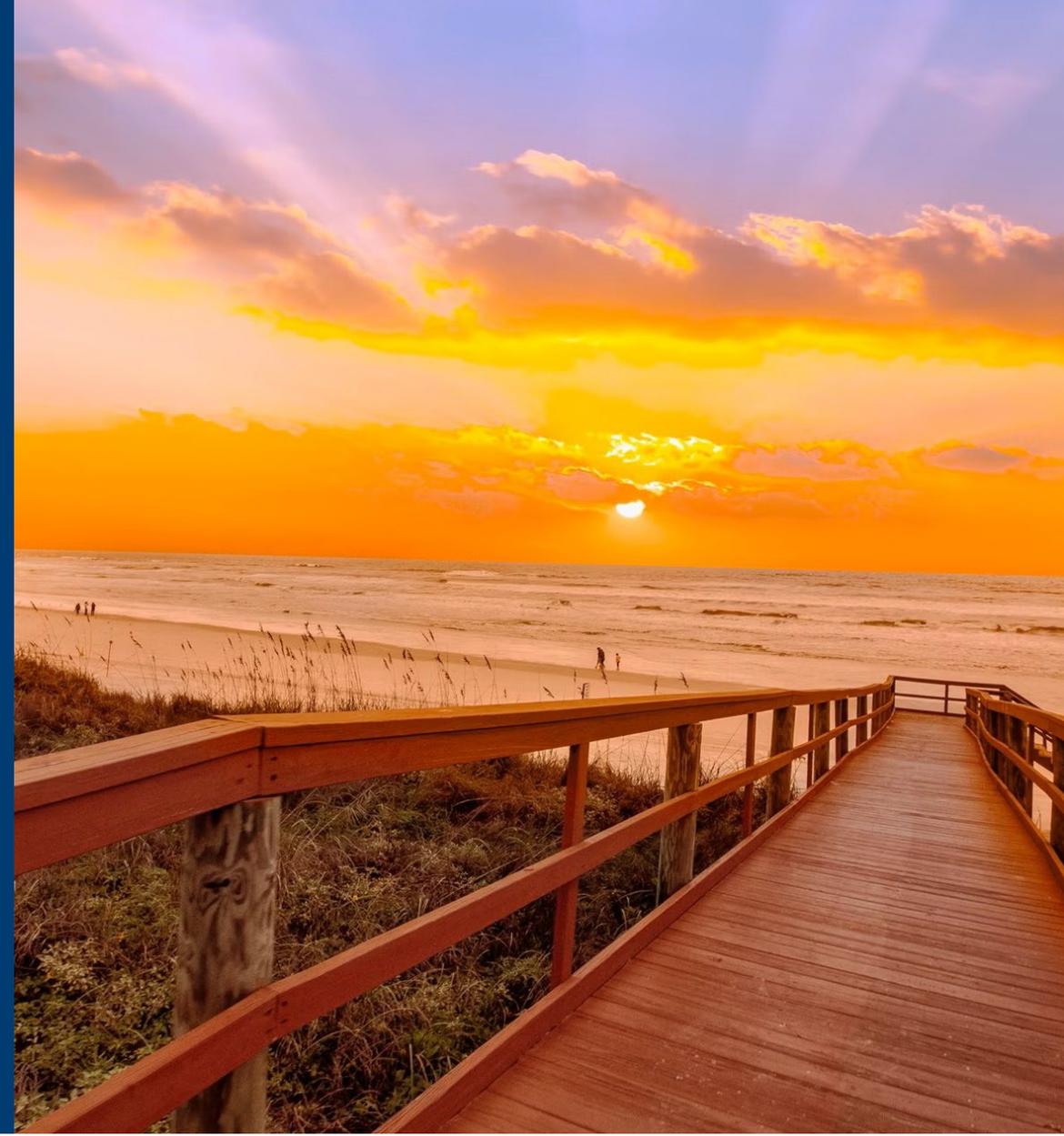


ST. JOHNS COUNTY

**Economic Impact & Visitor Tracking Study
January 2025 to December 2025**



**ST. AUGUSTINE
PONTE VEDRA**
FLORIDA'S HISTORIC COAST®

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METHODOLOGY

ECONOMIC IMPACT

Total economic impact is a function of direct spending by visitors in the St. Augustine/Ponte Vedra area, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

Downs & St. Germain Research uses IMPLAN economic impact analysis modeling to determine the total economic output based on direct expenditure data collected from visitors to the St. Augustine/Ponte Vedra area. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling.



DATA COLLECTION

Interviews were completed in person and online with **3,052 visitors** between January 1 and December 31, 2025.

In-person surveying locations included:

- Downtown St. Augustine
- Downtown St. Augustine Visitor Information Center
- St. Augustine Lighthouse & Maritime Museum
- Old Town Trolley Tour Stops
- Butler Beach
- Crescent Beach
- Creston House at Butler Beach
- Holiday Inn Express & Suites at Vilano Beach
- Ponte Vedra Beach
- St. Augustine Beach
- Vilano Beach
- Celtic Music & Heritage Festival/St. Patrick's Day Parade
- Romanza Festival
- St. Augustine Food & Wine Festival
- Sing Out Loud Festival
- Nights of Lights

The survey was also distributed online by the following partners:

- Sawgrass Marriott Golf Resort & Spa
- Beacher's Lodge Oceanfront Suites
- Florida's First Coast of Golf

EXECUTIVE SUMMARY



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

KEY PERFORMANCE INDICATORS

CY 2025



2,791,200

TOTAL VISITORS



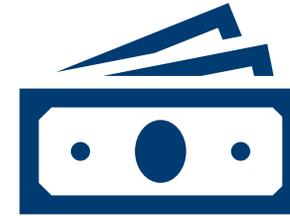
2,370,510

ROOM NIGHTS¹



\$1,593,477,000

DIRECT SPENDING



\$2,001,797,910

ECONOMIC IMPACT



\$24,649,055

TOURIST DEVELOPMENT TAX²

¹ Sources: Smith Travel Research, Key Data and Department of Business and Professional Regulation.
²Source: St. Johns County Tourist Development Council.

LODGING METRICS

CY 2025

Note: Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the **ADR of vacation rentals may appear inflated** in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.

COMBINED



58.3%

Occupancy



\$187.14

Average Daily Rate



\$109.10

Revenue Per Available Room

HOTELS¹



63.2%

Occupancy



\$171.99

Average Daily Rate



\$108.76

Revenue Per Available Room

VACATION RENTALS²



49.0%

Occupancy



\$214.44

Average Daily Rate



\$105.06

Revenue Per Available Room

ANNUAL VISITOR SNAPSHOT

CY 2025

- ◆ On average, overnight visitors¹ **planned** their trip **41 days** in advance and **booked** their trip **30 days** in advance.
- ◆ The top trip planning source were **friends/family** and **mapping websites**. This aligns with national trends as friends/family, general search, and online travel agencies are the most relied upon resources.
- ◆ Visitors' top reasons for traveling to the St. Augustine/Ponte Vedra area included a **beach vacation/leisure trip**, to **visit friends/family**, and to **visit historical sites**.
- ◆ **38%** of visitors recalled advertising about the St. Augustine/Ponte Vedra area. Top ad recall sources were **video streaming services** and **friends/relatives' social media**. **31%** of visitors were influenced by advertising to visit.
- ◆ **64.8%** of visitors traveled from the **Southeast** including **Florida** which accounted for **39.7%** of visitors. The top visitor markets were **Jacksonville** and **Orlando-Daytona Beach-Melbourne**.

- ◆ The majority of visitors traveled as a **family** or as a **couple** with **38%** of visitors traveling with **children**. On average, visitors traveled in parties of **3.3 people**².
- ◆ **40%** of visitors were visiting the St. Augustine/Ponte Vedra area for the **first time**.
- ◆ The majority of visitors **drove** to the area. Of the **19%** of visitors who **flew**, the majority flew into **Jacksonville International Airport**.
- ◆ **65%** of visitors stayed overnight in **paid accommodations**³ and stayed an average of **4.3 nights** – slightly longer than the overall average of 4.0 nights².
- ◆ Top visitor activities were **dining out at restaurants**, **visiting Downtown St. Augustine**, **visiting the beach**, **visiting historical sites**, and **shopping**.

¹Excludes day trippers.

²Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

³Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast.



ECONOMIC IMPACT



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

VISITORS

CY 2025

St. Johns County attracted

2,791,200

visitors in CY 2025



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

DIRECT SPENDING

CY 2025

St. Johns County visitors spent

\$1,593,477,000

on accommodations, restaurants,
groceries, transportation, attractions,
entertainment, and shopping within the
county in CY 2025



ECONOMIC IMPACT

CY 2025

Visitor spending generated a total economic impact¹ of

\$2,001,797,910

on St. Johns County

¹ Total economic impact is a function of direct spending by visitors in the St. Augustine/Ponte Vedra area, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars. Downs & St. Germain Research uses IMPLAN economic impact analysis modeling to determine the total economic output based on direct expenditure data collected from visitors to the St. Augustine/Ponte Vedra area. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling.



ROOM NIGHTS

CY 2025

St. Johns County visitors
generated

2,370,510

room nights¹ in paid
accommodations within the
county in CY 2025



TOURIST DEVELOPMENT TAX

CY 2025

Lodging expenditures by visitors
to St. Johns County generated

\$24,649,055

in TDT¹ collected



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

LOCAL TAX CONTRIBUTIONS BY VISITORS

CY 2025

Visitors to St. Johns County
contributed

\$81,600,490

in local taxes



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

JOBS & WAGES

CY 2025

Tourism in St. Johns County supported

14,600

local jobs, supporting

\$575,561,680

in wages and salaries within the county



VISITORS SUPPORT JOBS

CY 2025

For every

190

visitors, one job is supported in
St. Johns County



HOUSEHOLD SAVINGS

CY 2025

Visitors to St. Johns County saved residents

\$620

in local taxes per household in CY 2025



VISITOR PROFILE SUMMARY



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

VISITOR PROFILE

CY 2025



80%
Drove

\$1,653
Total Travel Party Spend¹

40%
First-Time Visitor

38%
Traveled with Children²

3.3
Travel Party Size¹

4.0
Length of Stay¹

¹Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

²Children are defined as people under 18 years old.

VISITOR TYPE¹

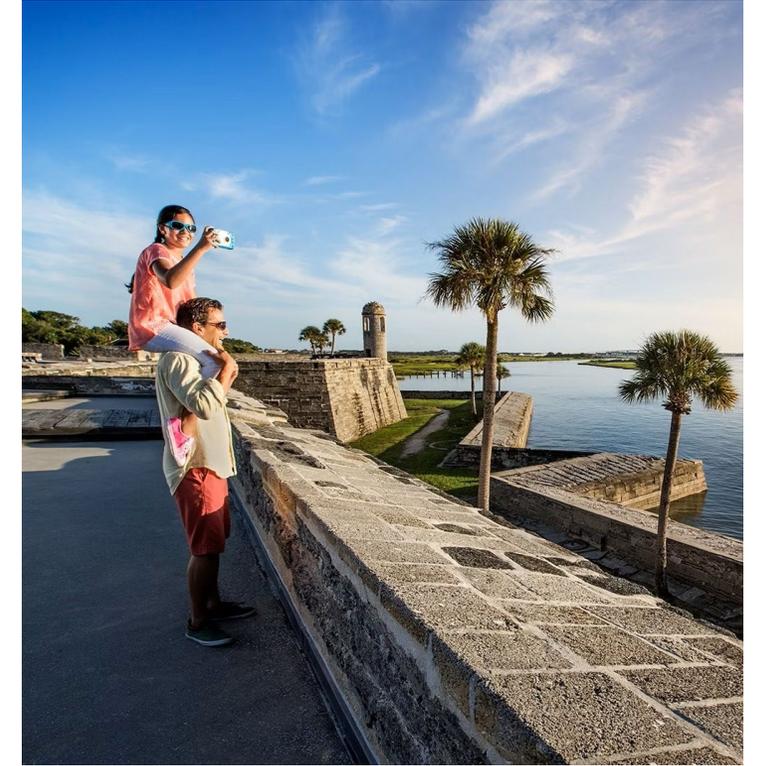
CY 2025



Paid accommodations²
65%



Nonpaid accommodations³
15%



Day trippers
20%

¹See Appendix II for data comparisons by visitor type.

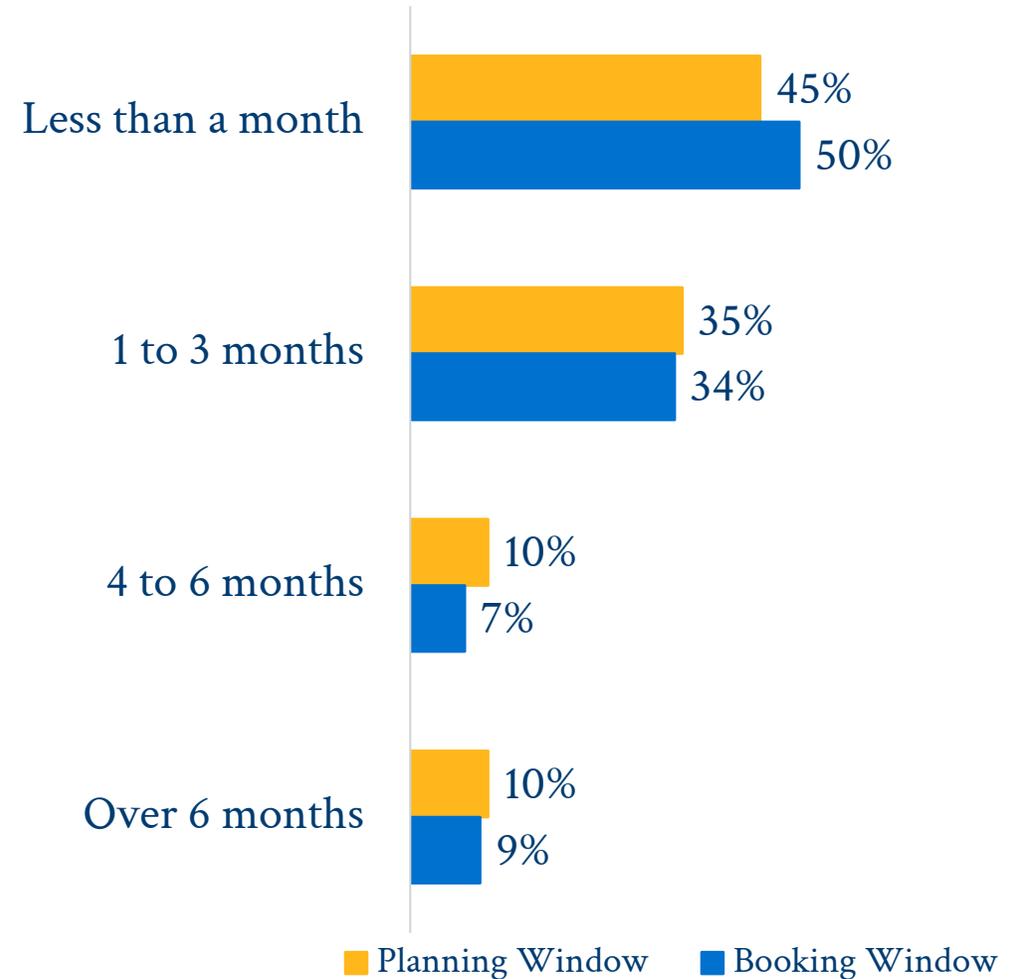
²Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast.

