

ST. JOHNS COUNTY TDC VISITOR TRACKING REPORT

JANUARY – MARCH 2020



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

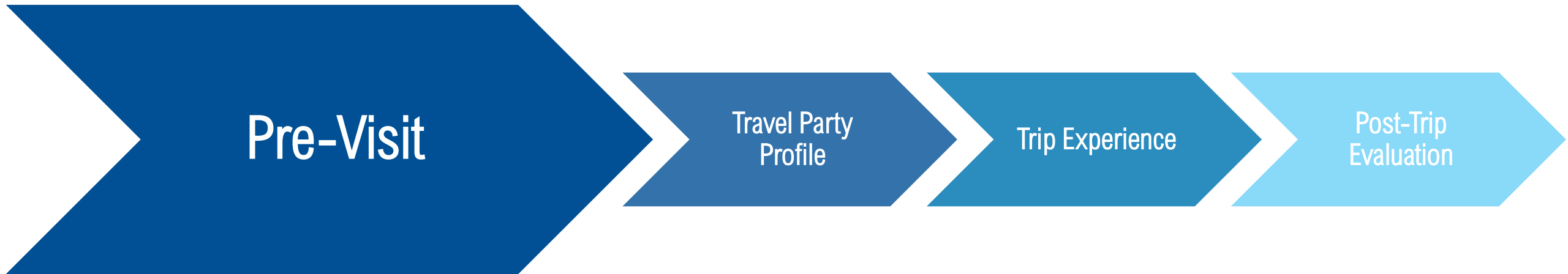
Post-Trip Evaluation

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

EXECUTIVE SUMMARY



VISITOR JOURNEY



TRANSPORTATION



75% of visitors drove to
St. Johns County



24% of visitors flew to St.
Johns County



1% of visitors came by boat

TRIP PLANNING

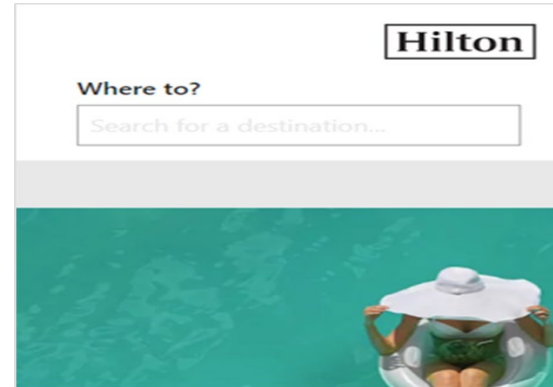
- 20% of visitors planned their trip less than a month in advance
- 49% of visitors planned their trip at least 4 months in advance
- Top trip planning sources:



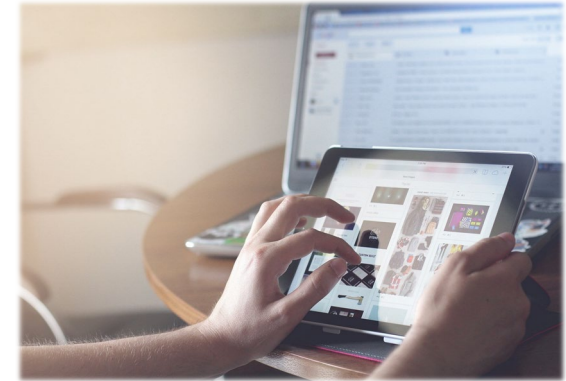
Search on Google
62%



Talk to friends
41%



Go to hotel/resort website/app
37%



Use TripAdvisor
29%

TOP REASONS FOR VISITING¹



Attractions/historical sites
44%



Beach
44%



Special occasion
17%



Visit friends/relatives
13%



Special event
13%

¹Up to 2 responses permitted

PRIMARY DESTINATION



76% of visitors said that St. Johns County was their primary destination on their trip

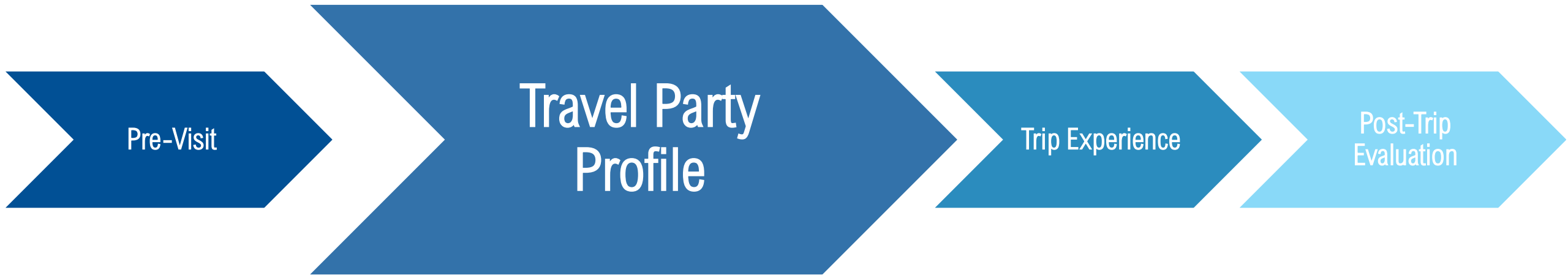


8% of visitors said their primary destination was Orlando/Disney



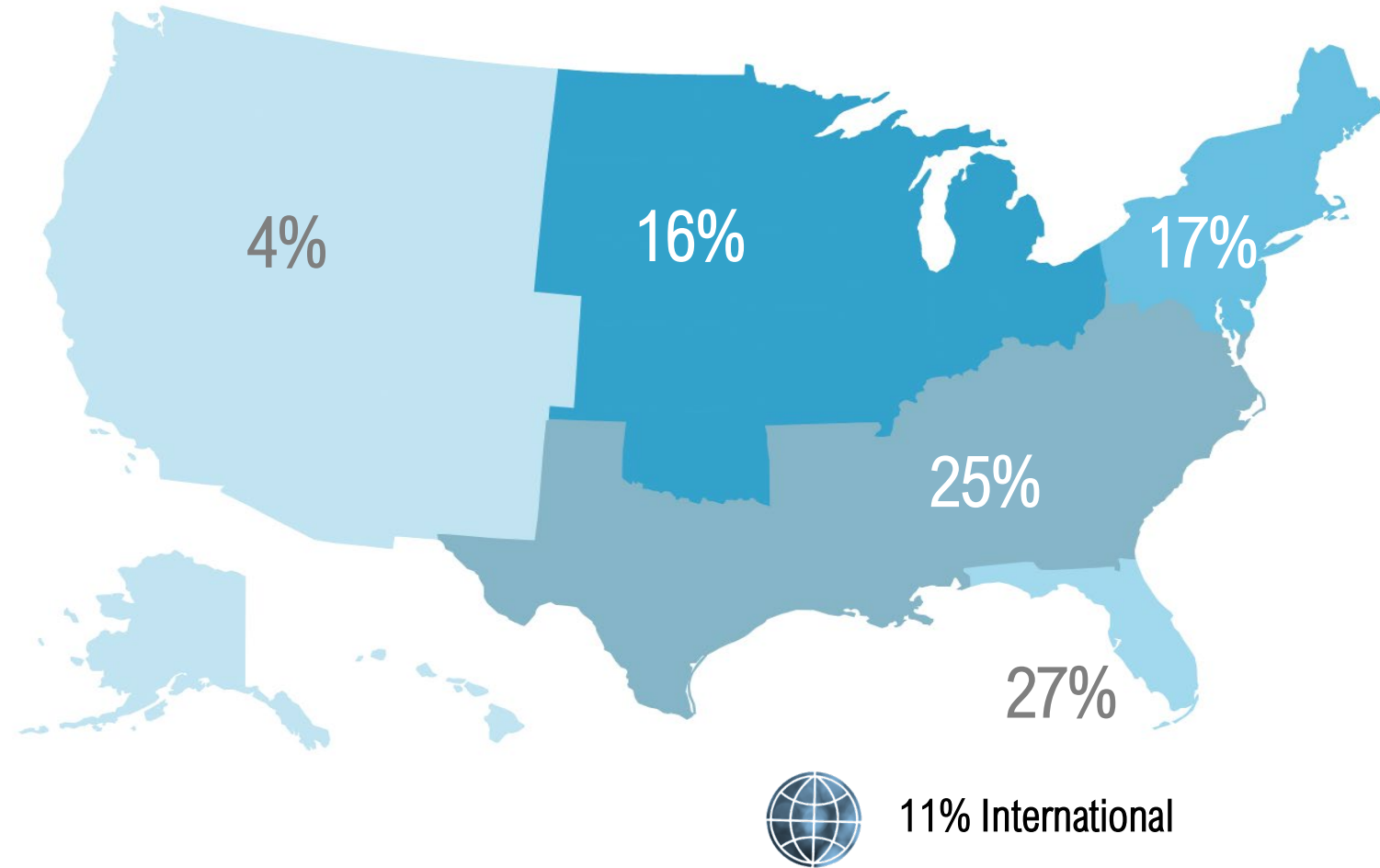
4% of visitors said their primary destination was Daytona

VISITOR JOURNEY

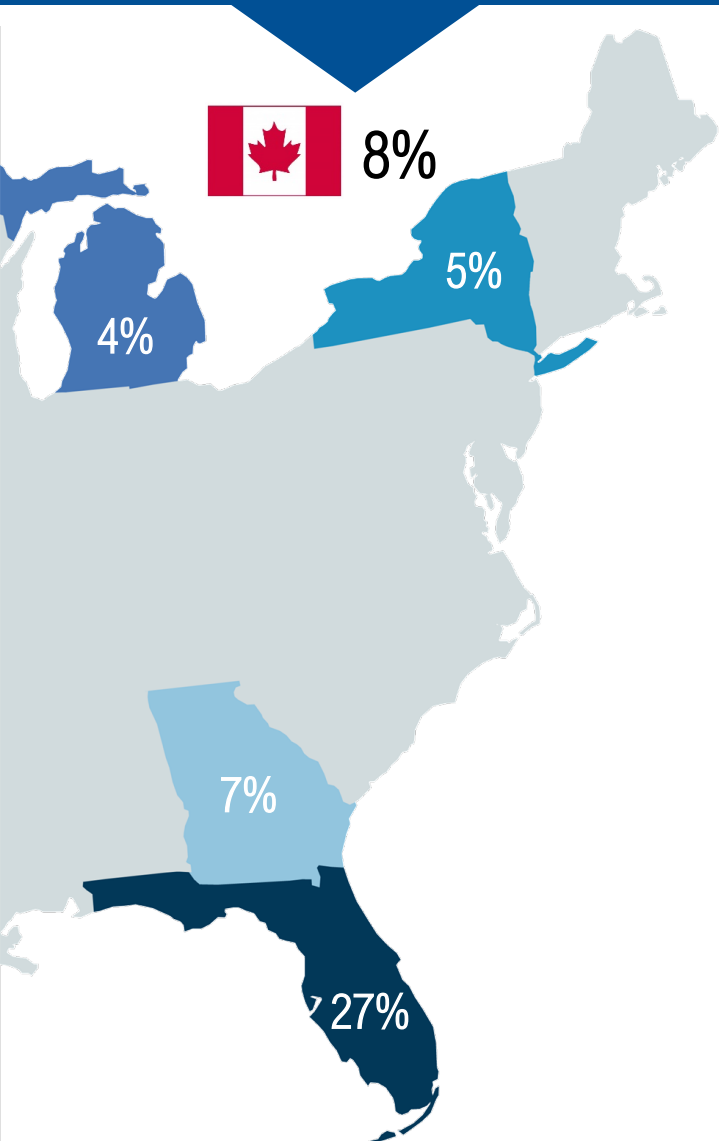






ORIGIN OF VISITORS

- » 27% of visitors were from Florida
- » 8% of visitors to St. Johns County were from Canada, and 3% were from other countries



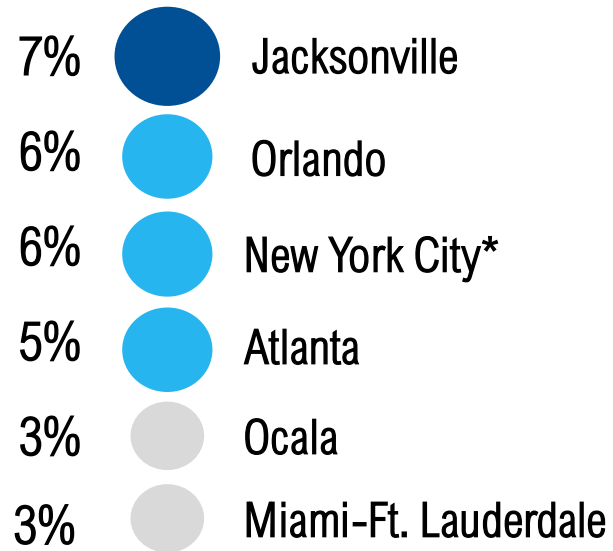
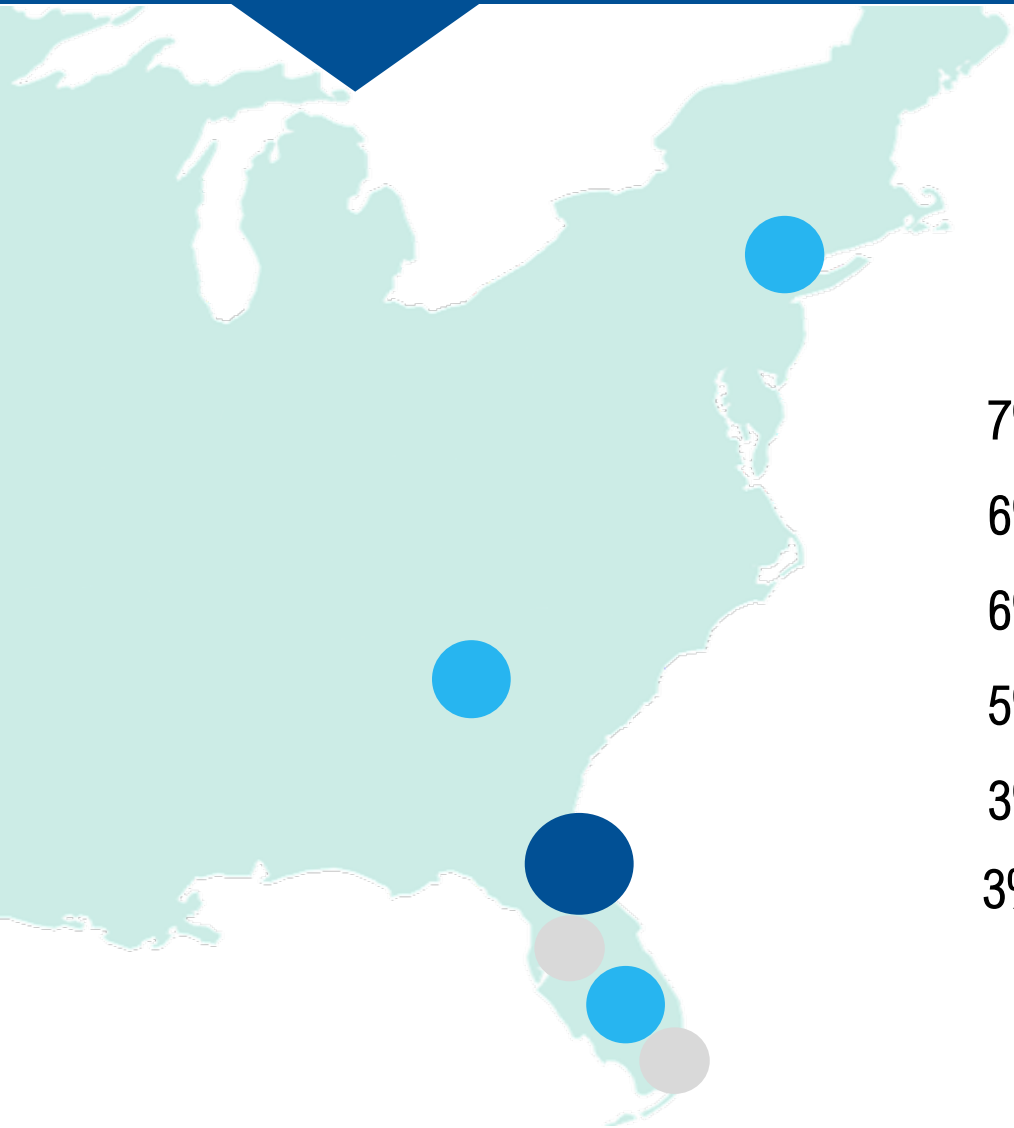
ORIGIN OF VISITORS



-  Florida
-  Canada
-  Georgia
-  New York
-  Michigan

» **60%** of visitors came from 4 states and Canada

ORIGIN OF VISITORS



» 30% of visitors came from 6 U.S. markets

TRAVEL PARTY SIZE AND COMPOSITION

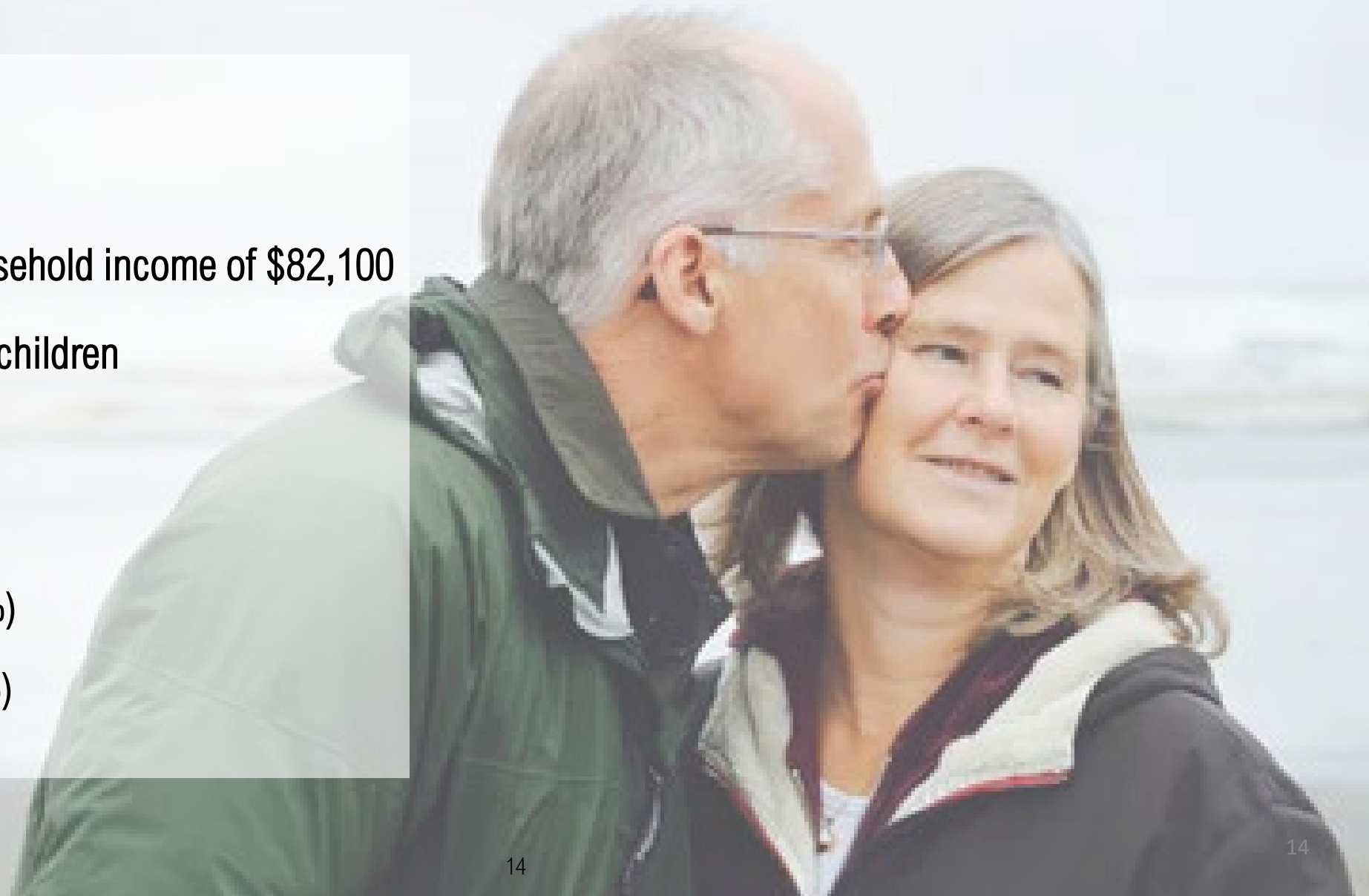
- » The average visitor traveled in a party composed of **2.7** people
- » **22%** traveled with at least one person under the age of 20



TYPICAL ST. JOHNS COUNTY VISITOR

- The typical Visitor:

- Was 54 years old
- Had a median household income of \$82,100
- 22% traveled with children
- Was from:
 - Florida (27%)
 - Southeast (25%)
 - Northeast (17%)



TYPICAL DAY TRIP VISITOR

○ The typical Day Trip Visitor:

- Was 50 years old
- Had a median household income of \$71,900
- 33% traveled with children
- Was from:
 - Jacksonville (21%)
 - Orlando (13%)
 - International (10%)



TYPICAL VACATIONER¹ VISITOR

- The typical Vacationer¹ Visitor:
 - Was 54 years old
 - Had a median household income of \$87,500
 - 22% traveled with children
 - Was from:
 - Southeast (31%)
 - Florida (22%)

¹Travel parties who stayed 1-5 nights.



