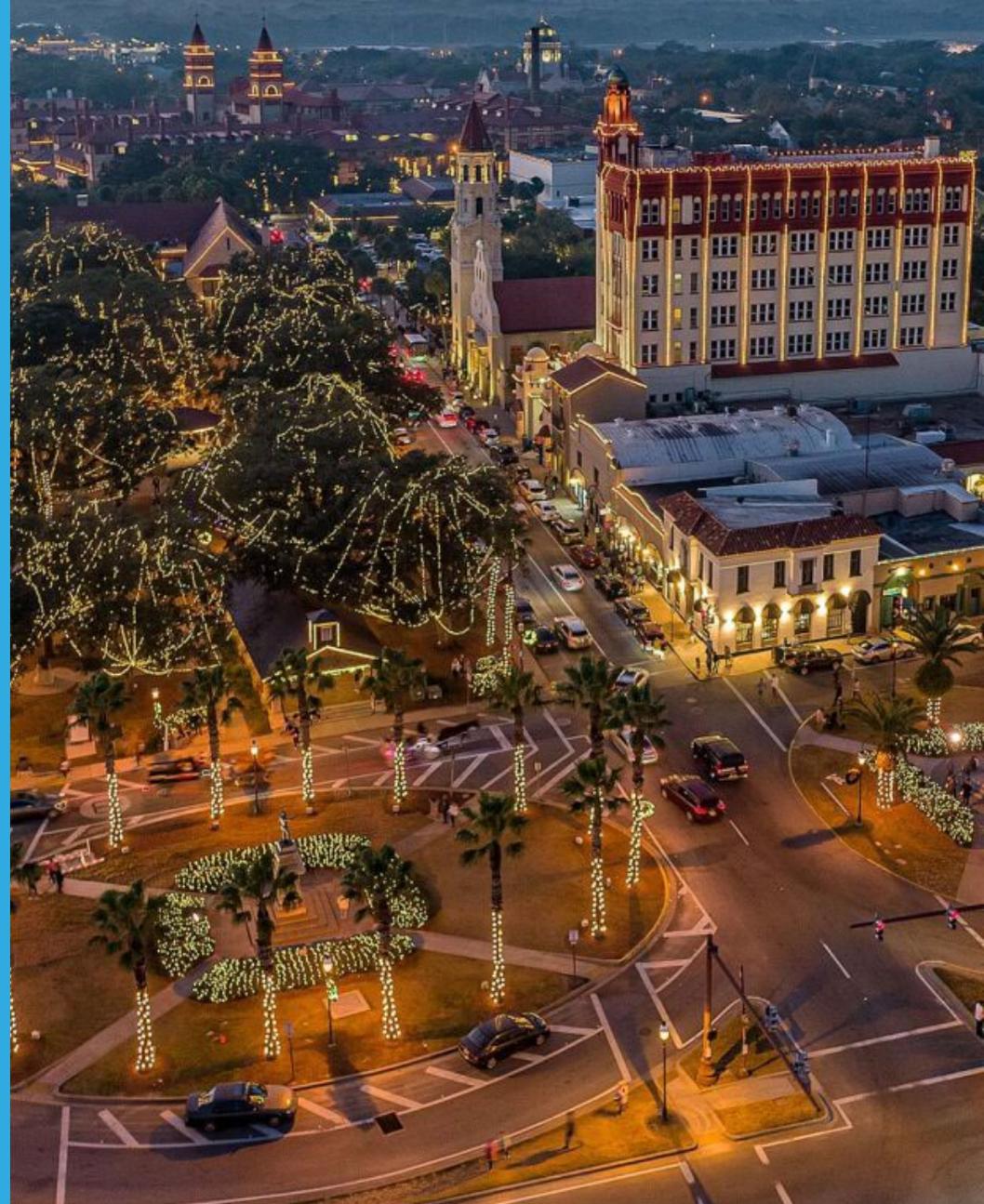


NIGHTS OF LIGHTS ECONOMIC IMPACT REPORT

November 15th, 2025 – January 11th, 2026

BY DOWNS & ST. GERMAIN RESEARCH



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

DS downs & st. germain
RESEARCH

OBJECTIVES AND METHODOLOGY

OBJECTIVE:

To assess the economic impact and overall attendee experience at the 2025-2026 Nights of Lights, held in St. Augustine, FL.

METHODOLOGY:

The data in this report is based on **662** total surveys collected: 589 in-person interviews conducted with Nights of Lights attendees and 73 surveys collected via email outreach, QR codes, and social media.



KEY TAKEAWAYS

KEY TAKEAWAY: ECONOMIC IMPACT



279,600 out-of-county attendees¹ to the 2025-2026 Nights of Lights produced **\$93,707,600 in direct spending** in St. Johns County, resulting in an **economic impact of \$120,704,200.**

¹ Including out-of-county attendees and local residents, 371,900 individuals attended the 2025-2026 Nights of Lights.

KEY TAKEAWAY : NIGHTS OF LIGHTS AS A VISITOR DRAW



Over **3 in 4** out-of-county Nights of Lights attendees came to the St. Augustine/Ponte Vedra area mainly to see the lights.

Nights of Lights was the singular draw to the area for nearly **7 in 10** out-of-county attendees.

While many visitors traveled from elsewhere in Florida, the **top out-of-county** attendee market was **New York City**.

The event's **ability to draw a large number of attendees** from outside the area highlights its key role as a visitor draw.

KEY TAKEAWAY: FIRST-TIME AND REPEAT ATTENDEES



Nearly **4 in 5** out-of-county Nights of Lights attendees had never been to the event before.

Word of mouth is important: attendees most commonly heard about the event from friends or family, through social media, or in online travel reviews.

This data highlights an opportunity to turn strong interest from new attendees into repeat visits.



KEY TAKEAWAY: ATTENDEE SATISFACTION



Nearly **1 in 3** attendees rated their overall experience at Nights of Lights as **very good** and over **2 in 5** said they would **definitely return**.

Most attendees who used the event's **parking/shuttles** rated the experience as **acceptable** rather than good or very good.

While satisfaction is relatively high, there is room to encourage repeat event visitation by improving the attendee experience.

ECONOMIC IMPACT

TOTAL ECONOMIC IMPACT

\$120,704,200

When including indirect and induced effects¹ of direct spending, the total economic impact of people attending the 2025-2026 Nights of Lights who **live outside** of St. Johns County was \$120,704,200.²

¹ Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.

²On accommodations, restaurants, groceries, transportation, attractions, entertainment, tickets, shopping, and “other” expenses.

DIRECT SPENDING

\$93,707,600

2025-2026 Nights of Lights attendees who **live outside** of St. Johns County spent \$93,707,600¹ in the county during their stay.

¹On accommodations, restaurants, groceries, transportation, attractions, entertainment, tickets, shopping, and “other” expenses.

OUT-OF-COUNTY VISITORS

279,600

Including overnight visitors and day trippers, 279,600 individuals from **outside** St. Johns County attended the 2025-2026 Nights of Lights¹.

¹ Including out-of-county attendees and local residents, 371,900 individuals attended the 2025-2026 Nights of Lights.

ROOM NIGHTS

165,790

Attendees who **live outside** of St. Johns County spent 165,790 nights in hotels, motels, etc. while attending the 2025-2026 Nights of Lights.