³Visitors staying in a second home, timeshare, or with friends/relatives.

TRIP PLANNING & BOOKING CYCLE: OVERNIGHT VISITORS

CY 2025

On average, overnight visitors¹ **planned** their trip **41 days** in advance and **booked** their trip **30 days** in advance.

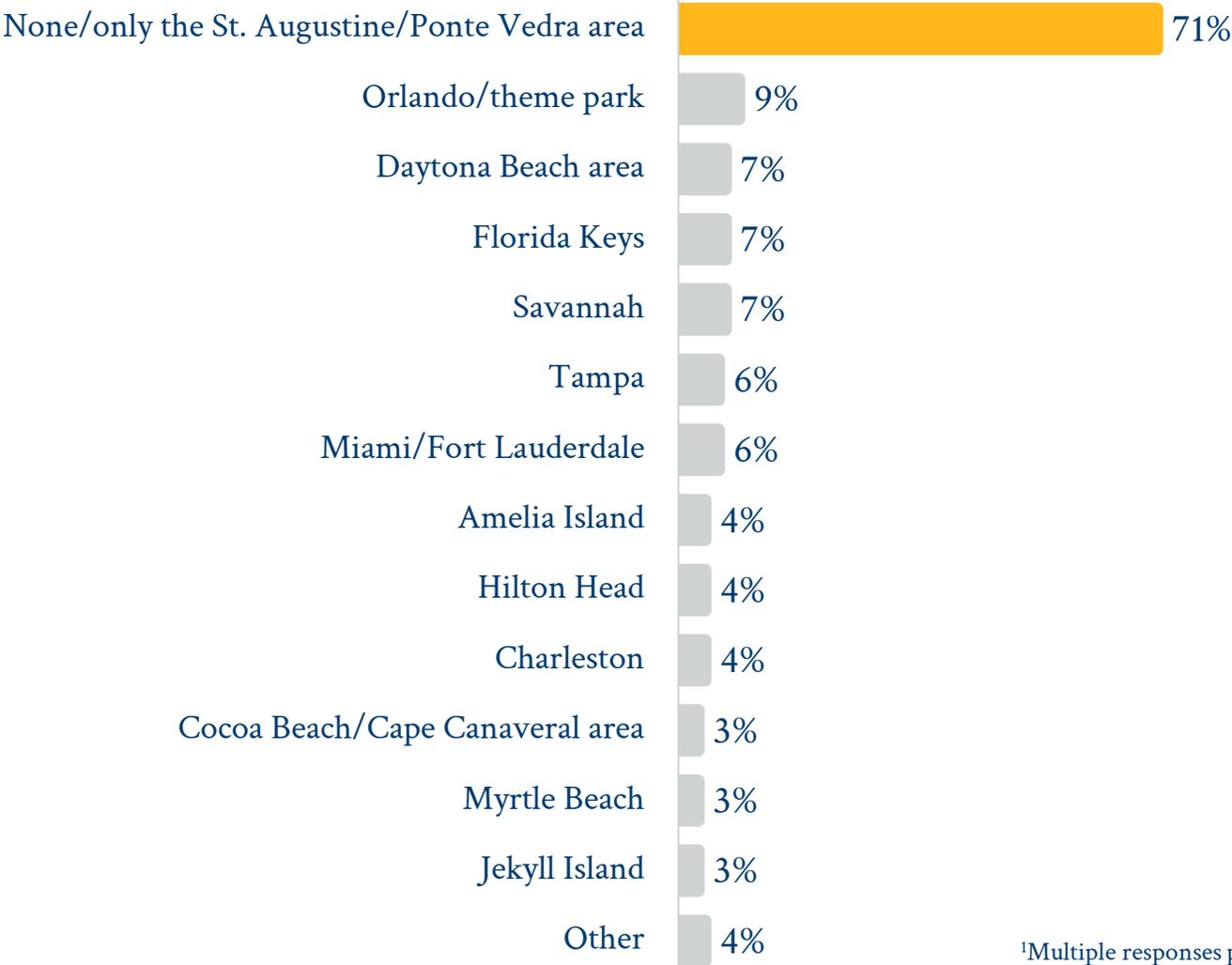


¹Excludes day trippers.

TRIP PLANNING DESTINATIONS¹

CY 2025

Nearly 3 in 4 visitors only considered the St. Augustine/Ponte Vedra area when planning their trip



¹Multiple responses permitted.



TOP TRIP PLANNING SOURCES¹

CY 2025



Friends/relatives
40%



Mapping websites
37%



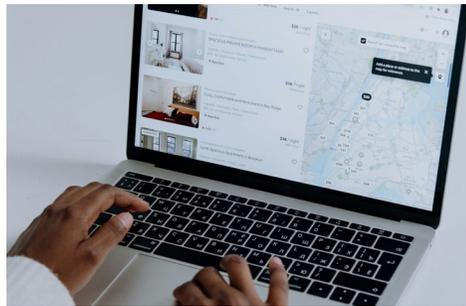
Previous Visit
33%



Destination websites²
33%



Hotel websites/apps
28%



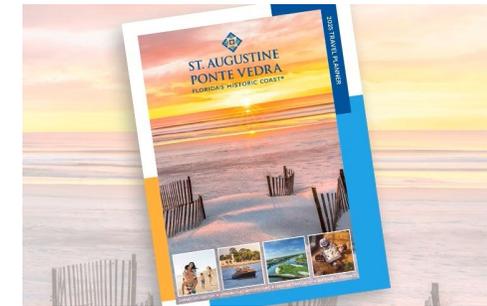
Vacation rental company
27%



Review website/app
26%



Video streaming services
24%

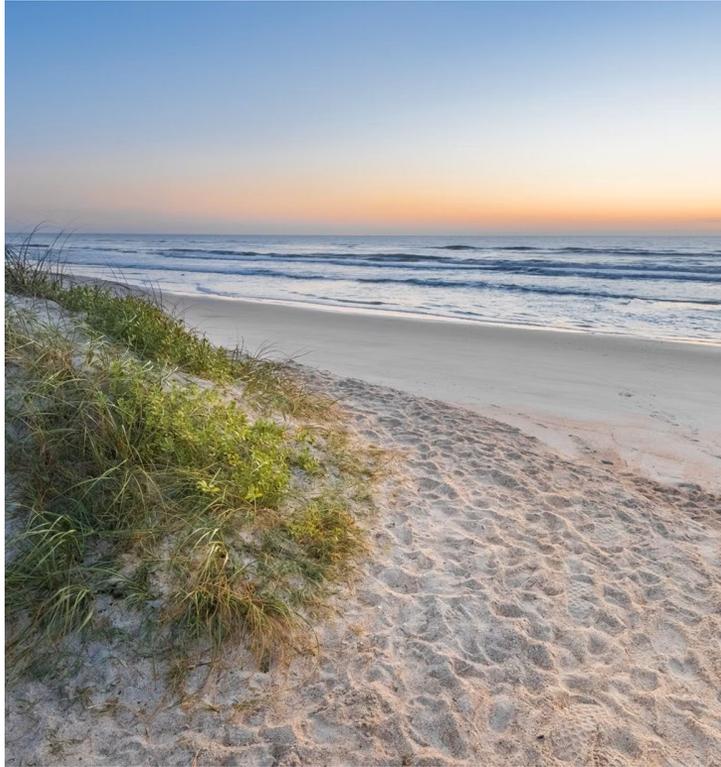


Visitor guide/brochure
21%



MAIN REASONS FOR VISITING¹

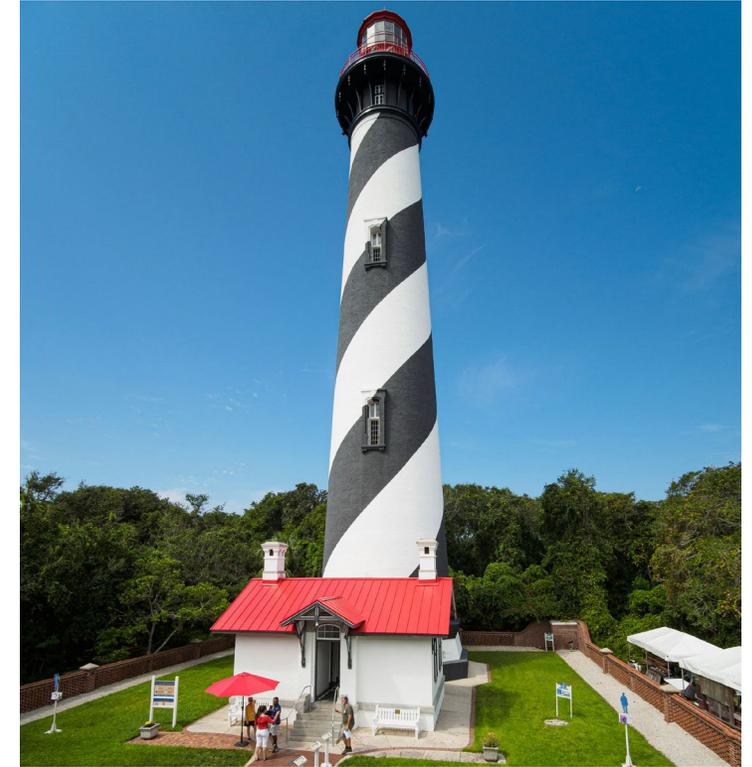
CY 2025



Beach vacation/leisure trip
48%



Visit friends/relatives
22%



Visit historical sites
20%

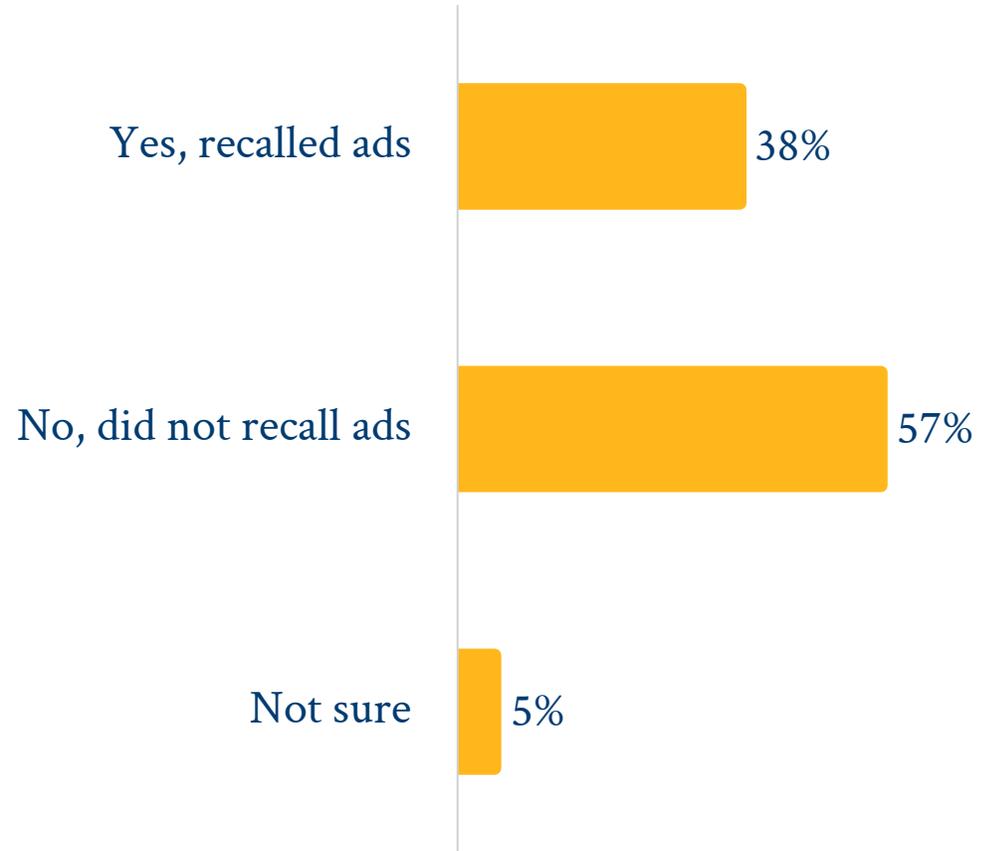
¹Multiple responses permitted.

ADVERTISING RECALL

CY 2025

Nearly 2 in 5 visitors recalled advertising about the St. Augustine/Ponte Vedra area

This information influenced 31% of all visitors to visit the St. Augustine/Ponte Vedra area.