TYPICAL LONG-TERM¹ VISITOR

- The typical Long-Term¹ Visitor:
 - Was 61 years old
 - Had a median household income of \$79,600
 - 7% traveled with children
 - Was from
 - Northeast (29%)
 - International (25%)
 - Midwest (22%)

¹Travel parties who stayed 6 nights or more.



VISITOR JOURNEY



FIRST TIME AND EXPERIENCED VISITORS

- » Almost 2 in 5 were first time visitors
- » 23% had visited more than 10 times



LENGTH OF STAY

- » 24% of visitors to St. Johns County were day trippers, while 76% stayed overnight
- » The average visitor spent about 5.8 nights in St. Johns County



VISITORS' ACCOMMODATIONS



41%
Hotel/motel/resort



24%
Day trippers



15%
Rental house/condo/Airbnb

TOP ACTIVITIES DURING VISIT¹



Restaurants
83%



Attractions, historical sites
71%



Beach
64%



Shopping, antiques
61%



Trolley/walking/ghost tour
44%

¹Multiple responses permitted

TRAVEL PARTY SPENDING

- » Visiting travel parties spent **\$515** a day and **\$2,989** on their trip



SOCIAL MEDIA

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



Facebook
61%



Instagram
22%



Twitter
8%

AREA STAYED

» 3 in 4 visitors stayed in St. Augustine



St. Augustine
73%



Ponte Vedra
14%



Other
12%

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
White sandy beaches	4.8
Peaceful/relaxing	4.8
Open space, green space, natural areas	4.7
Food/restaurants	4.7
Convenient location	4.7
Value for your travel dollar	4.6
Access to amenities	3.7

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
- » 95% 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

» 3 in 5 visitors said that additional public parking would make St. Johns County a better place to visit



More public parking
58%



Less crowded
24%



More public restrooms
9%



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

History/Culture (58%)



"There are a ton of historical attractions here that are suitable for the entire family. There is so much to do!"



Beach/Ocean (55%)



"This is a lovely city for a couple's honeymoon or anniversary. The beaches are great, and we love Bridge of Lions."



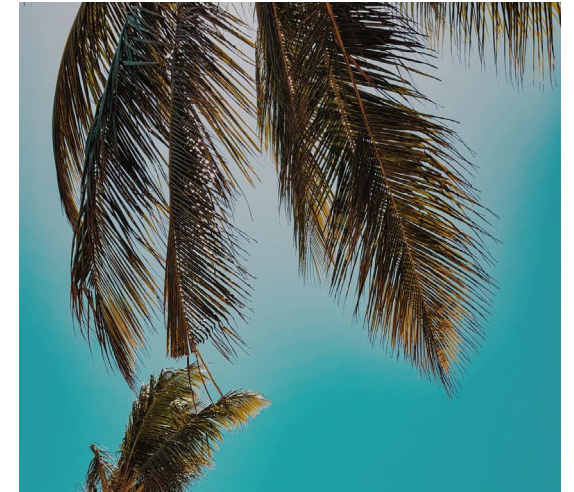
Attractions (52%)



"Visit the Amphitheatre and catch a show. This was our first time there and we really enjoyed this small venue show. We also enjoy the Fort area."



Better Weather (28%)



"80-degree weather in March is incredible. I love being able to get outside and enjoy it!"



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 (48%)



"A magical city and a history buffs dream! It is unlike any other city in Florida with surprises around every corner."



Best Beaches (29%)



"The best city to visit in Florida! St. Augustine has the best beaches in Florida and great food."



Great Restaurants (25%)



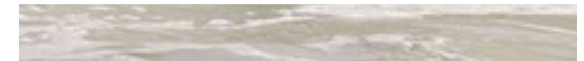
"It is a charming old district with great restaurants and bars"



Beautiful (23%)



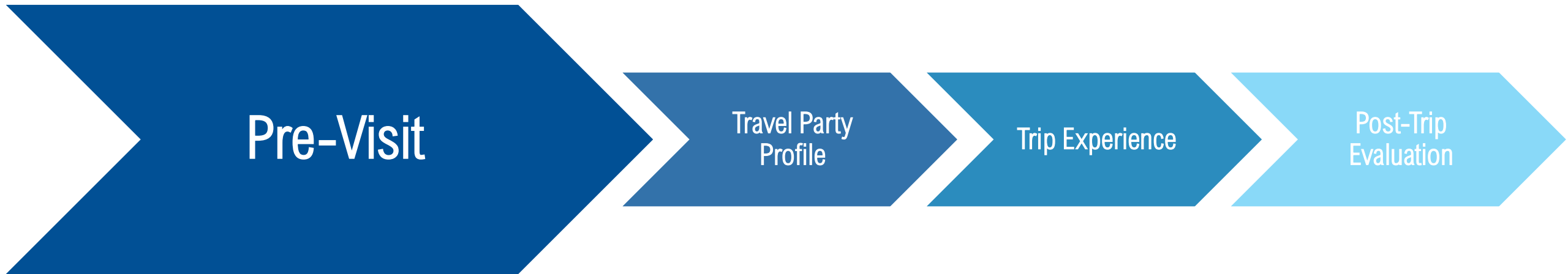
"St. Augustine is a beautiful city and has something for all ages."



DETAILED FINDINGS

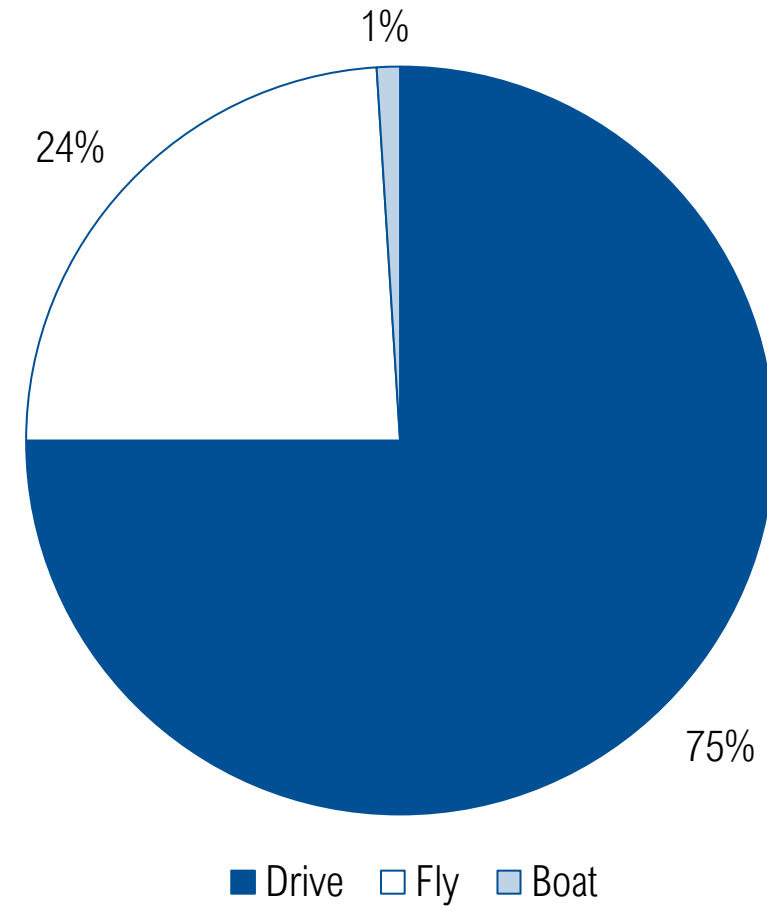


VISITOR JOURNEY



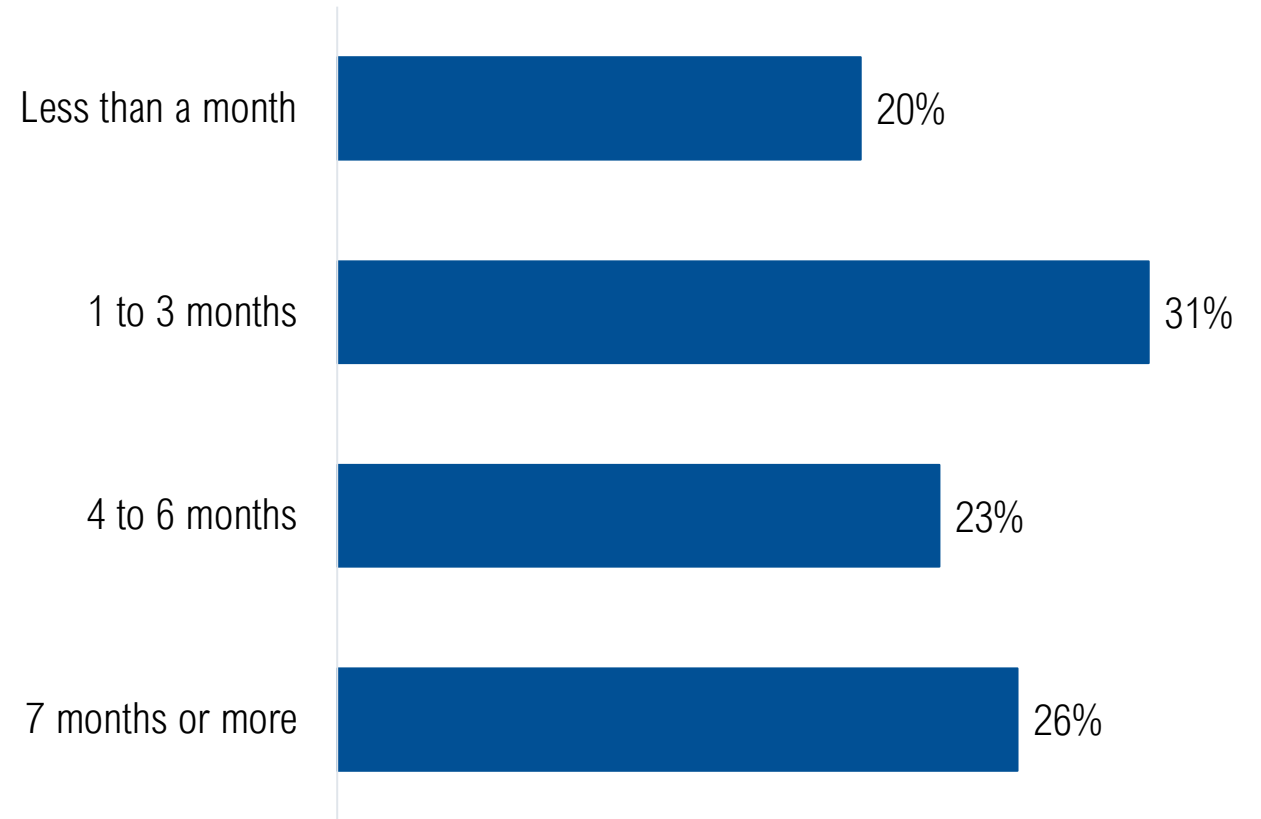
VISITOR TRANSPORTATION

→ **3 in 4** visitors drove to St. Johns County



TRIP PLANNING CYCLE

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



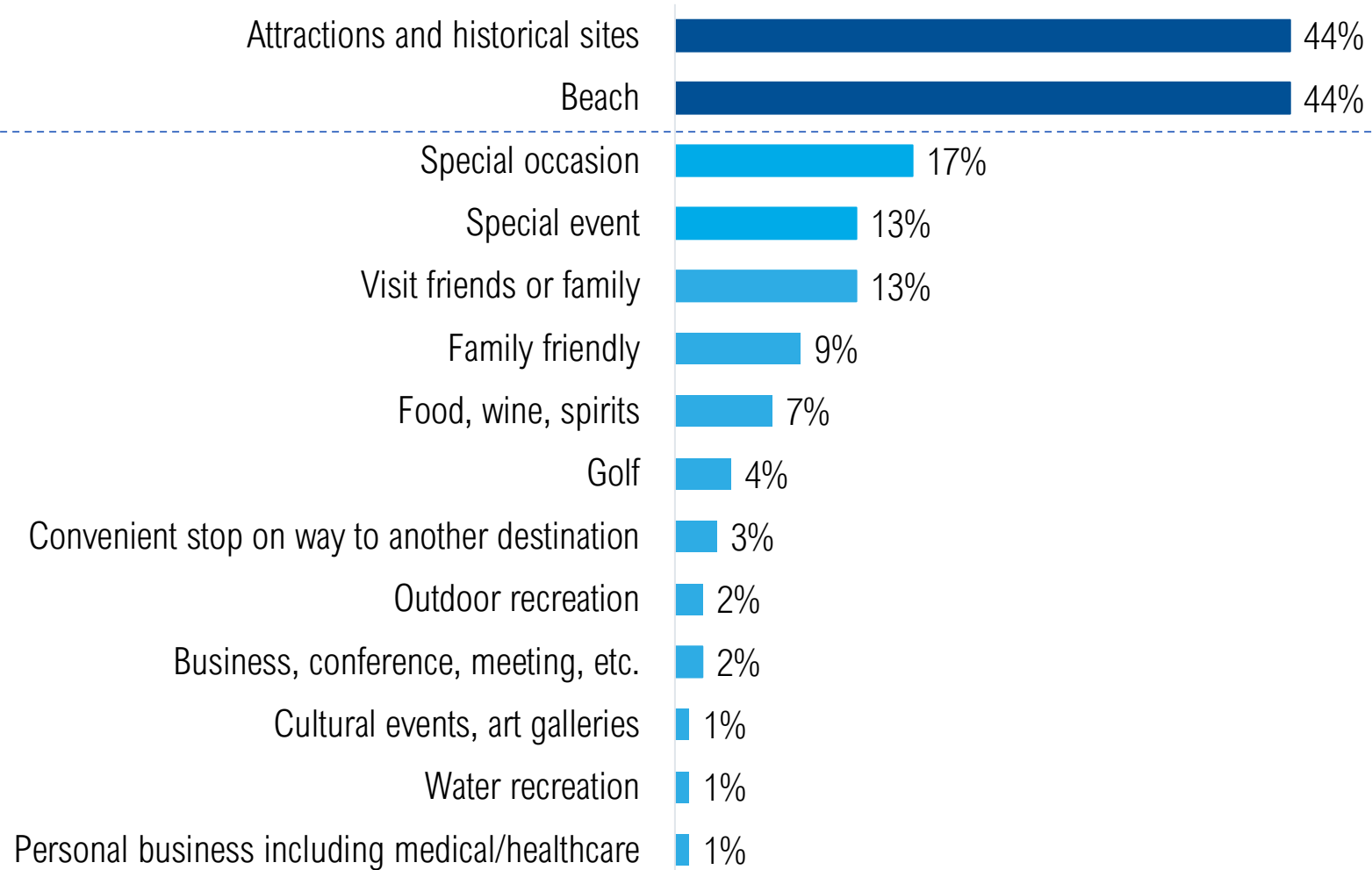
TRIP PLANNING SOURCES¹

Trip Planning Source	
Search on Google	62%
Talk to friends	41%
Go to a hotel/resort website/app	37%
Use TripAdvisor	29%
Go to VisitStAugustine.com	23%
Destination social media	17%
Deal-based promotion	16%
Use Priceline	12%
Go to FloridasHistoricCoast.com or HistoricCoastCulture.com	12%
Go to an airline website/app	10%
Personal social media	6%
Contact a travel agent	6%
Look at travel magazines	6%
Look in travel sections of newspapers	4%
Read travel guides	3%
Other	0%
None	0%

¹Multiple responses permitted.