ECONOMIC IMPACT SUMMARY

	2025-2026
Economic Impact	\$120,704,200
Direct Spending¹	\$93,707,600
Out-of-County Visitors	279,600
Room Nights	165,790

¹On accommodations, restaurants, groceries, transportation, attractions, entertainment, tickets, shopping, and “other” expenses.

DETAILED FINDINGS

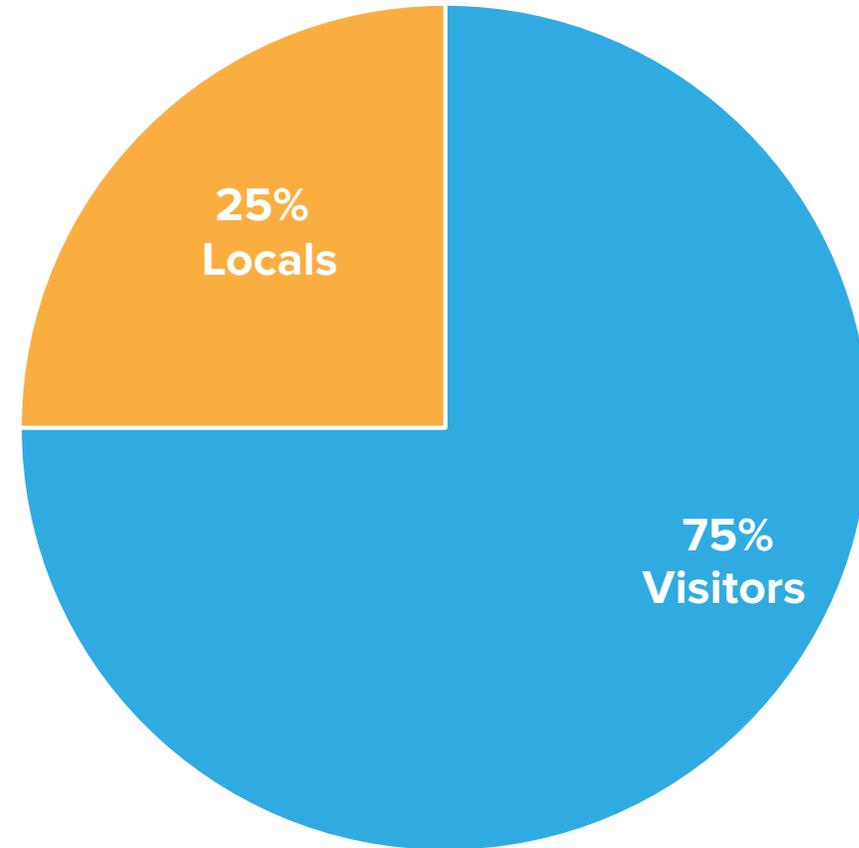
VISITORS TO ST. JOHNS COUNTY*

*Includes only out-of-county Nights of Lights attendees, not local residents.

ATTENDEES

◆ **3 in 4** Nights of Lights attendees were visitors to the area

Do you live in St. Johns County, Florida for at least 6 months of the year?



THE AVERAGE VISITOR

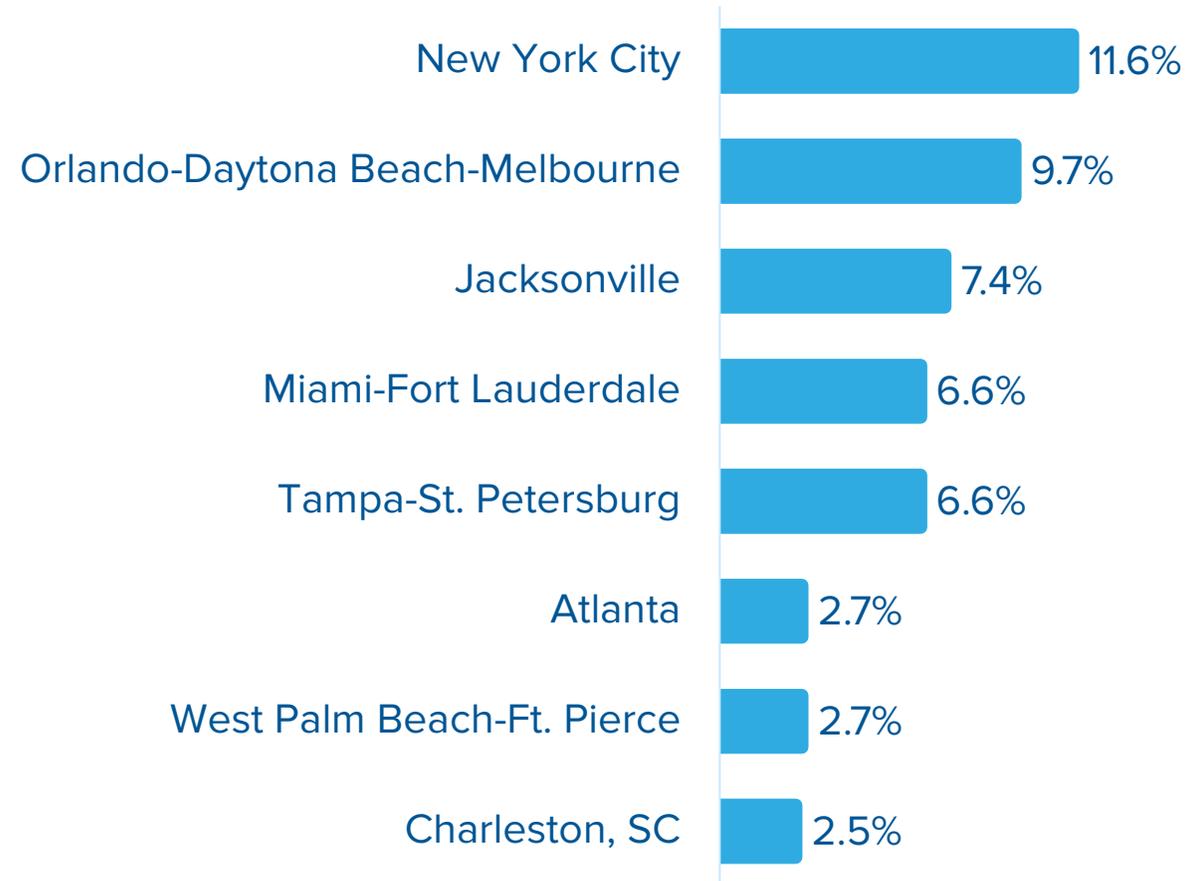
- ❖ On average, out-of-county attendees spent **2.2** nights in the area
- ❖ The average out-of-county attendee travel party size was **3.5** people



ORIGIN MARKETS

- While most out-of-county attendees travel from elsewhere in Florida, the top origin market is **New York City**
- Florida attendees most commonly travel from the **Orlando** area