TOP ADVERTISING SOURCES¹

CY 2025

Base: 38% of visitors who recalled advertising



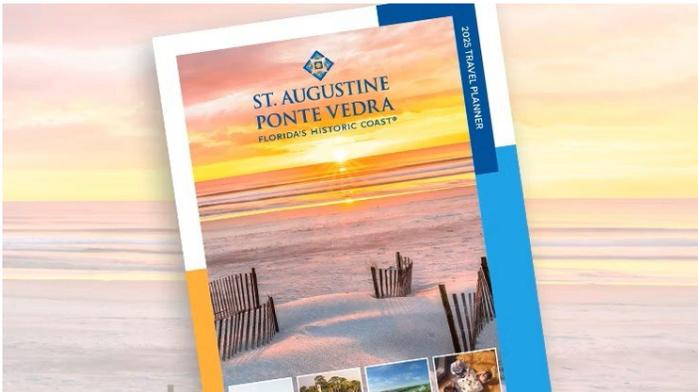
Video streaming services
41%



Friends/relatives social media
40%



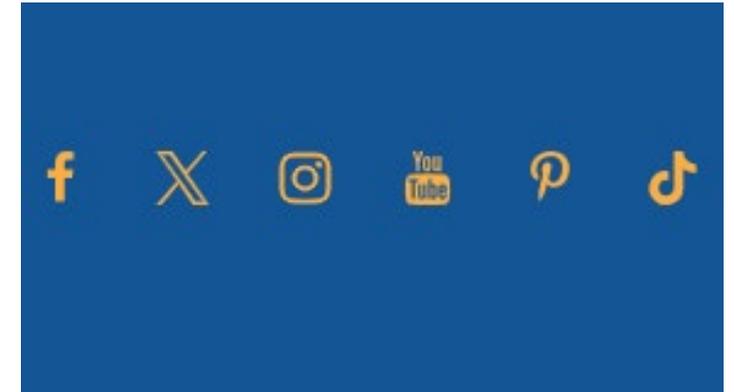
Television
28%



Visitor guide/brochure
26%



Online travel reviews, blogs, stories
25%



St. Augustine/Ponte Vedra social media
22%

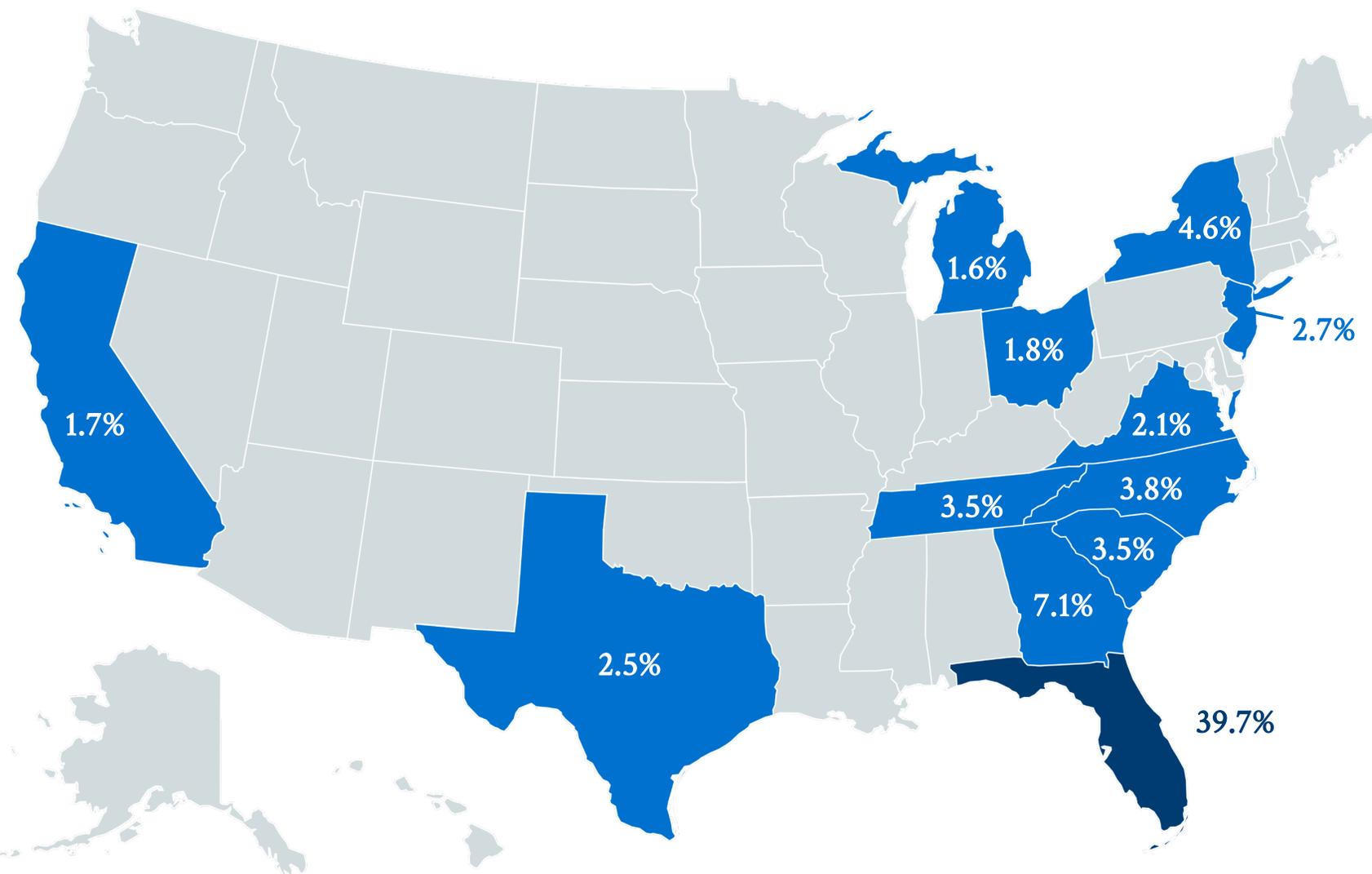


¹Multiple responses permitted.



REGION OF ORIGIN & TOP ORIGIN STATES

CY 2025

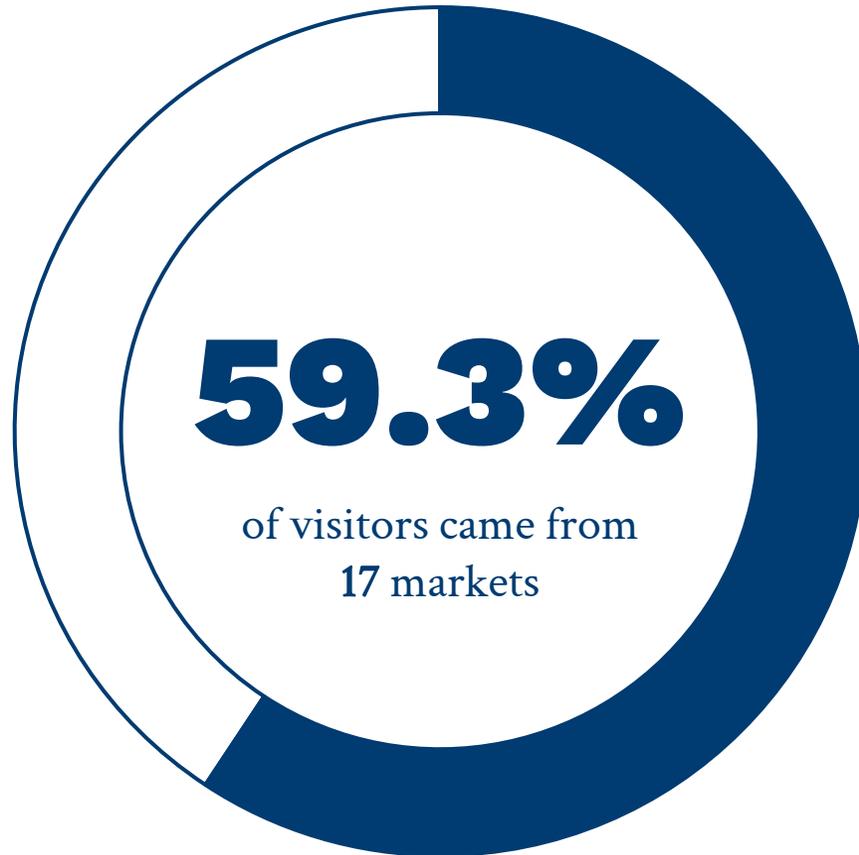


Region of Origin	2025
Florida	39.7%
Southeast	25.1%
Northeast	13.9%
Midwest	10.0%
West	4.2%
International ¹	7.1%

¹The majority of international visitors came from the United Kingdom (1.9%), Canada (1.9%), Germany (0.5%), and Brazil (0.4%).

TOP ORIGIN MARKETS

CY 2025



Markets	2025
Jacksonville	12.9%
Orlando – Daytona Beach – Melbourne	10.1%
New York City ¹	6.6%
Miami – Fort Lauderdale	4.6%
Tampa – St. Petersburg	4.5%
Atlanta	4.1%
Gainesville	2.9%
Washington, DC – Hagerstown	1.6%
Savannah	1.4%
Charlotte	1.4%
Philadelphia	1.4%
Nashville	1.3%
Raleigh – Durham	1.3%
Charleston, SC	1.3%
Fort Myers – Naples	1.3%
Dallas – Fort Worth	1.3%
West Palm Beach – Fort Pierce	1.3%



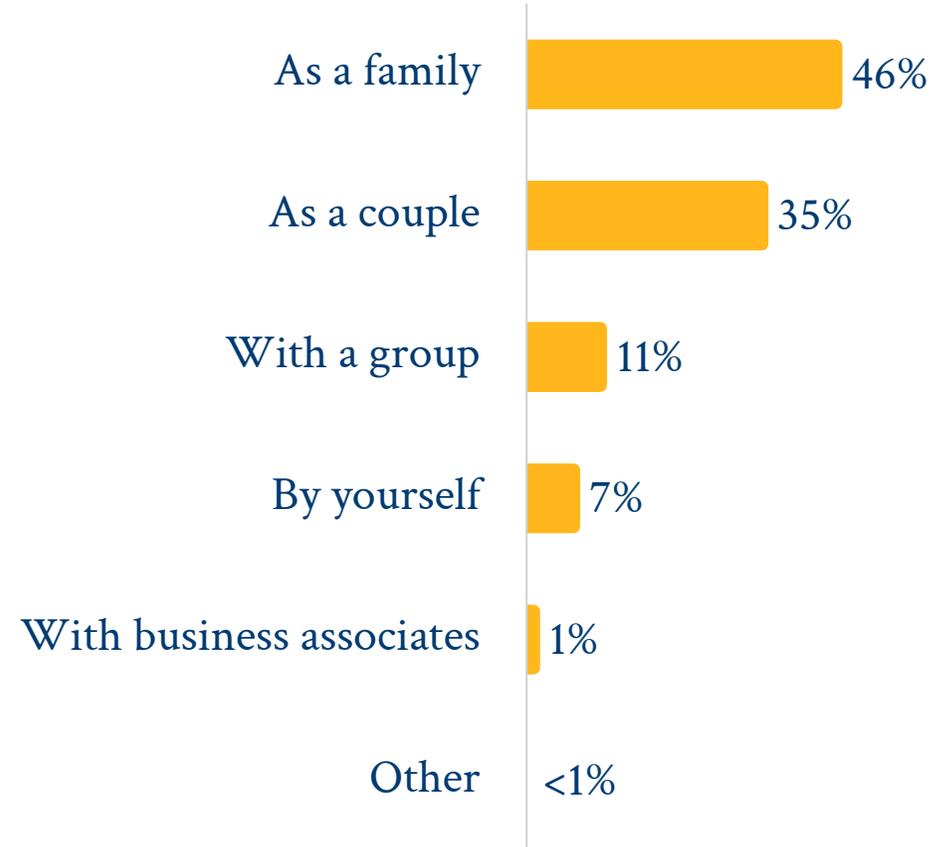
ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

¹New York City market includes some areas in Connecticut, New Jersey, and Pennsylvania.

TRAVEL PARTIES

CY 2025

The majority of visitors **traveled as a family** or **as a couple**.

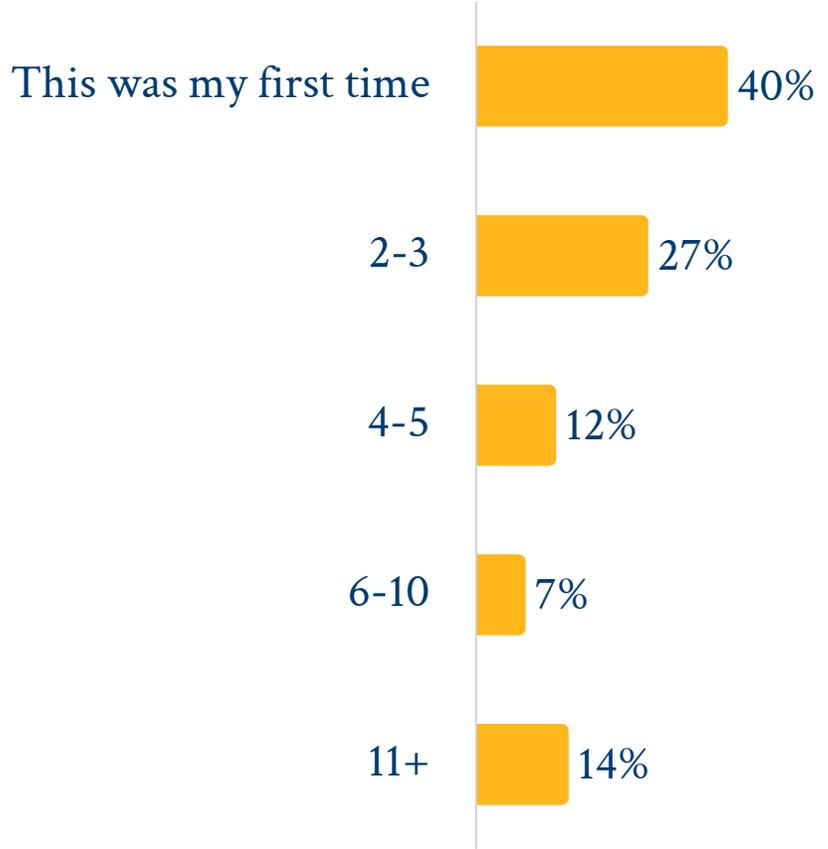


NEW & RETURNING VISITORS¹

CY 2025

2 in 5 visitors said this was their **first time** visiting the St. Augustine/Ponte Vedra area.

1 in 7 visitors were loyalists, having visited **over 10 times**.



¹See Appendix I for data comparison of first-time and repeat visitors.



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®



TOP VISITOR ACTIVITIES¹

CY 2025



Dining out
76%



Visit Downtown St. Augustine
71%



Beach
70%



Visit historical sites
57%



Shopping
49%



Trolley/walking/ghost tour
30%



Spending time with family
30%



Visiting friends/family
29%



Art galleries and museums
24%

¹Multiple responses permitted.

ECONOMIC IMPACT DETAILED FINDINGS



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

LODGING METRICS

CY 2025

Note: Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the **ADR of vacation rentals may appear inflated** in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.