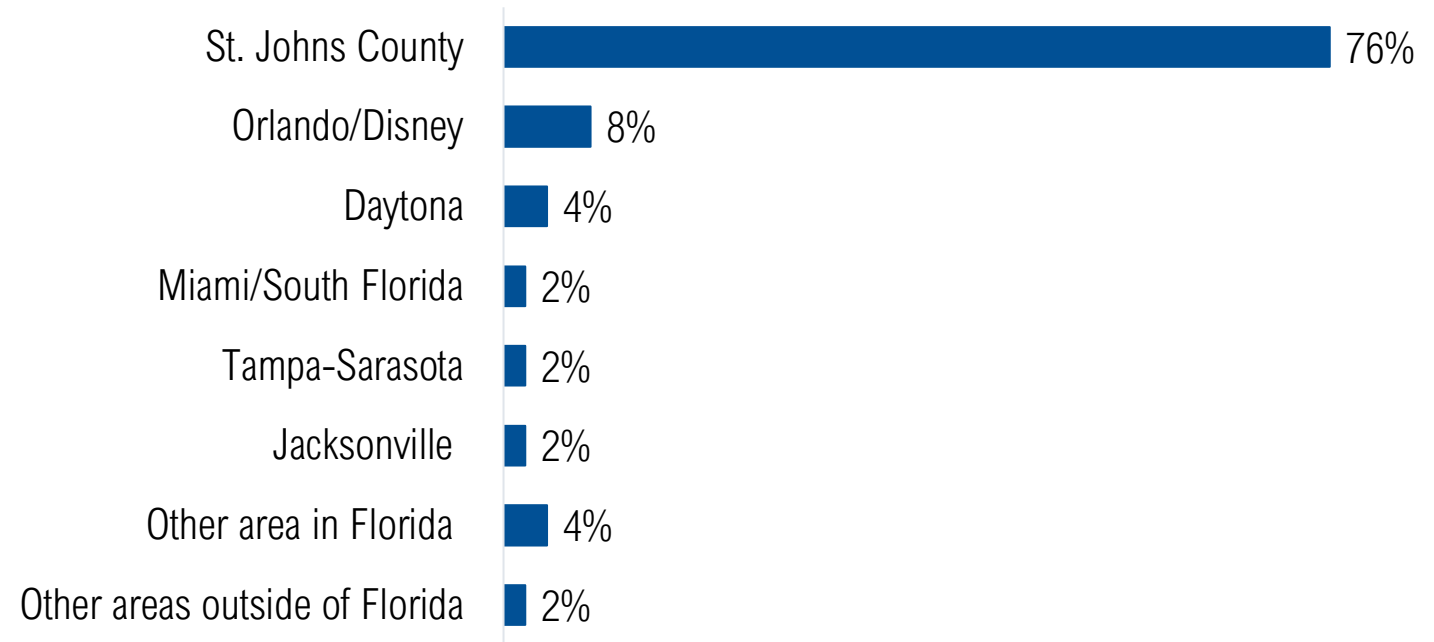
REASONS FOR VISITING¹



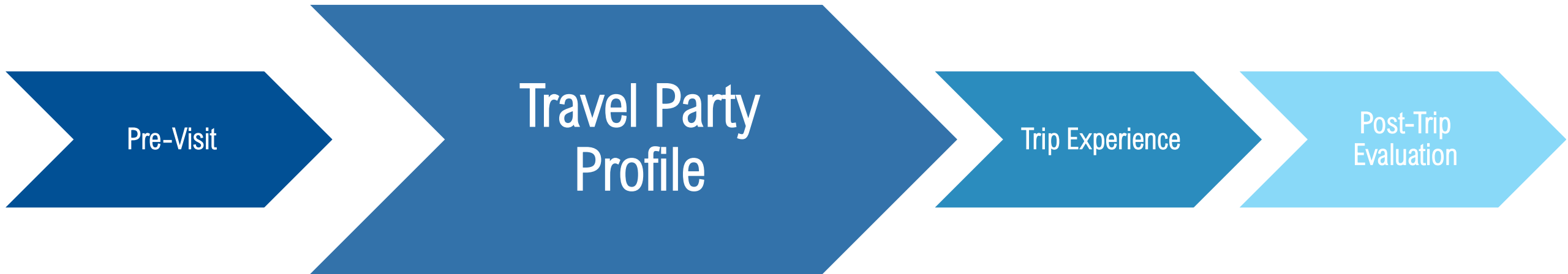
¹Up to 2 responses permitted

PRIMARY DESTINATION

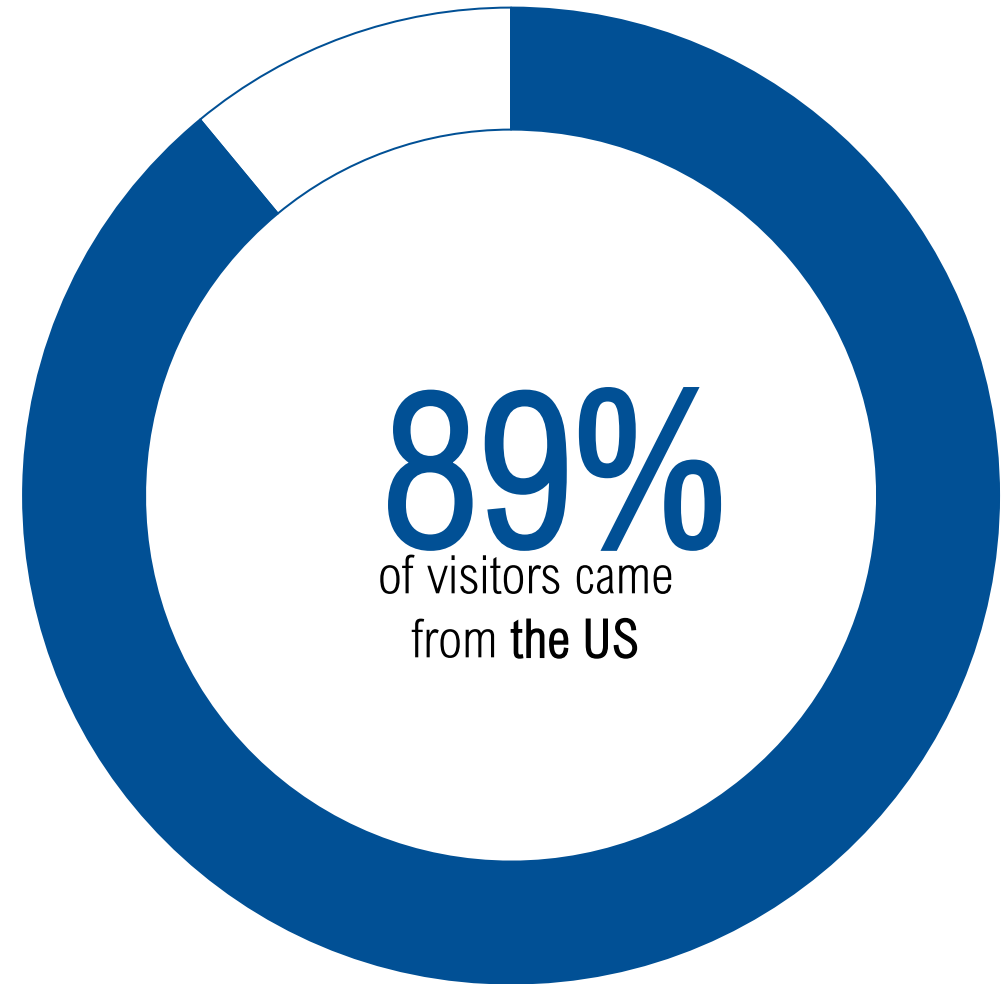
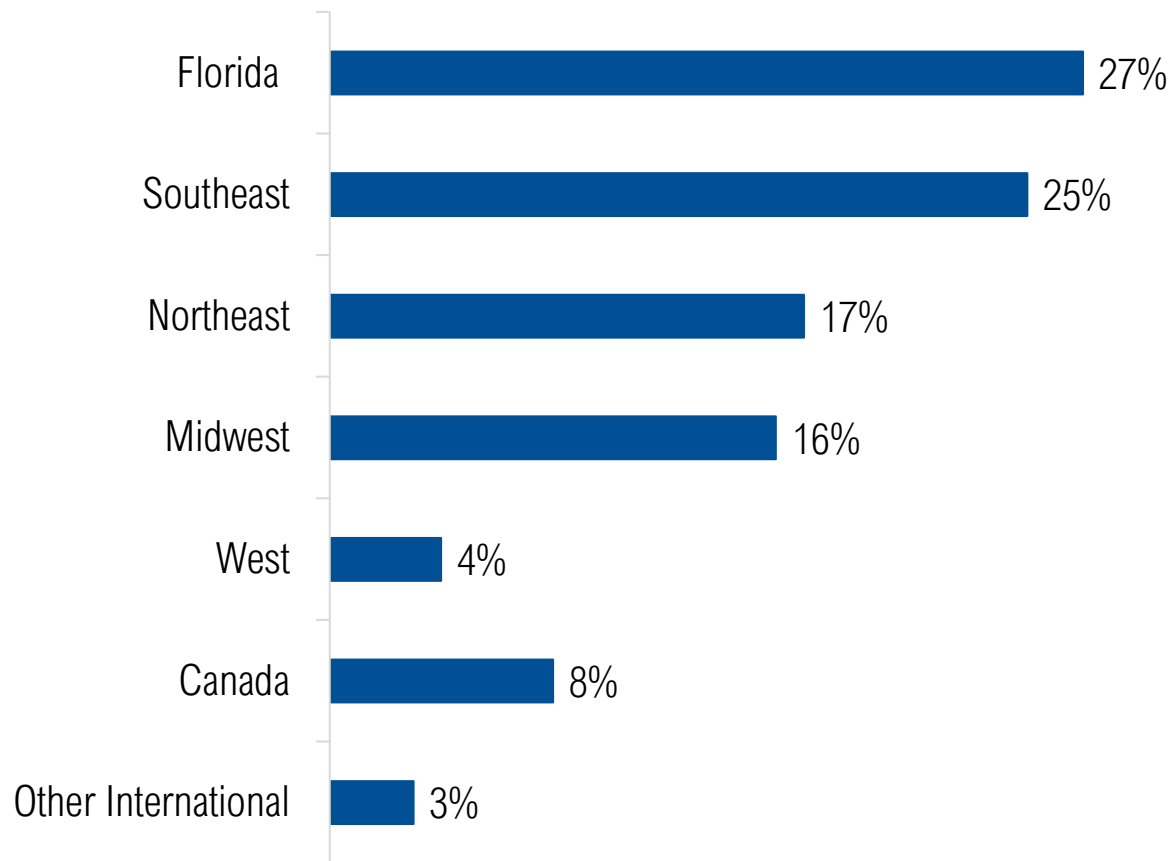
→ **76%** of visitors said that St. Johns County was the primary destination on their trip



VISITOR JOURNEY

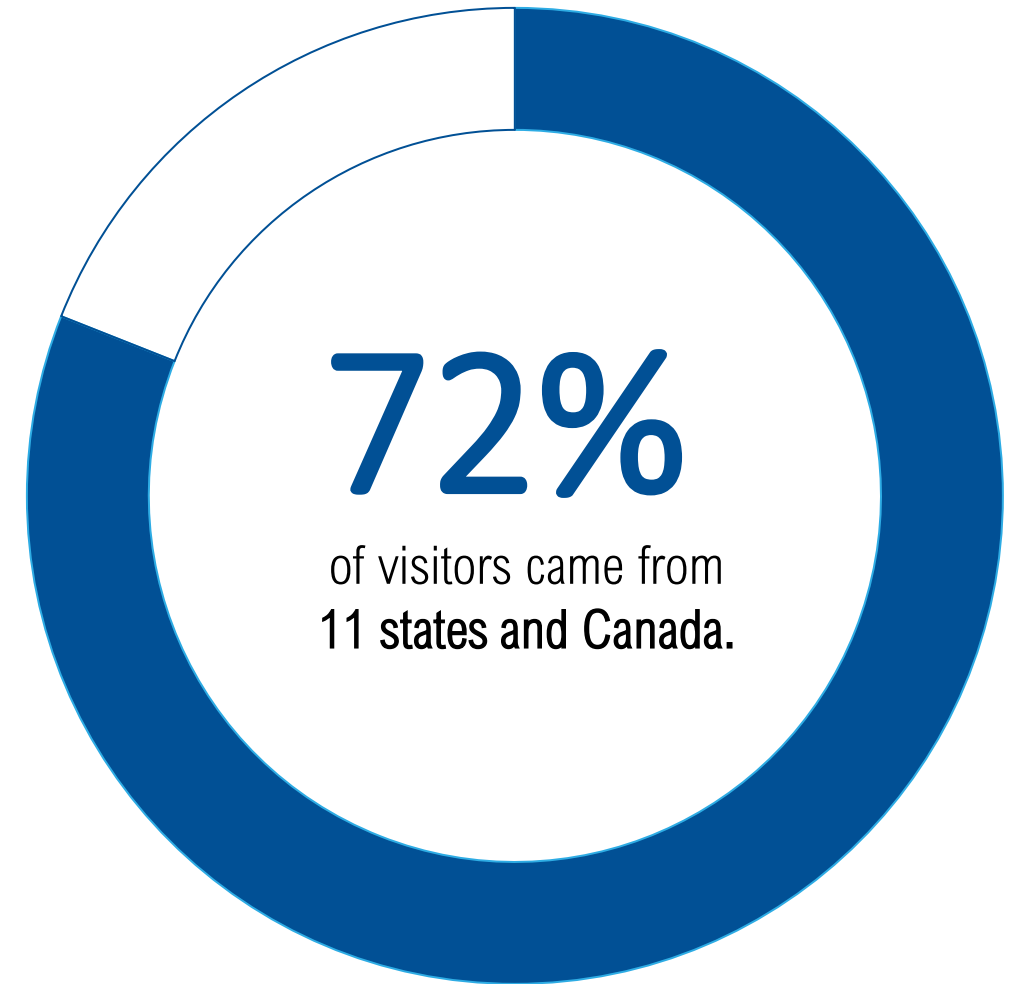


ORIGIN OF VISITORS: REGIONS



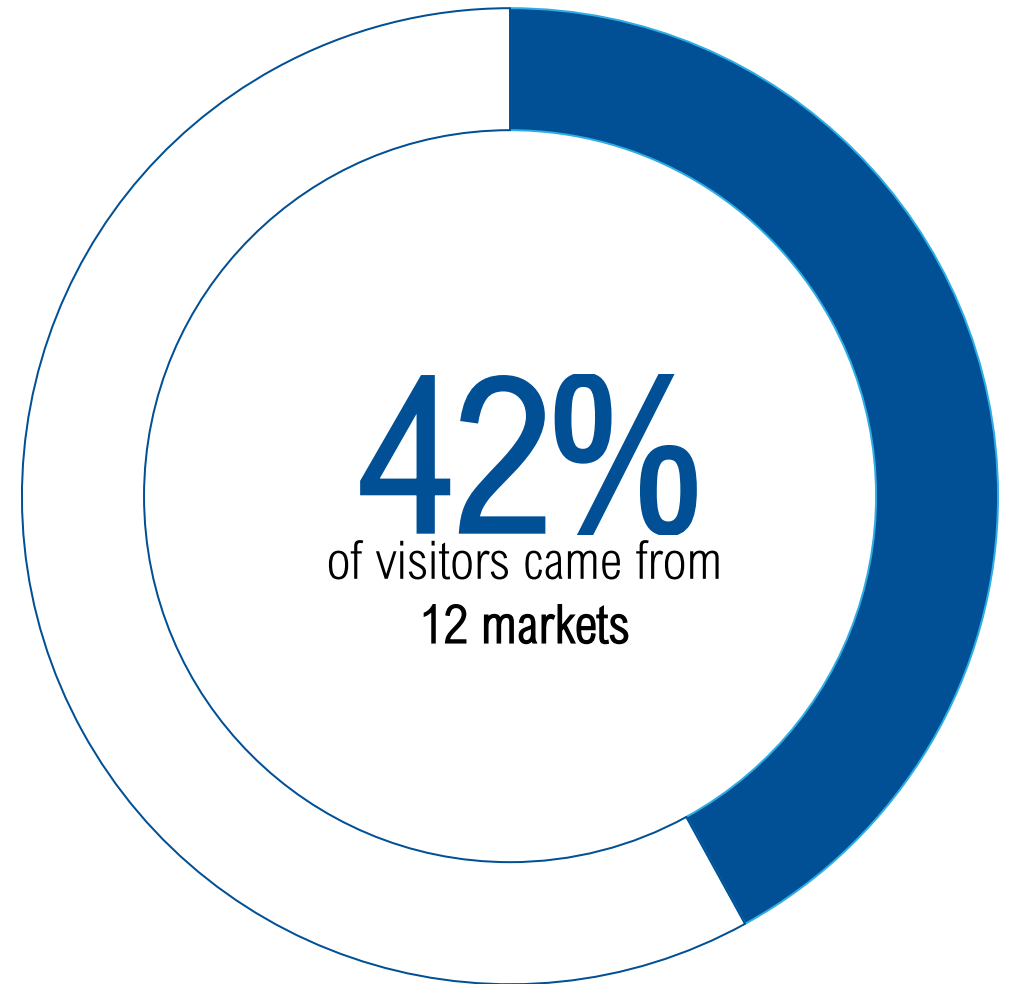
ORIGIN OF VISITORS: STATES & COUNTRIES

Origin	Percentage of Visitors
Florida	27%
Canada	8%
Georgia	7%
New York	5%
Michigan	4%
North Carolina	3%
Ohio	3%
New Jersey	3%
Tennessee	3%
Texas	3%
Virginia	3%
Pennsylvania	3%



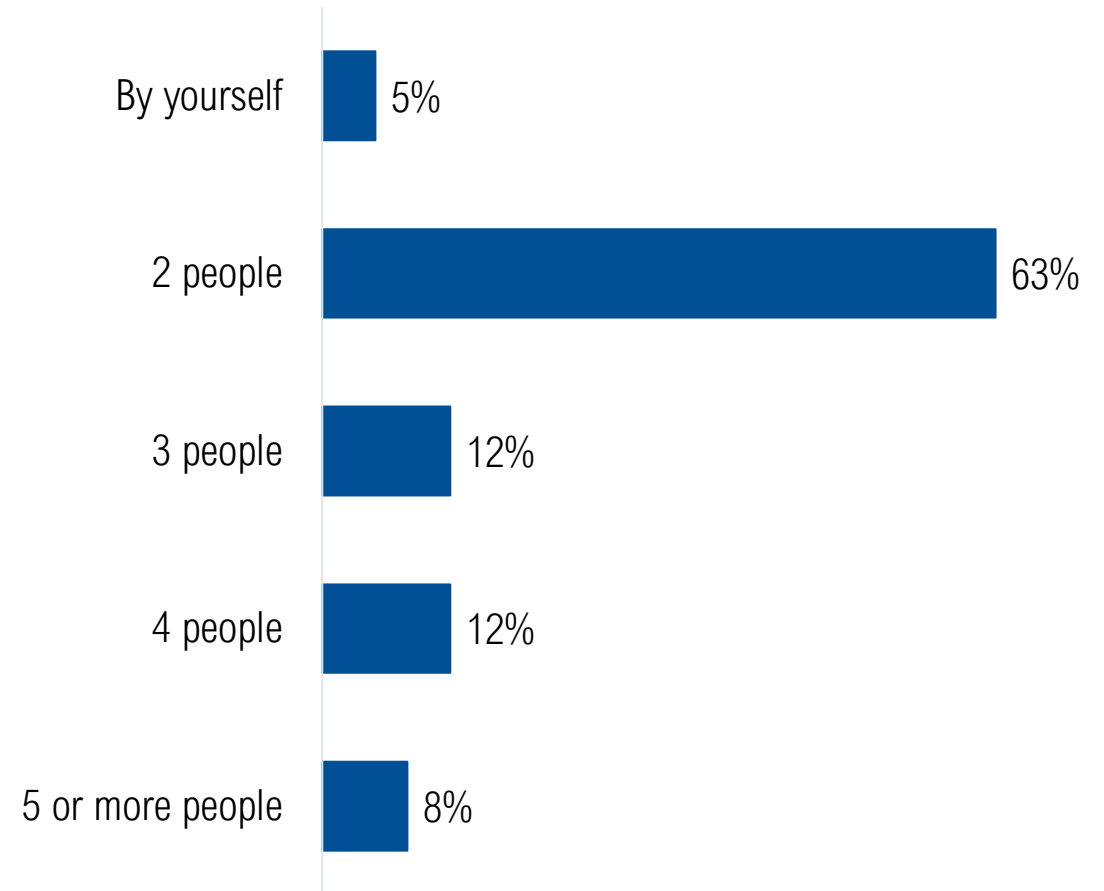
ORIGIN OF VISITORS: MARKETS

Market	% of Visitors
Jacksonville	7%
Orlando	6%
New York City*	6%
Atlanta	5%
Ocala	3%
Miami-Ft. Lauderdale	3%
Tampa-Clearwater-St. Petersburg	2%
Gainesville	2%
Washington D.C. - Baltimore	2%
Philadelphia	2%
Lakeland	2%
Detroit	2%