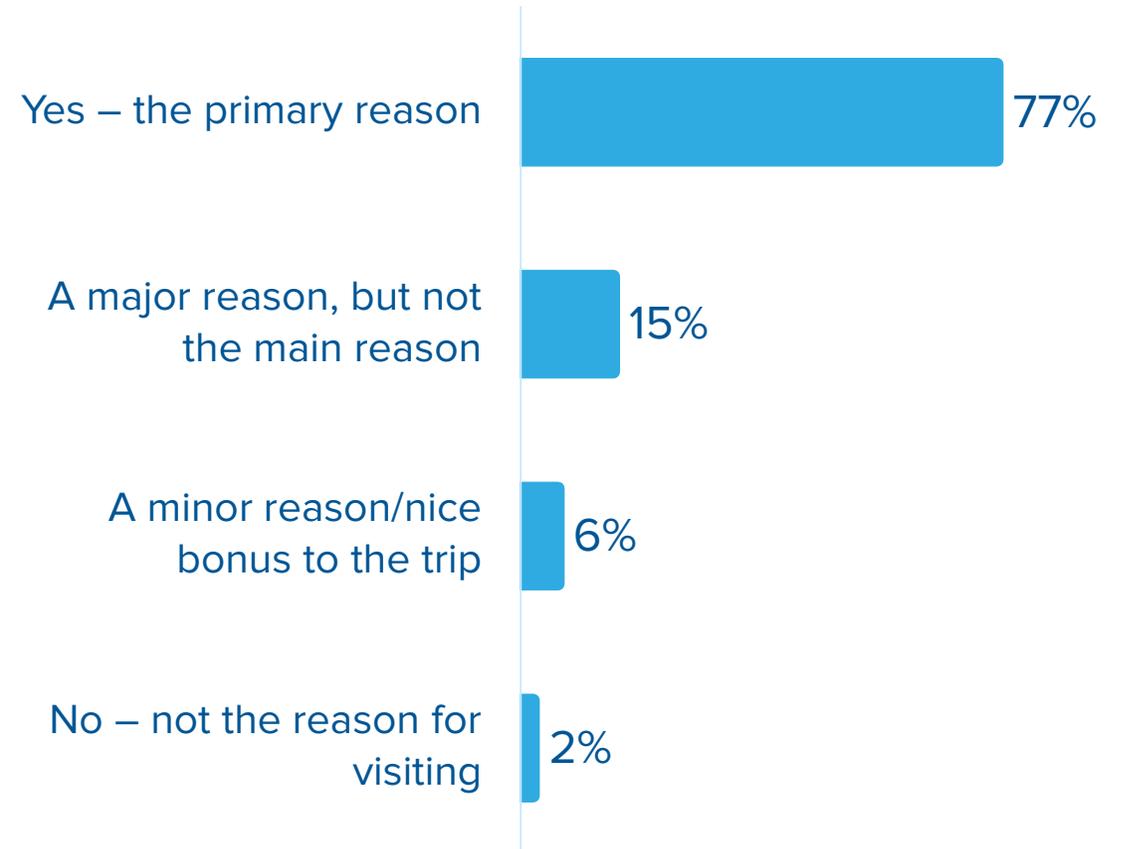
Top Markets



MAIN REASON

❖ Nights of Lights was the main reason **over 3 in 4** out-of-town attendees came to the area

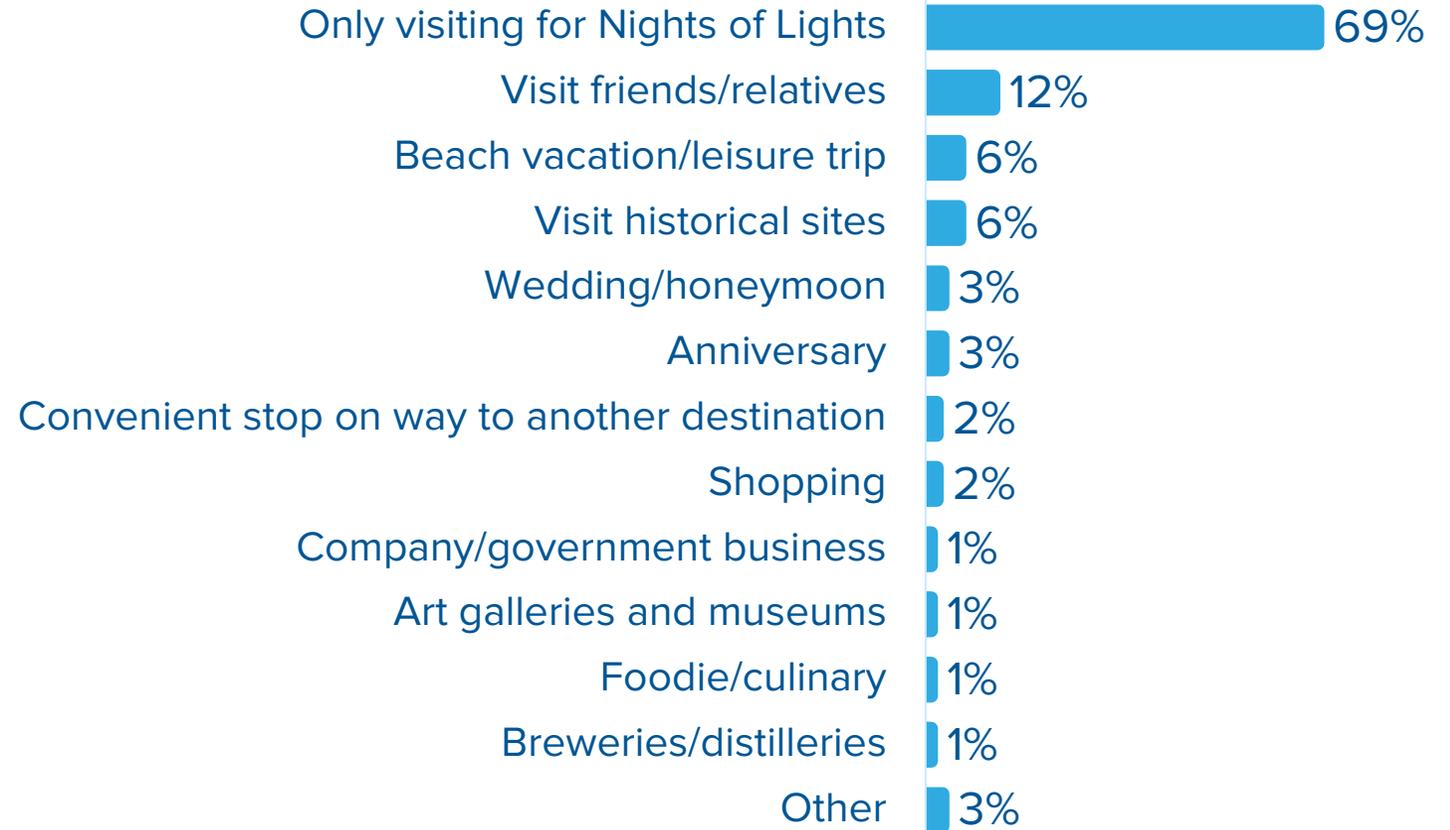
Was Nights of Lights your main reason for coming to the St. Augustine/Ponte Vedra area?



