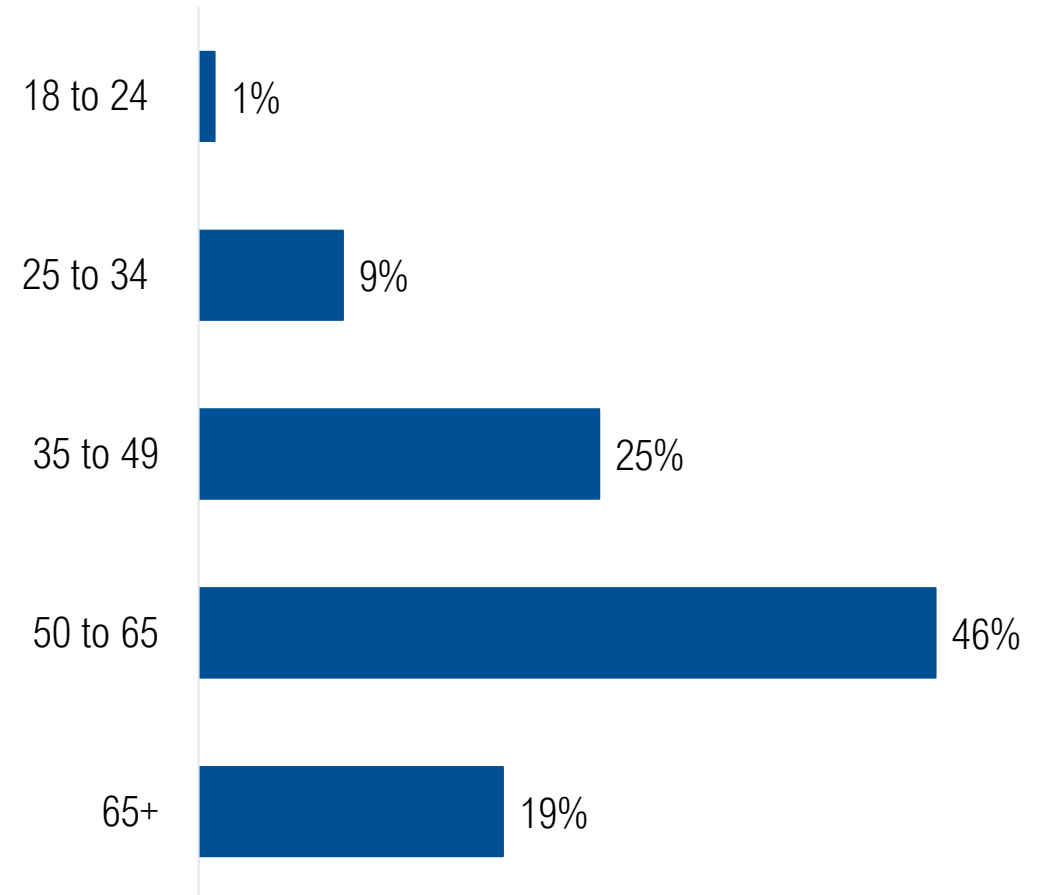
TRAVEL PARTY SIZE AND COMPOSITION

- The average visitor traveled in a party composed of **2.9** people
- **15%** traveled with children under 20
- **94%** traveled with at least 1 other person



Median Age

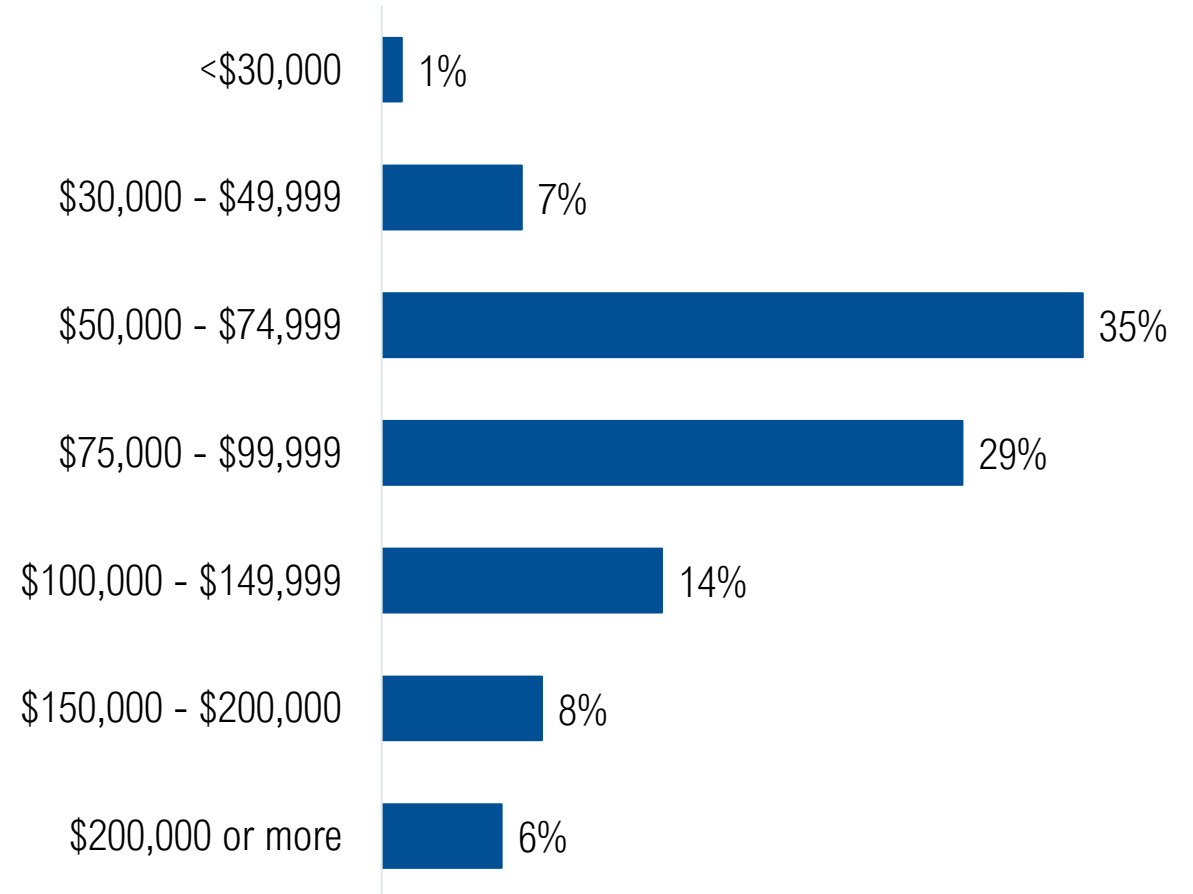
→ The median age of October – December visitors was **55 years old**.



HOUSEHOLD INCOME IN 2018

Median Household Income

→ October – December visitors had a median household income of **\$81,000**



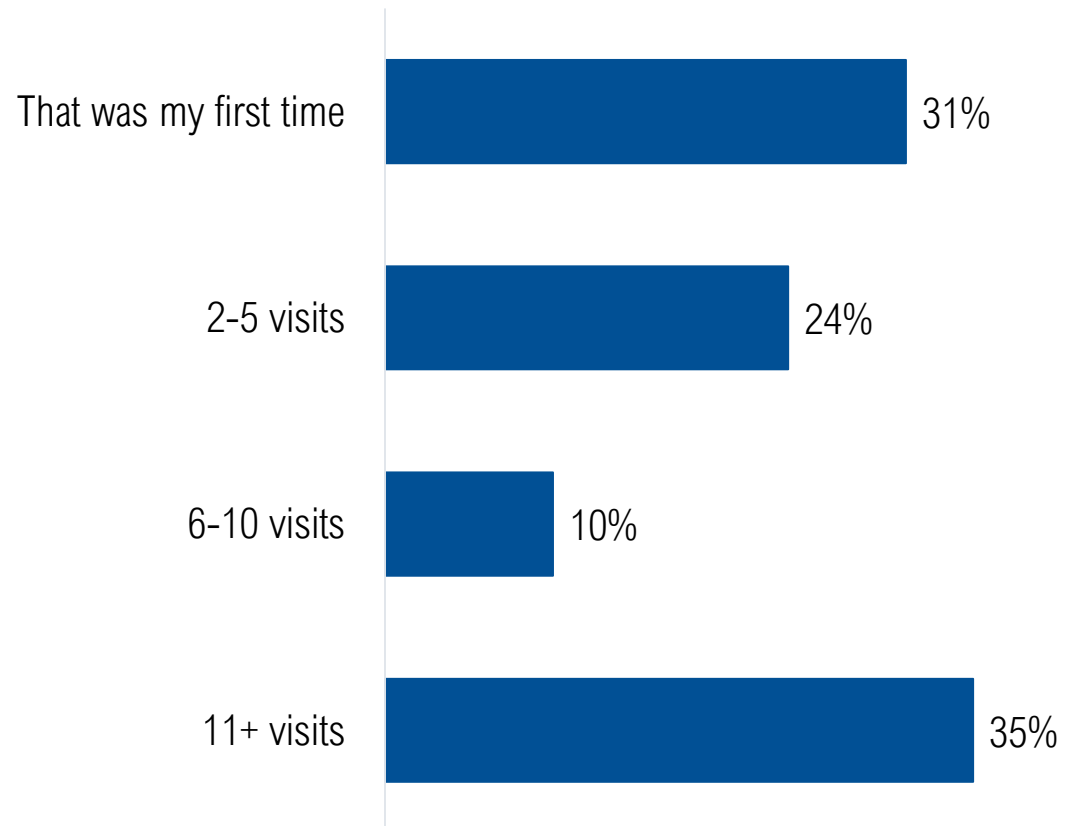
VISITOR JOURNEY



NUMBER OF TIMES IN DESTINATION

→ **31%** were first time visitors

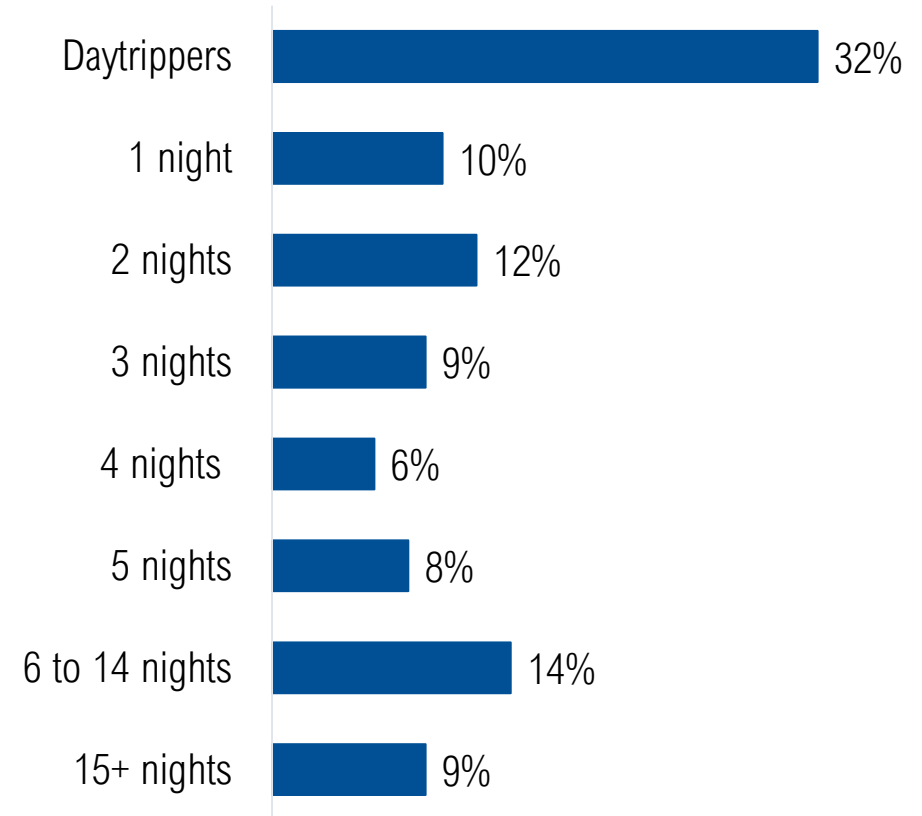
→ **35%** had visited more than 10 times