TRAVEL PARTY SIZE AND COMPOSITION

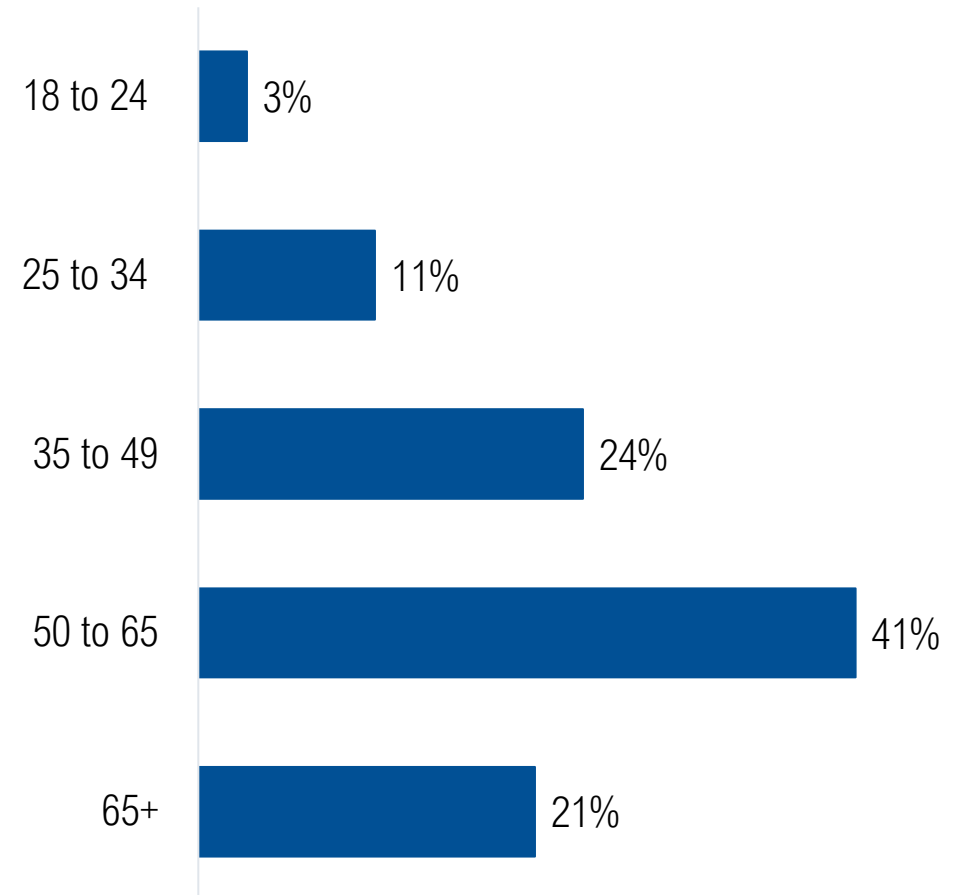
- The average visitor traveled in a party composed of **2.7** people
- **22%** traveled with children under 20
- **95%** traveled with at least 1 other person



AGE

Median Age

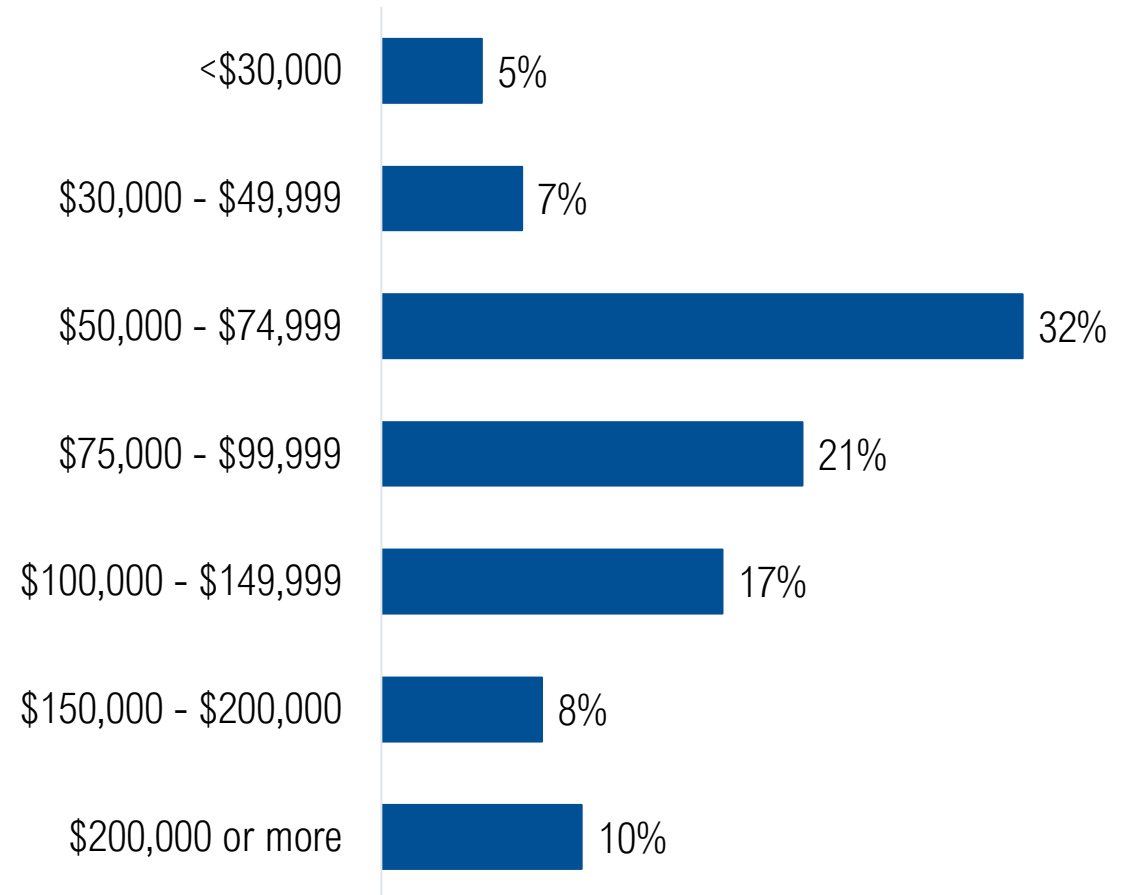
→ The median age of January – March visitors was **54 years old**.



HOUSEHOLD INCOME IN 2019

Median Household Income

→ January – March visitors had a median household income of **\$82,100**



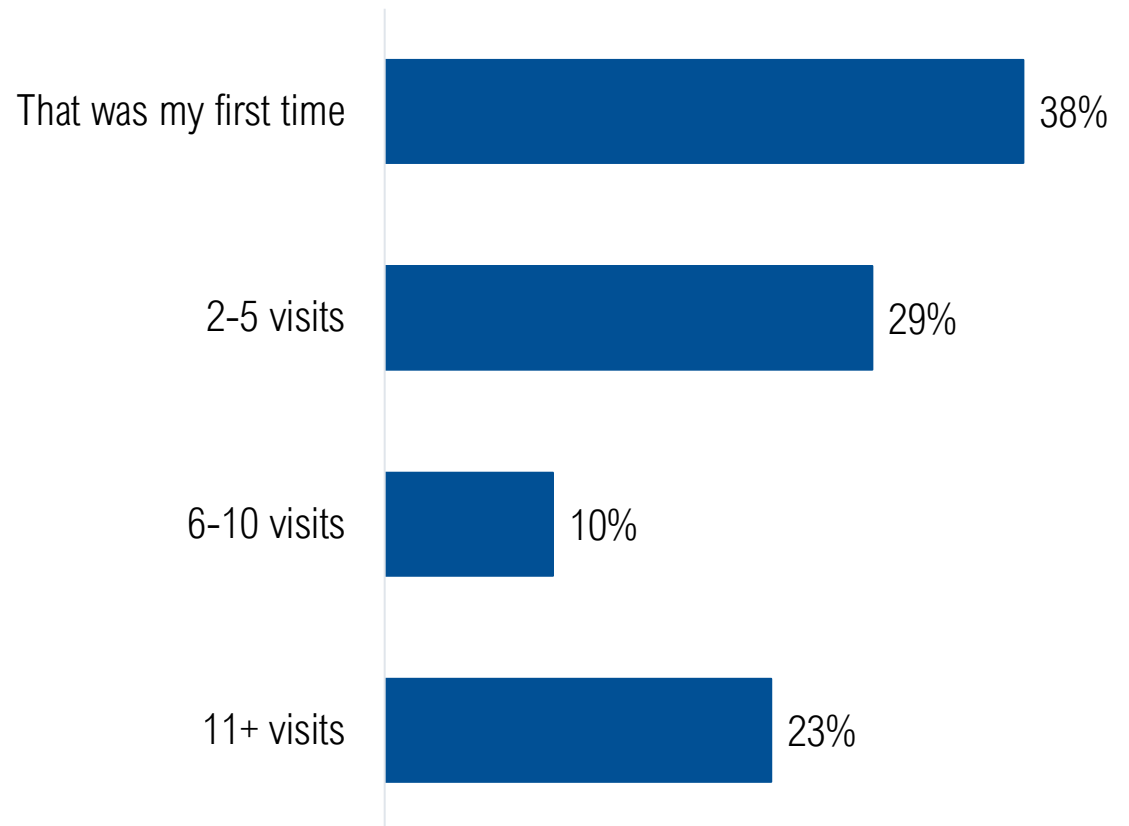
VISITOR JOURNEY



NUMBER OF TIMES IN DESTINATION

→ 38% were first time visitors

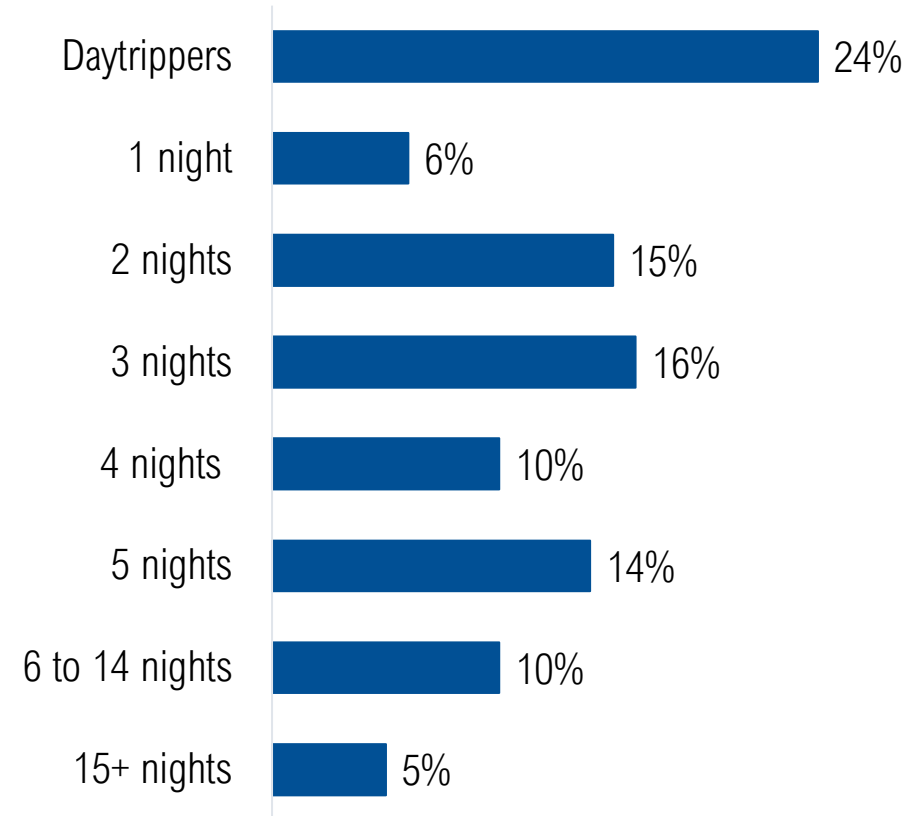
→ 23% had visited more than 10 times



LENGTH OF STAY

→ **24%** of visitors to St. Johns County were day trippers, while **76%** stayed overnight

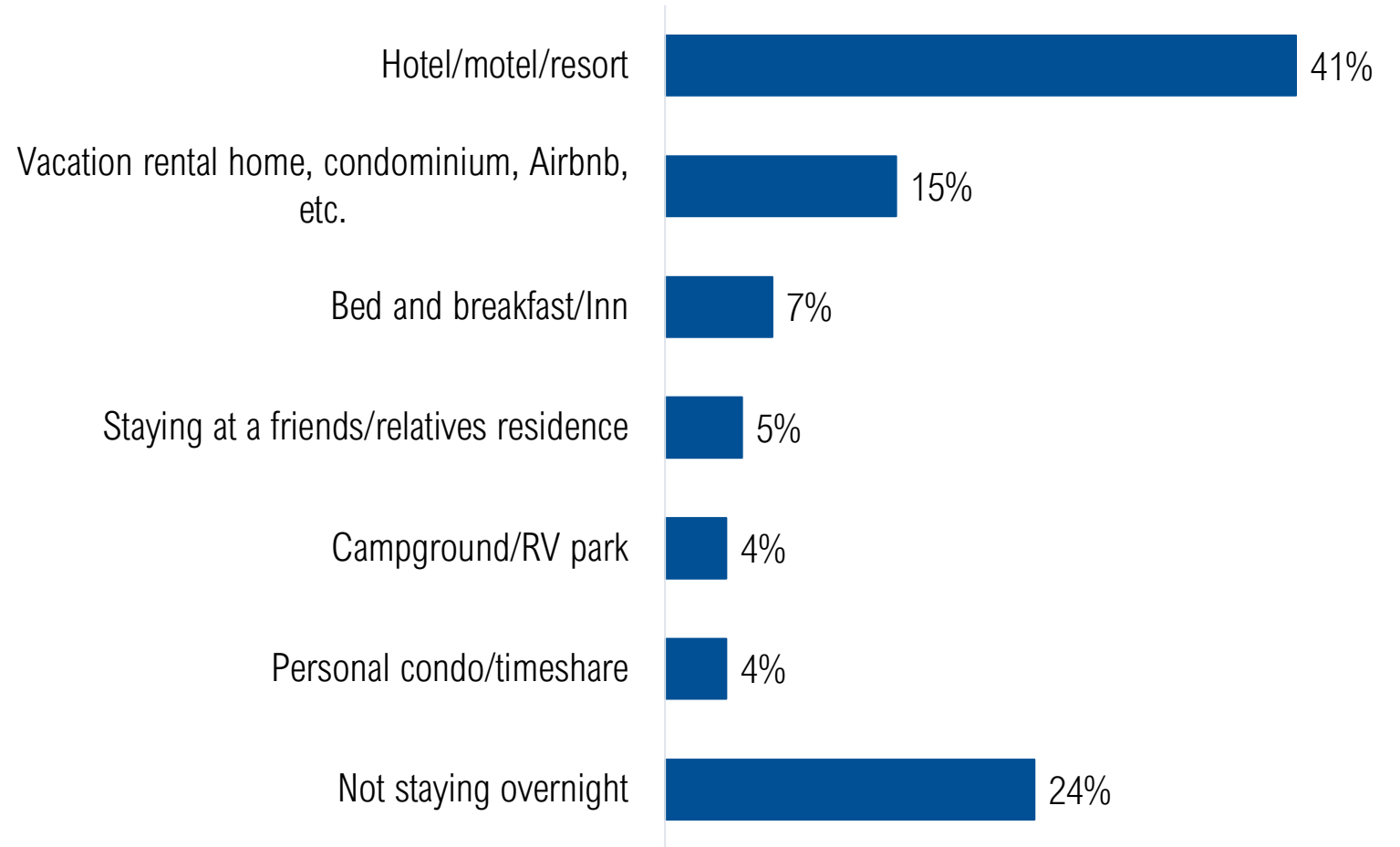
→ Visitors spent an average of **5.8** nights in St. Johns County



VISITORS' ACCOMMODATIONS

→ **41%** of visitors to St. Johns County stayed in a hotel/motel or resort

→ **7 in 10** visitors stayed in St. Johns County during the week (Monday-Thursday)



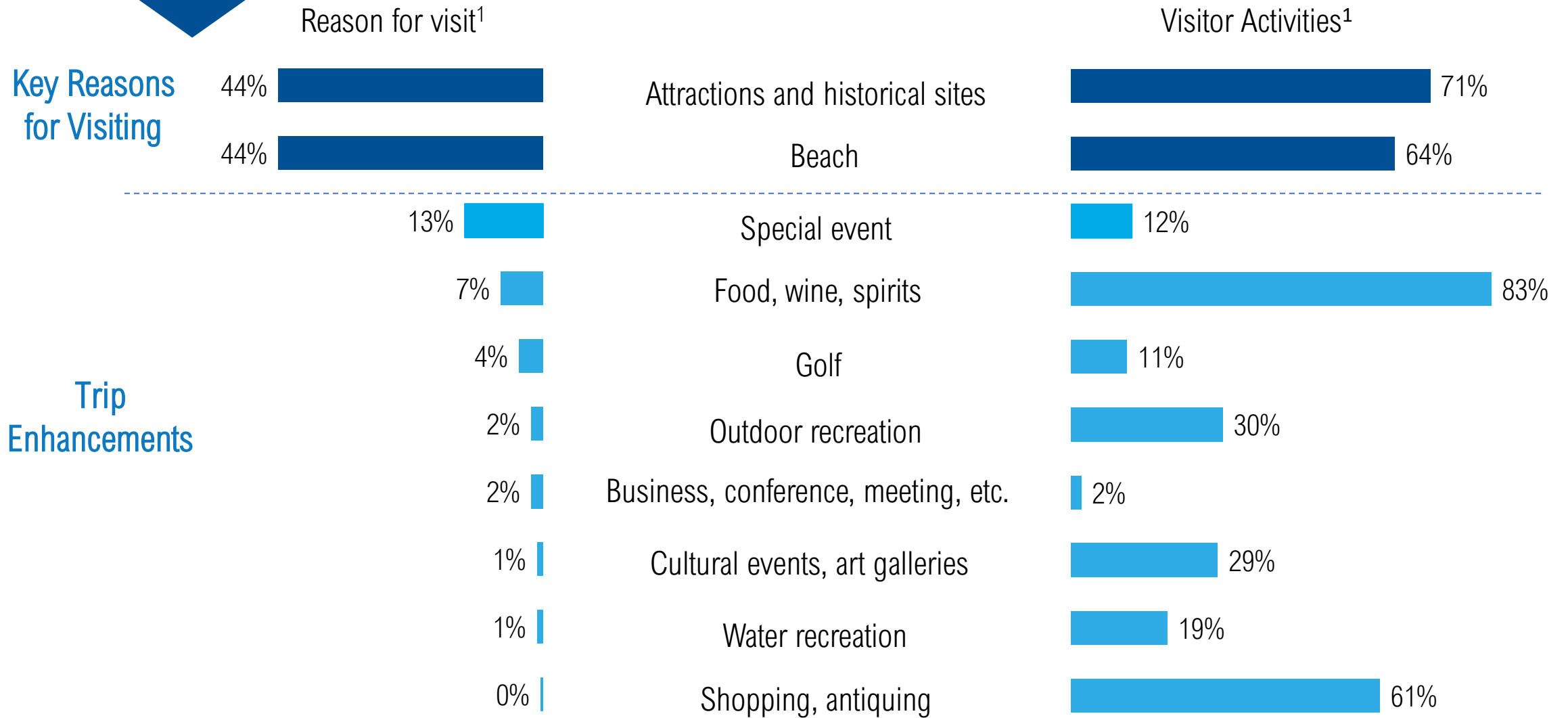
VISITOR ACTIVITIES¹



¹Multiple responses permitted.