OTHER MAIN REASONS

- ◆ Nearly **7 in 10** out-of-county attendees were **only** in the area for Nights of Lights
- ◆ **12%** were also in the area to visit friends or relatives
- ◆ **12%** were visiting for leisure and/or to see the area's historical sites

In addition to Nights of Lights, were there other main reasons for taking this trip to the St Augustine/Ponte Vedra area?*

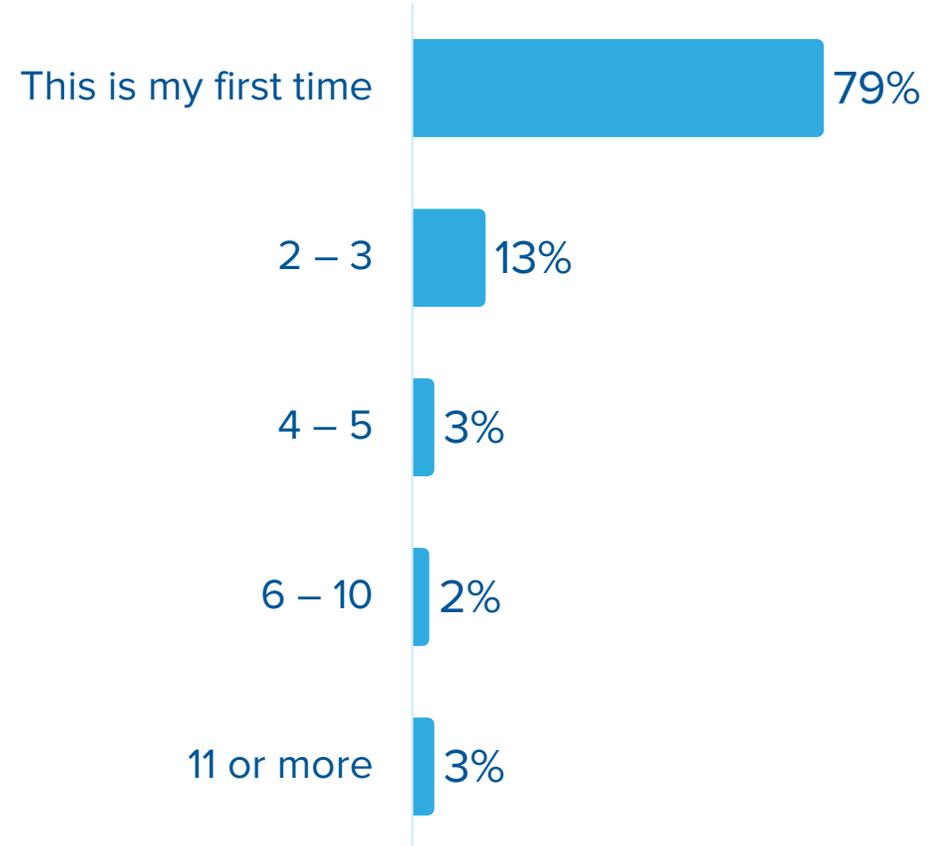


*Multiple responses permitted. Percents based on all visitors. Includes reasons chosen by 1% of visitors or more.

FIRST-TIME ATTENDEES

◆ Nearly **4 in 5** out-of-county attendees were attending Nights of Lights for the first time

Approximately how many times have you ever attended Nights of Lights?



AWARENESS SOURCE

Over **3 in 4** out-of-county attendees heard about Nights of Lights from friends or relatives

Nearly **half** saw information about Nights of Lights on their personal social media or in online travel reviews, blogs, or stories

How did you hear about Nights of Lights?*

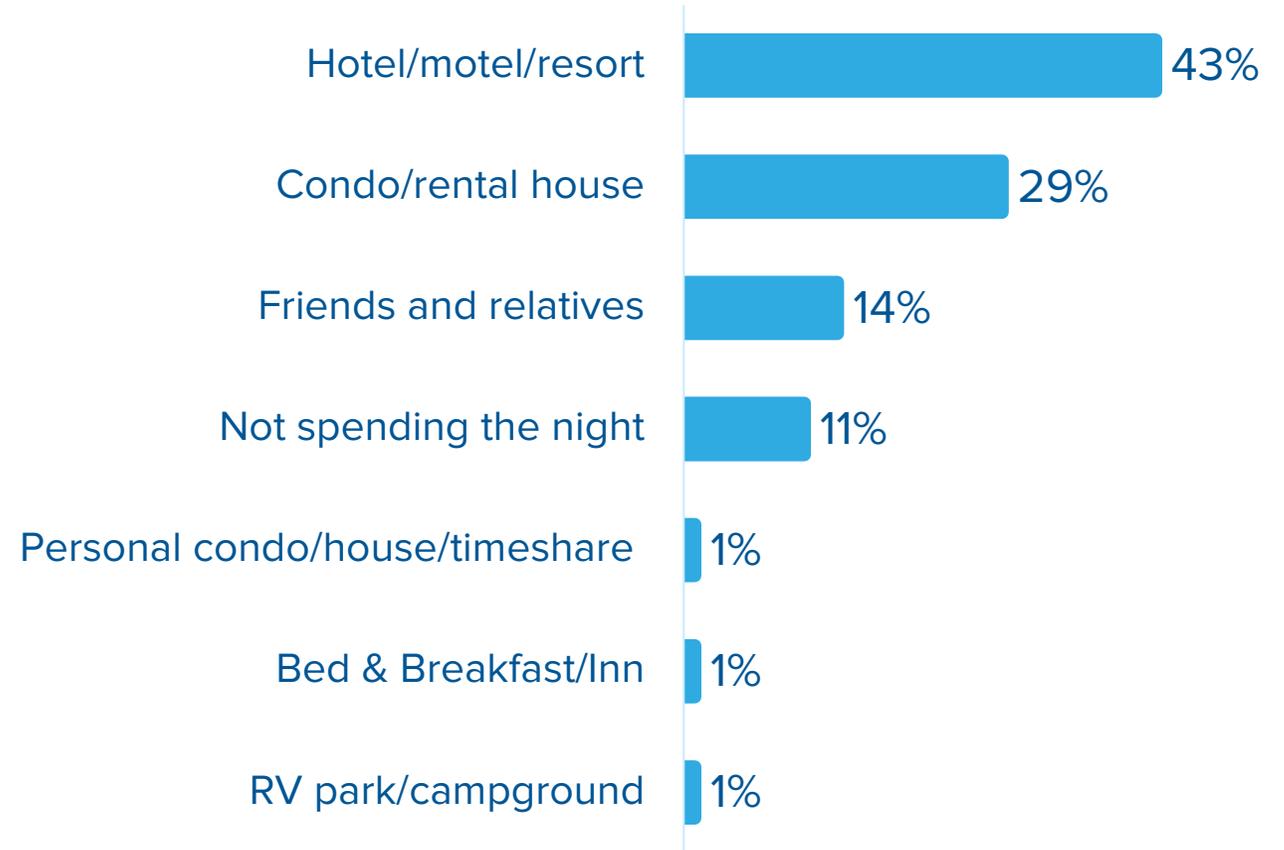


*Multiple responses permitted.

VISITOR TYPE

- ◆ Nearly **3 in 4** out-of-county attendees stayed in paid accommodations* while attending Nights of Lights
- ◆ **15%** stayed with friends/family or in a personal second home
- ◆ **11%** did not stay overnight in the area

In what type of accommodations did you stay/are you staying in St. Augustine/Ponte Vedra?