COMBINED LODGING METRICS	CY 2025
Occupancy	58.3%
ADR	\$187.14
RevPAR	\$109.10

HOTEL METRICS ¹	CY 2025
Occupancy	63.2%
ADR	\$172.00
RevPAR	\$108.76

VACATION RENTAL METRICS ²	CY 2025
Occupancy	49.1%
ADR	\$214.60
RevPAR	\$105.32

¹ Source: Smith Travel Research.

² Source: Key Data and Department of Business and Professional Regulation (DBPR).



IMPACT OF TOURISM METRICS

CY 2025

	CY 2025
Visitors	2,791,200
Direct Spending	\$1,593,477,000
Economic Impact ¹	\$2,001,797,910
Room Nights ²	2,370,510
TDT ³	\$24,649,055
Local Tax Contributions by Visitors	\$81,600,490
Jobs Supported	14,600
Wages Supported	\$575,561,680
Visitors per Job Supported	190
Local Tax Savings per Household	\$620

¹Total economic impact is a function of direct spending by visitors in the St. Augustine/Ponte Vedra area, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars. Downs & St. Germain Research uses IMPLAN economic impact analysis modeling to determine the total economic output based on direct expenditure data collected from visitors to the St. Augustine/Ponte Vedra area. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling.

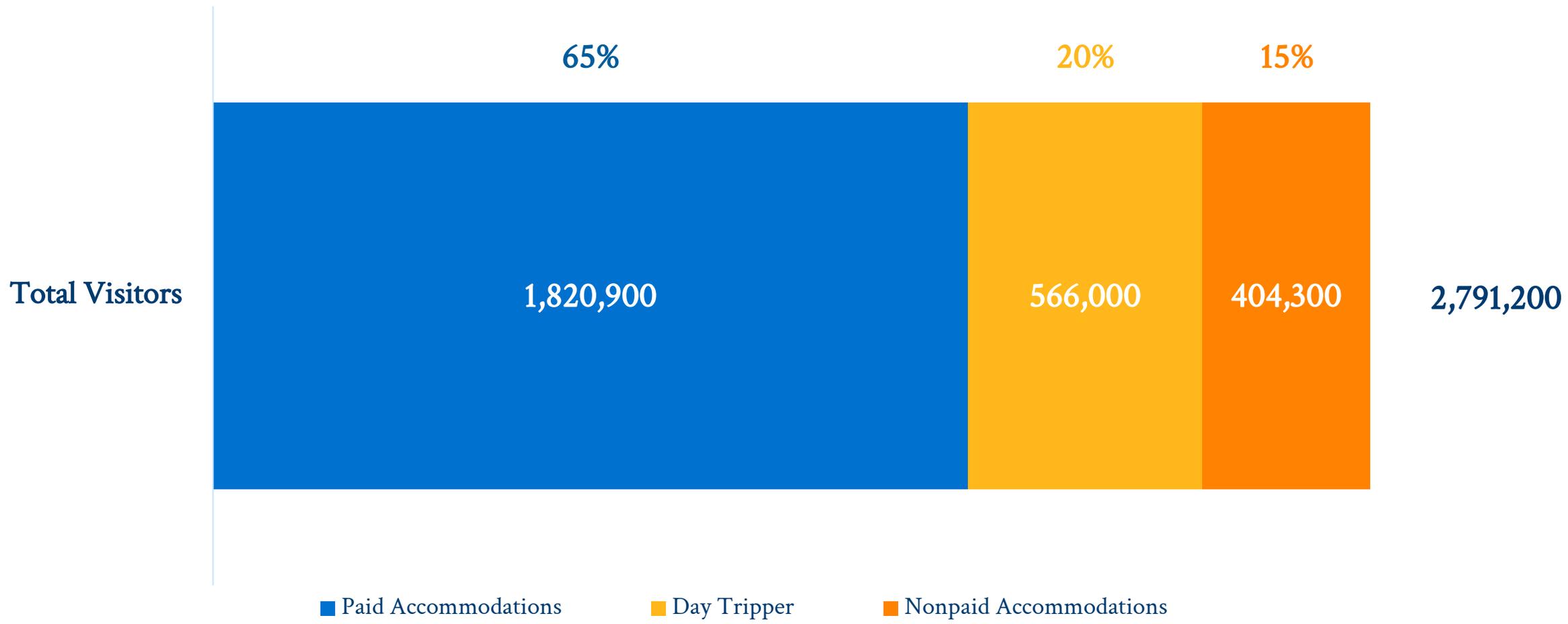
² Source: Smith Travel Research and Department of Business and Professional Regulation.

³ Source: Source: St. Johns County Tourist Development Council.



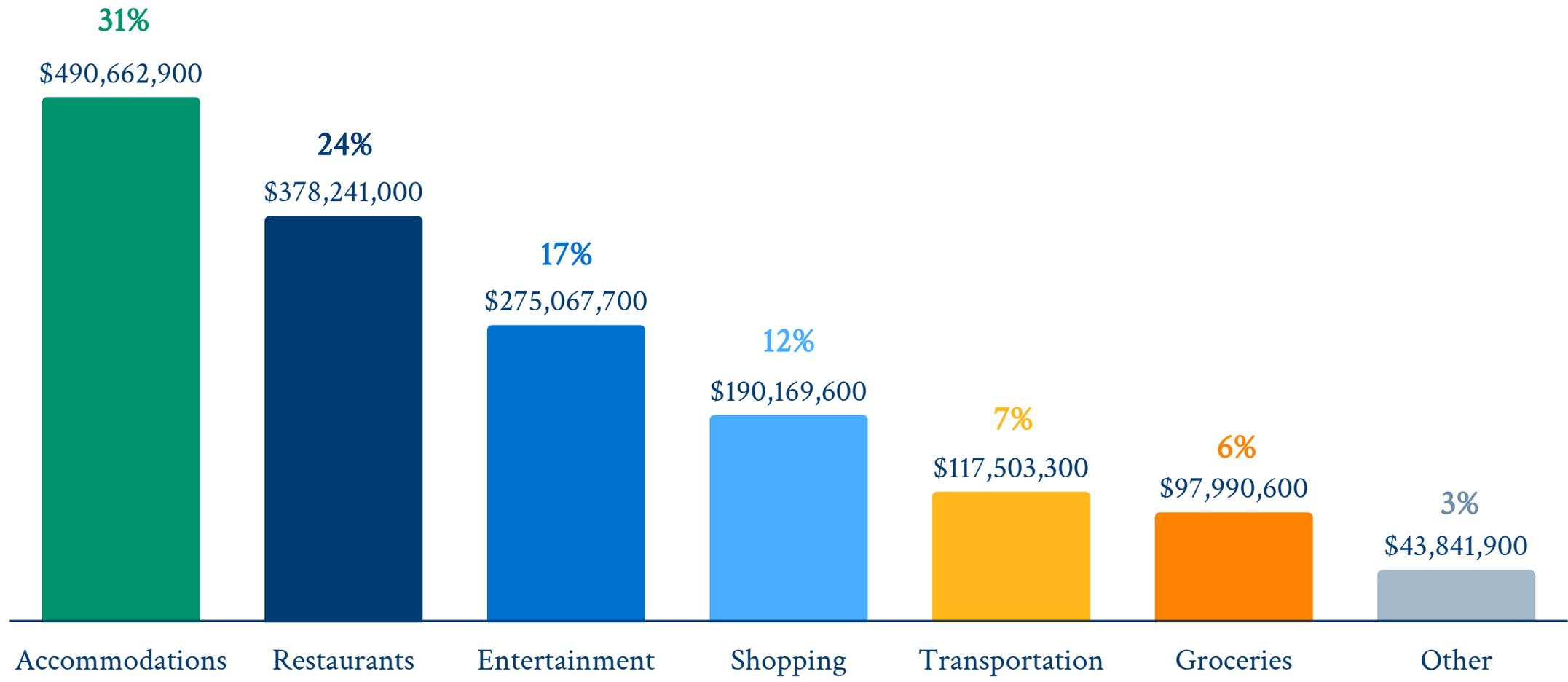
VISITOR TYPES

CY 2025



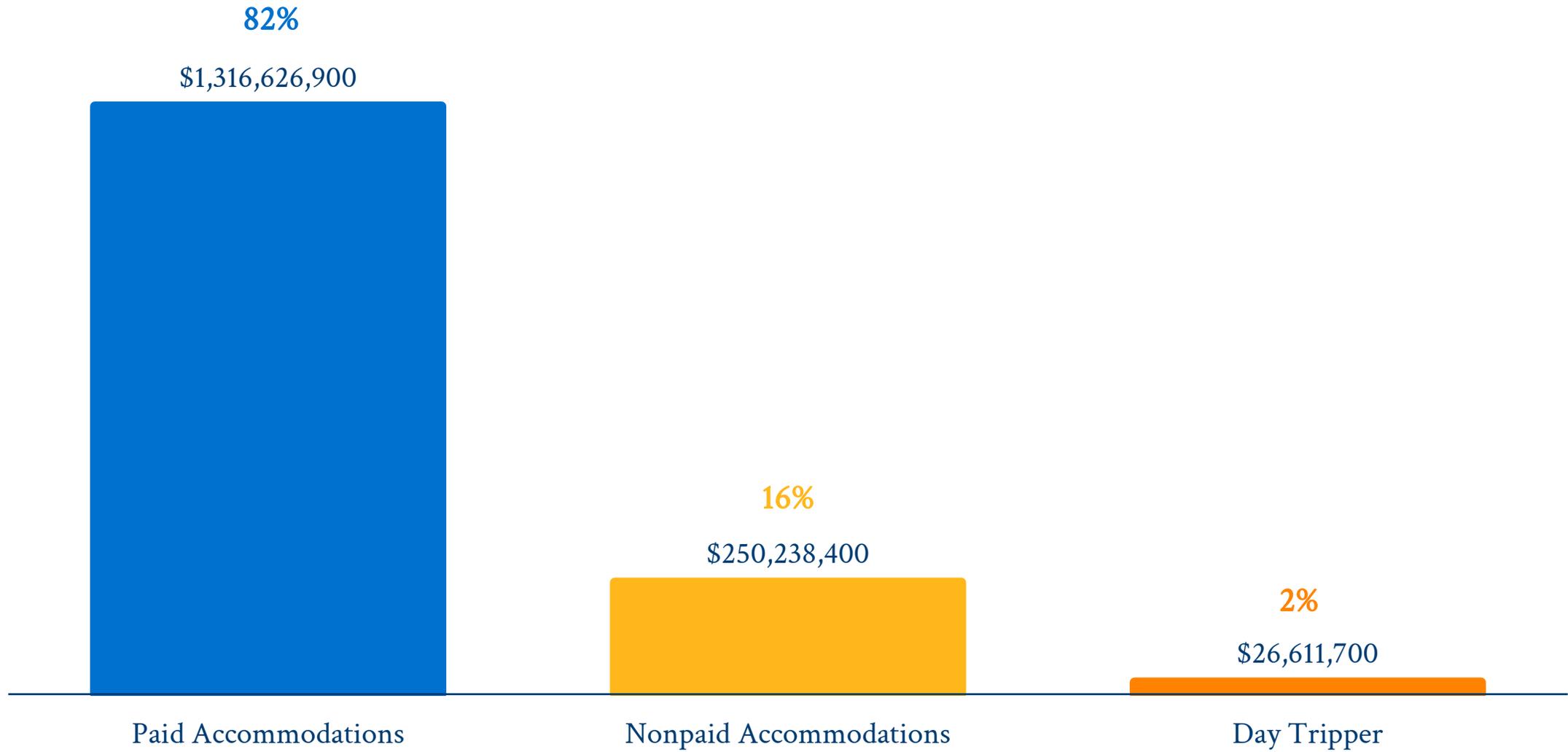
DIRECT SPENDING BY CATEGORY

CY 2025



DIRECT SPENDING BY VISITOR TYPE

CY 2025



TRAVEL PARTY SPENDING¹

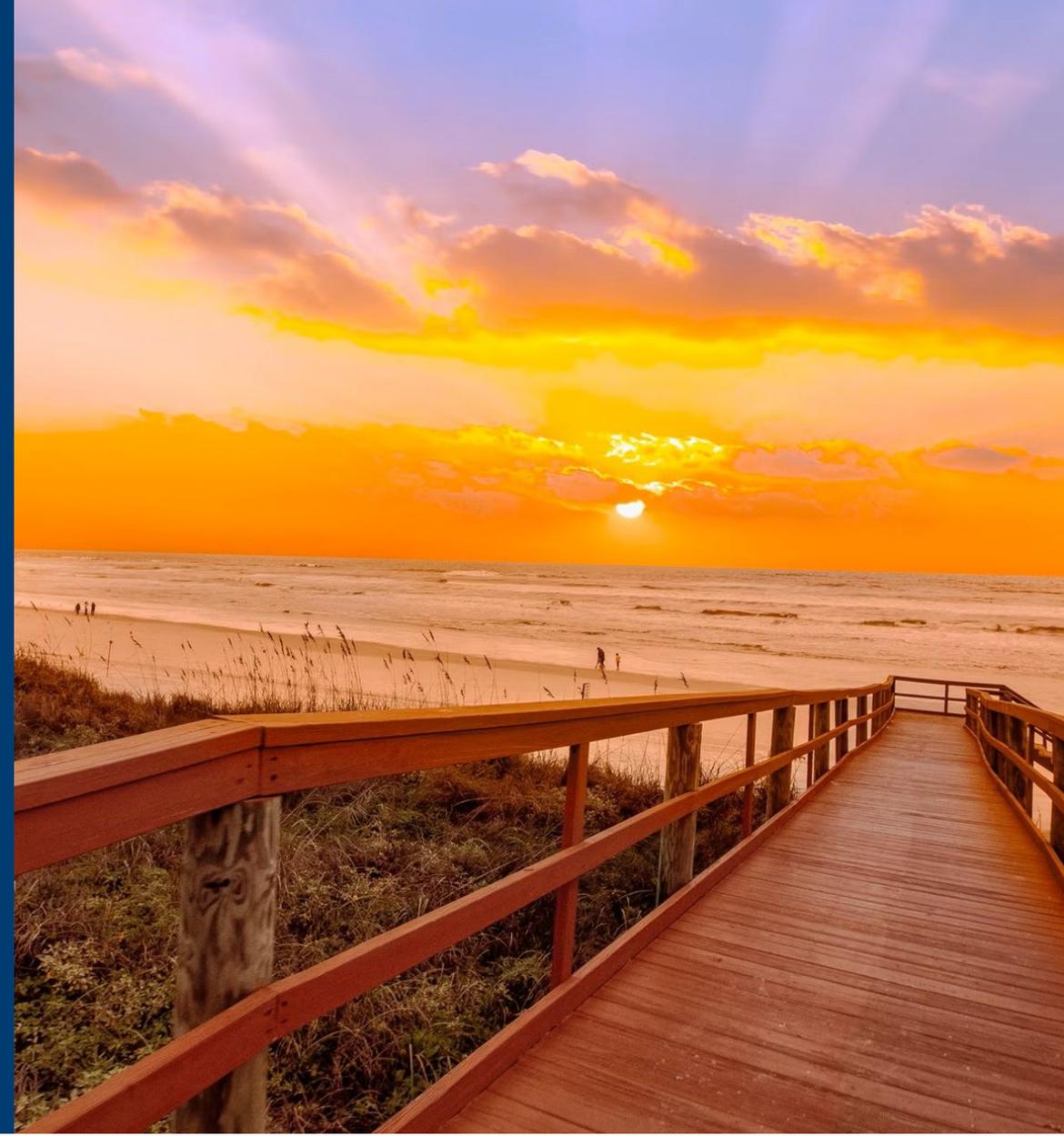
CY 2025

	Daily Travel Party Spend	Total Travel Party Spend
Accommodations	\$123	\$486
Restaurants	\$107	\$422
Groceries	\$25	\$98
Shopping	\$49	\$194
Entertainment	\$74	\$295
Transportation	\$30	\$117
Other	\$10	\$41
Total	\$417	\$1,653

¹Spending includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.