REASON FOR VISIT VS. VISITOR ACTIVITIES



¹Multiple responses permitted.

DAILY TRAVEL PARTY SPENDING

	Average Travel Party Spend per Day	Total Travel Party Spend per trip ¹
Lodging	\$153	\$888
Restaurants	\$127	\$737
Groceries	\$21	\$123
Shopping	\$57	\$332
Admissions	\$76	\$439
Entertainment	\$33	\$193
Transportation	\$43	\$248
Other	\$5	\$29
Total	\$515	\$2,989

¹Calculated based on average nights stayed.

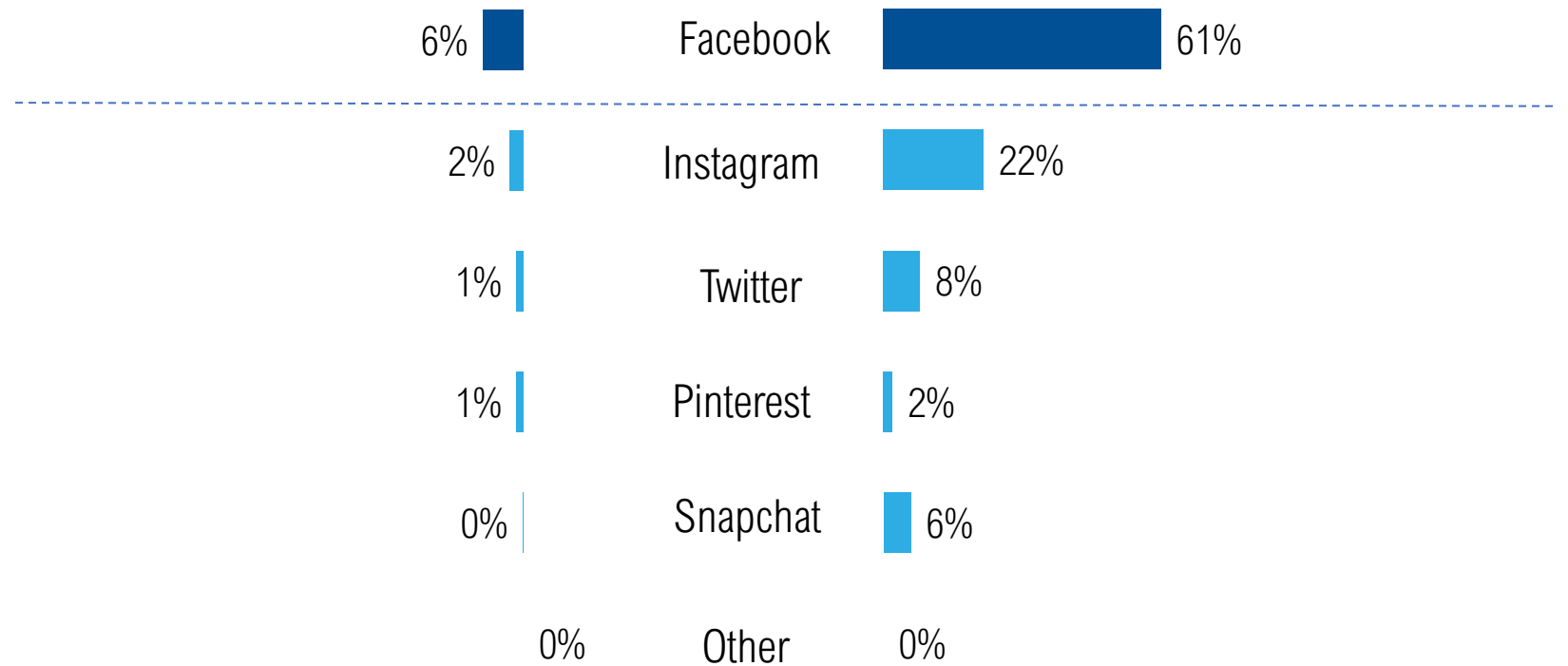
SOCIAL MEDIA: PLANNING VS. SHARING

How visitors planned their trips¹

→ **6%** 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

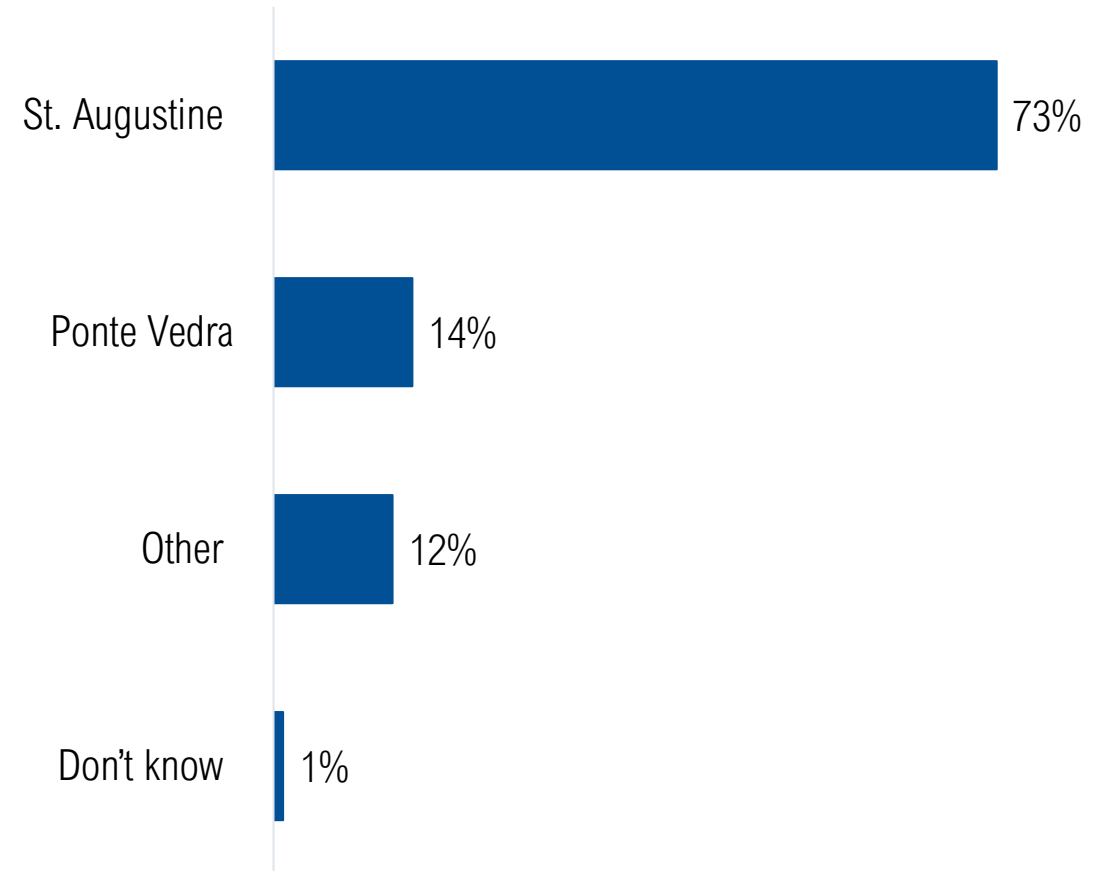
How visitors shared their trips¹



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
White sandy beaches	4.8
Peaceful/relaxing	4.8
Open space, green space, natural areas	4.7
Food/restaurants	4.7
Convenient location	4.7
Value for your travel dollar	4.6
Access to amenities	3.7

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

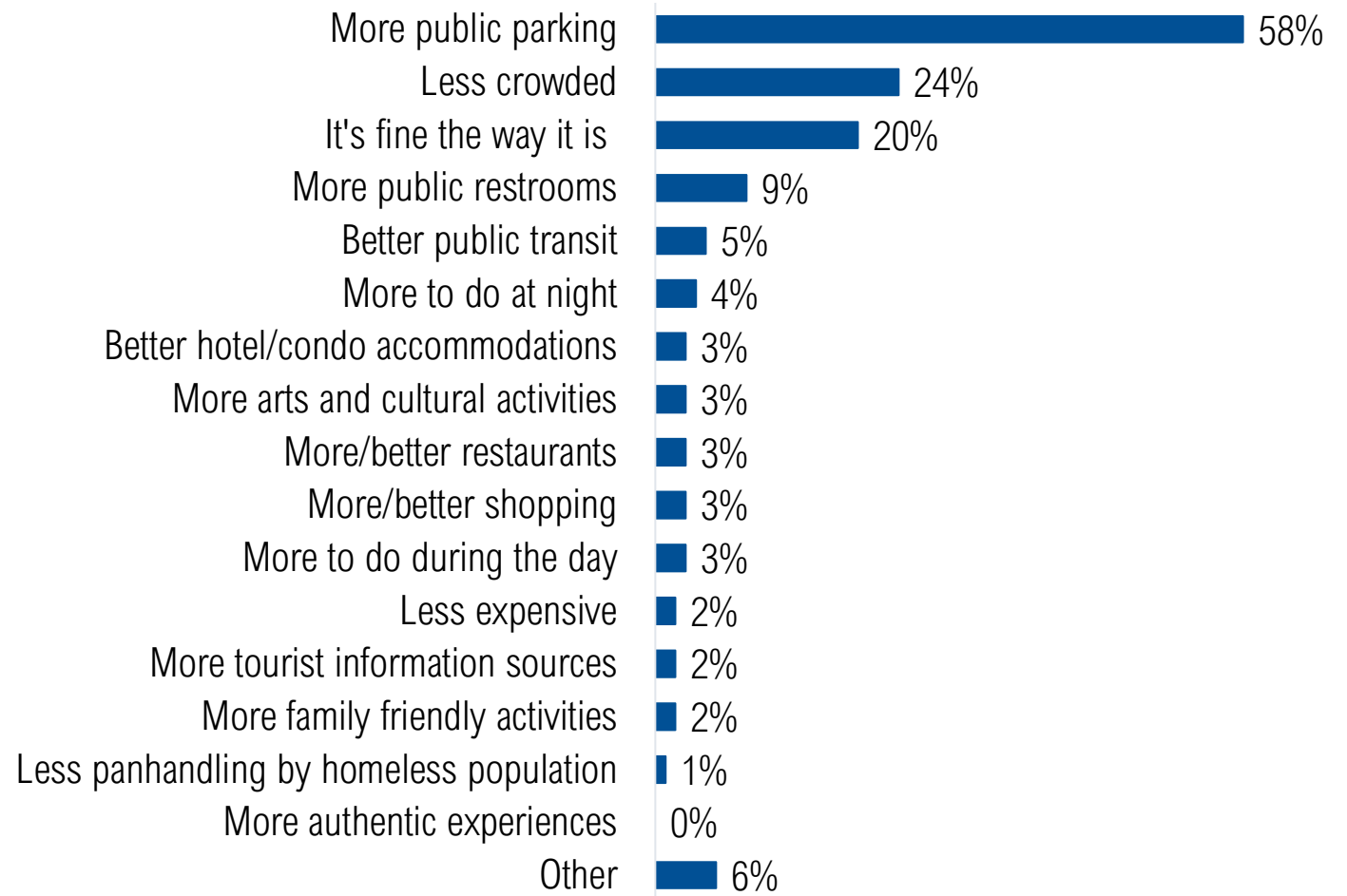
→**94%** of visitors would recommend St. Johns County to a friend or relative

→**95%** 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.

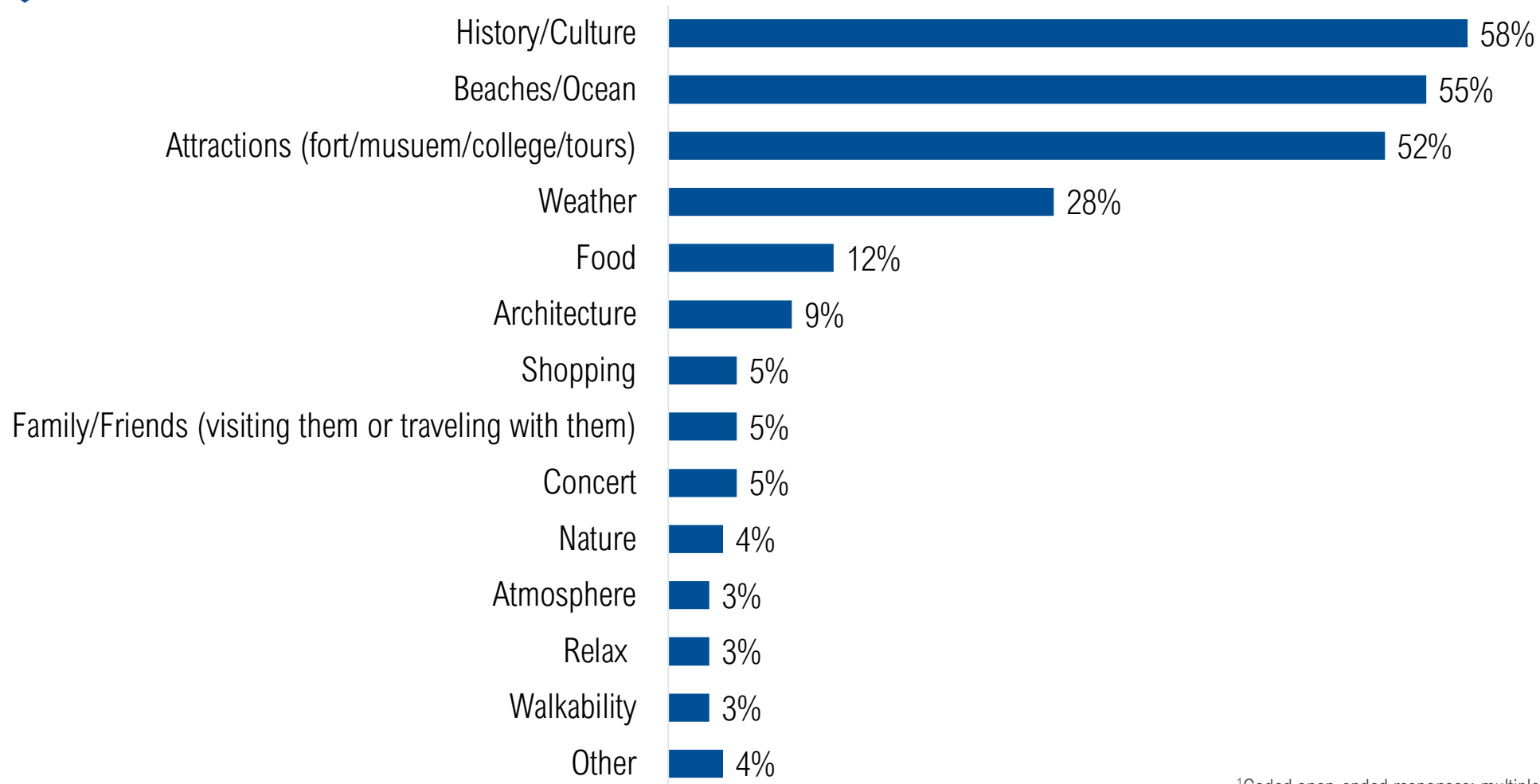
MAKING ST. JOHNS COUNTY A BETTER PLACE TO VISIT¹

→ **3 in 5** 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.