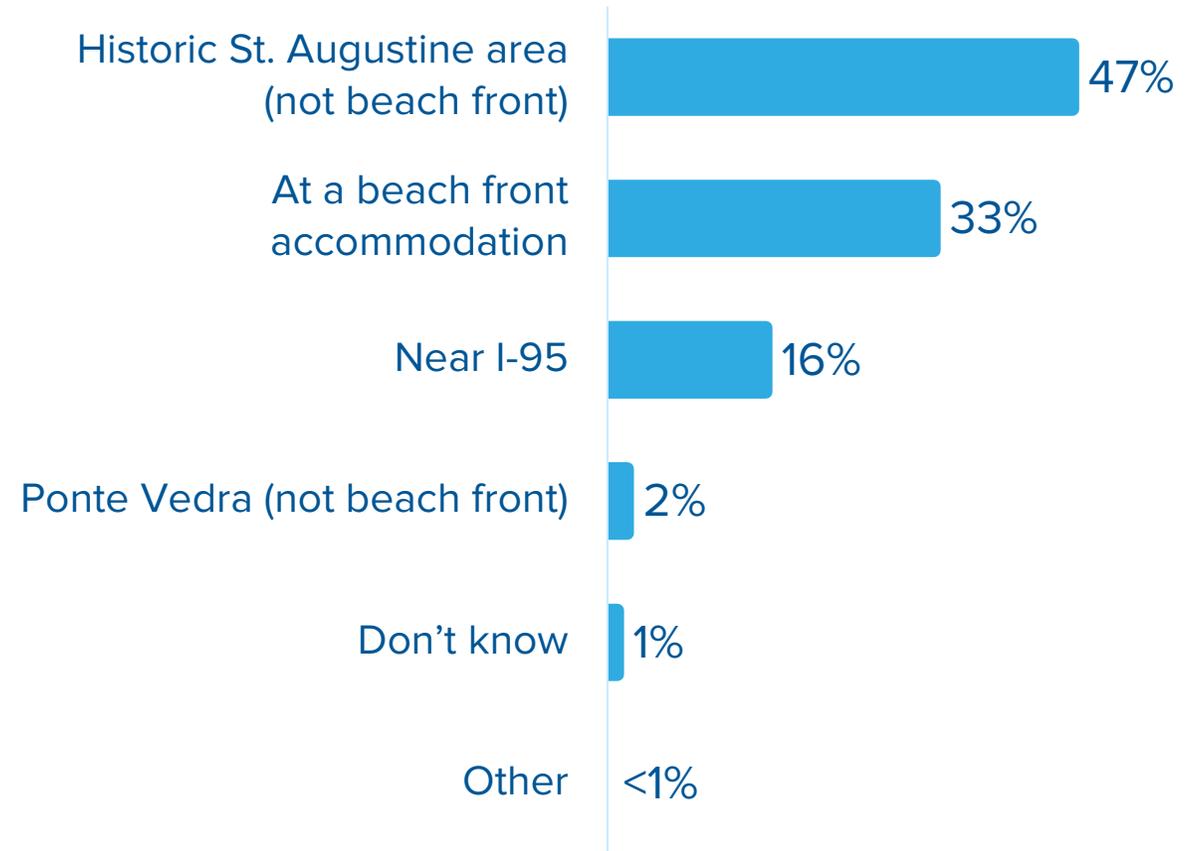


*Includes visitors staying in a hotel/motel/resort; condo/rental house; B&B/inn; or RV park/campground.

ACCOMMODATION LOCATION

- ◆ Nearly **half** of overnight out-of-county attendees stayed in the Historic St. Augustine area
- ◆ **1 in 3** stayed at a beach front accommodation
- ◆ Nearly **1 in 6** stayed near I-95

In which part of the St. Augustine/Ponte Vedra area did you stay?*



*Based on visitors staying overnight in the St. Augustine/Ponte Vedra area.

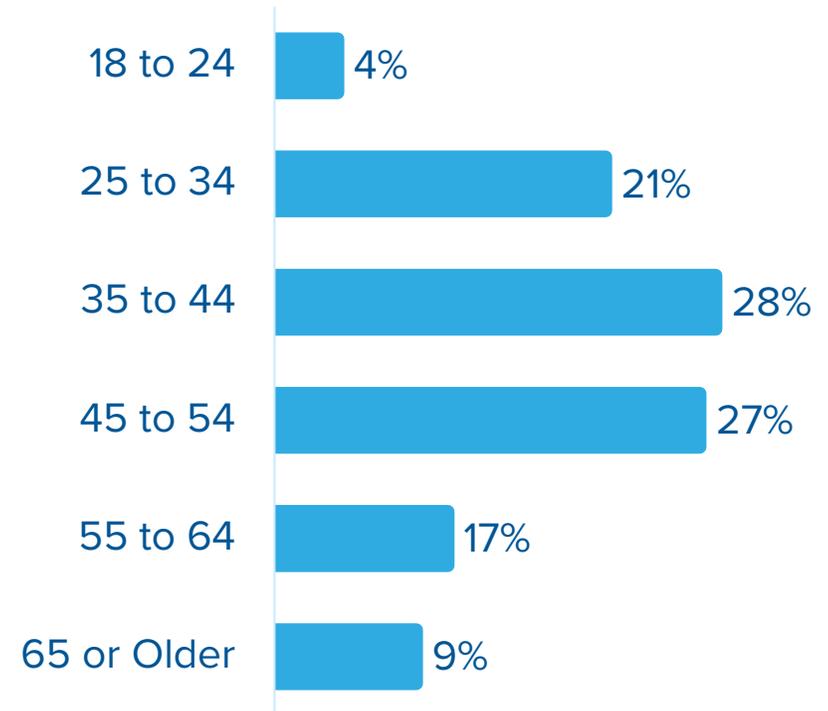
DEMOGRAPHICS

VISITORS TO ST. JOHNS COUNTY*

*Includes only out-of-county Nights of Lights attendees, not local residents.