VISITOR PROFILE DETAILED FINDINGS



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

STUDY OBJECTIVES: VISITOR JOURNEY

PRE-VISIT

- Planning/booking cycle
- Trip planning destinations
- Planning sources
- Reasons for visiting
- Recall of destination messaging

TRAVEL PARTY PROFILE

- Visitor origin
- Party size
- Party composition
- Demographics
- Primary destination

TRIP EXPERIENCE

- Mode of transportation
- Accommodations
- Booking
- Length of stay
- Activities in destination
- Visitor spending

POST TRIP EVALUATION

- Trip satisfaction
- Likelihood of recommending the area to others
- Likelihood of returning

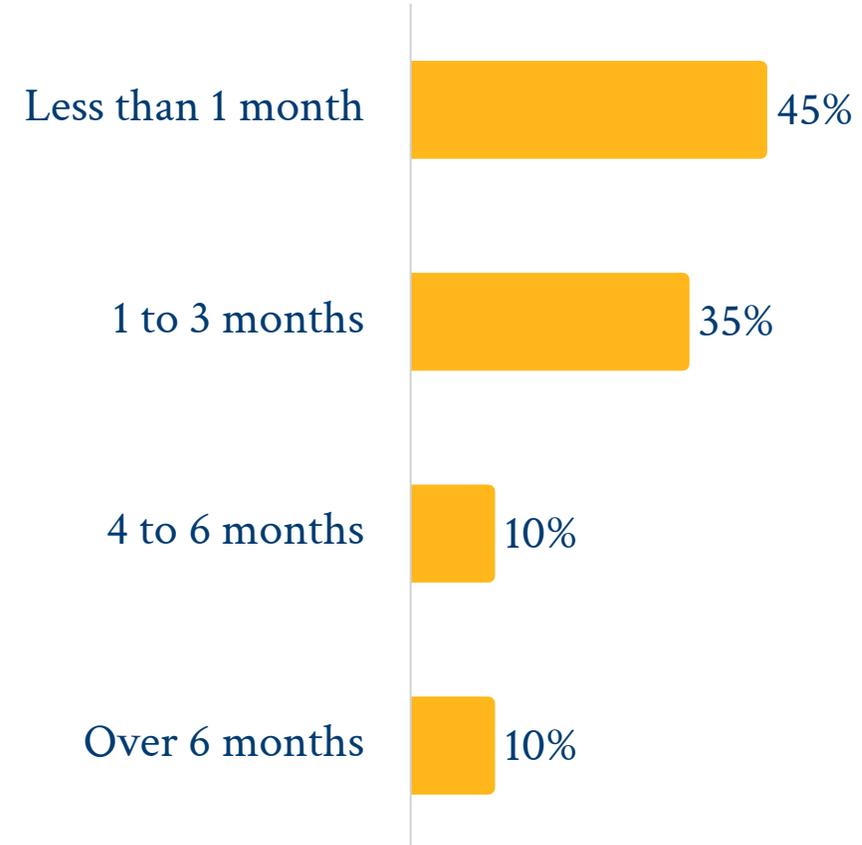
VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE: OVERNIGHT VISITORS¹

CY 2025

- **Overnight visitors** to the St. Augustine/Ponte Vedra area have short trip **planning** windows, as **nearly half** planned their trip **less than one month in advance**
- On the other hand, **over 1 in 3 overnight visitors** planned their trip **1 to 3 months in advance**
- The typical **overnight visitor** planned their trip **41 days (between 1 and 2 months)** in advance



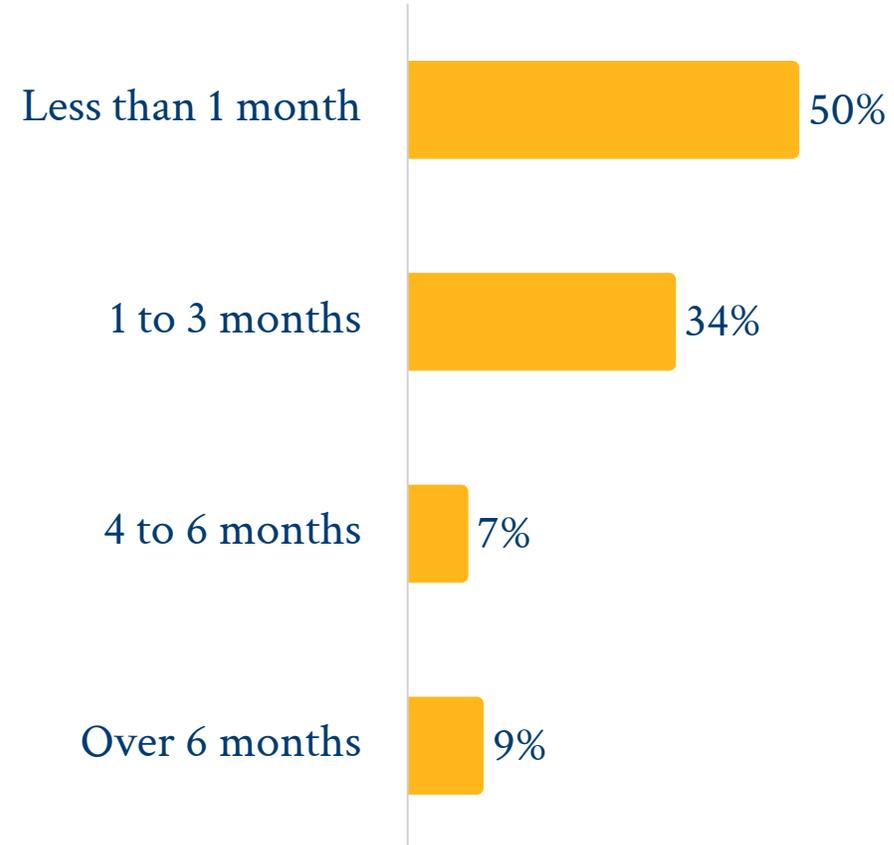
¹Excludes day trippers.



TRIP BOOKING CYCLE: OVERNIGHT VISITORS¹

CY 2025

- **Overnight visitors** to the St. Augustine/Ponte Vedra area have short **booking** windows, as **half** booked their trip **less than one month in advance**
- On the other hand, **over 1 in 3 overnight visitors** booked their trip **1 to 3 months in advance**
- The typical **overnight visitor** booked their trip **30 days (about 1 month)** in advance



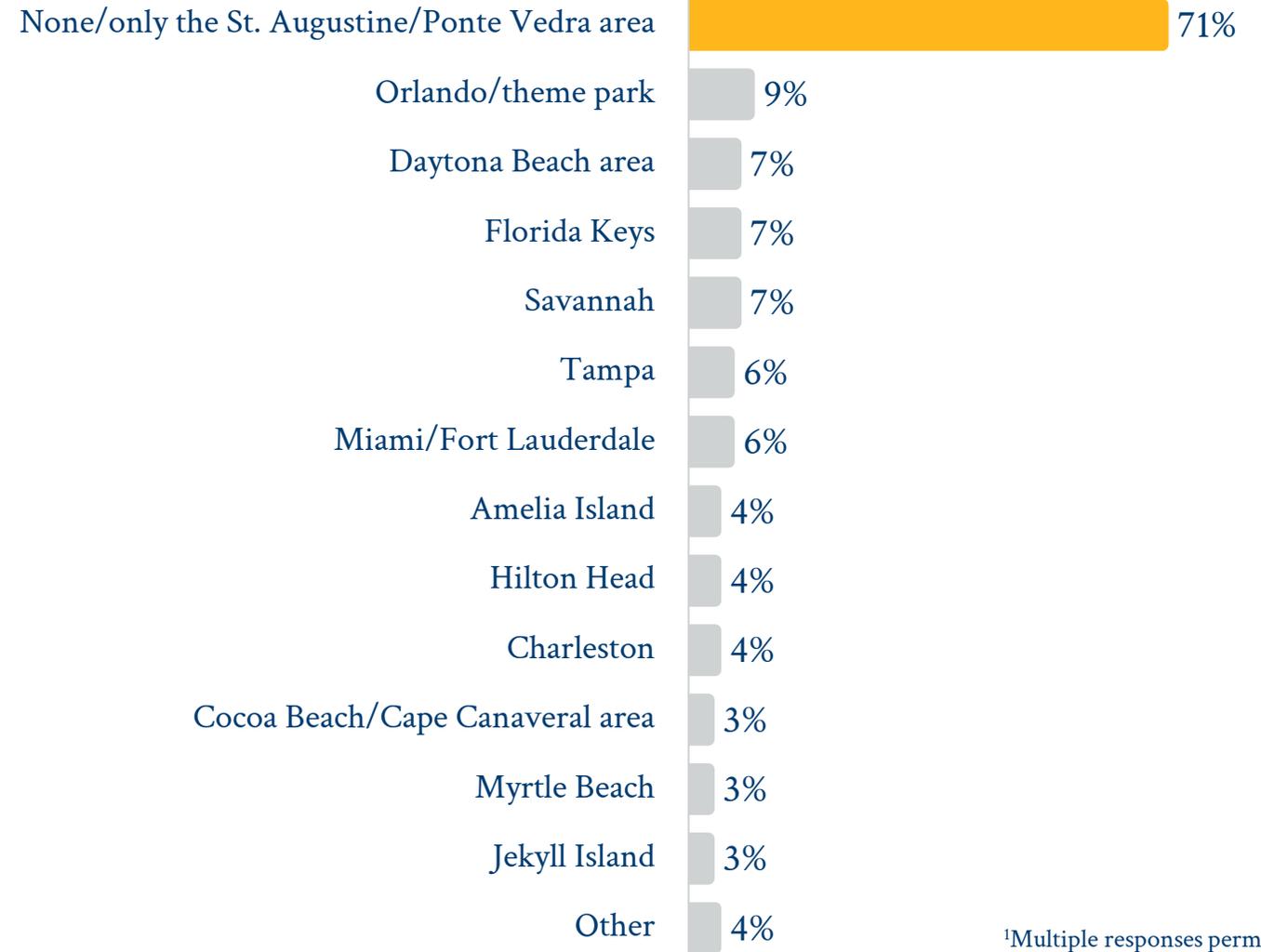
¹Excludes day trippers.



TRIP PLANNING DESTINATIONS¹

CY 2025

- Nearly 3 in 4 visitors only considered the St. Augustine/Ponte Vedra area when planning their trip



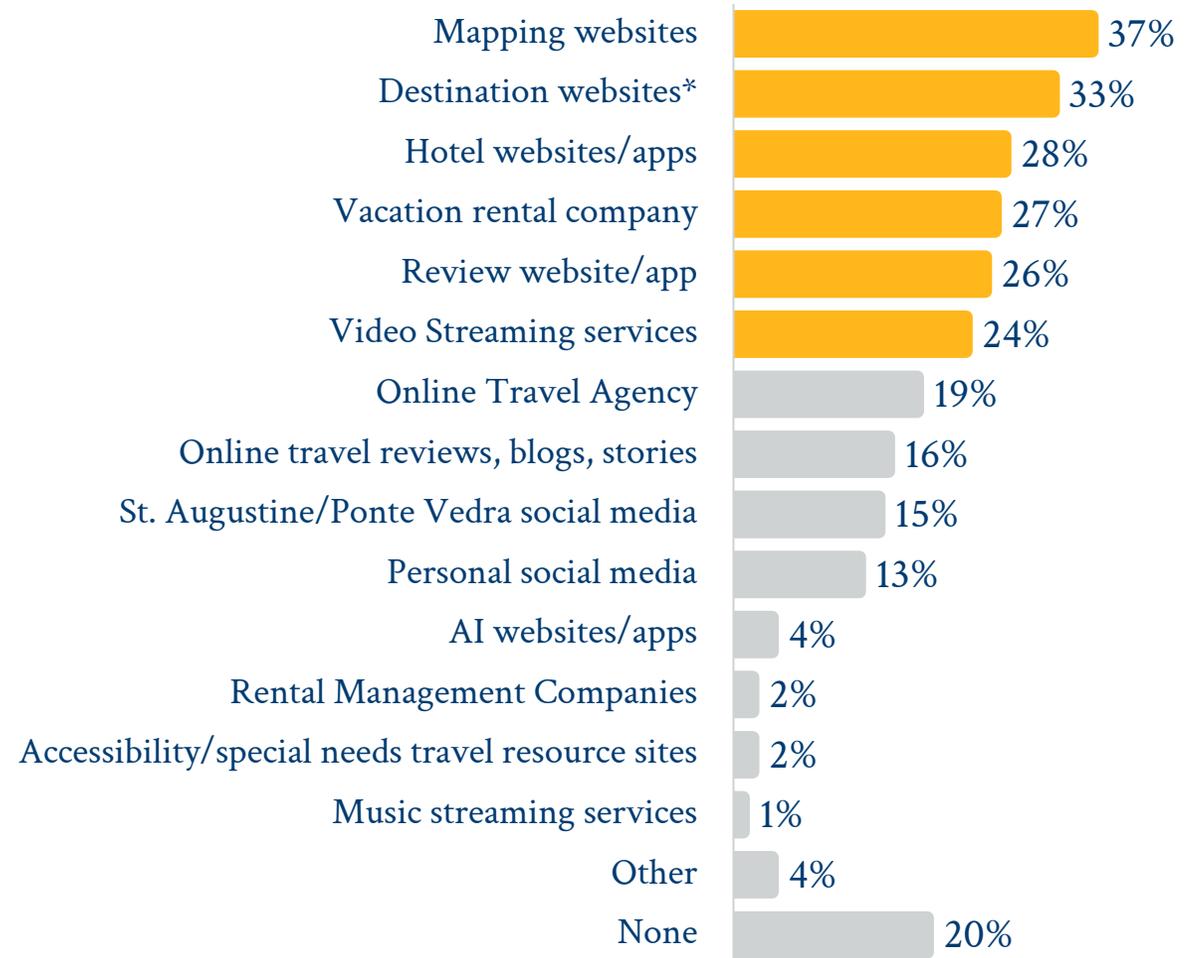
¹Multiple responses permitted.