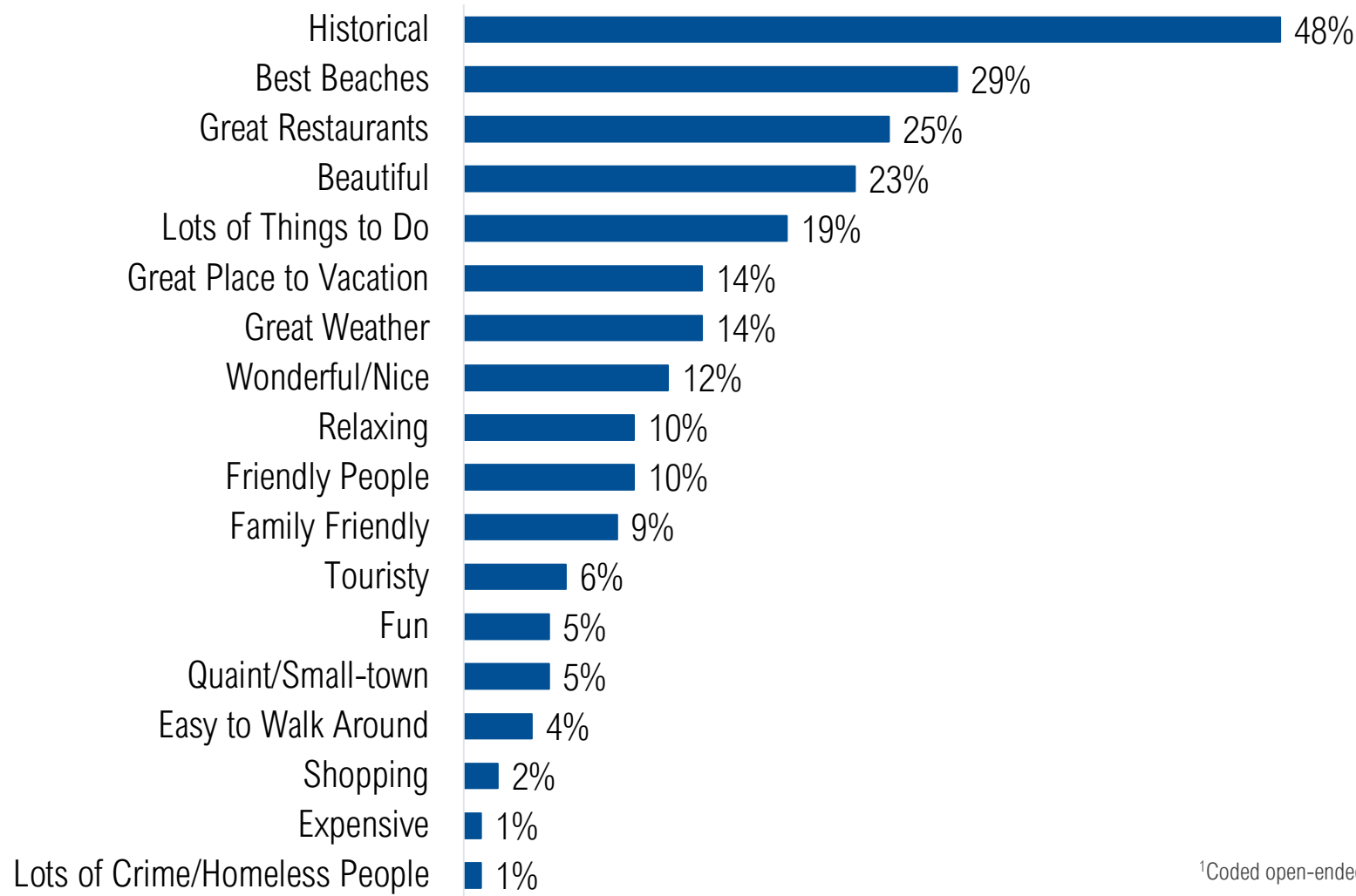
WHAT DO YOU DO AND SEE IN ST. JOHNS COUNTY THAT YOU CAN'T DO OR SEE AT HOME: HISTORY/CULTURE

- “Get to learn a more extensive history of this city and get to tour historical buildings.”
- “Seeing the oldest city and its Spanish style architecture is amazing.”
- “It’s a beautiful old town. Whether it is the fort, the old brick roads, or the Bridge of Lions. There is so much to do and see.”
- “We are staying at the historical and elegant Casa Monica Hotel. Downtown is lovely!”
- “Getting to learn about the oldest city and getting married here will be something I cherish forever.”
- “There are a ton of historical attractions here that are suitable for the entire family. There is so much to do!”
- “The historic attractions and the beach are amazing here.”
- “The historic downtown and Spanish culture here are just so beautiful.”
- “I’m glad I got to see the Lighthouse and all of the other historic attractions. Such an amazing city!”
- “The historic downtown with beautiful beaches are wonderful. There is not much more I could ask for.”

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

- “The ocean. Being away from the stresses of daily life is the main thing. “
- “This is a lovely city for a couple's honeymoon or anniversary. The beaches are great, and we love Bridge of Lions.”
- “The beaches are beautiful and so much less crowded.”
- “The beaches and no snow are great during the winter.”
- “Back home I live inland so getting to go to the beach is awesome.”
- “I love just being able to sit on the beach and relax.”
- “The beaches and warm weather are great!”
- “Being able to go to the beach during the winter is awesome.”
- “Beautiful white sandy beaches. There are so many sand dollars and starfish!”
- “It’s such a romantic city with a gorgeous coastal area.”

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

- “One of the most beautiful and historic cities we've visited in the States.”
- “A magical city and a history buffs dream! It is unlike any other city in Florida with surprises around every corner.”
- “Like walking back in time. St. Augustine's history has been well preserved. The buildings, streets, attractions are beautiful. A lot of history to appreciate. We highly recommend staying at St. Francis Inn Bed and Breakfast. Easy walk to any downtown attraction or restaurant.”
- “St. Augustine is a very scenic and historic city. Plenty of things to do day and night. And there are exceptional cuisine choices.”
- “Very cultural American city by the sea with wonderful weather and an interesting history.”
- “We are so glad we stopped in St. Augustine before heading home from Daytona this weekend. St. Augustine is a historian's dream come true. So much history to learn about. We only had time to take a trolley tour and visit the Cathedral and Shrine. Would make a perfect family vacation or a field trip.”

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

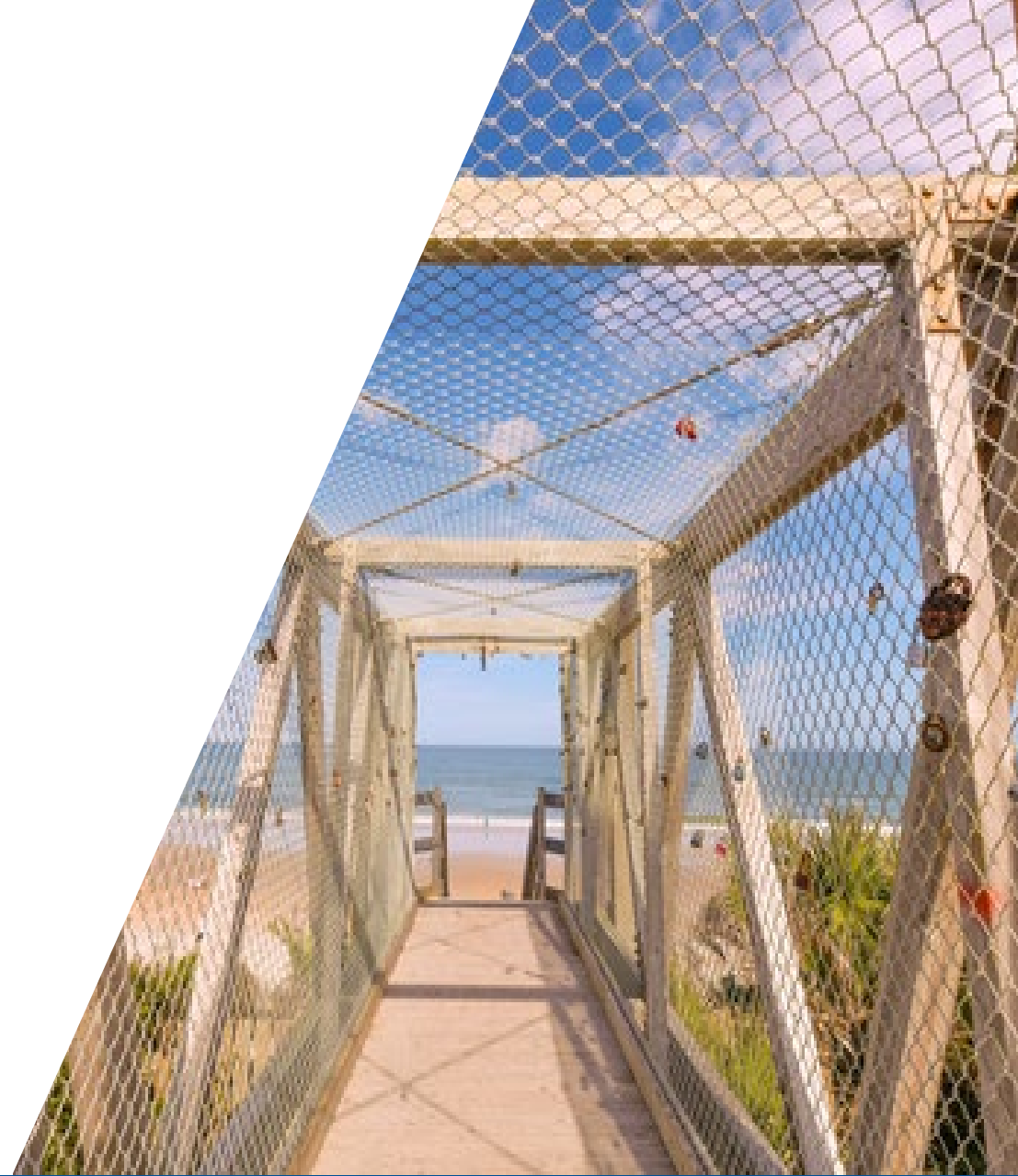
- “A nice city, with nice beaches and lots to do!”
- “It has a very European feel and some very nice beaches.”
- “The beaches are gorgeous; the weather is warm, and the people are very welcoming great city.”
- “The best city to visit in Florida! St. Augustine has the best beaches in Florida and great food.”
- “It is the perfect vacation spot! The beaches aren't too crowded, the weather is nice, the people are welcoming, and the the old city is magical.”
- “An American city that looks like a Mediterranean coastal town. There are beautiful beaches, warm weather, warm people, and great restaurants.”
- “Great city! We love staying at World Golf Village. There is great golf, perfect beaches, and amazing weather”
- “A very cultural city with nice beaches and warm weather.”

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 RESTAURANTS

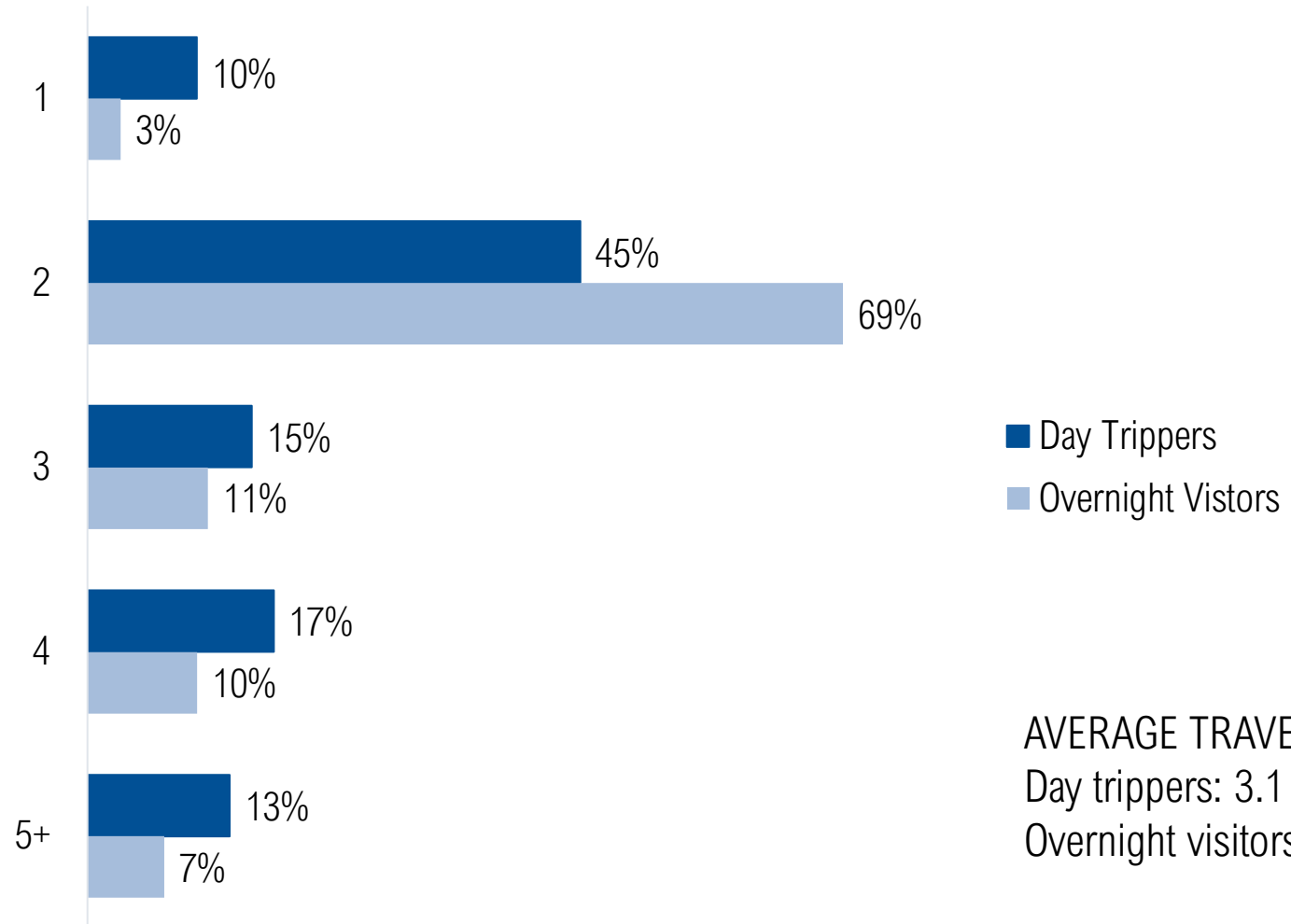
- “Good food and wine bars, an awesome amphitheater, great historical venues, and nice people. There is always something going on.”
- “It is a charming old district with great restaurants and bars ”
- “The downtown section is amazing and the drive over A1A is breathtaking. the food is so great!”
- “An unexpected Florida destination with awesome golf courses and great food.”
- “It's the closest beach to Gainesville the restaurants and bars are great, and the old city is really special.”
- “Our favorite anniversary destination. Such a romantic town. Love all the bed and breakfasts and restaurants in downtown. The weather is beautiful in February come back every year.”
- “Nice town near Jax with really good bars and restaurants generally very chill.”
- “The city is a break from the norm. The food choices are excellent, the beaches are nice, and the golf is perfect.”
- “Very good dining that is close to home and a good get away for special occasions.”



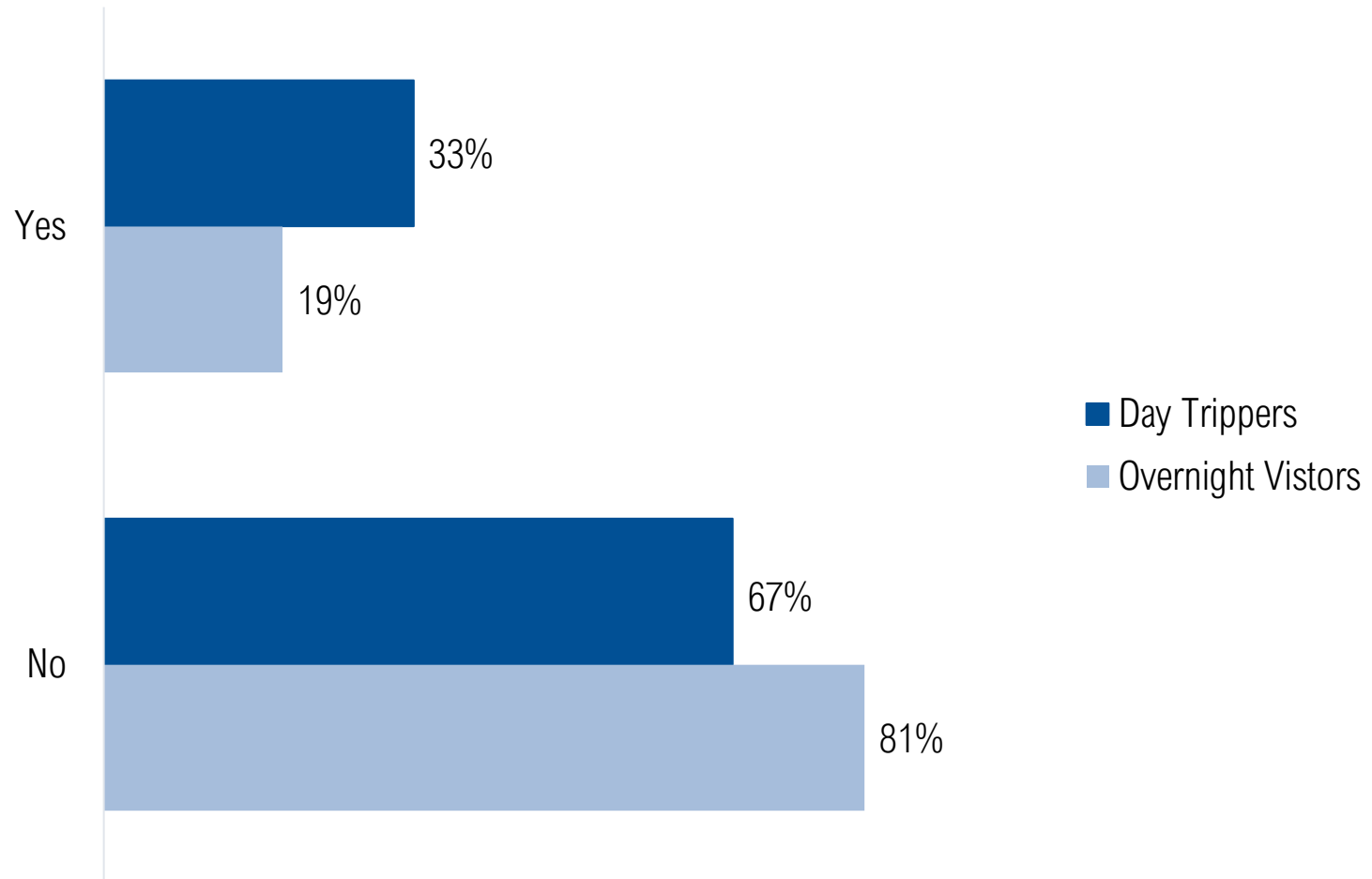
DAY TRIPPER VS. OVERNIGHT VISITOR CROSSTABS