AGE*

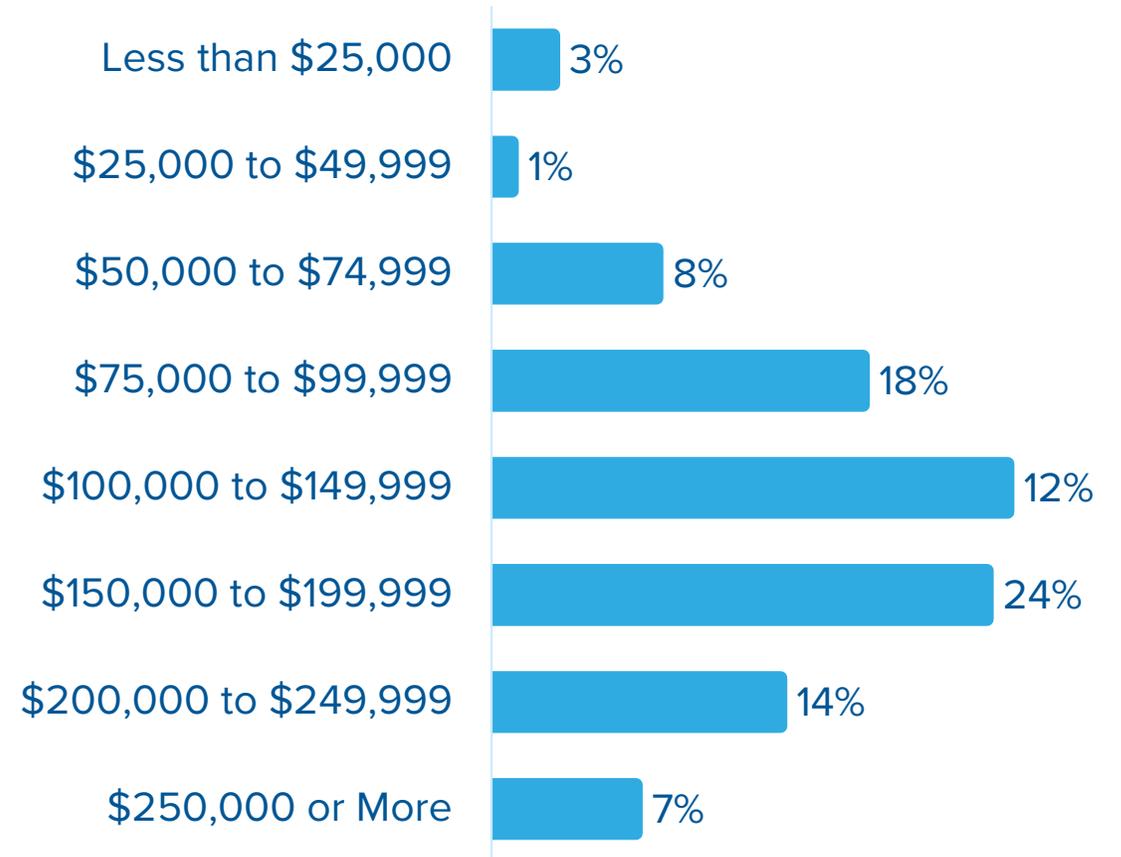
◆ The average out-of-county Nights of Lights attendee was **43** years old



*Age of the member of travel party surveyed. The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all event attendees.

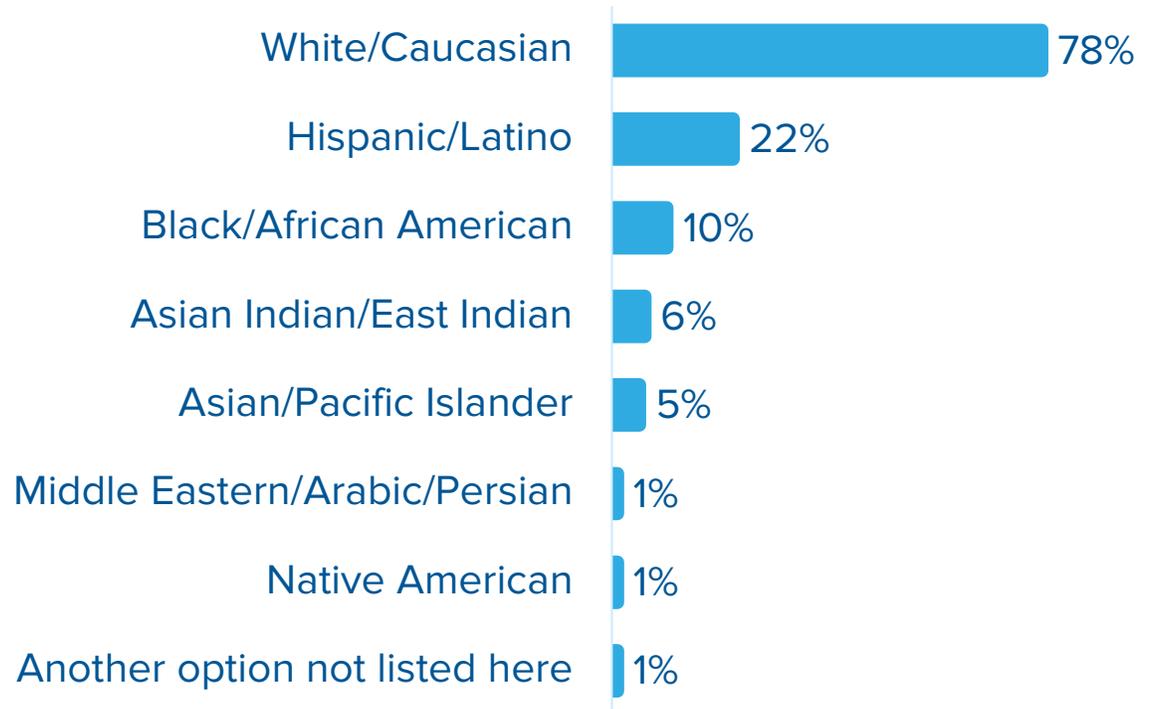
ANNUAL HOUSEHOLD INCOME

❖ The average out-of-county Nights of Lights attendee had an annual household income of **\$166,670**



RACE/ETHNICITY*

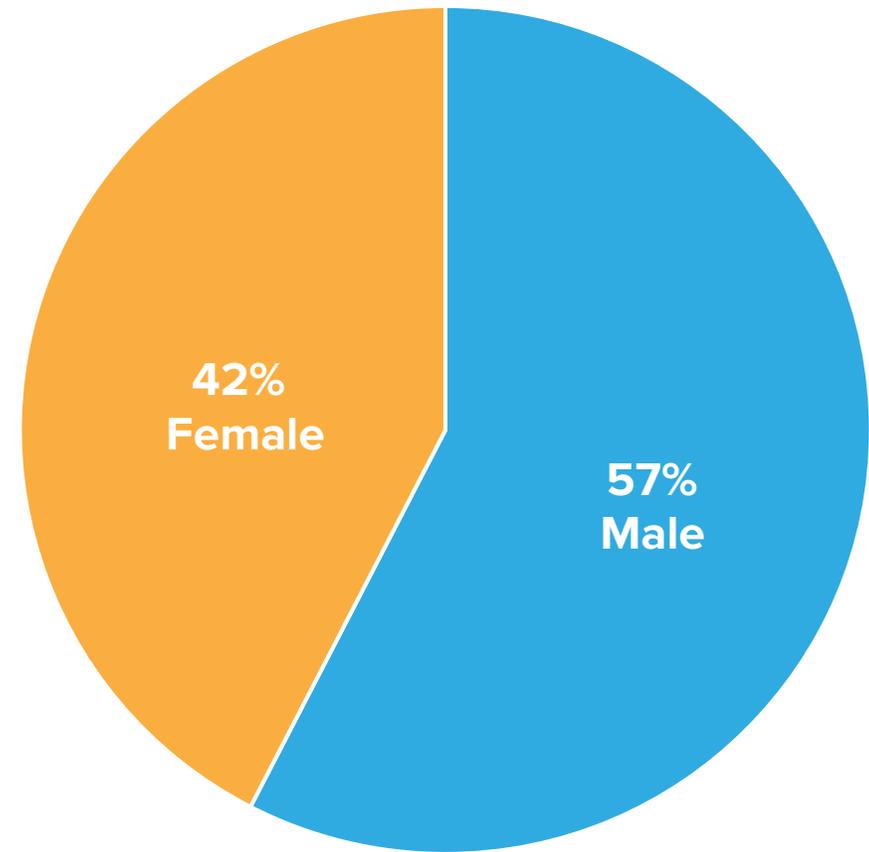
◆ Nearly **4 in 5** out-of-county Nights of Lights attendees identified their race as Caucasian/White



*Multiple responses permitted.
Race/ethnicity of the member of travel party surveyed. The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all event attendees

GENDER*

◆ Nearly **3 in 5** out-of-county Nights of Lights attendees identified their gender as male



*Gender of the member of travel party surveyed. The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all event attendees.