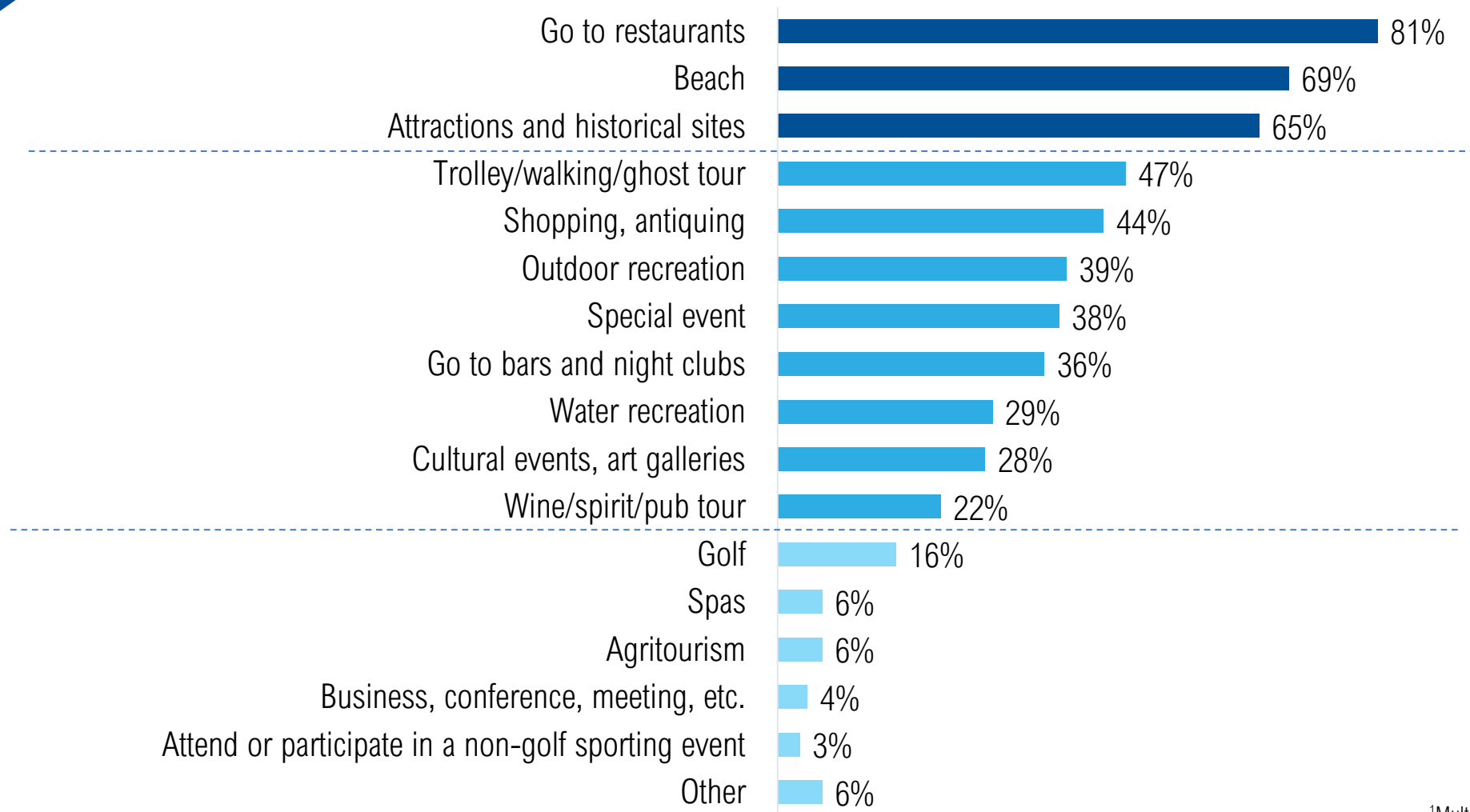
LENGTH OF STAY

→ **32%** of visitors to St. Johns County were day trippers, while **68%** stayed overnight

→ Visitors spent an average of **5.4** nights in St. Johns County



VISITOR ACTIVITIES¹



¹Multiple responses permitted.



REASON FOR VISIT VS. VISITOR ACTIVITIES

Key Reasons for Visiting

Reason for visit¹

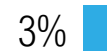
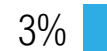
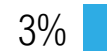


Attractions and historical sites

Beach

Special event

Visitor Activities¹



Shopping, antiques

Outdoor recreation

Food, wine, spirits

Business, conference, meeting, etc.

Cultural events, art galleries

Water recreation

Golf



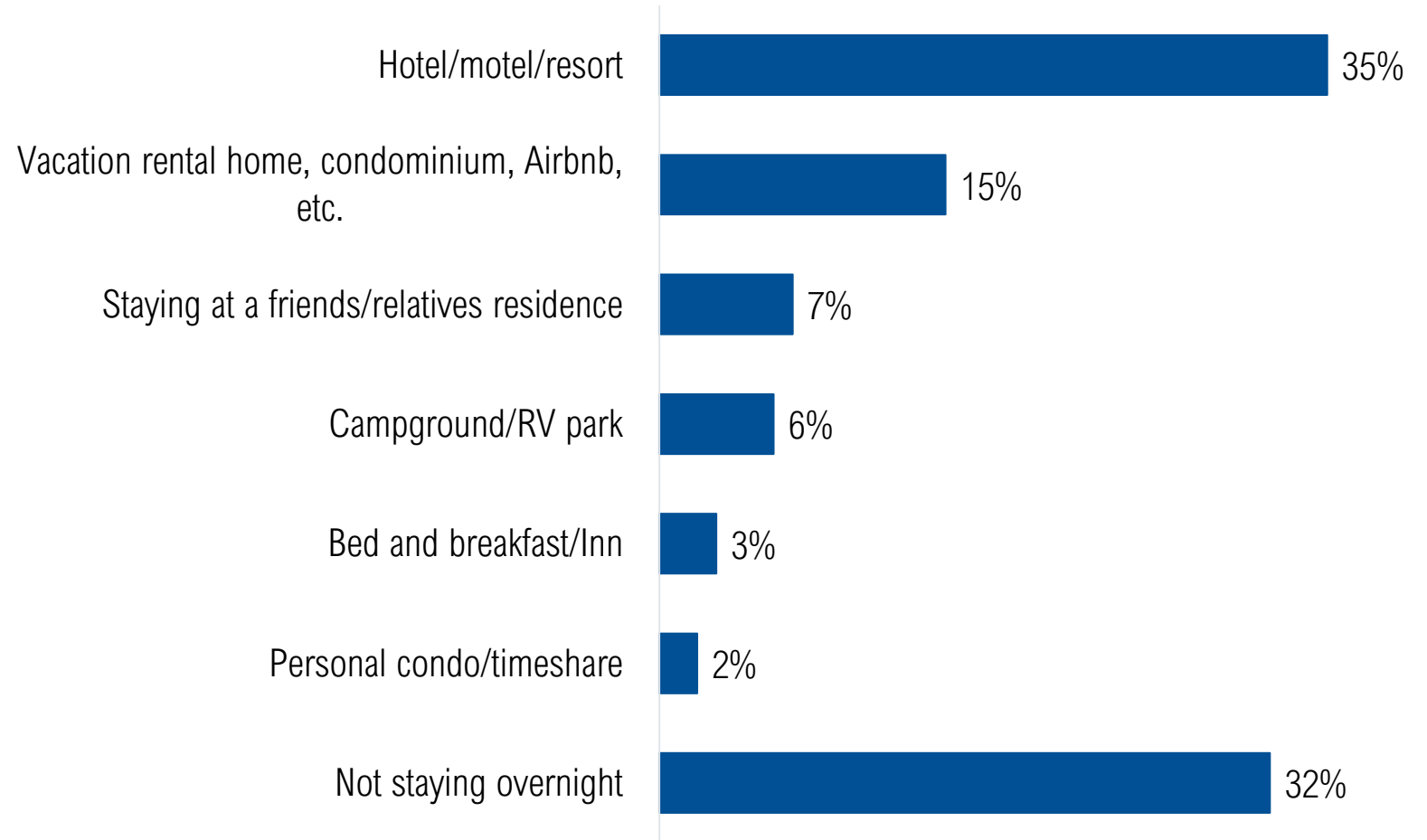
Trip Enhancements

¹Multiple responses permitted.

VISITORS' ACCOMMODATIONS

→ **34%** of visitors to St. Johns County stayed in a hotel/motel or resort

→ **8 in 10** visitors stayed in St. Johns County during the week (Monday-Thursday)



DAILY TRAVEL PARTY SPENDING

	Average Travel Party Spend per Day	Total Travel Party Spend per trip ¹
Lodging	\$120	\$648
Restaurants	\$113	\$610
Groceries	\$14	\$76
Shopping	\$71	\$384
Admissions	\$93	\$502
Entertainment	\$36	\$194
Transportation	\$41	\$221
Other	\$13	\$70
Total	\$501	\$2,705

¹Calculated based on average nights stayed.

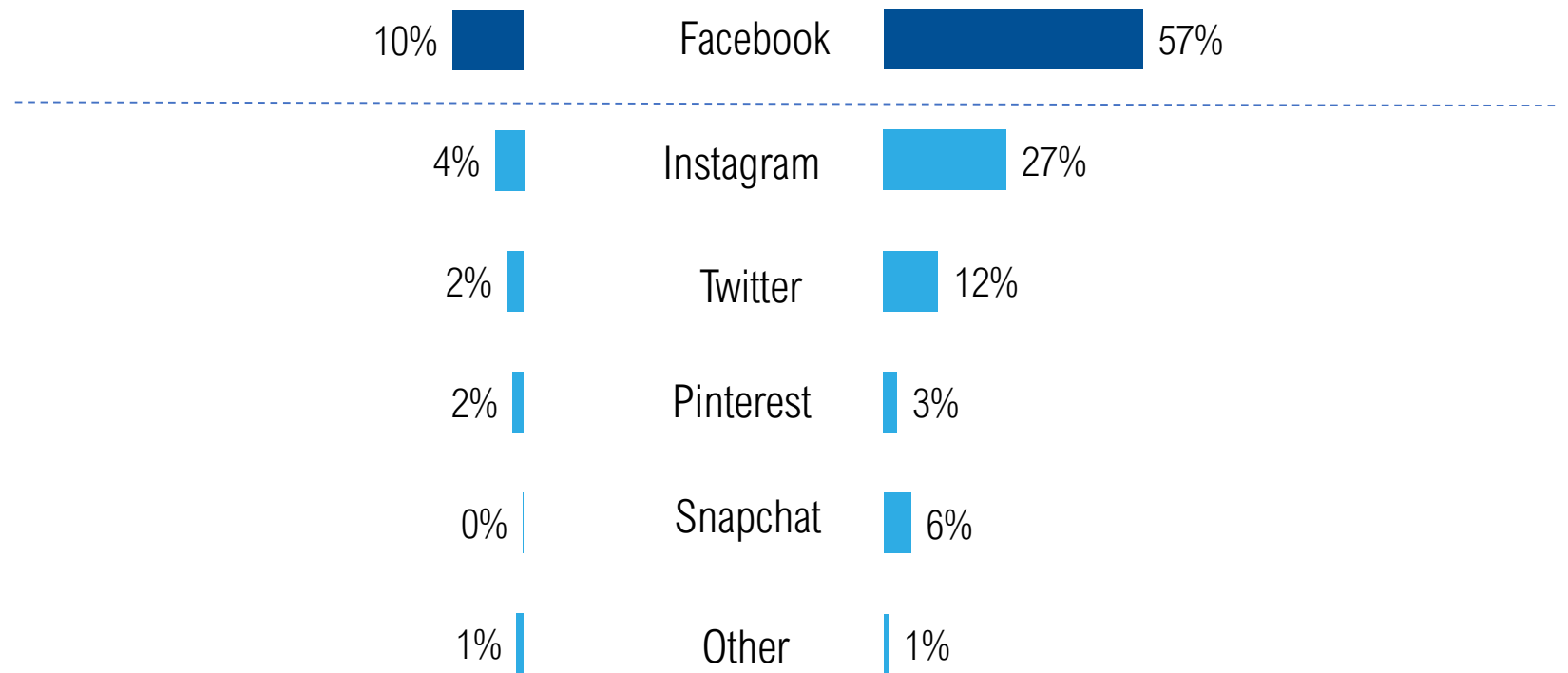
SOCIAL MEDIA: PLANNING VS. SHARING

How visitors planned their trips¹

→ **12%** of visitors used social media to plan their trips

→ **64%** of visitors shared their trip experiences on social media during their trip or shortly after