ONLINE TRIP PLANNING SOURCES¹

CY 2025

- **Nearly 2 in 5** visitors used **mapping websites** (Google Maps, etc.) as an online planning source for their trip to the St. Augustine/Ponte Vedra area
- **1 in 3** visitors planned their trip using **destination websites** (VisitStAugustine.com, FloridasHistoricCoast.com, and HistoricCoastCulture.com)



¹Multiple responses permitted.

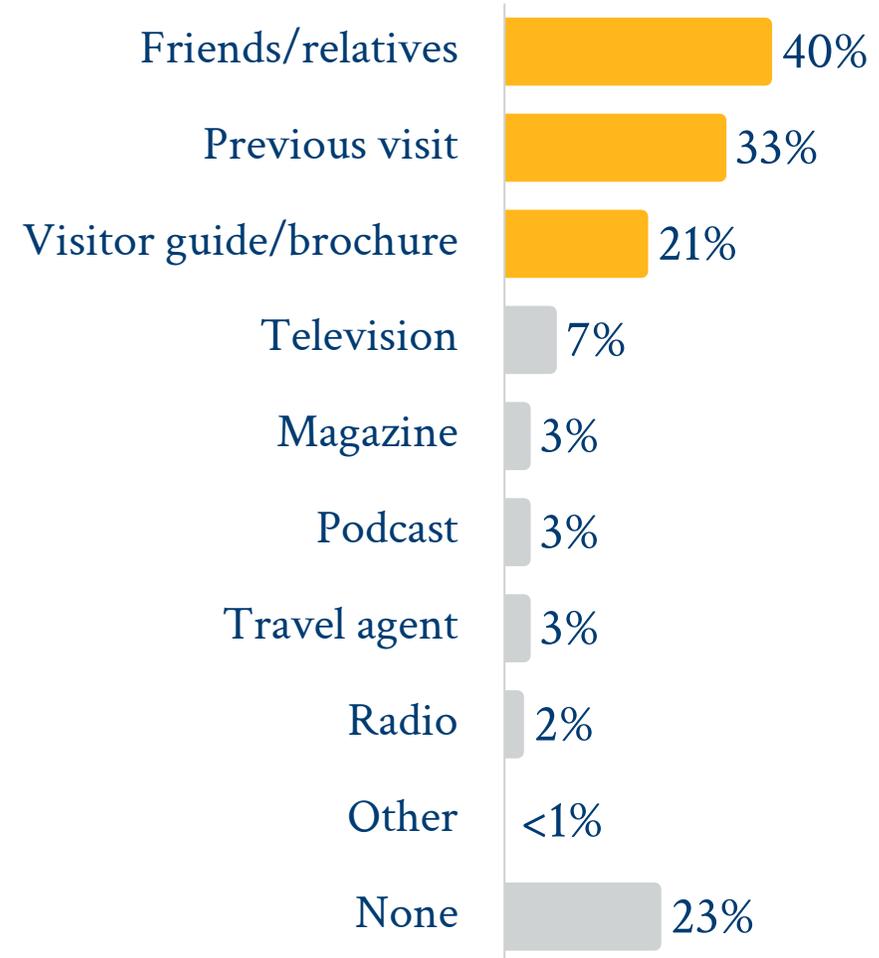
*Includes VisitStAugustine.com, FloridasHistoricCoast.com, and HistoricCoastCulture.com.



OTHER TRIP PLANNING SOURCES¹

CY 2025

- **2 in 5** visitors planned their trip to the St. Augustine/Ponte Vedra area through **friends/relatives**
- **1 in 3** visitors planned their trip based on a **previous visit** to the St. Augustine/Ponte Vedra area
- **Over 1 in 5** visitors used a **visitor guide/brochure** to plan their trip



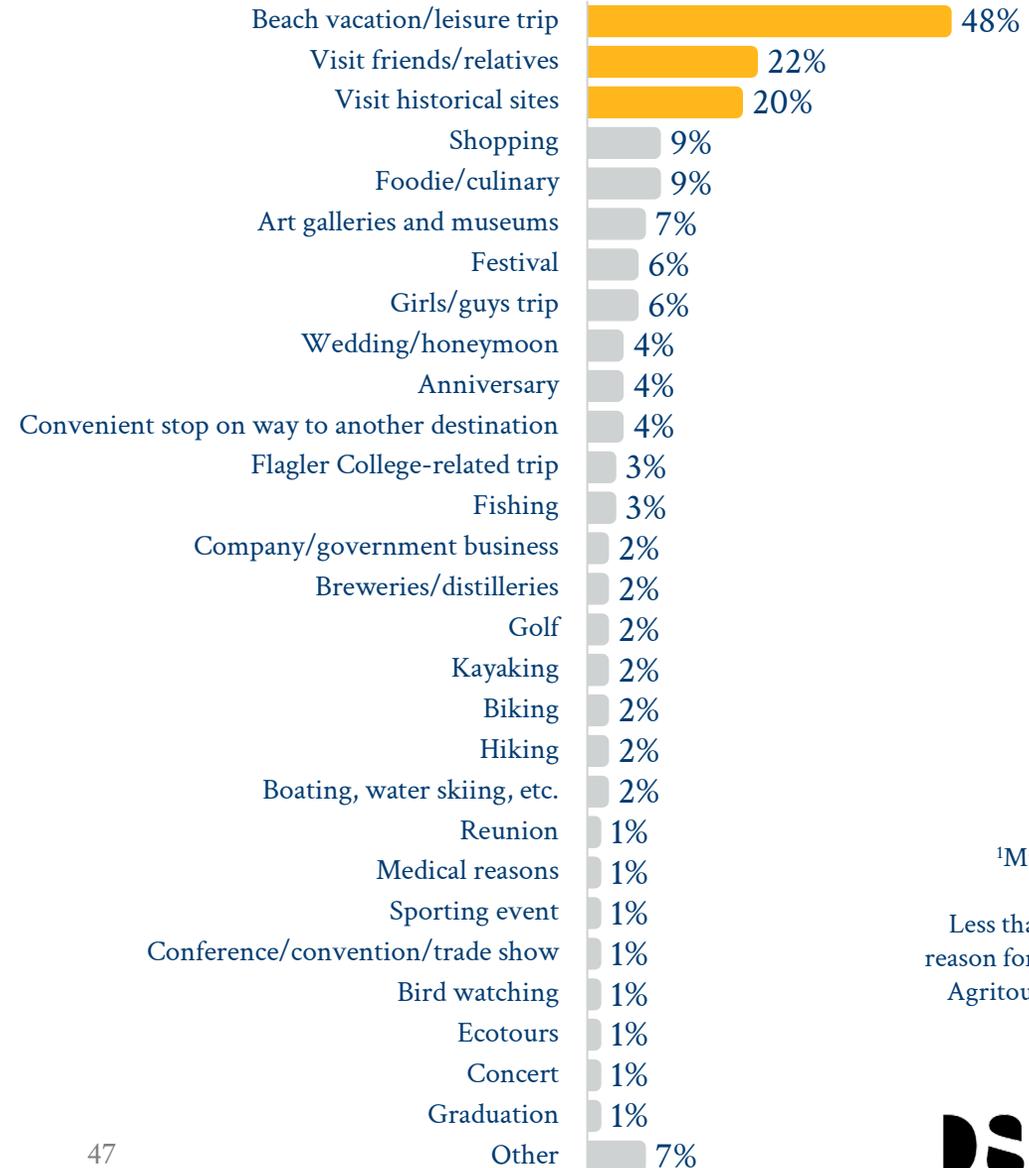
¹Multiple responses permitted.



REASONS FOR VISITING¹

CY 2025

- **Nearly half** of visitors traveled to the St. Augustine/Ponte Vedra area for a **beach vacation**
- **Over 1 in 5** visitors came to **visit friends/relatives**
- **1 in 5** visitors traveled to see the **historical sites**



¹Multiple responses permitted.

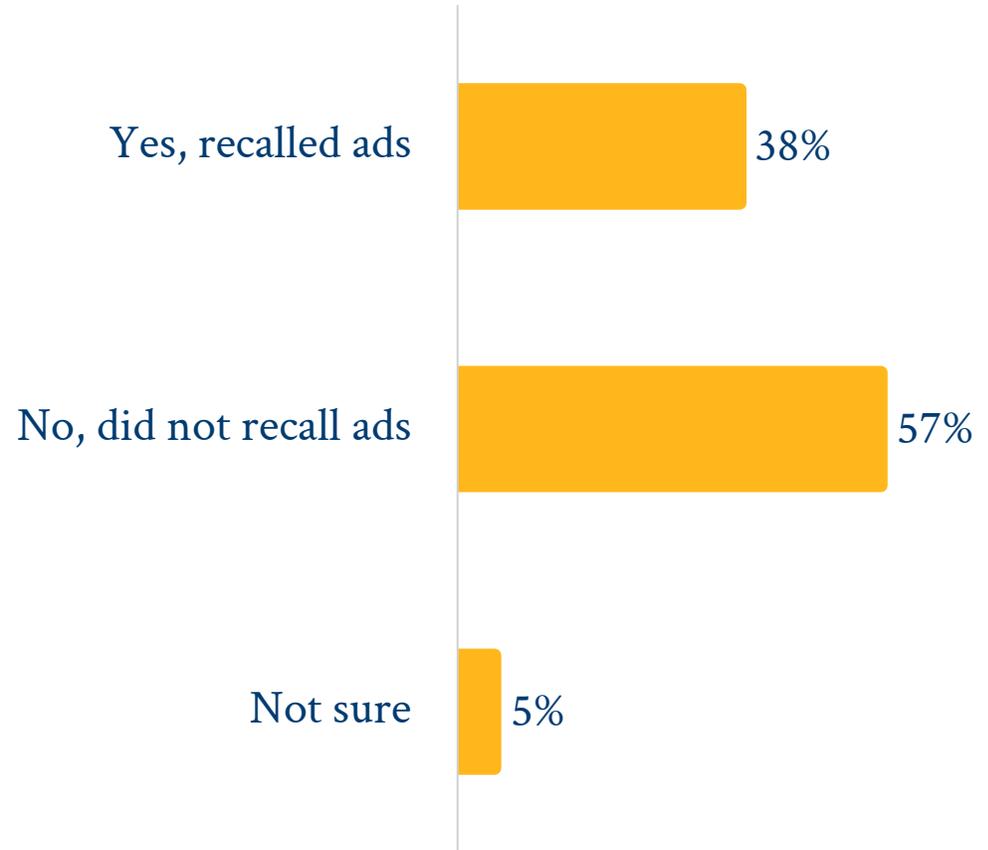
Less than 1% of visitors stated their reason for visiting was the following: Agritourism, tennis/pickleball, and performing arts.



ADVERTISING RECALL

CY 2025

- **Nearly 2 in 5** visitors **recalled advertising** about the St. Augustine/Ponte Vedra area



ADVERTISING RECALL¹

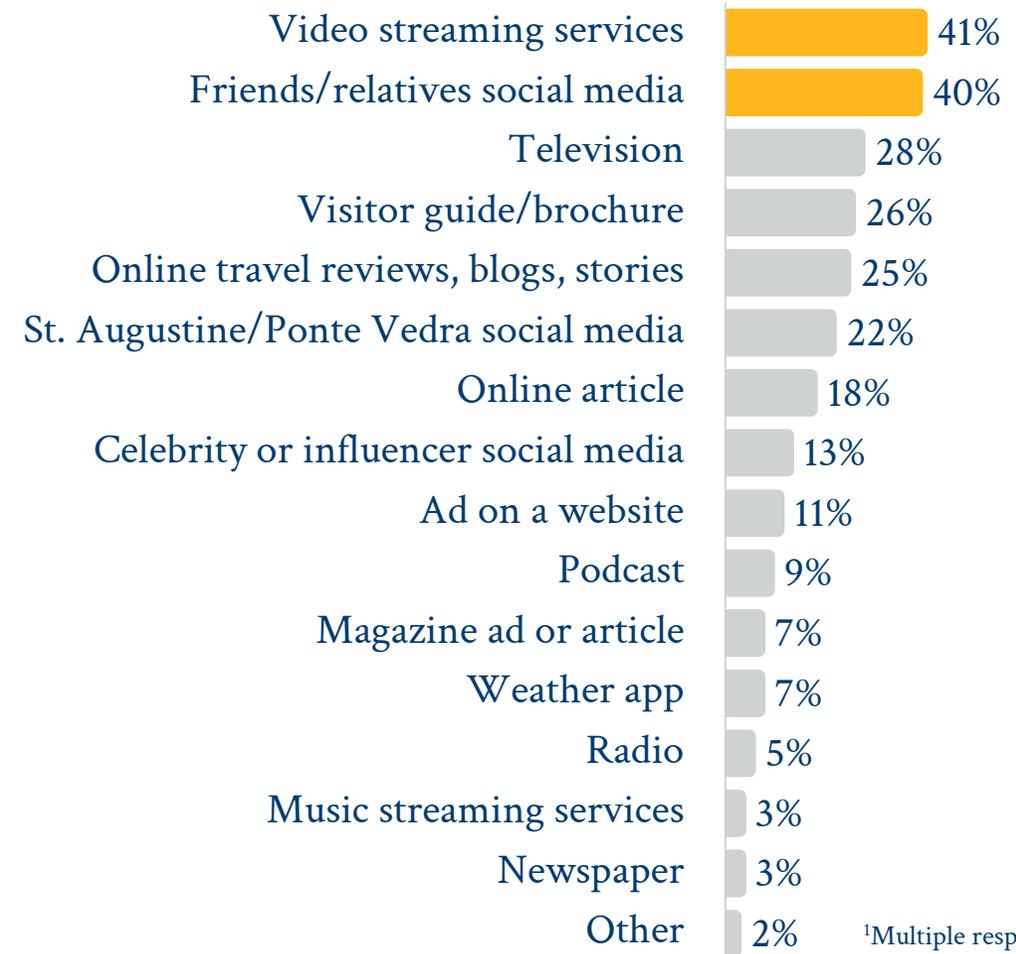
CY 2025

Of the **38%** of visitors who **recalled advertising** about the St. Augustine/Ponte Vedra area:

- **Over 2 in 5** noticed it on a **video streaming service** (YouTube, Hulu, etc.)
- **2 in 5** noticed it on **friends/relatives' social media**

This information influenced **31% of all visitors** to visit the St. Augustine/Ponte Vedra area

Base: **38%** of visitors who recalled advertising



¹Multiple responses permitted.