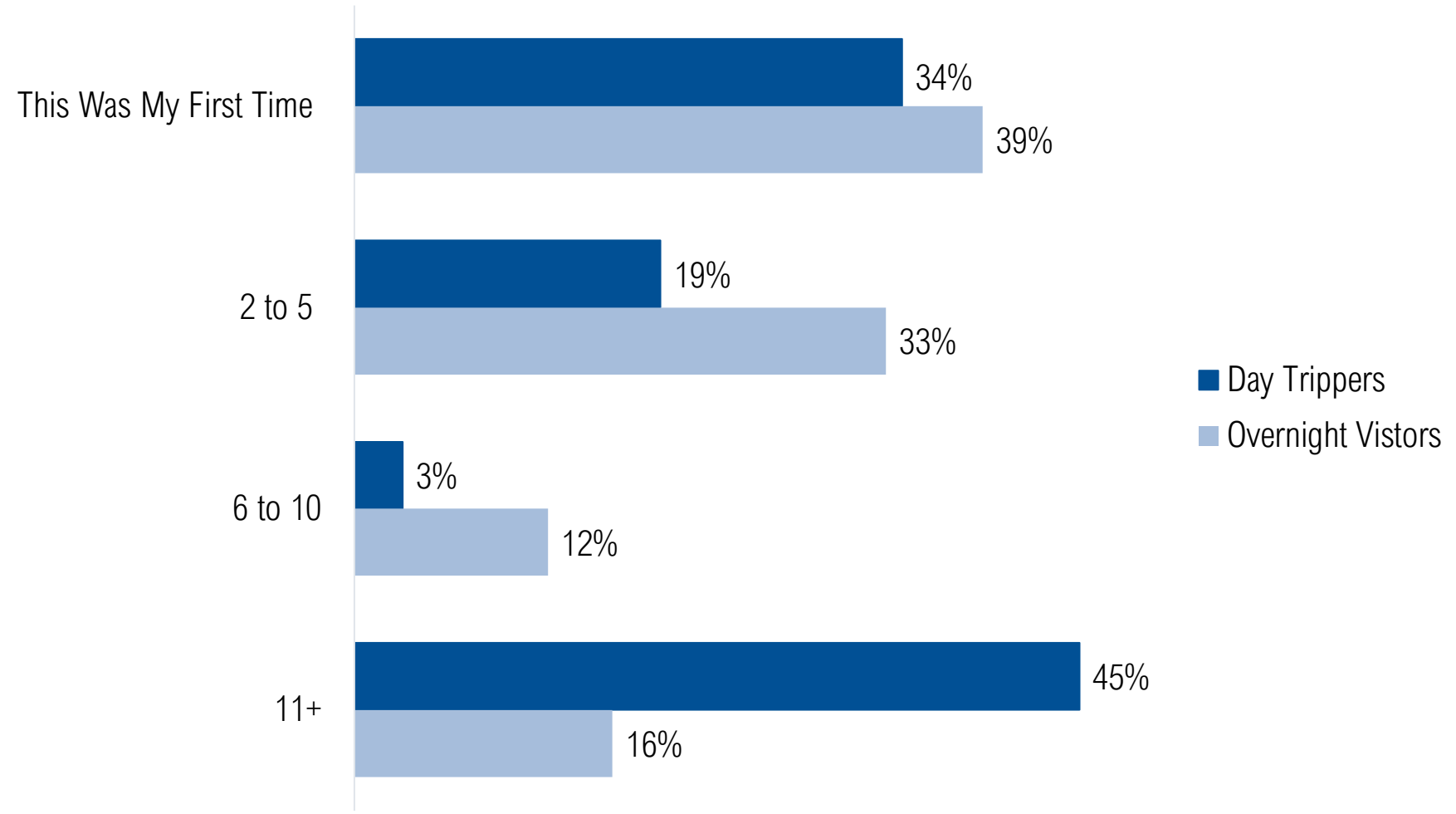
DURING THIS TRIP TO THE ST. AUGUSTINE/PONTE VEDRA AREA, HOW MANY PEOPLE ARE IN YOUR TRAVEL PARTY INCLUDING YOURSELF?



DID YOU TRAVEL WITH CHILDREN AGE 18 OR UNDER?



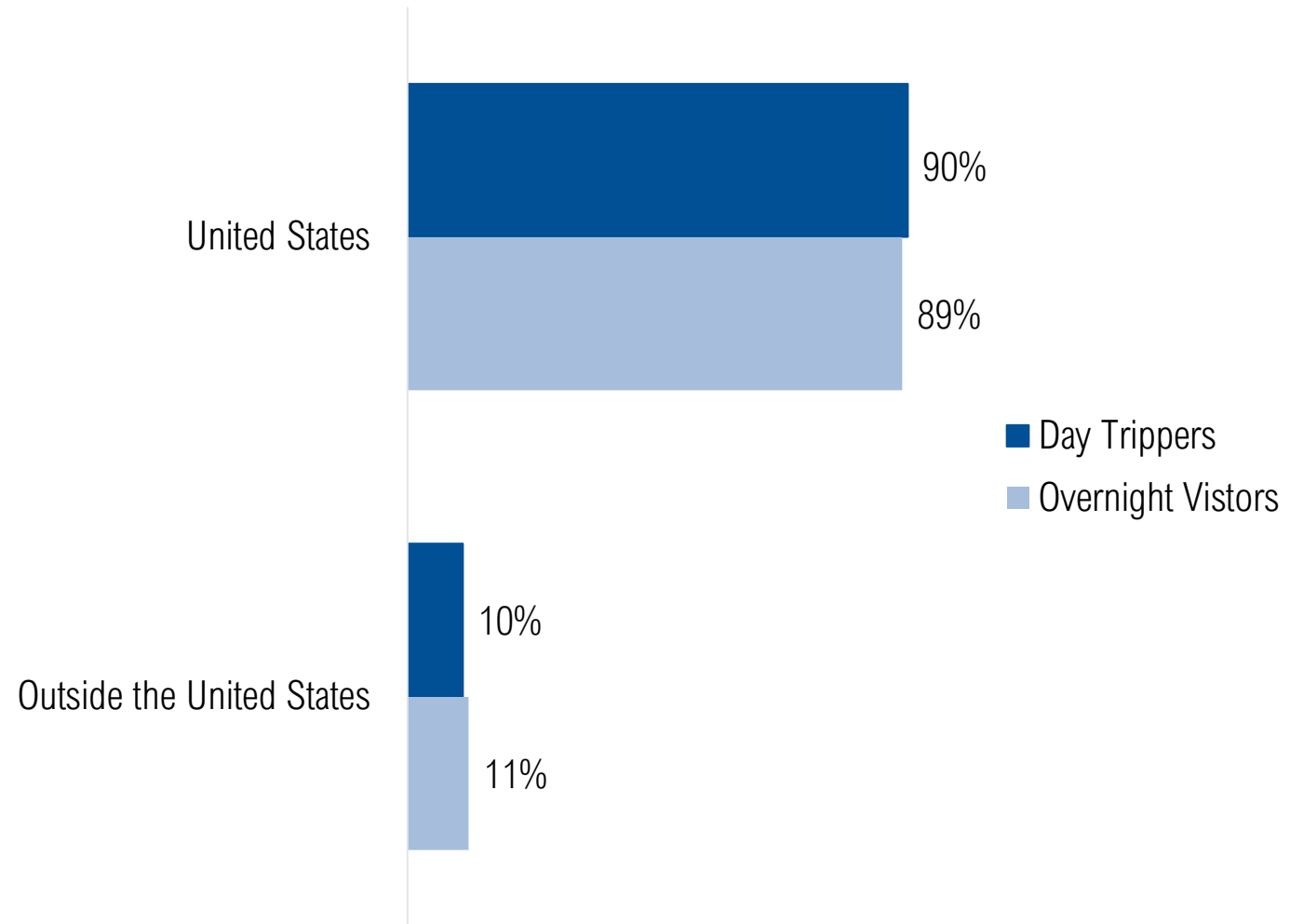
APPROXIMATELY HOW MANY TIMES HAVE YOU EVER VISITED THE ST. AUGUSTINE/PONTE VEDRA AREA?



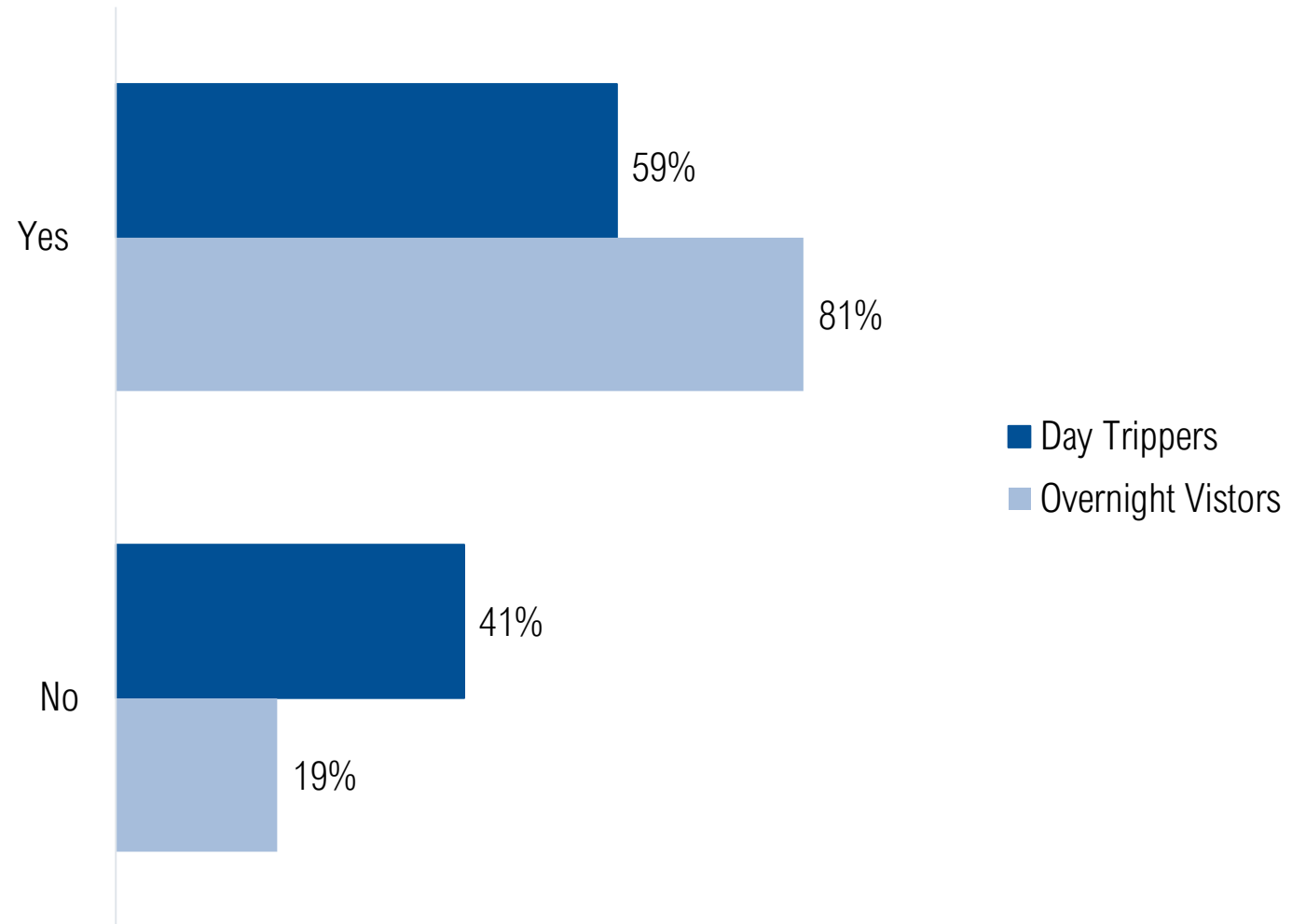
DID YOU USE ANY OF THE FOLLOWING TO PLAN YOUR TRIP TO THE ST. AUGUSTINE/PONTE VEDRA AREA OR DURING YOUR TRIP HERE?

	Day Trippers	Overnight Visitors
Search on Google	60%	76%
Talk to Friends	45%	39%
Go to VisitStAugustine.com	24%	23%
Use TripAdvisor	23%	23%
Destination Social Media	16%	17%
Deal-Based Promotion	13%	17%
Go to FloridasHistoricCoast.com	10%	12%
Contact a Travel Agent	8%	6%
Look at Travel Magazines	7%	6%
Personal Social Media	5%	7%
Go to a Hotel/Resort Website/App	3%	46%
Look in Travel Sections of Newspapers	3%	4%
Use Priceline	2%	14%
Go to an Airline Website/App	0%	12%
Read Travel Guides	0%	4%
Airbnb/Homeaway	0%	0%
Other	0%	0%
None	0%	0%

DO YOU LIVE IN THE US OR OUTSIDE THE US?



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



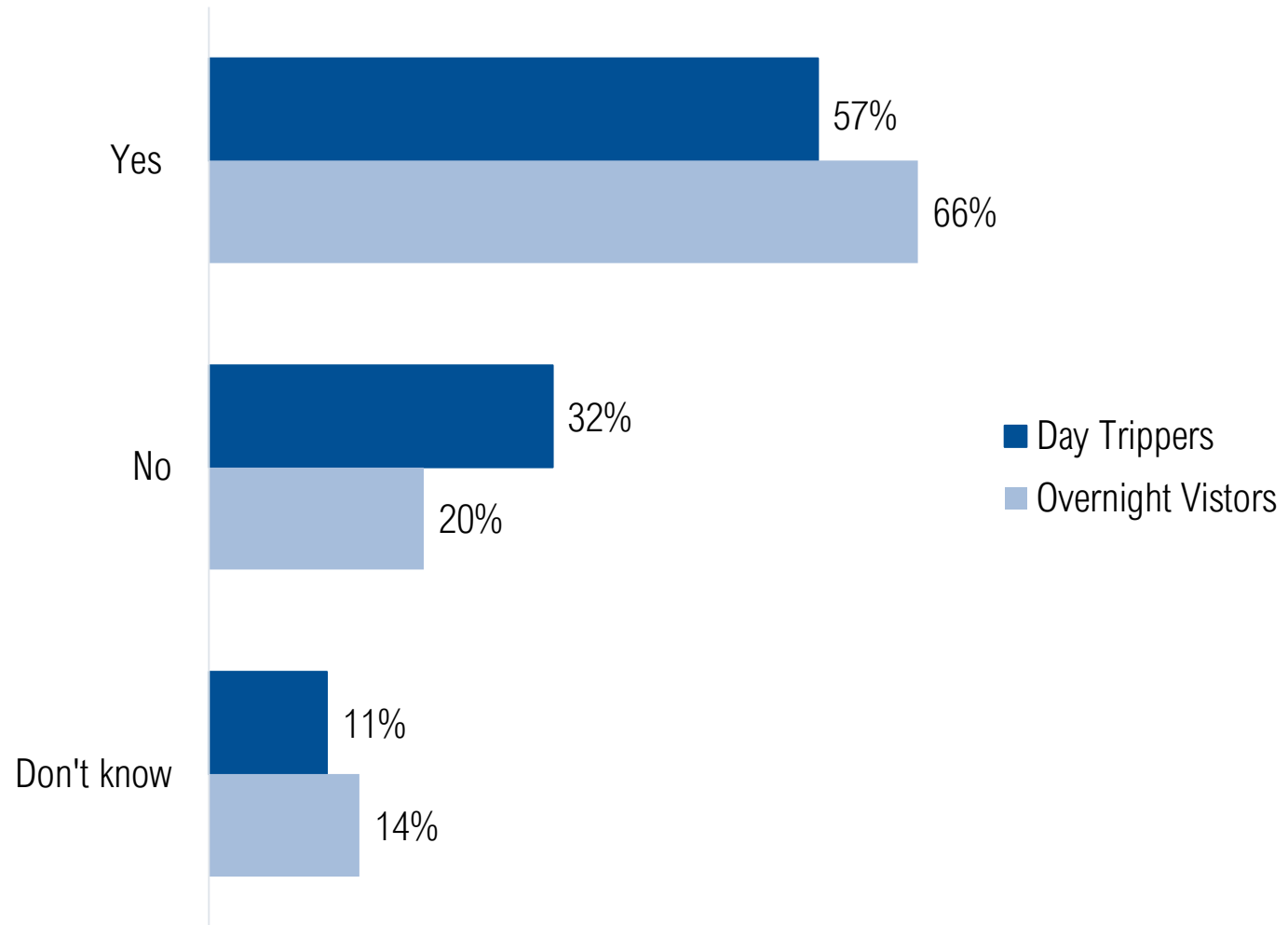
WHAT IS YOUR MAIN REASON FOR TAKING THIS TRIP OR VACATION TO THE ST. AUGUSTINE/PONTE VEDRA AREA?

	Day Trippers	Overnight Visitors
Attractions and Historical Sites	38%	59%
Beach	25%	51%
Special Event (e.g., Festival, Concert, etc.)	25%	9%
Food, Wine, Spirits	24%	1%
Special Occasion	10%	20%
Visit Friends or Family	5%	10%
Family Friendly	5%	10%
Golf	5%	2%
Cultural Events, Art Galleries	2%	0%
Business, Conference, Meeting, etc.	1%	3%
Personal Business (Including Medical/Healthcare)	1%	0%
Outdoor Recreation	0%	3%
Water Recreation	0%	2%

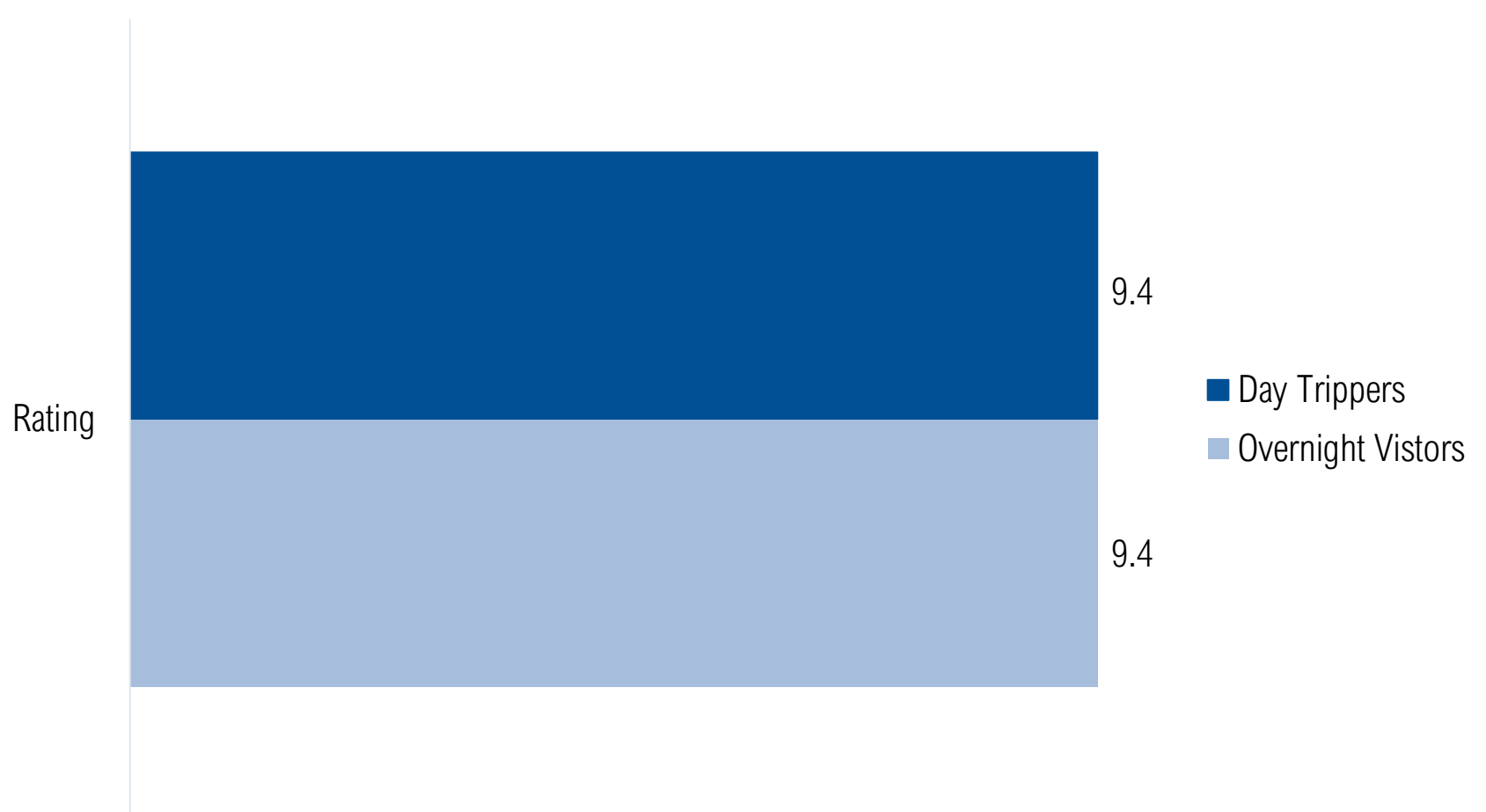
PLEASE TELL ME IF YOU ENGAGE IN ANY OF THE FOLLOWING ACTIVITIES WHEN YOU ARE IN THE ST. AUGUSTINE/PONTE VEDRA AREA.