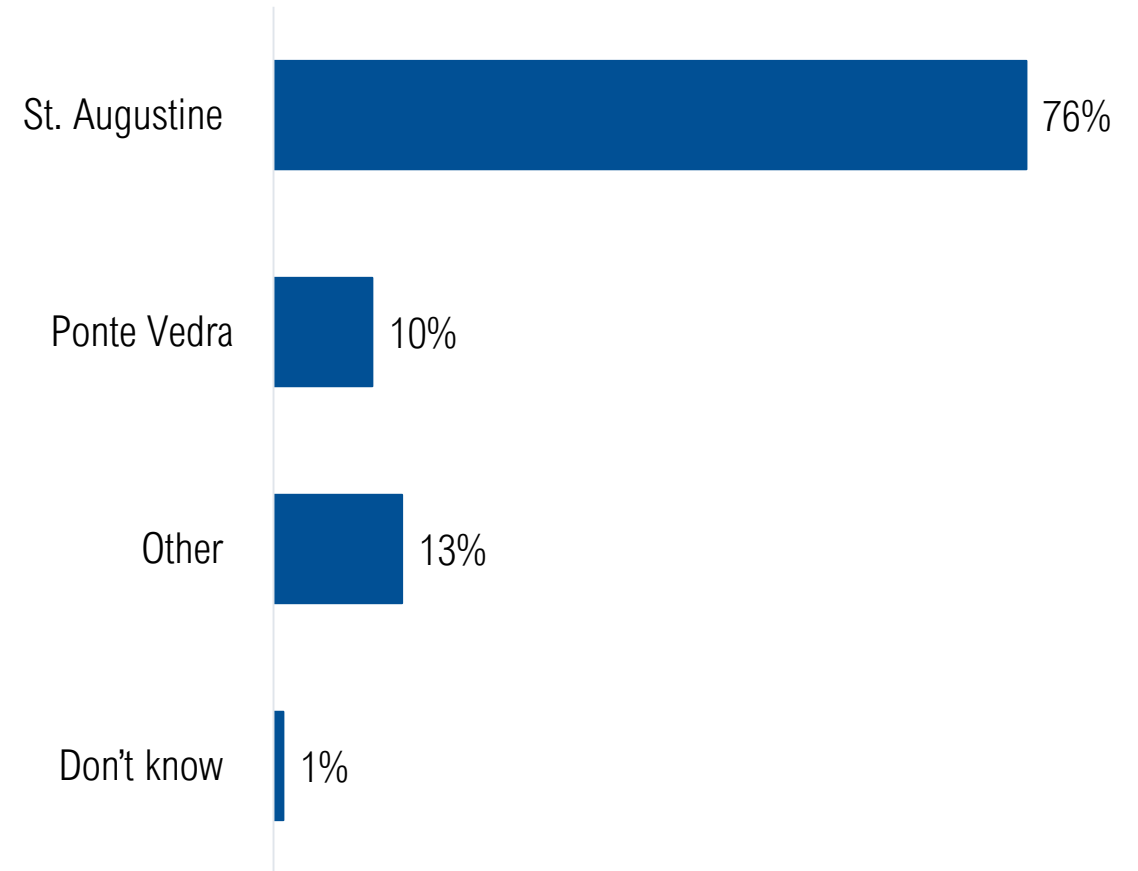
How visitors shared their trips¹



¹Multiple responses permitted.

AREA STAYED

→ **3 in 4** visitors stayed in St. Augustine



VISITOR JOURNEY



ST. JOHNS COUNTY RATINGS¹

	Average Visitor Rating
Plenty to see and do	4.9
A safe destination	4.8
A “family” atmosphere	4.8
Convenient location	4.8
Peaceful/relaxing	4.7
Open space, green space, natural areas	4.7
Food/restaurants	4.7
White sandy beaches	4.7
Value for your travel dollar	4.6
Access to amenities	4.0

¹Visitors rated their experience in St. Johns county on a 5 point scale, where 5 is excellent and 1 is poor.



VISITOR SATISFACTION

→Visitors gave St. Johns County an overall rating of **9.4¹ out of 10** as a place to visit

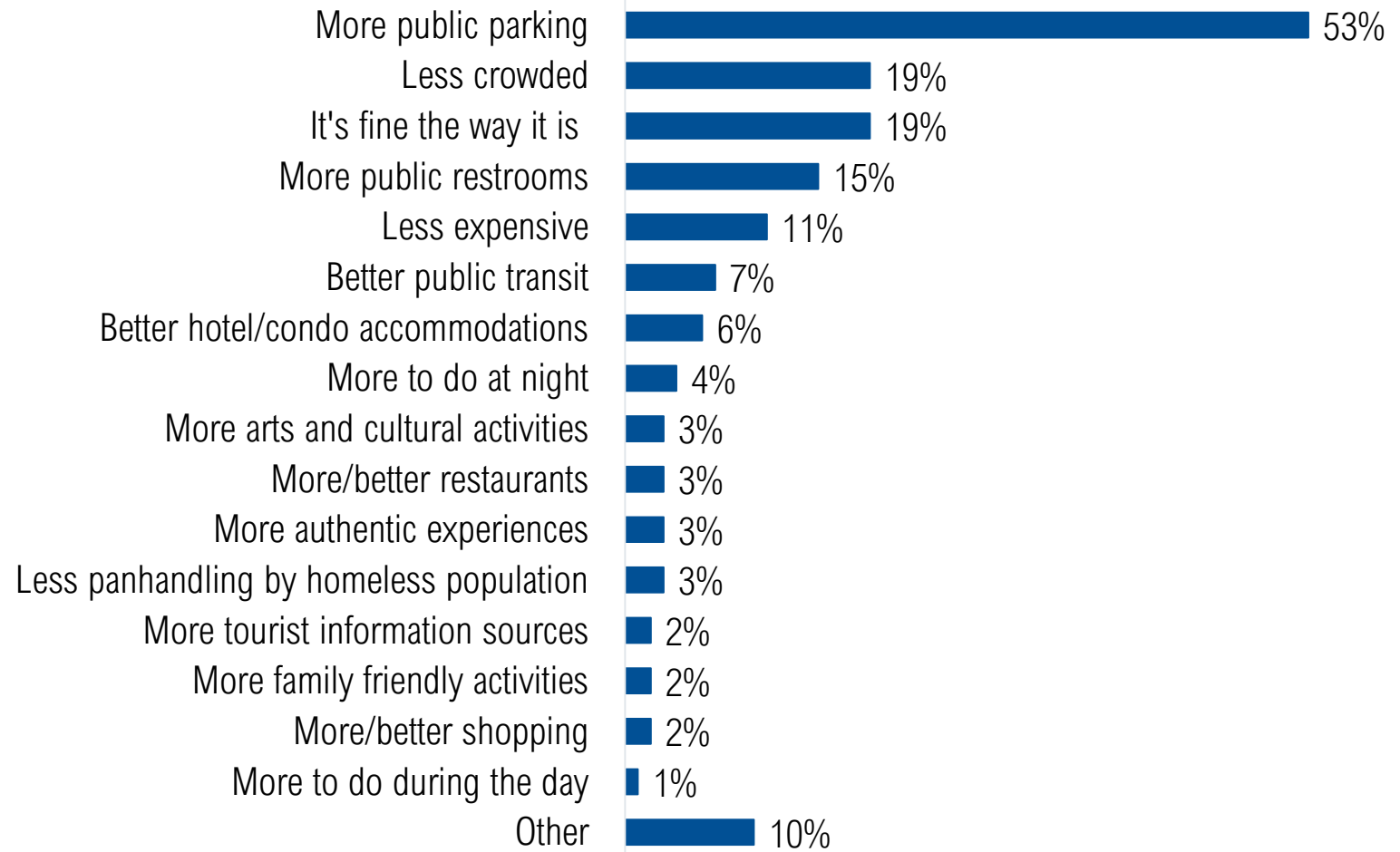
→**94%** of visitors would recommend St. Johns County to a friend or relative

→**94%** of visitors will come back to St. Johns County

¹Based on a scale from 1 to 10 where 1 means poor and 10 means excellent.

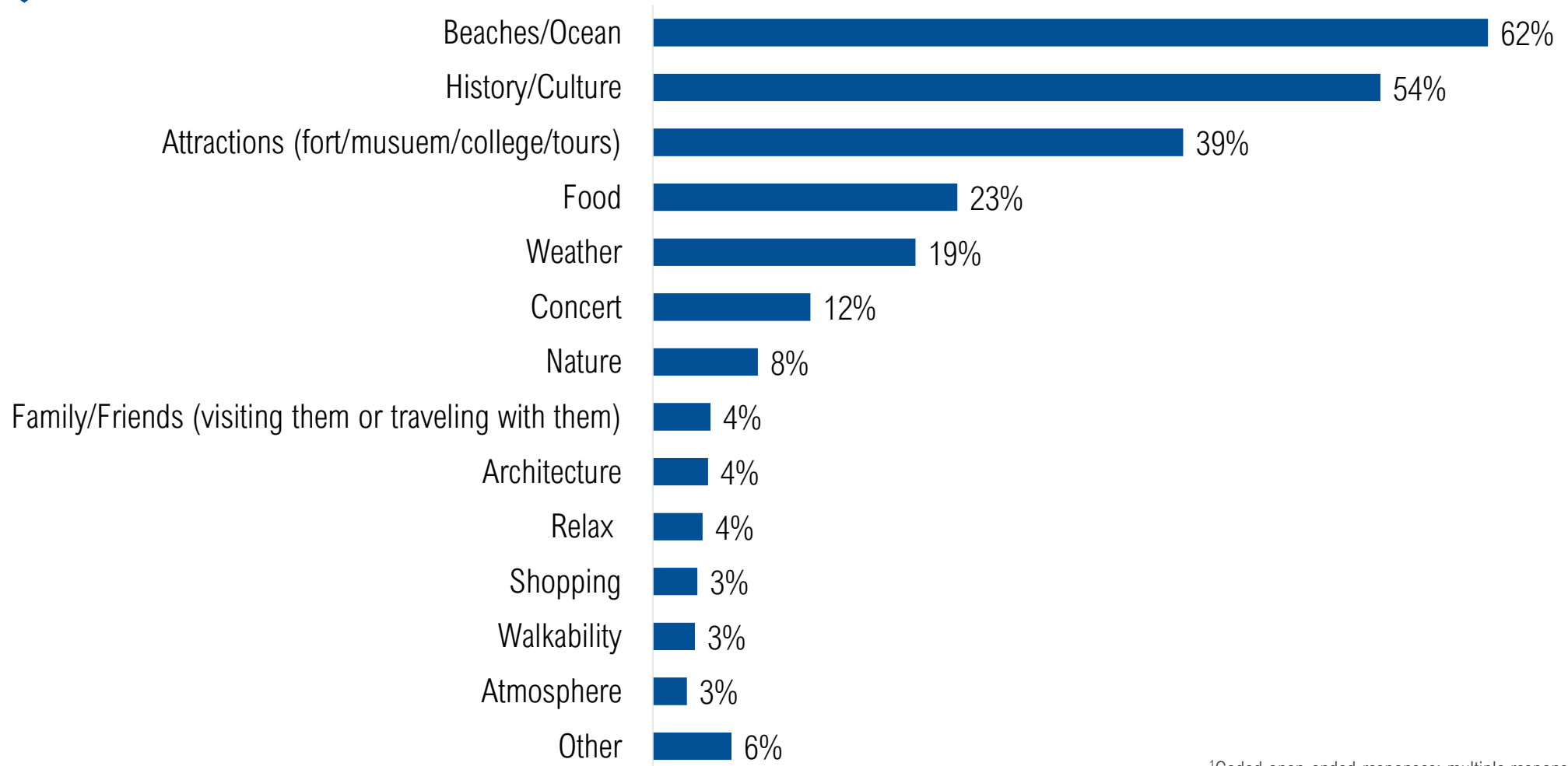
MAKING ST. JOHNS COUNTY A BETTER PLACE TO VISIT¹