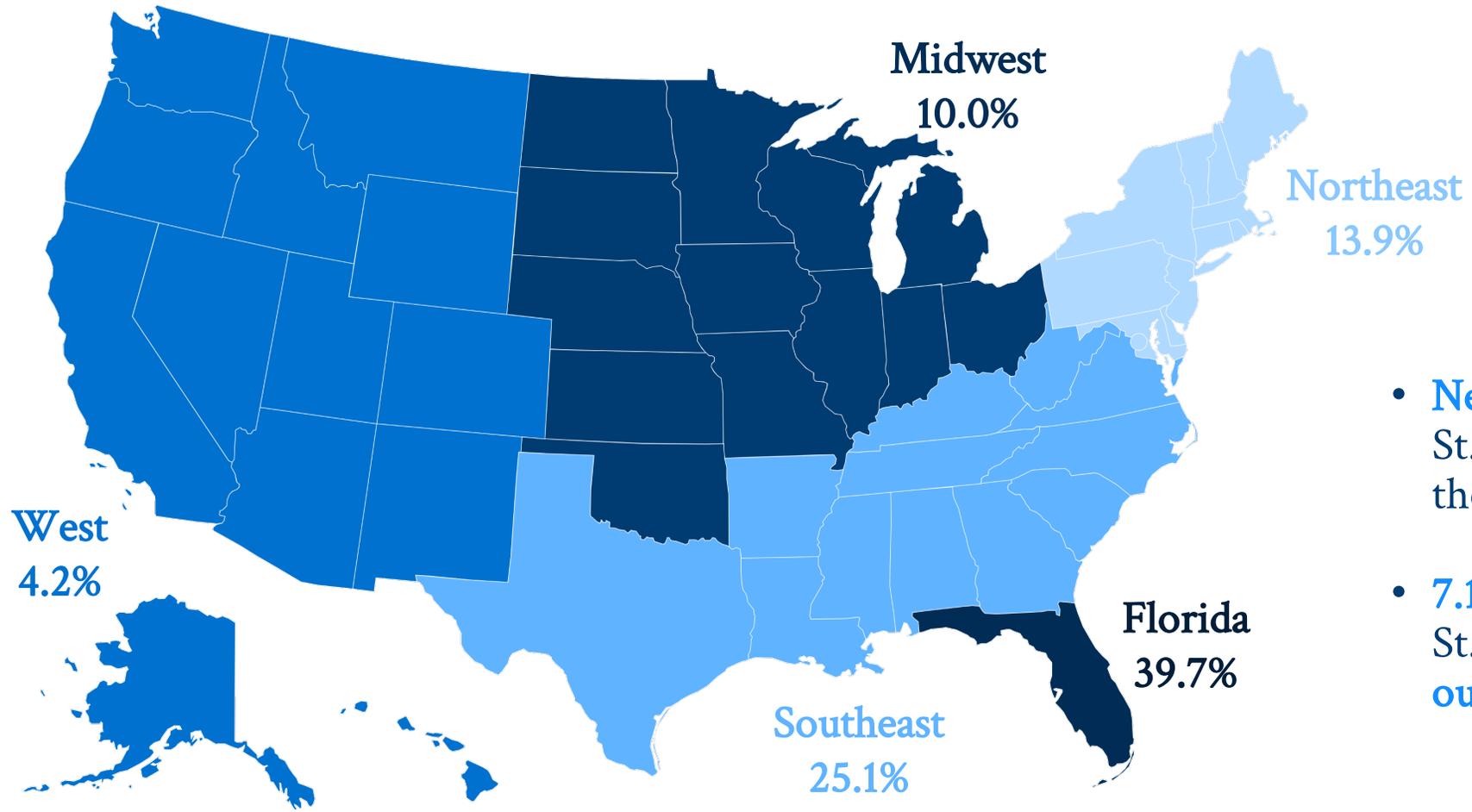
ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN

CY 2025



- **Nearly 2 in 3** visitors traveled to the St. Augustine/Ponte Vedra area from the **Southeast**, including Florida
- **7.1%** of visitors traveled to the St. Augustine/Ponte Vedra area from **outside of the U.S.¹**

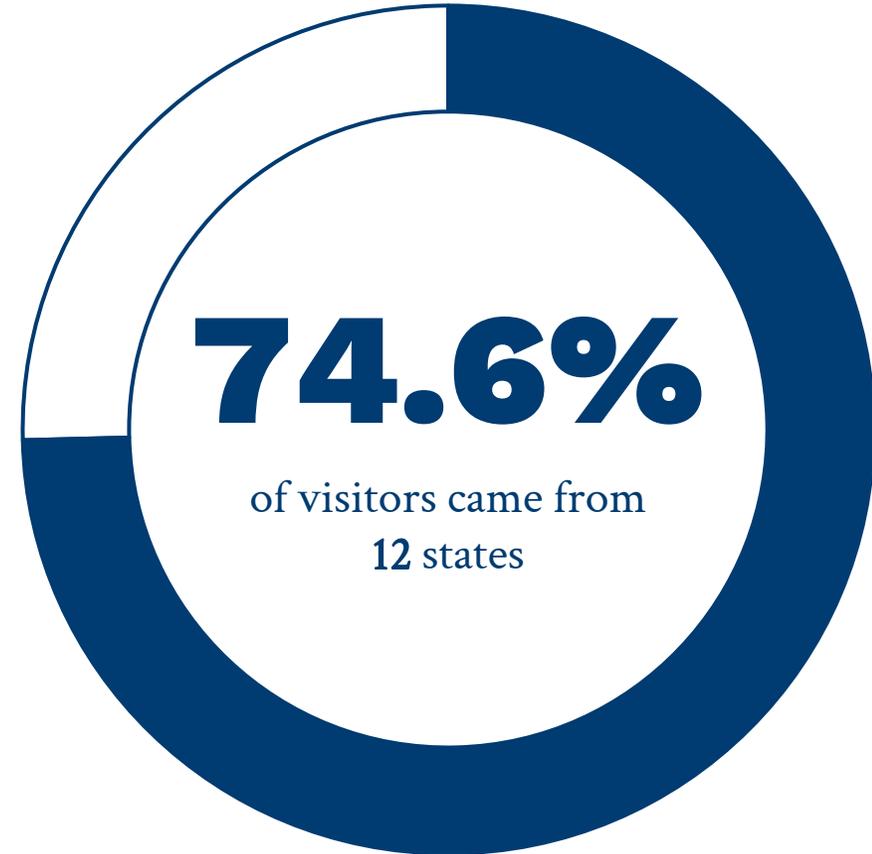
¹The majority of international visitors came from the United Kingdom (1.9%), Canada (1.9%), Germany (0.5%), and Brazil (0.4%).



TOP ORIGIN STATES

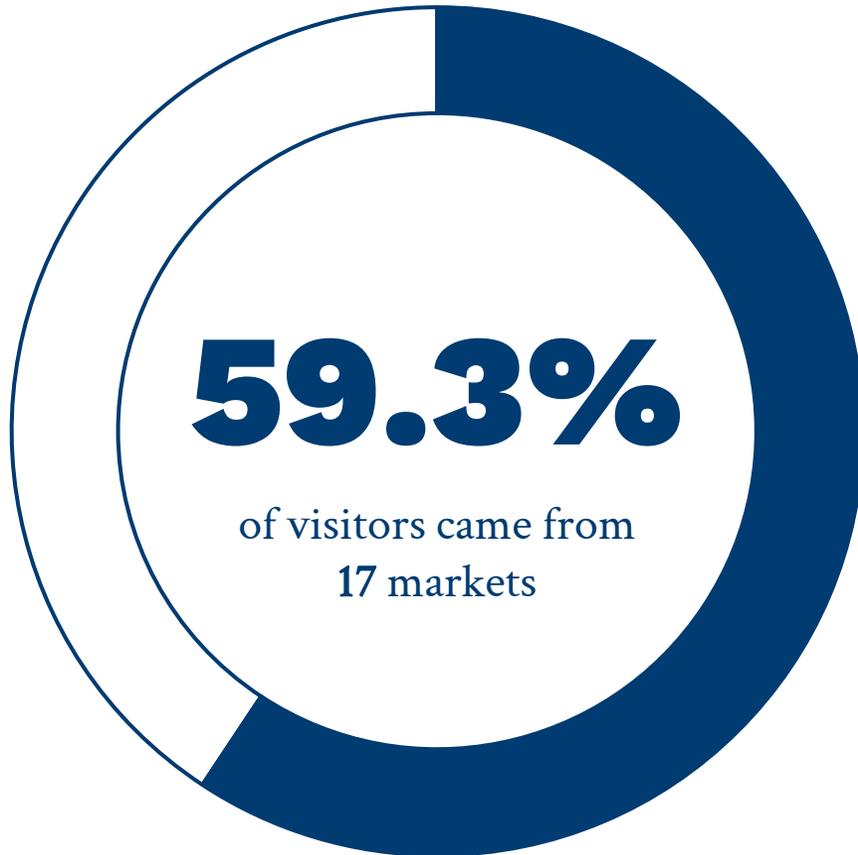
CY 2025

State of Origin	2025
Florida	39.7%
Georgia	7.1%
New York	4.6%
North Carolina	3.8%
Tennessee	3.5%
South Carolina	3.5%
New Jersey	2.7%
Texas	2.5%
Virginia	2.1%
Ohio	1.8%
California	1.7%
Michigan	1.6%



TOP ORIGIN MARKETS

CY 2025



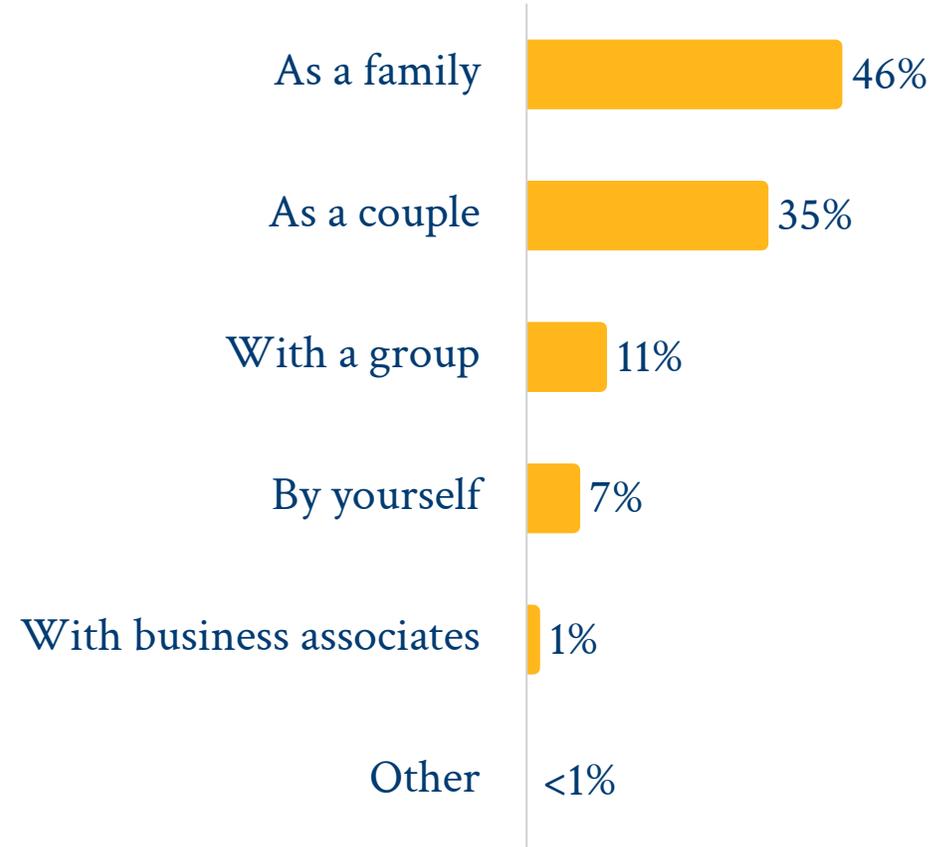
Markets	2025
Jacksonville	12.9%
Orlando – Daytona Beach – Melbourne	10.1%
New York City ¹	6.6%
Miami – Fort Lauderdale	4.6%
Tampa – St. Petersburg	4.5%
Atlanta	4.1%
Gainesville	2.9%
Washington, DC – Hagerstown	1.6%
Savannah	1.4%
Charlotte	1.4%
Philadelphia	1.4%
Nashville	1.3%
Raleigh – Durham	1.3%
Charleston, SC	1.3%
Fort Myers – Naples	1.3%
Dallas – Fort Worth	1.3%
West Palm Beach – Fort Pierce	1.3%

¹New York City market includes some areas in Connecticut, New Jersey, and Pennsylvania.