	Day Trippers	Overnight Visitors
Go to Restaurants	74%	86%
Attractions and Historical Sites	52%	77%
Shopping, Antiquing	40%	68%
Trolley/Walking/Ghost Tour	35%	47%
Beach	33%	74%
Special Event (e.g., Festival, Concert, etc.)	21%	10%
Go to Bars and Night Clubs	19%	39%
Outdoor Recreation	14%	35%
Wine/Spirit/Pub Tour	14%	27%
Cultural Events, Art Galleries	11%	35%
Golf	6%	12%
Water Recreation	2%	25%
Agritourism	1%	4%
Spas	1%	4%
Business, Conference, Meeting, etc.	1%	2%
Attend or Participate in a Non-Golf Sporting Event	0%	1%
Other	0%	0%

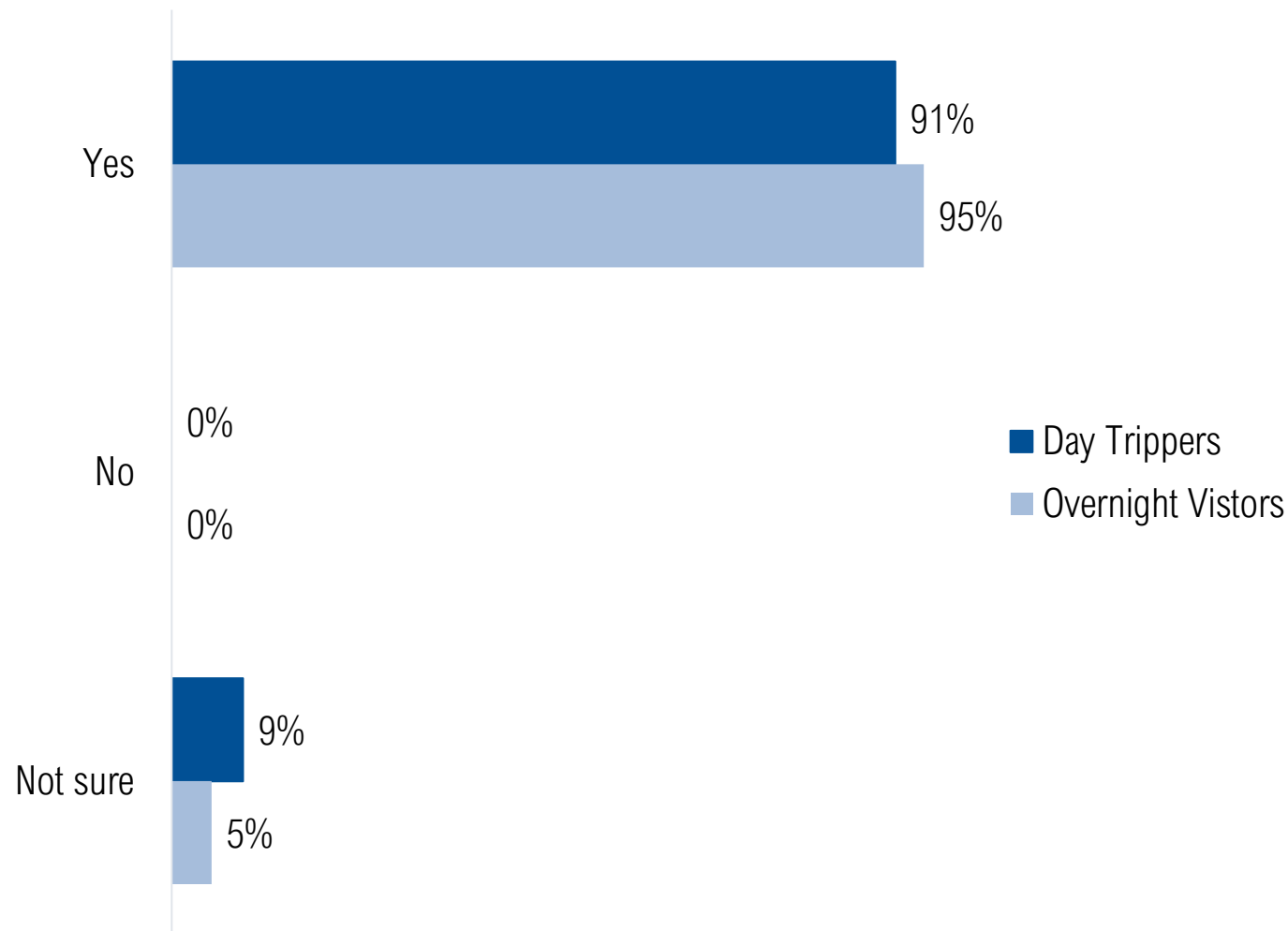
WILL YOU SHARE ABOUT YOUR TRIP ON SOCIAL MEDIA DURING OR SHORTLY AFTER YOUR TRIP TO THE AREA?



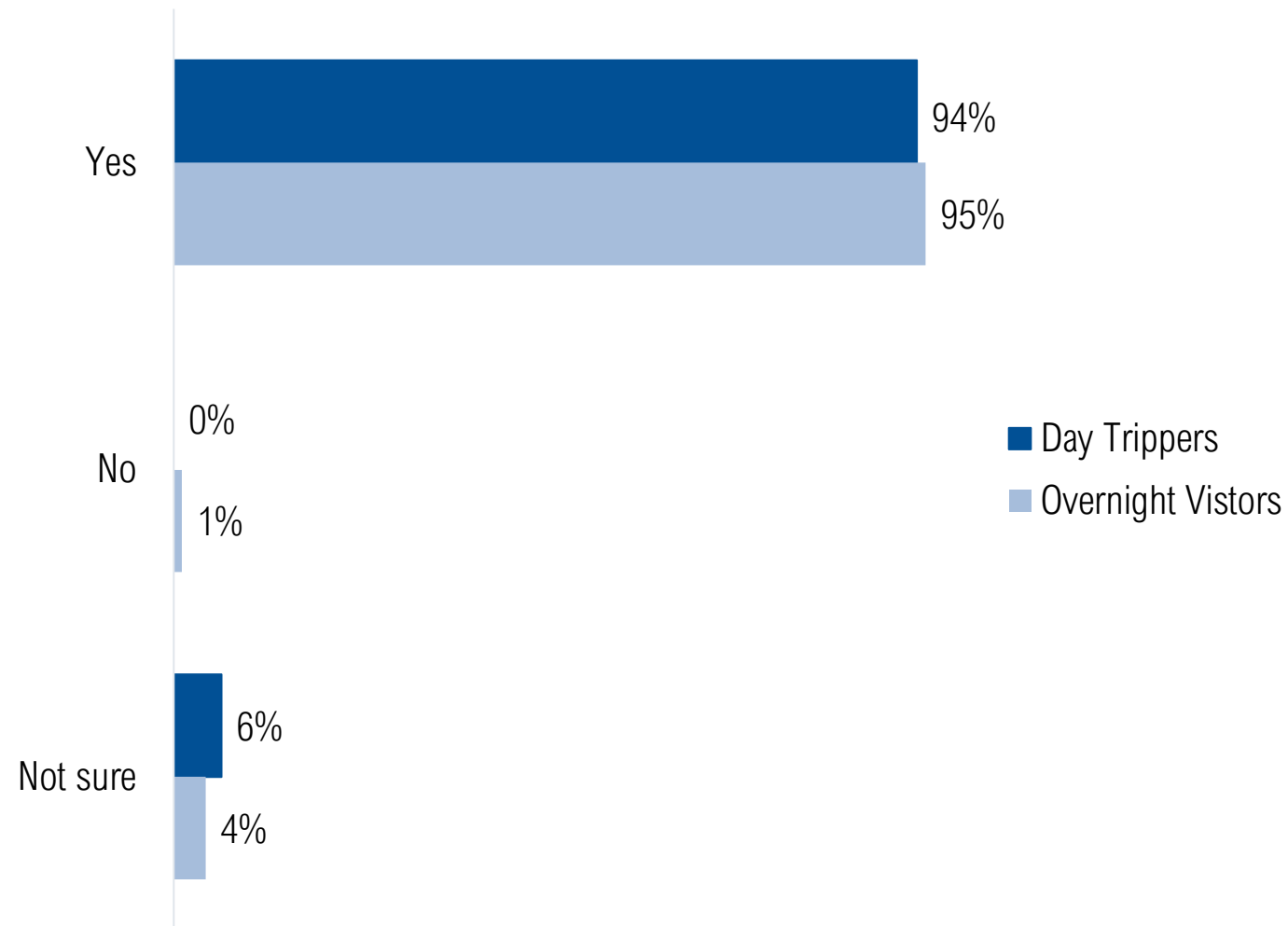
HOW WOULD YOU RATE THE ST. AUGUSTINE/PONTE VEDRA AREA OVERALL AS A PLACE TO VISIT?



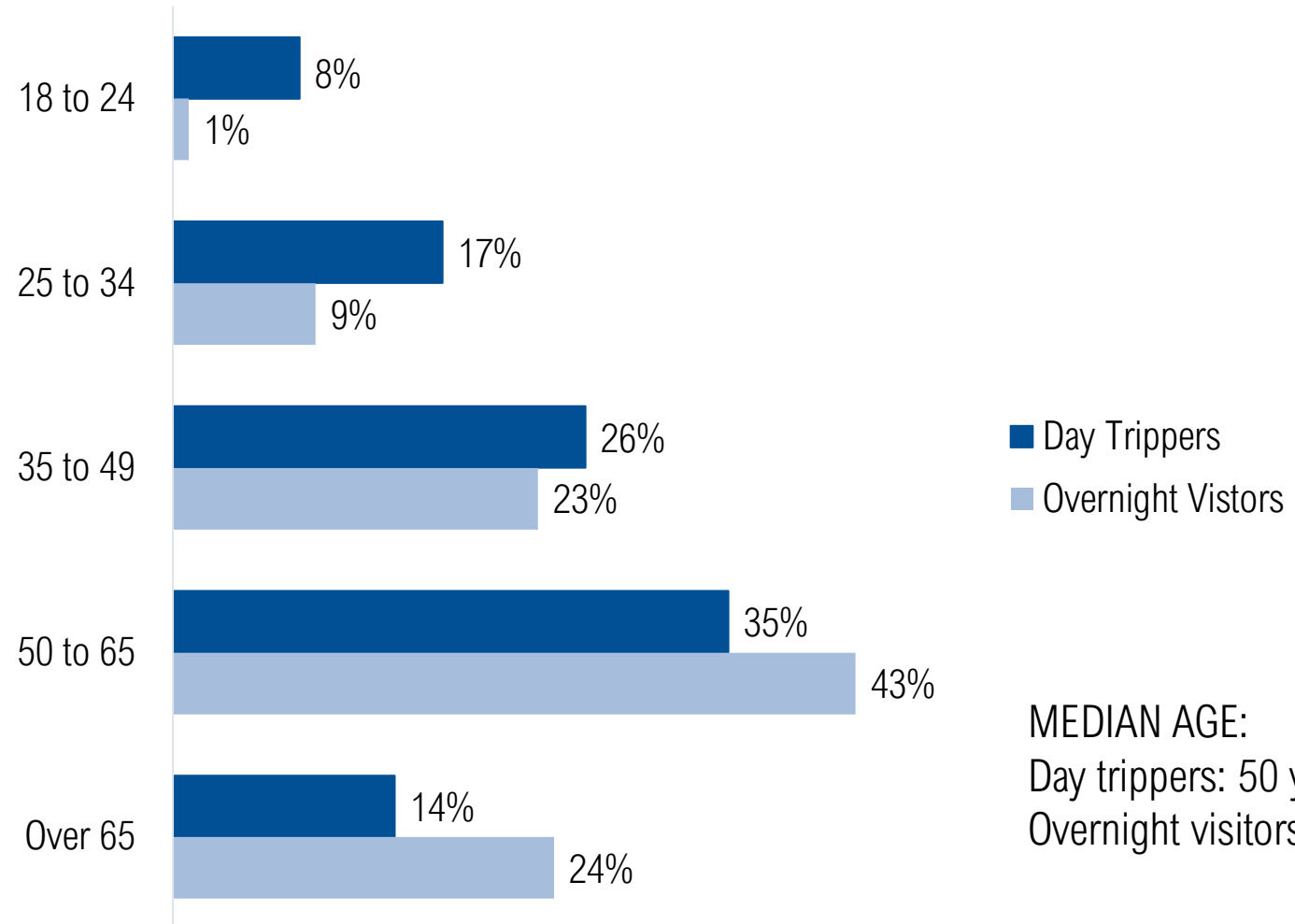
WOULD YOU RECOMMEND THE ST. AUGUSTINE/PONTE VEDRA AREA TO A FRIEND OR RELATIVE OVER OTHER VACATION AREAS IN FLORIDA?



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

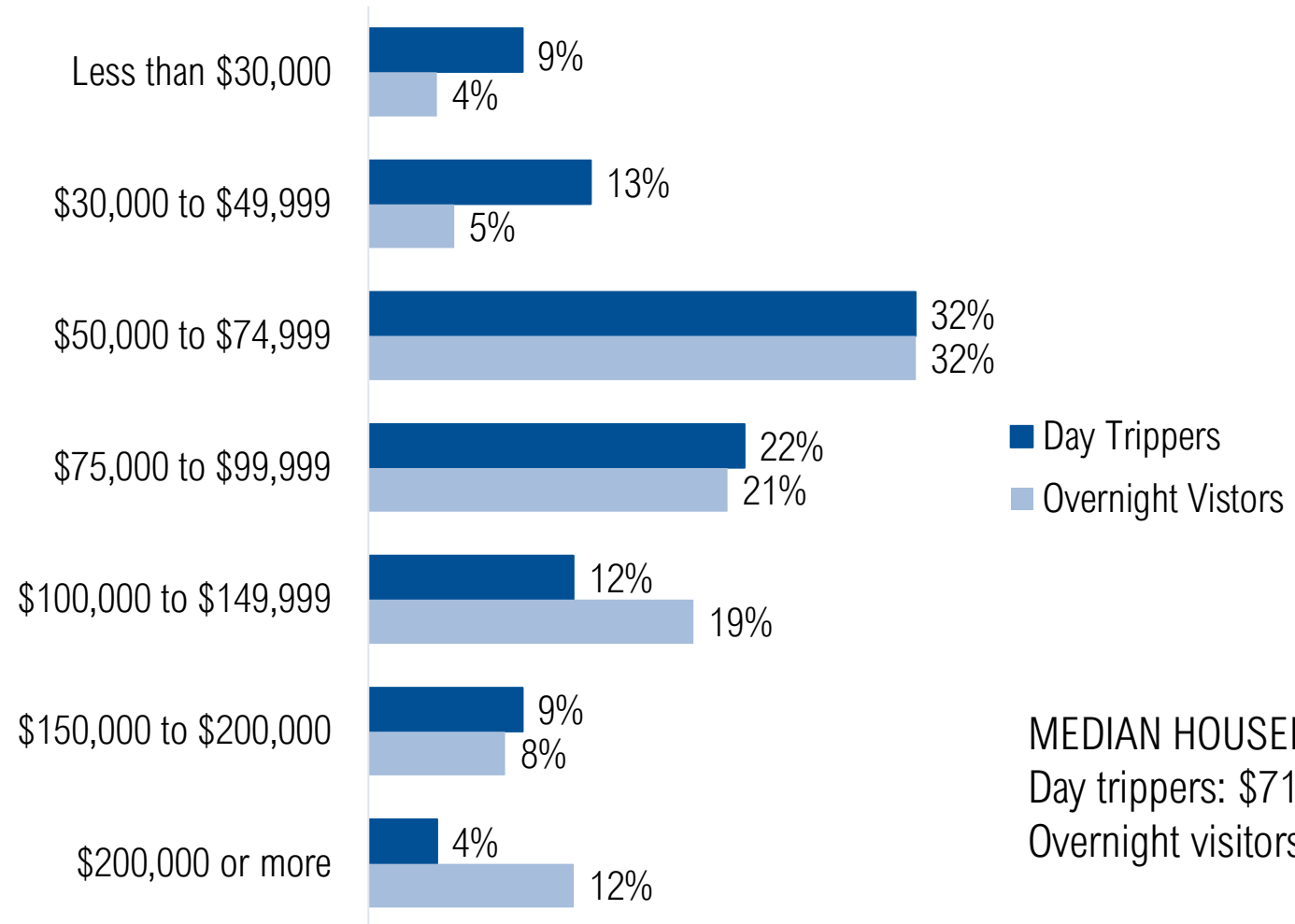


WHICH CATEGORY BEST FITS YOUR AGE?



MEDIAN AGE:
Day trippers: 50 years old
Overnight visitors: 56 years old

WHICH CATEGORY BEST FITS YOUR TOTAL HOUSEHOLD INCOME IN 2019 FROM ALL SOURCES?



MEDIAN HOUSEHOLD INCOME:
 Day trippers: \$71,900
 Overnight visitors: \$85,700

METHODOLOGY



Data Collection

- ◆ Visitor tracking is completed via internet surveys and in-person interviewing with 404 visitors between January 1st and March 31st 2020 in areas throughout St. Johns County, including public areas, hotels, and events.

ST. JOHNS COUNTY TDC VISITOR TRACKING REPORT

JANUARY – MARCH 2020

Joseph St. Germain, Ph.D.
Phillip Downs, Ph.D.
Rachael Anglin
Erin Dinkel
Isiah Lewis
Glencora Haskins
Downs & St. Germain Research