→ **1 in 2** visitors said that additional public parking would make St. Johns County a better place to visit



¹Multiple responses permitted.

WHAT DO YOU DO AND SEE IN ST. JOHNS COUNTY THAT YOU CAN'T DO OR SEE AT HOME?¹



¹Coded open-ended responses; multiple responses permitted.

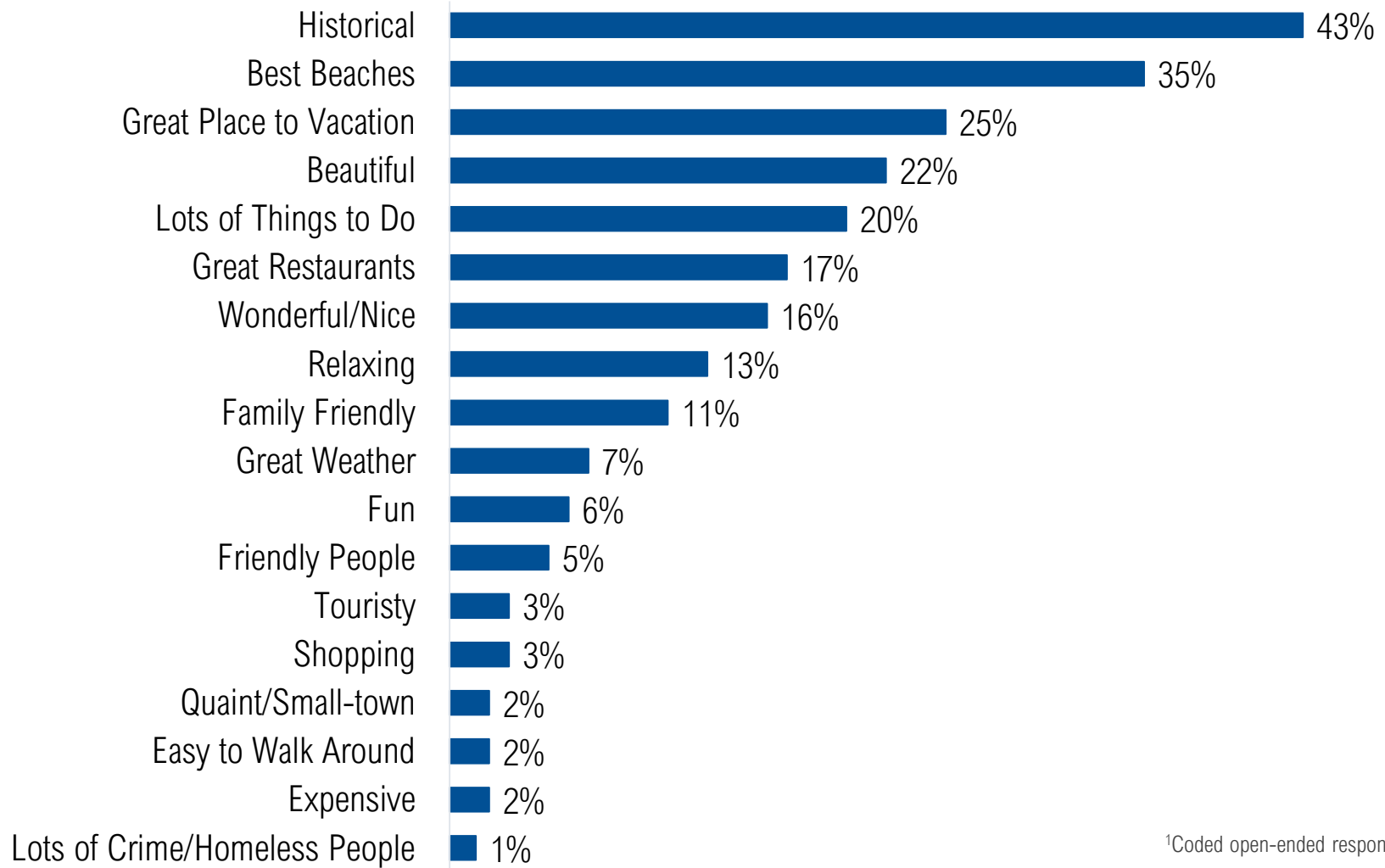
WHAT DO YOU DO AND SEE IN ST. JOHNS COUNTY THAT YOU CAN'T DO OR SEE AT HOME: BEACHES/OCEAN

- “The white sandy beaches and historical attractions as well as beachfront dining.”
- “St. Augustine’s white sandy beaches and the lighthouse.”
- “The beautiful beaches and all the sightseeing of historical sites.”
- “Amazing beaches, weather, and family friendly activities.”
- “Beautiful ocean with good weather.”
- “Going to the beach and it being almost 90 degrees in November.”
- “Awesome beach, restaurants and a historic downtown area.”
- “The beaches and local seafood restaurants. We saw a school of dolphins!”
- “Gorgeous beaches with great downtown dining.”
- “Vacation homes on the beach with great fishing spots and a variety of restaurants.”

WHAT DO YOU DO AND SEE IN ST. JOHNS COUNTY THAT YOU CAN'T DO OR SEE AT HOME: HISTORY/CULTURE

- “The oldest city has a lot of charm, best beach on the east coast of Florida. We’re getting married Saturday here.”
- “Nights of Lights and the downtown decorations are nice. I like the historical attractions too.”
- “The history of St. Augustine and the unique tours and dining experiences.”
- “The Old Jail, Fountain of Youth, and The Amphitheater are all awesome.”
- “I like the historic sites and museums around town.”
- “I came down for the day to see the historical town.”
- “You can see so much history! So many historic buildings and attractions.”
- “You can see the great historic district alongside perfect beaches with no crowds.”
- “Enjoyed seeing the history of America with Spain and England and there were many different dining choices.”
- “Loved seeing downtown historic landmarks such as the Fort and the Lighthouse.”

IF YOU WERE TALKING TO A FRIEND WHO HAD NEVER VISITED, HOW WOULD YOU DESCRIBE ST. JOHNS COUNTY AS A PLACE TO VISIT OR VACATION?¹



¹Coded open-ended responses; multiple responses permitted.

IF YOU WERE TALKING TO A FRIEND WHO HAD NEVER VISITED, HOW WOULD YOU DESCRIBE ST. JOHNS COUNTY AS A PLACE TO VISIT OR VACATION: HISTORICAL

- “An amazing city on the water with an abundance of history, Southern culture, and hospitality.”
- “Really pretty historical district with lots of restaurants and shopping. It looks like an old European town.”
- “So glad we stopped in St. Augustine and explored the oldest city. Very special, small, hometown feel.”
- “We are planning on buying a home in the oldest city because it’s such a magical place with amazing weather, restaurants, beachfront houses, and the downtown area. We love St. Augustine!”
- “You’ll fall in love with the old city charm, historic buildings, culture, and beautiful, white sandy beach.”
- “St. Augustine is a really interesting city filled with old charm and mixed with modern age amenities.”
- “A city with old town charm. There is so much to do. Love the unique historical attractions in downtown. Great tour options, spectacular beach, pier and hotels on the beach are so close to historic downtown. 5 stars!”
- “St. Augustine is a gem! Such a neat historical town with an amazing beach.”

IF YOU WERE TALKING TO A FRIEND WHO HAD NEVER VISITED, HOW WOULD YOU DESCRIBE ST. JOHNS COUNTY AS A PLACE TO VISIT OR VACATION: BEST BEACHES

- “One of the best beaches we’ve ever stepped foot on in AND out of the US!”
- “Great beach, beautiful view from pier, simply paradise! Our 5-year-old didn’t want to leave!”
- “My favorite beach on the East coast!”
- “You have to come to St. Augustine for a beach vacation or concert. Remarkably peaceful and beautiful city with breathtaking views of the Atlantic Ocean.”
- “Exceptional beach! One of the nicest in Florida.”
- “My family’s favorite beach in Florida. A relaxing beach, great for kids, history lessons, and phenomenal dining.”
- “The beaches are amazing, and the historical part of town is mind blowing. So much to do and see.”
- “Breathtaking historical city with perfect beaches. The weather is outstanding for this time of year and the Southern hospitality is world class.”