DETAILED FINDINGS

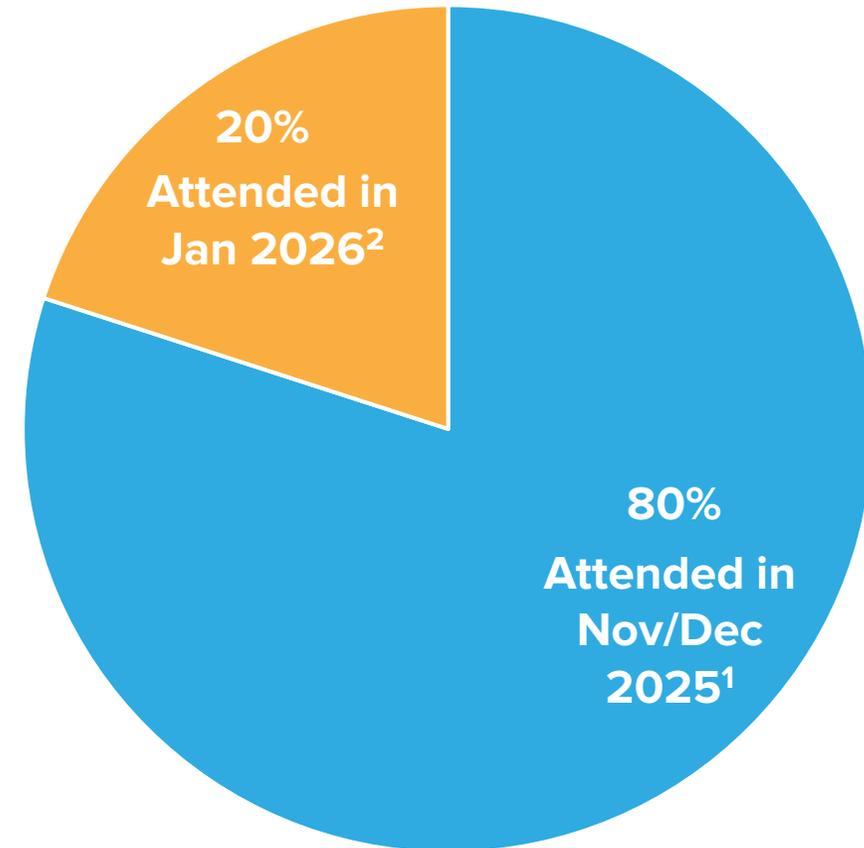
ST. JOHNS COUNTY RESIDENTS AND VISITORS*

*Includes both out-of-county Nights of Lights attendees and local residents.

EVENT ATTENDANCE

- ❖ **4 in 5** Nights of Lights attendees went to the event on or prior to January 1, 2026
- ❖ Visitors to the area attended an average of **1.7** nights of the event; residents, **2.5** nights

When did you attend Nights of Lights?