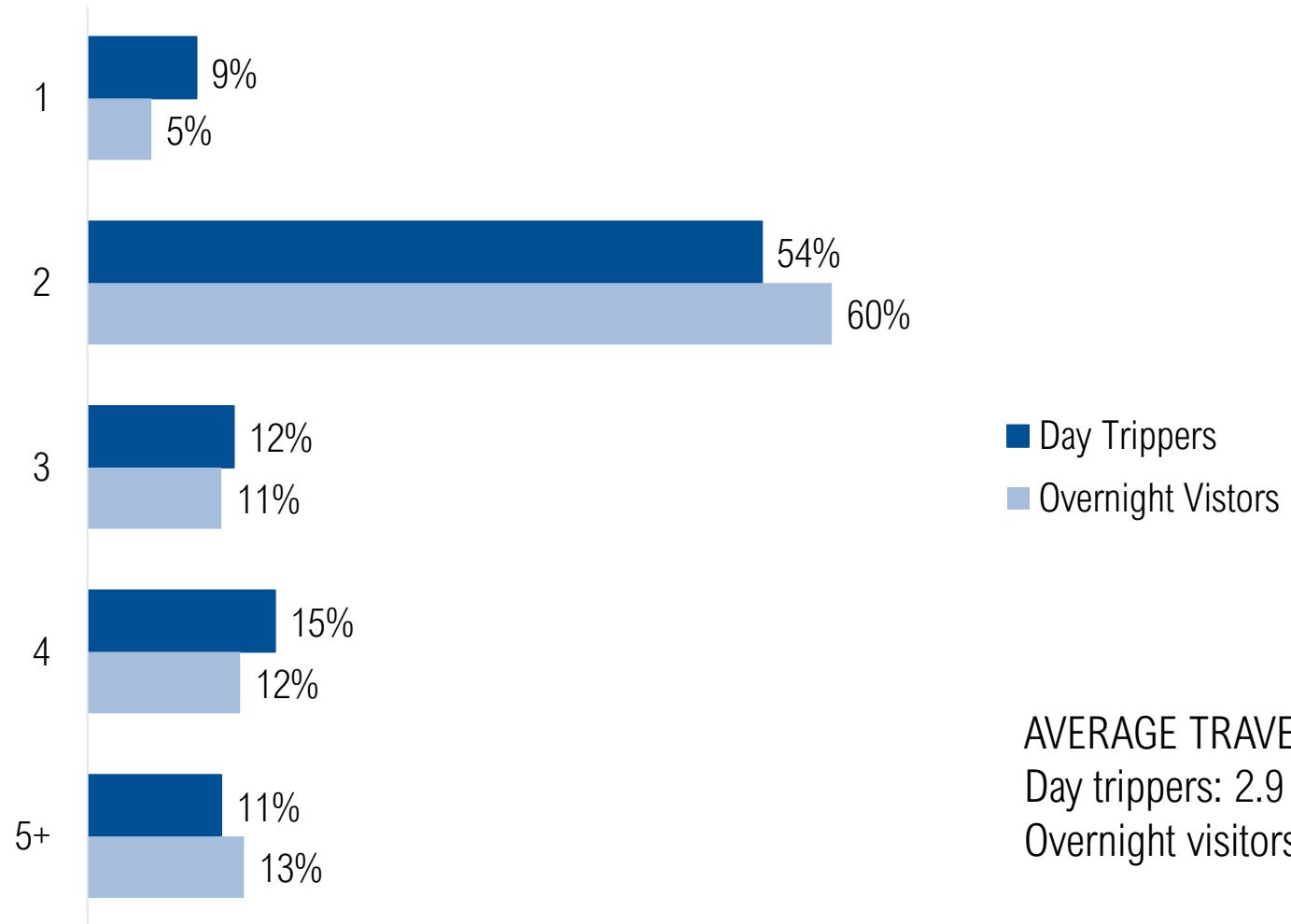
IF YOU WERE TALKING TO A FRIEND WHO HAD NEVER VISITED, HOW WOULD YOU DESCRIBE ST. JOHNS COUNTY AS A PLACE TO VISIT OR VACATION: GREAT PLACE TO VACATION

- “St. Augustine is the perfect place to vacation or live in. Such a beautiful city!”
- “Our favorite destination away from home. We love St. Augustine’s charm, events, restaurants, and the beach.”
- “An American gem!”
- “Put St. Augustine on your list of Top 10 Places to Visit in Florida. Such a beautiful city full of things to do.”
- “Felt like we were on the Travel Channel. Amazing city!”
- “A great place to live or vacation. Not as crowded as other bigger Florida tourist attractions. Great weather and beautiful beaches.”
- “Our new favorite place to visit in Florida. Loved the historical attractions and the beach was incredible.”
- “Our favorite getaway. St. Augustine beach is perfect for a couples’ retreat. Quiet beaches with the downtown very close by.”
- “A bit of paradise.”
- “It's the best spot in Florida. Laid-back environment, easy-going, overall great time.”

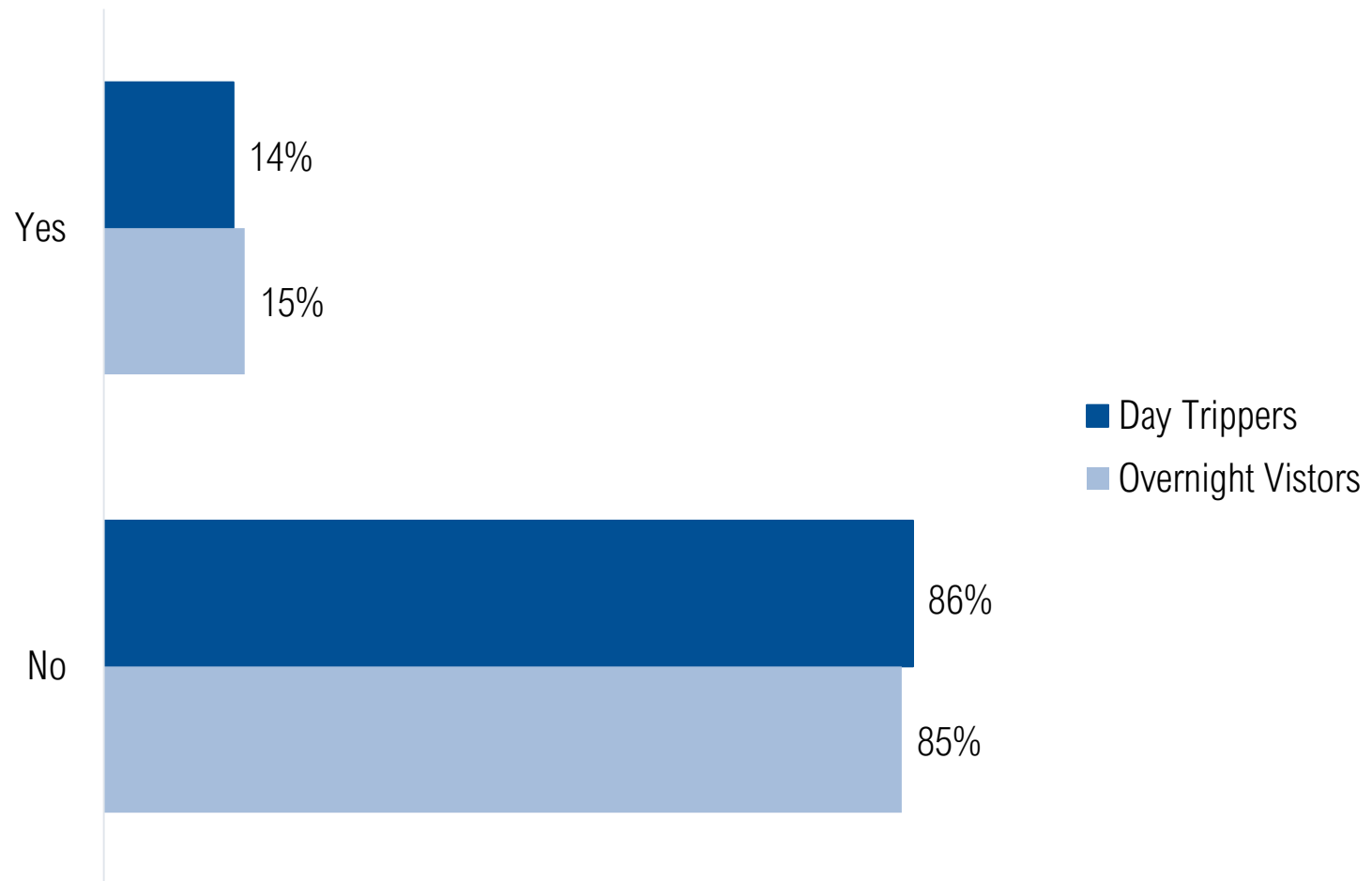
DAY TRIPPER VS. OVERNIGHT VISITOR CROSSTABS



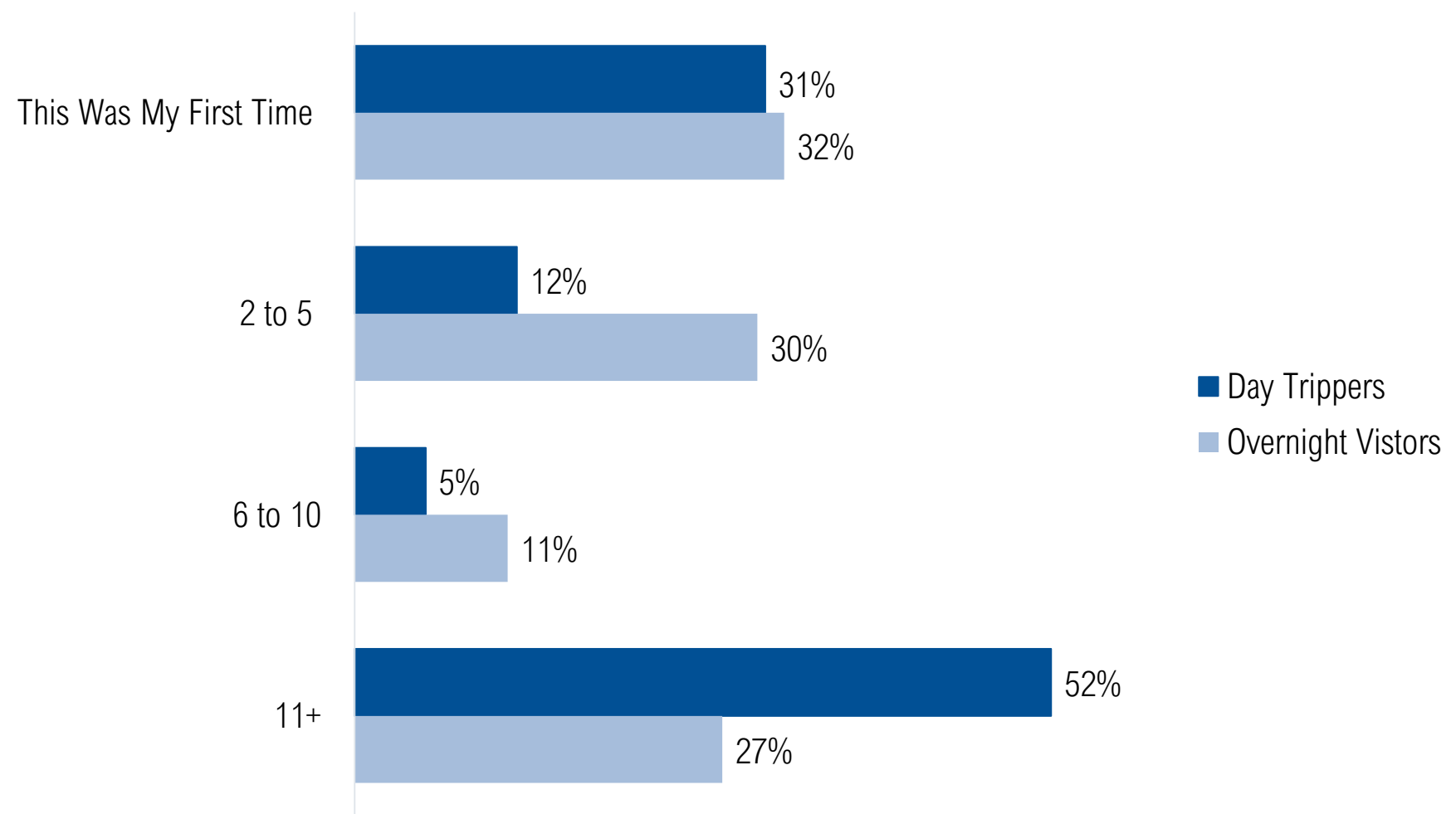
DURING THIS TRIP TO THE ST. AUGUSTINE/PONTE VEDRA AREA, HOW MANY PEOPLE ARE IN YOUR TRAVEL PARTY INCLUDING YOURSELF?



DID YOU TRAVEL WITH CHILDREN AGE 18 OR UNDER?



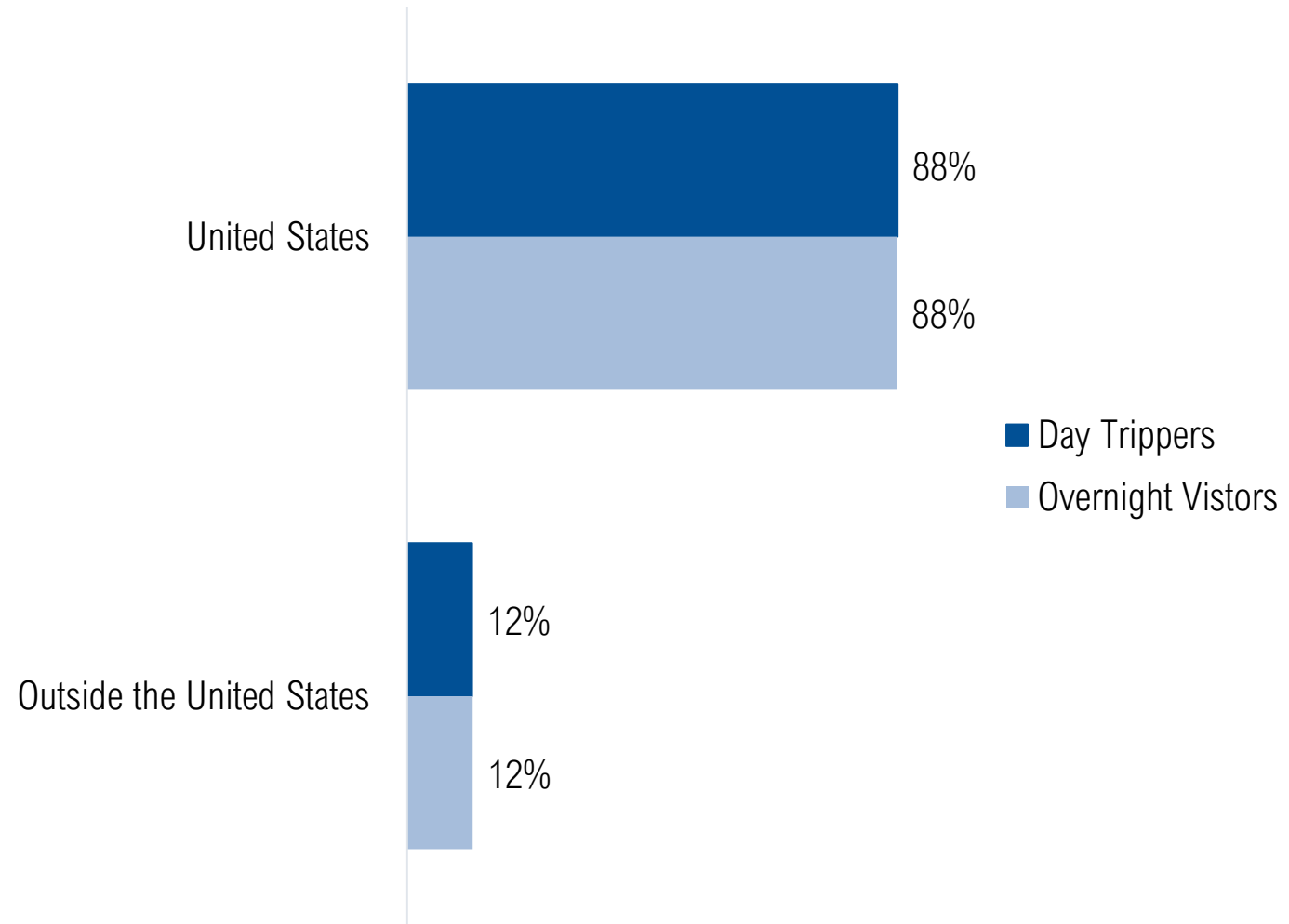
APPROXIMATELY HOW MANY TIMES HAVE YOU EVER VISITED THE ST. AUGUSTINE/PONTE VEDRA AREA?



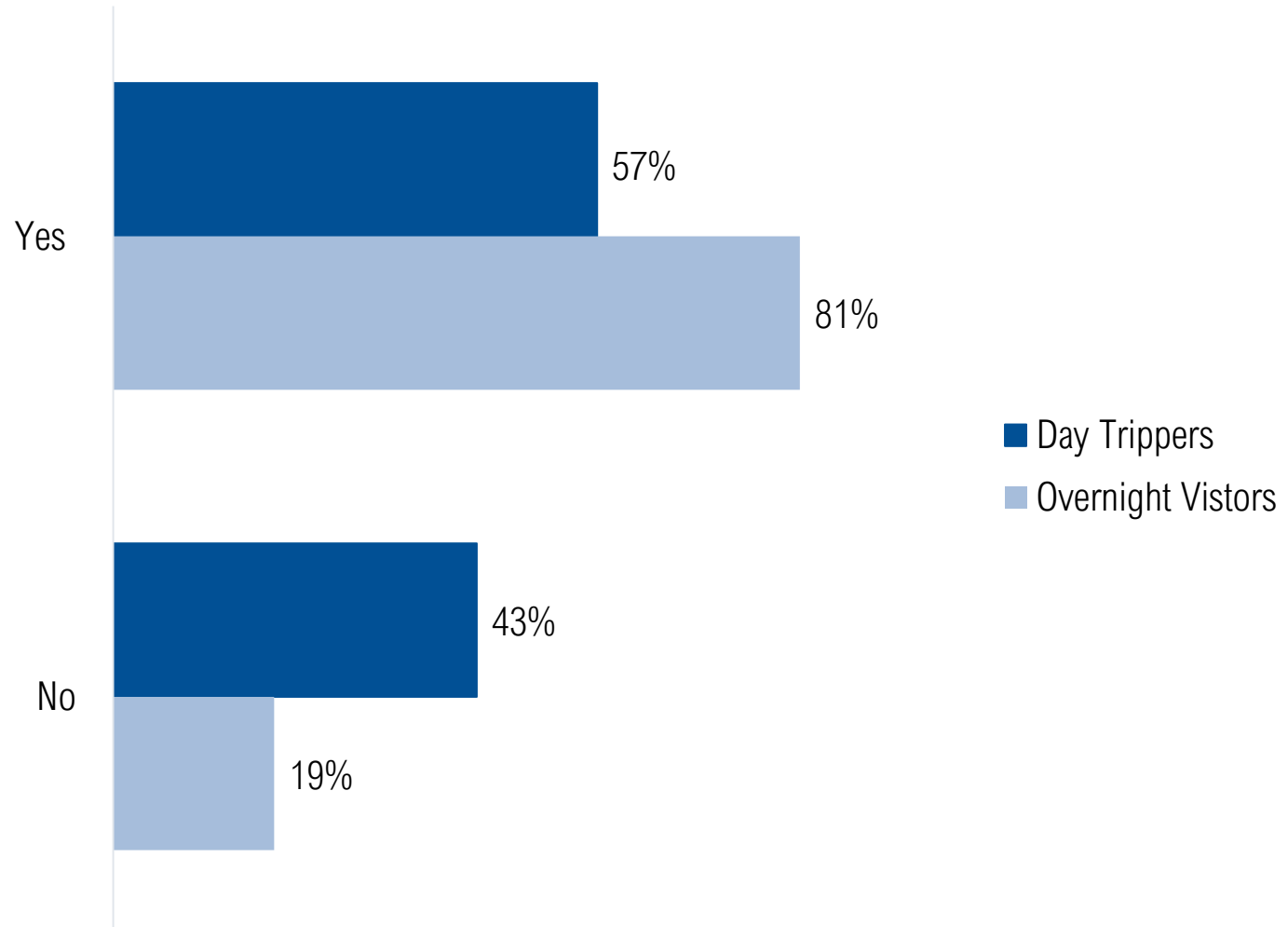
DID YOU USE ANY OF THE FOLLOWING TO PLAN YOUR TRIP TO THE ST. AUGUSTINE/PONTE VEDRA AREA OR DURING YOUR TRIP HERE?

	Day Trippers	Overnight Visitors
Search on Google, Yahoo, etc.	39%	59%
Destination Social Media	22%	31%
Use a Trip Planning App	21%	42%
Talk to Friends	19%	45%
Go to VisitStAugustine.com	15%	32%
Personal Social Media	9%	13%
Go to a Hotel/Resort Website	5%	29%
Deal-Based Promotion	5%	22%
Use an Online Travel Agency such as Priceline	4%	15%
Go to FloridasHistoricCoast.com	4%	13%
Contact a Travel Agent	3%	6%
Look at Travel Magazines	2%	5%
Read Travel Guides	2%	5%
Go to an Airline Website	1%	6%
Look in Travel Sections of Newspapers	1%	4%
Airbnb/Homeaway	0%	1%
Other	26%	10%
None	8%	5%

DO YOU LIVE IN THE US OR OUTSIDE THE US?



IS THE ST. AUGUSTINE/PONTE VEDRA AREA YOUR PRIMARY DESTINATION ON THIS TRIP?



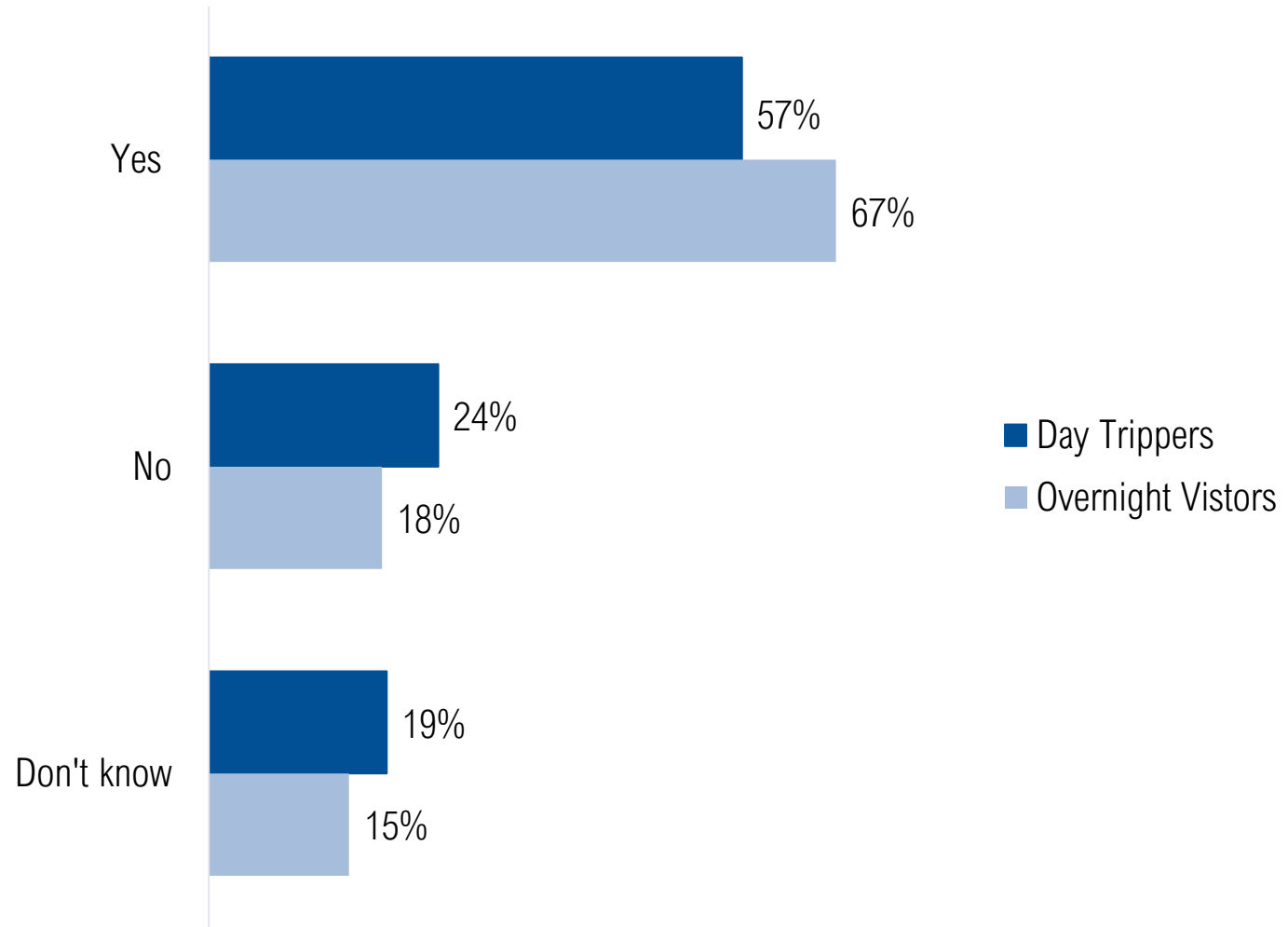
WHAT IS YOUR MAIN REASON FOR TAKING THIS TRIP OR VACATION TO THE ST. AUGUSTINE/PONTE VEDRA AREA?