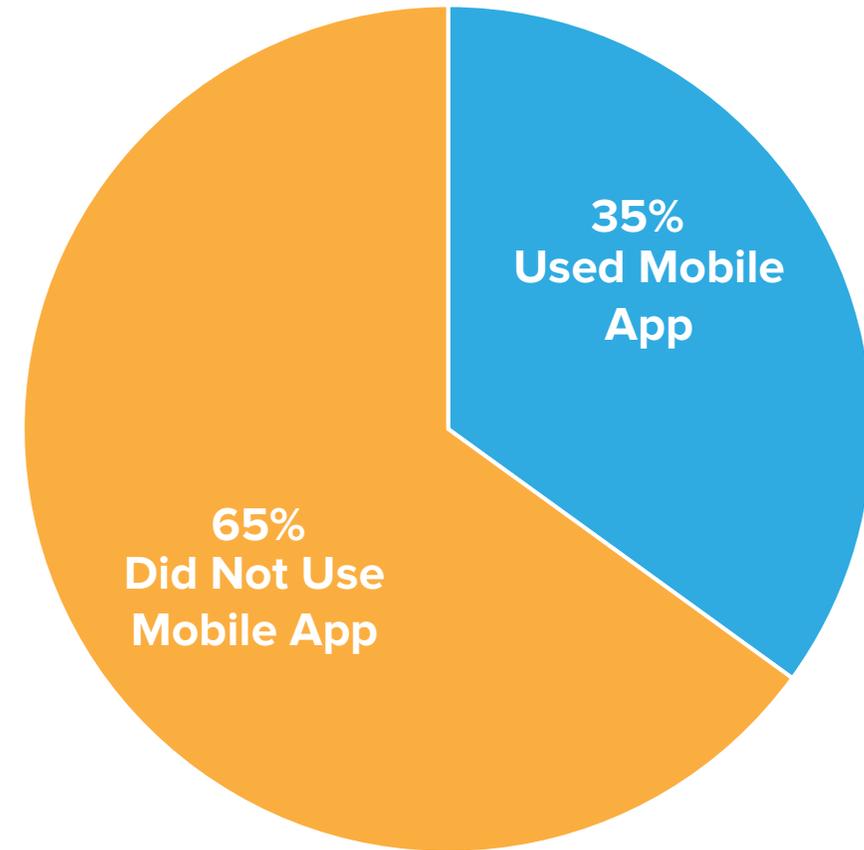
¹ On or prior to January 1, 2026

² On or after January 2, 2026

MOBILE APP USAGE

Over **1 in 3** attendees used the Nights of Lights mobile app

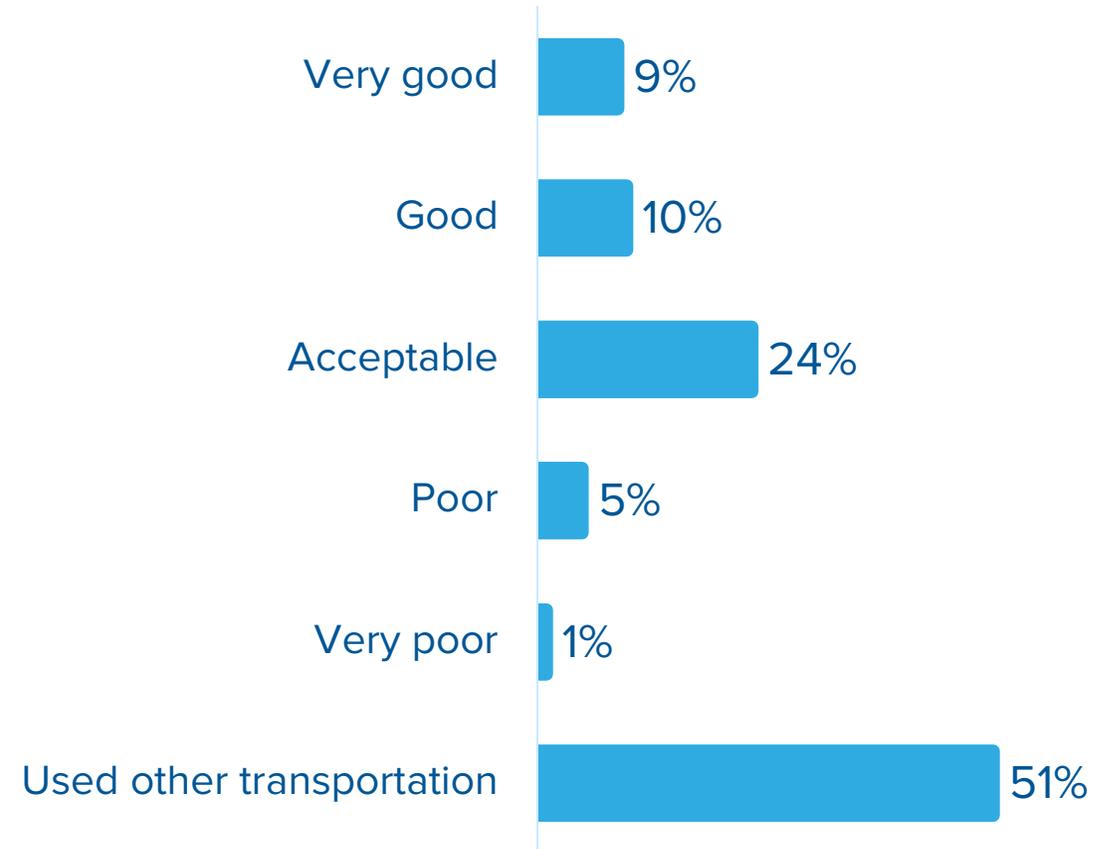
Did you use the Nights of Lights mobile app?



PARKING/SHUTTLE RATINGS

- ◆ Nearly **1 in 5** attendees rate the parking/shuttles at Nights of Lights as good or very good
- ◆ Nearly **1 in 4** attendees rate it as acceptable

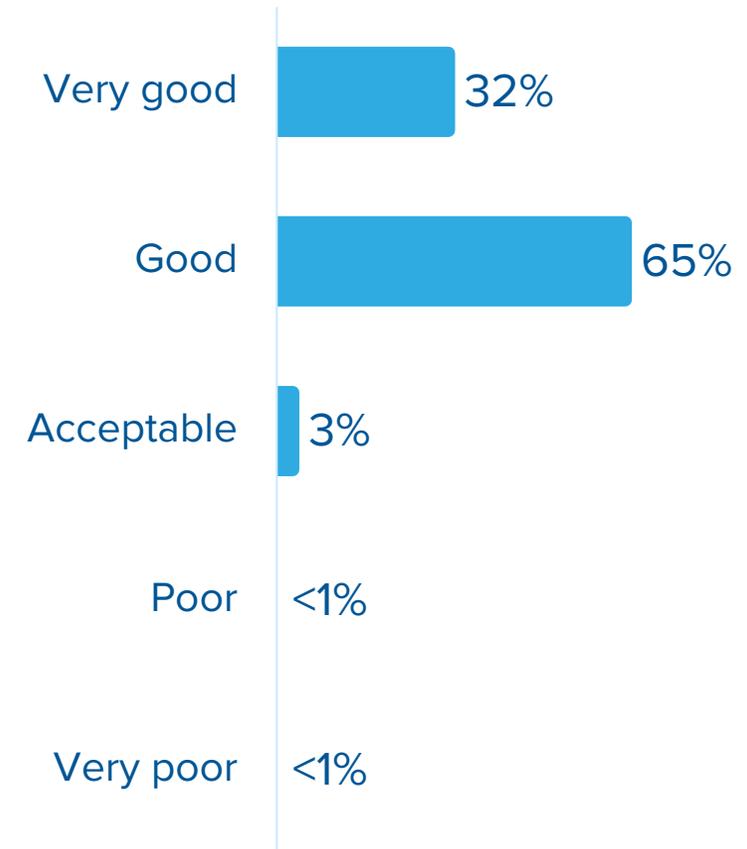
How would you rate the parking/shuttles for Nights of Lights?



EXPERIENCE RATINGS

- ◆ Nearly **all** attendees rate their overall experience at Nights of Lights as good or very good
- ◆ Nearly **1 in 3** attendees rate their experience as very good

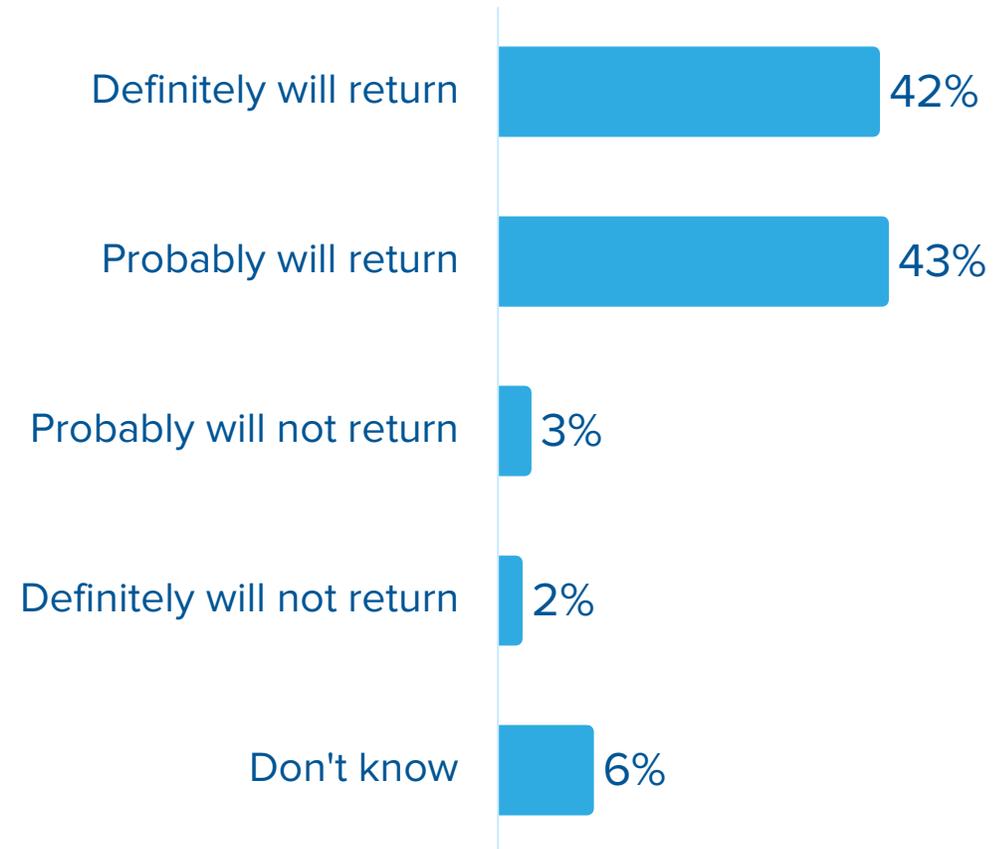
How would you rate your overall experience at Nights of Lights?



LIKELIHOOD OF RETURNING

- ◆ Nearly **9 in 10** attendees plan to return to Nights of Lights next year
- ◆ Over **2 in 5** will definitely return for next year's Nights of Lights

How likely are you to return to Nights of Lights next year?



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