	Day Trippers	Overnight Visitors
Special Event (e.g., Festival, Concert, etc.)	40%	20%
Attractions and Historical Sites	23%	32%
Beach	23%	29%
Convenient Stop on the Way to Another Destination	14%	3%
Food, Wine, Spirits	13%	2%
Visit Friends or Family	4%	20%
Outdoor Recreation	4%	6%
Family Friendly	3%	10%
Shopping, Antiquing	3%	6%
Business, Conference, Meeting, etc.	3%	3%
Water Recreation	3%	3%
Cultural Events, Art Galleries	3%	3%
Special Occasion	2%	15%
Flagler College	0%	2%
Personal Business (Including Medical/Healthcare)	0%	2%
Golf	0%	2%
Other	5%	7%

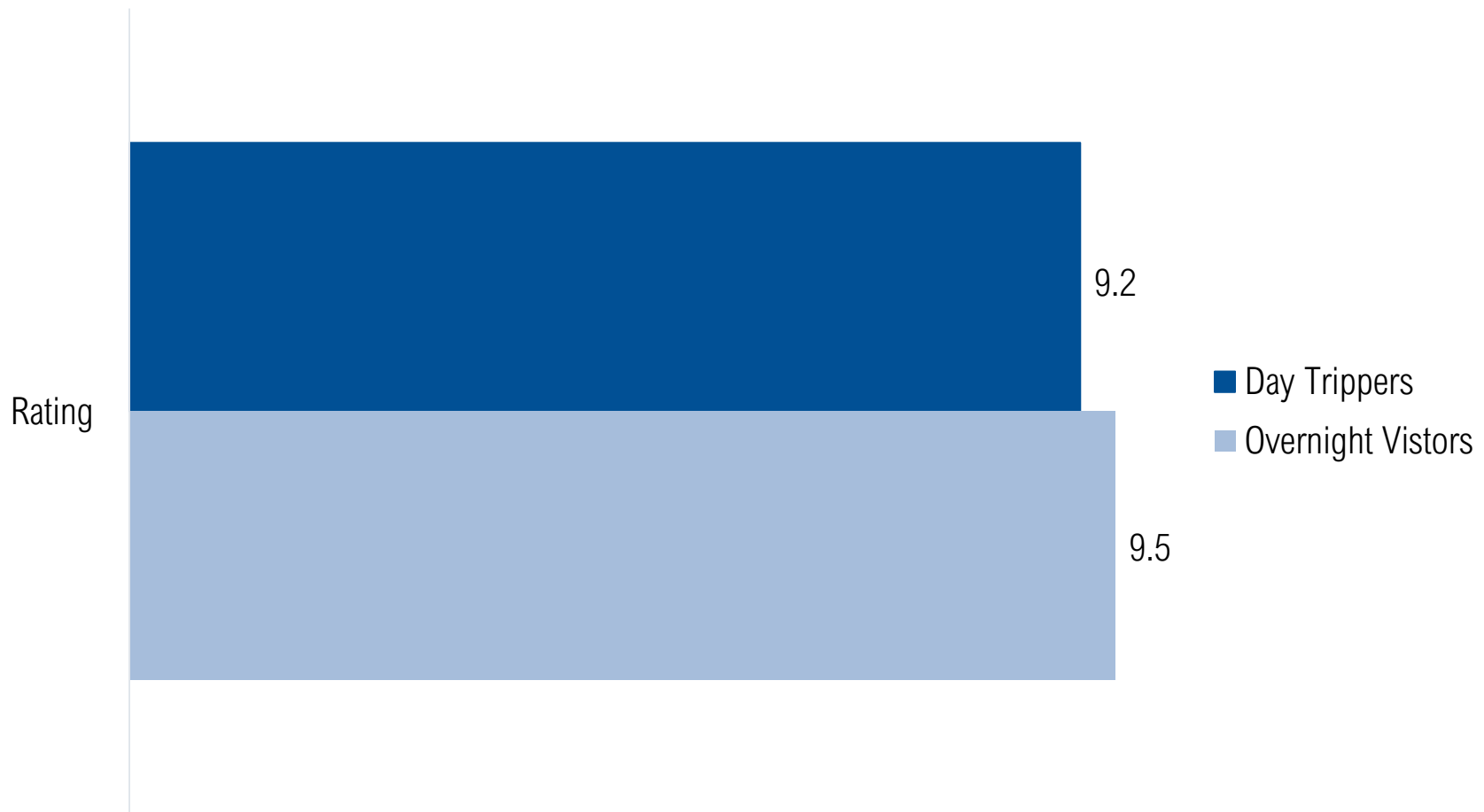
PLEASE TELL ME IF YOU ENGAGE IN ANY OF THE FOLLOWING ACTIVITIES WHEN YOU ARE IN THE ST. AUGUSTINE/PONTE VEDRA AREA.

	Day Trippers	Overnight Visitors
Go to Restaurants	74%	84%
Attractions and Historical Sites	48%	71%
Beach	45%	79%
Special Event (e.g., Festival, Concert, etc.)	38%	39%
Trolley/Walking/Ghost Tour	35%	51%
Shopping, Antiquing	30%	50%
Outdoor Recreation	24%	45%
Go to Bars and Night Clubs	24%	41%
Cultural Events, Art Galleries	17%	32%
Wine/Spirit/Pub Tour	13%	26%
Water Recreation	9%	37%
Agritourism	5%	6%
Golf	4%	21%
Business, Conference, Meeting, etc.	3%	5%
Attend or Participate in a Non-Golf Sporting Event	1%	4%
Spas	0%	8%
Other	6%	6%

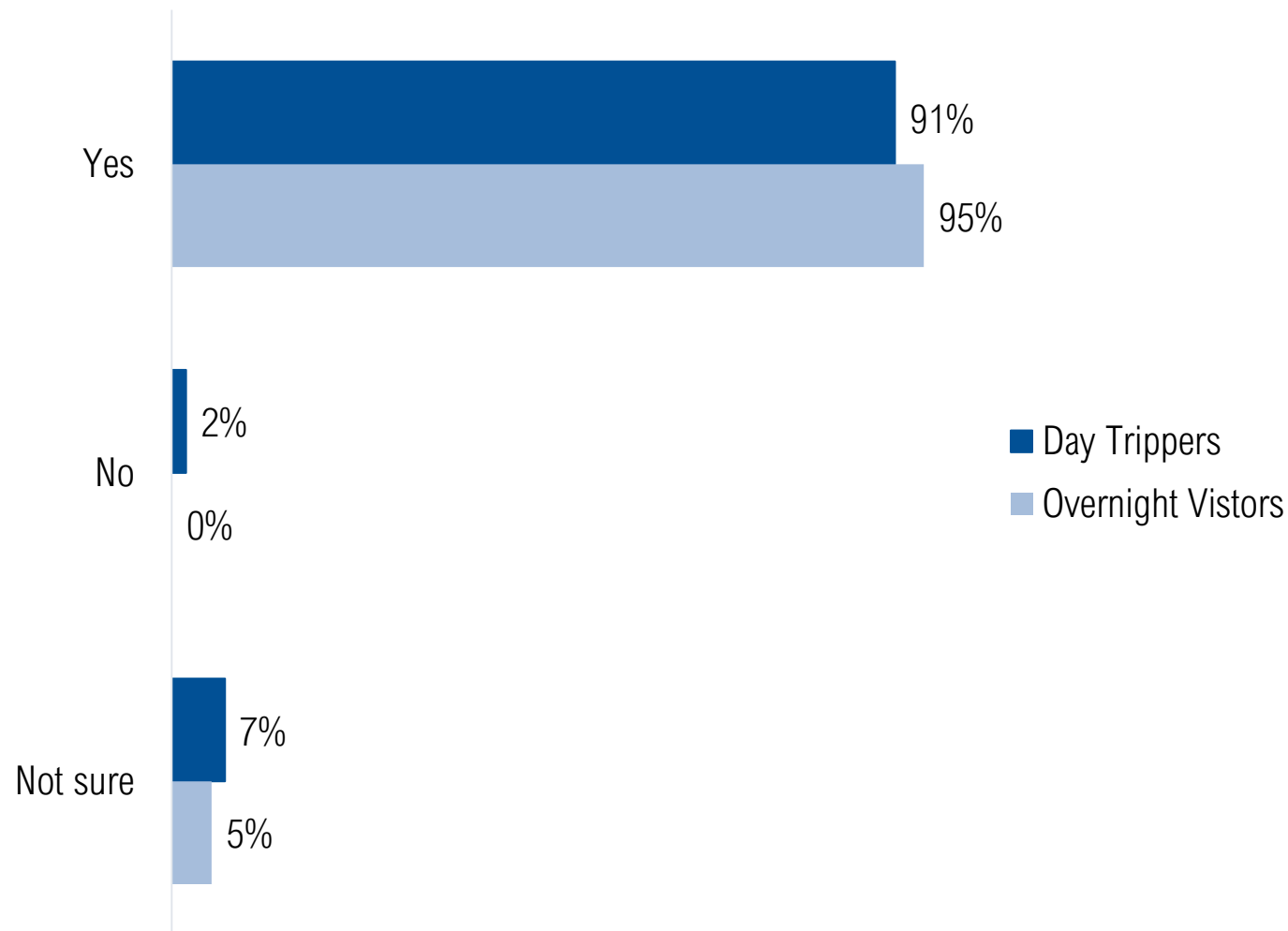
WILL YOU SHARE ABOUT YOUR TRIP ON SOCIAL MEDIA DURING OR SHORTLY AFTER YOUR TRIP TO THE AREA?



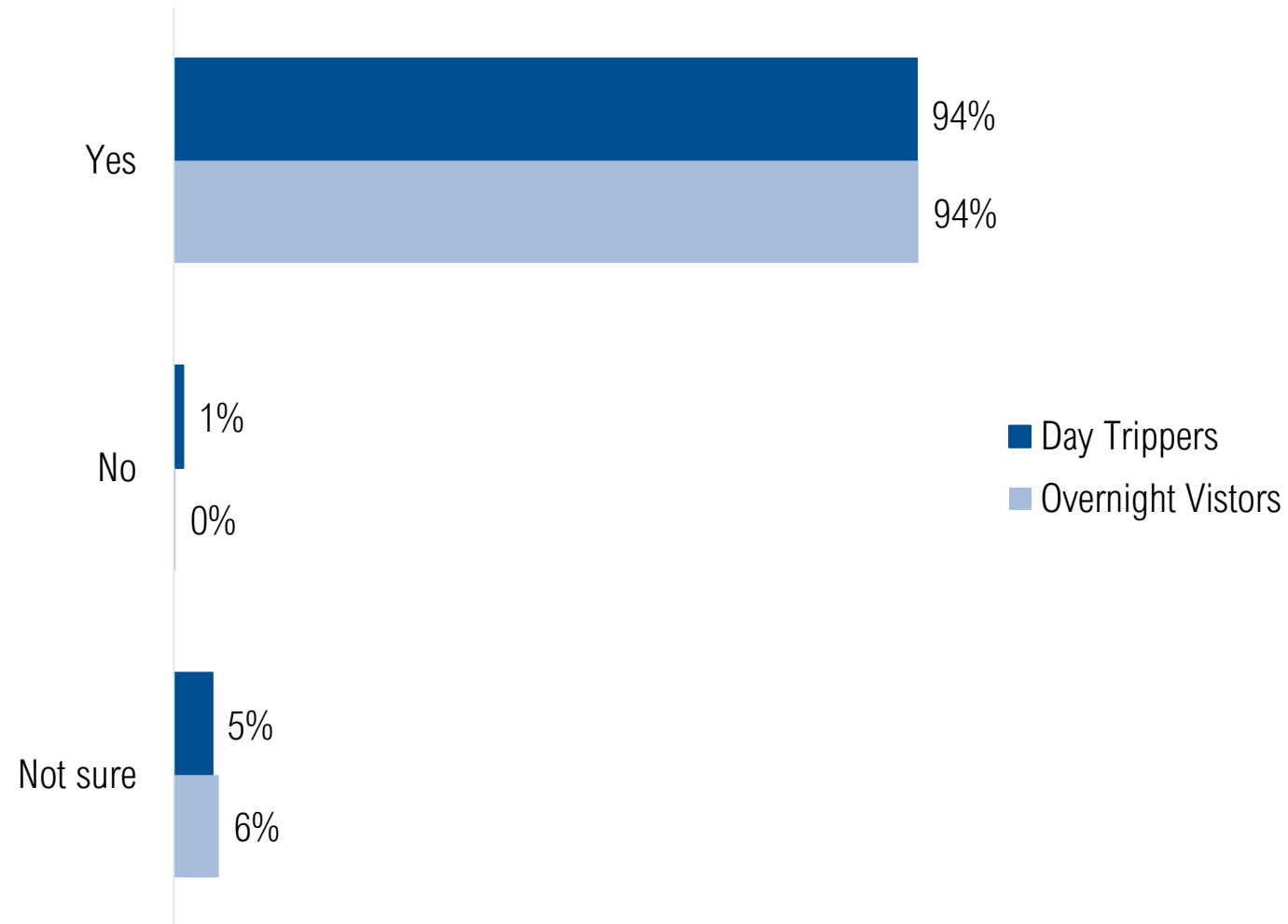
HOW WOULD YOU RATE THE ST. AUGUSTINE/PONTE VEDRA AREA OVERALL AS A PLACE TO VISIT?



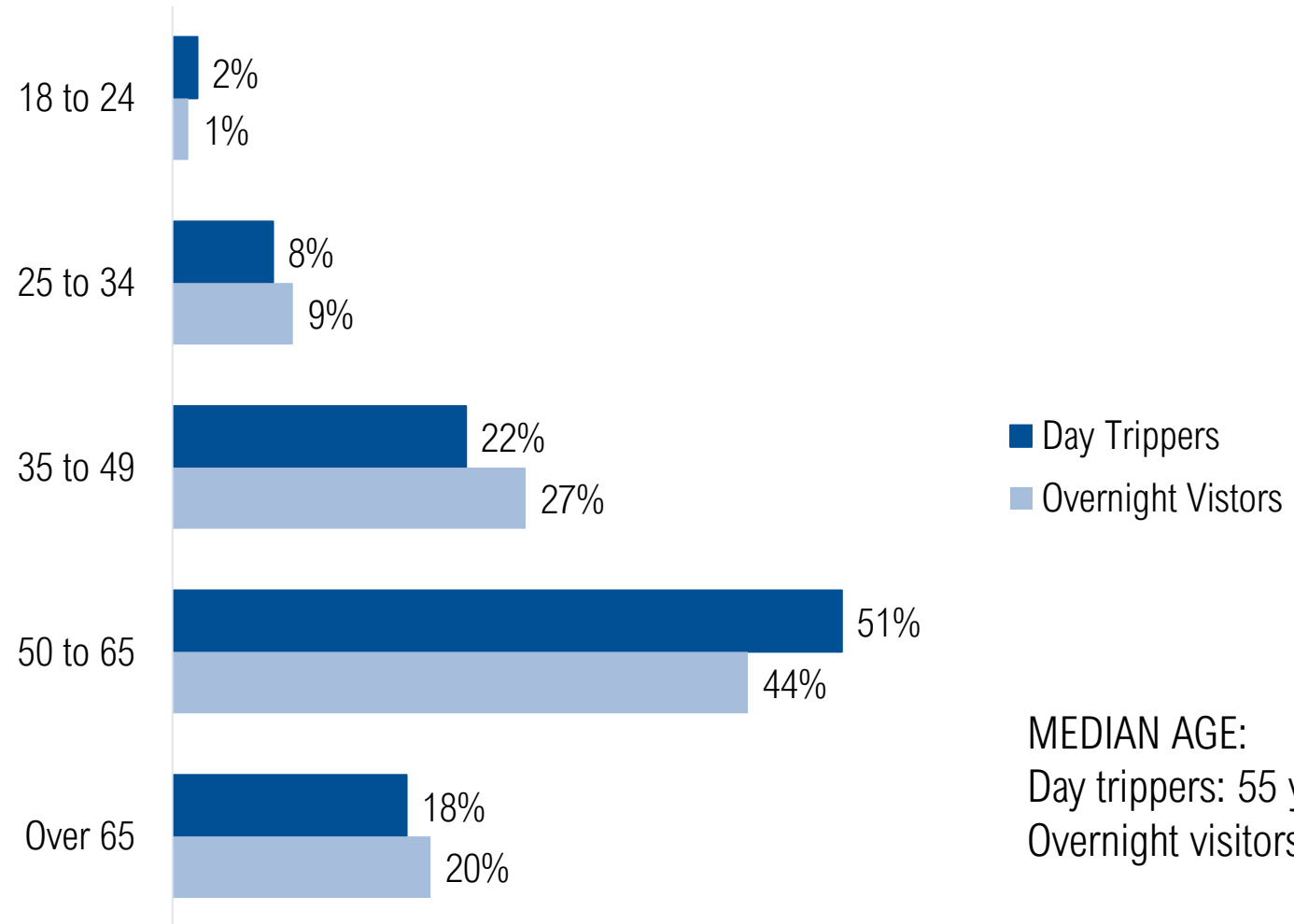
WOULD YOU RECOMMEND THE ST. AUGUSTINE/PONTE VEDRA AREA TO A FRIEND OR RELATIVE OVER OTHER VACATION AREAS IN FLORIDA?



WILL YOU COME BACK TO THE ST. AUGUSTINE/PONTE VEDRA AREA?

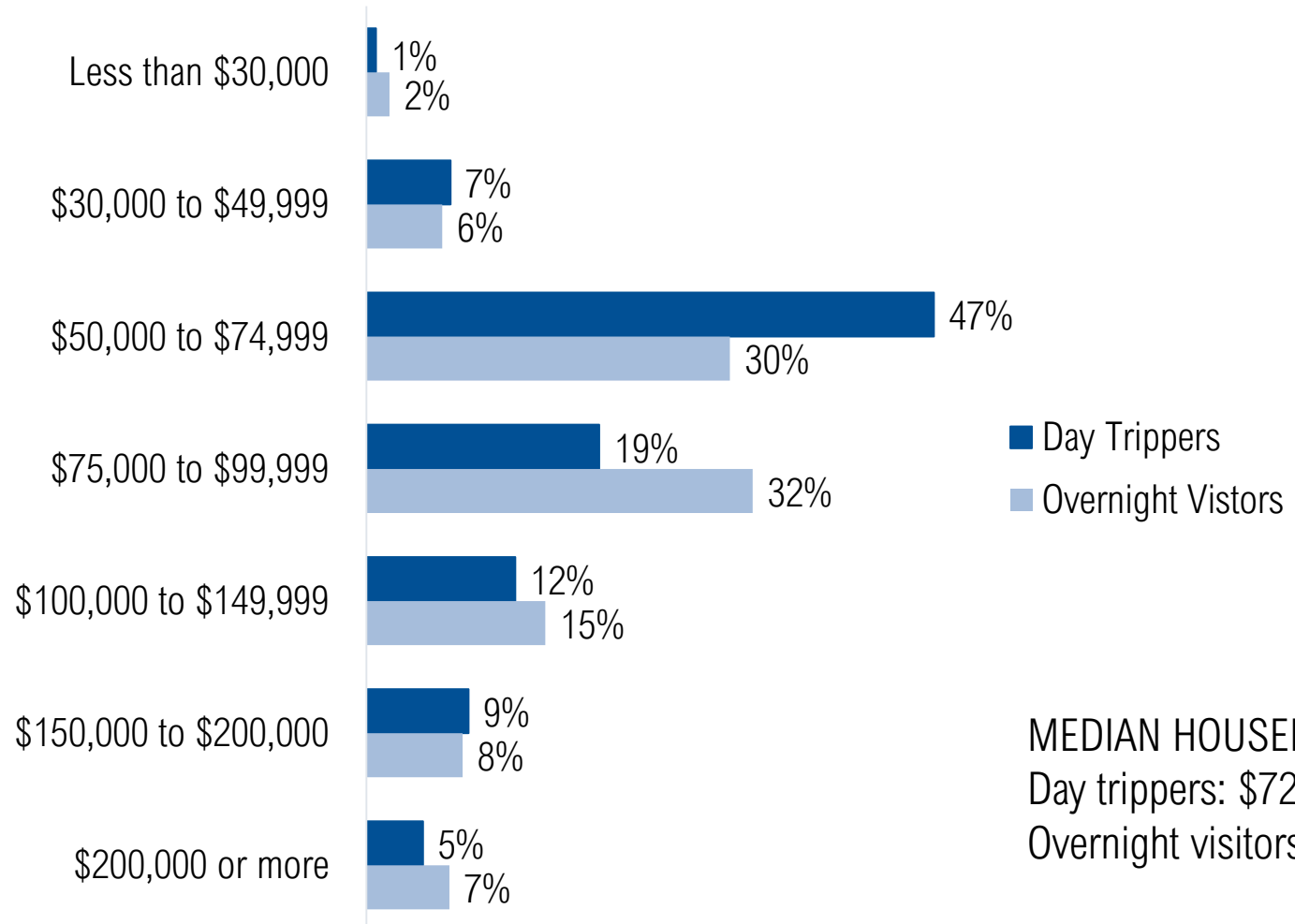


WHICH CATEGORY BEST FITS YOUR AGE?



MEDIAN AGE:
Day trippers: 55 years old
Overnight visitors: 54 years old

WHICH CATEGORY BEST FITS YOUR TOTAL HOUSEHOLD INCOME IN 2018 FROM ALL SOURCES?



MEDIAN HOUSEHOLD INCOME:
 Day trippers: \$72,300
 Overnight visitors: \$84,400

METHODOLOGY



Data Collection

- ◆ Visitor tracking is completed via internet surveys and in-person interviewing with 655 visitors between October 1st and December 31st 2019 in areas throughout St. Johns County, including public areas, hotels, and events.

ST. JOHNS COUNTY TDC VISITOR TRACKING REPORT

OCTOBER – DECEMBER 2019

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ST. JOHNS COUNTY
TOURIST DEVELOPMENT COUNCIL
Florida's Historic Coast | St. Augustine & Ponte Vedra



downs & st. germain
RESEARCH