TRAVEL PARTIES

CY 2025

- **Nearly half** of visitors traveled as a **family**
- **Over 1 in 3** visitors traveled as a **couple**
- **38%** of travel parties **included children**²
- The average travel party¹ size was **3.3**



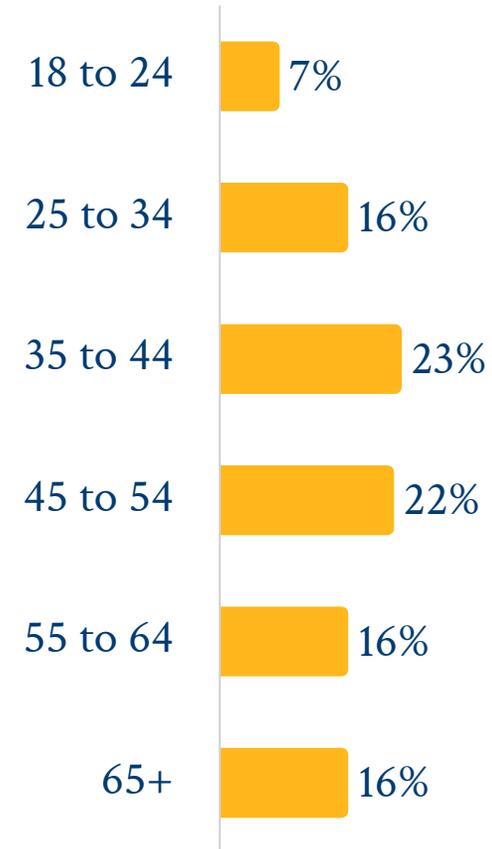
¹Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

²Children are defined as people under 18 years old.

- The **median age** of visitors to the St. Augustine/Ponte Vedra area was **47**¹

¹Age of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



HOUSEHOLD INCOME

CY 2025

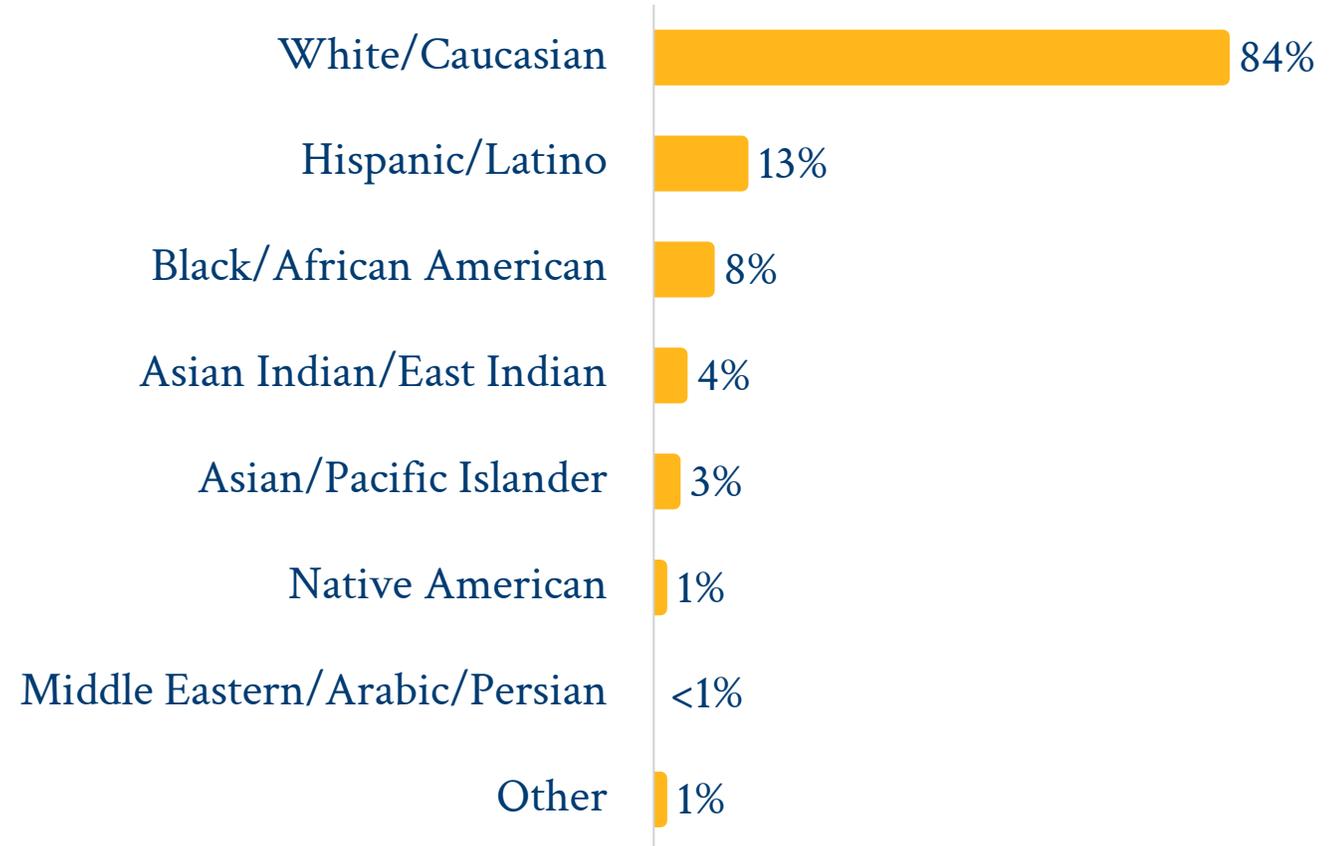
- Visitors to the St. Augustine/Ponte Vedra area had a **median household income of \$118,500** per year
- **60%** of visitors had household incomes over **\$100,000**



RACE/ETHNICITY¹

CY 2025

- **Over 4 in 5** visitors to the St. Augustine/Ponte Vedra area identified as **White/Caucasian**²



¹Multiple responses permitted

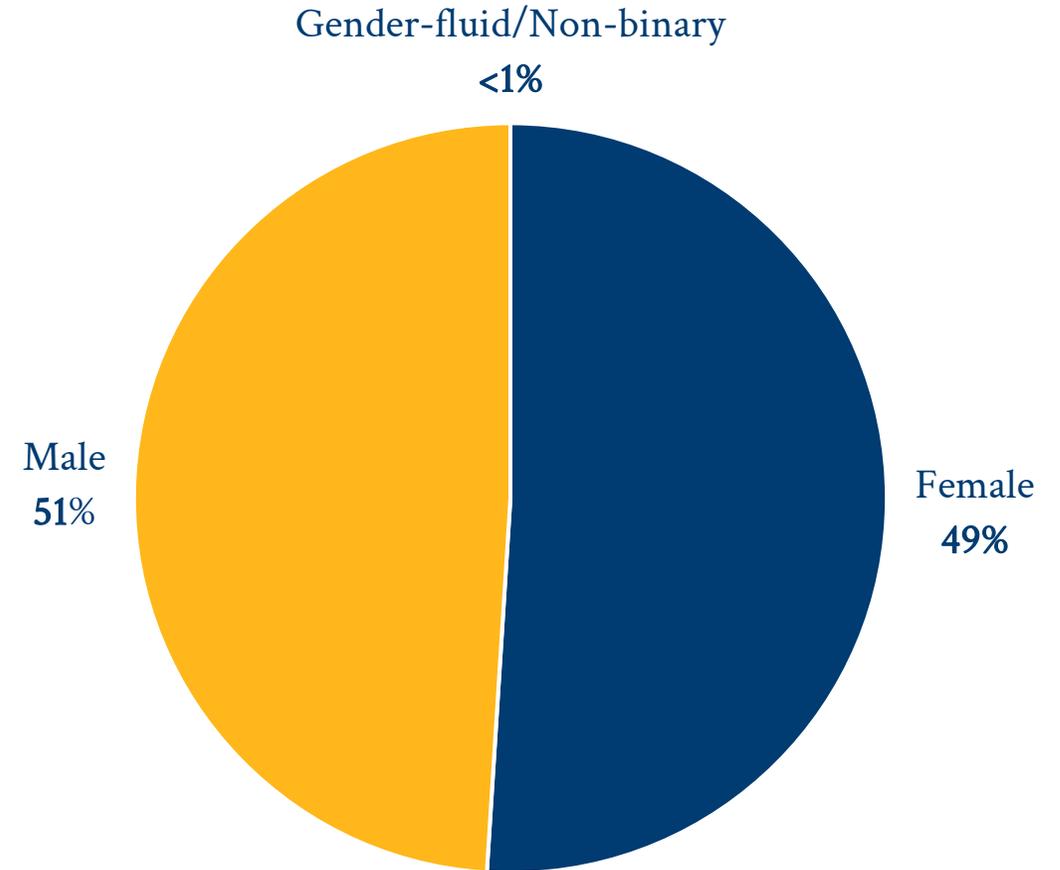
²Race/ethnicity of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

GENDER¹

CY 2025

- Visitors to the St. Augustine/Ponte Vedra area were almost evenly **split** between female and male¹

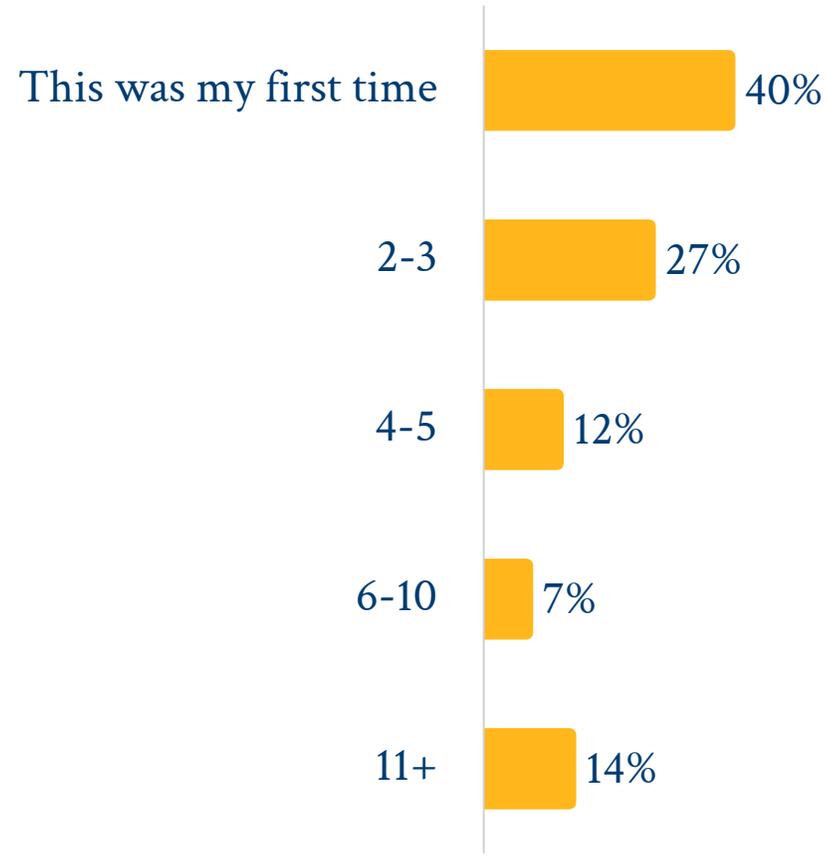


¹Gender of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

NEW & RETURNING VISITORS¹

CY 2025

- **2 in 5** visitors said this was their **first time visiting** the St. Augustine/Ponte Vedra area
- **1 in 7** visitors were loyalists, having visited **over 10 times**

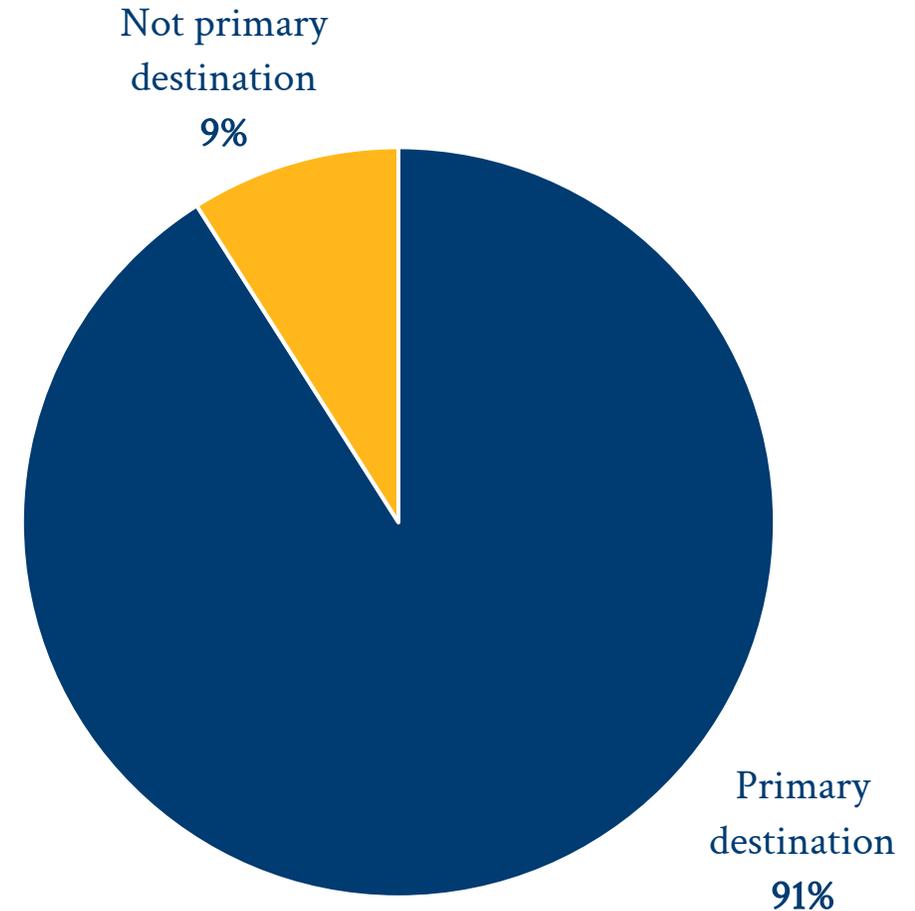


¹See Appendix I for data comparison of first-time and repeat visitors.

PRIMARY TRIP DESTINATION

CY 2025

- The St. Augustine/Ponte Vedra area was the **primary destination** for **over 9 in 10** visitors
- Among visitors whose primary destination was not the St. Augustine/Ponte Vedra area, top primary destinations included **Orlando, Jacksonville, and Daytona**¹



¹Coded open-ended responses; multiple responses permitted.

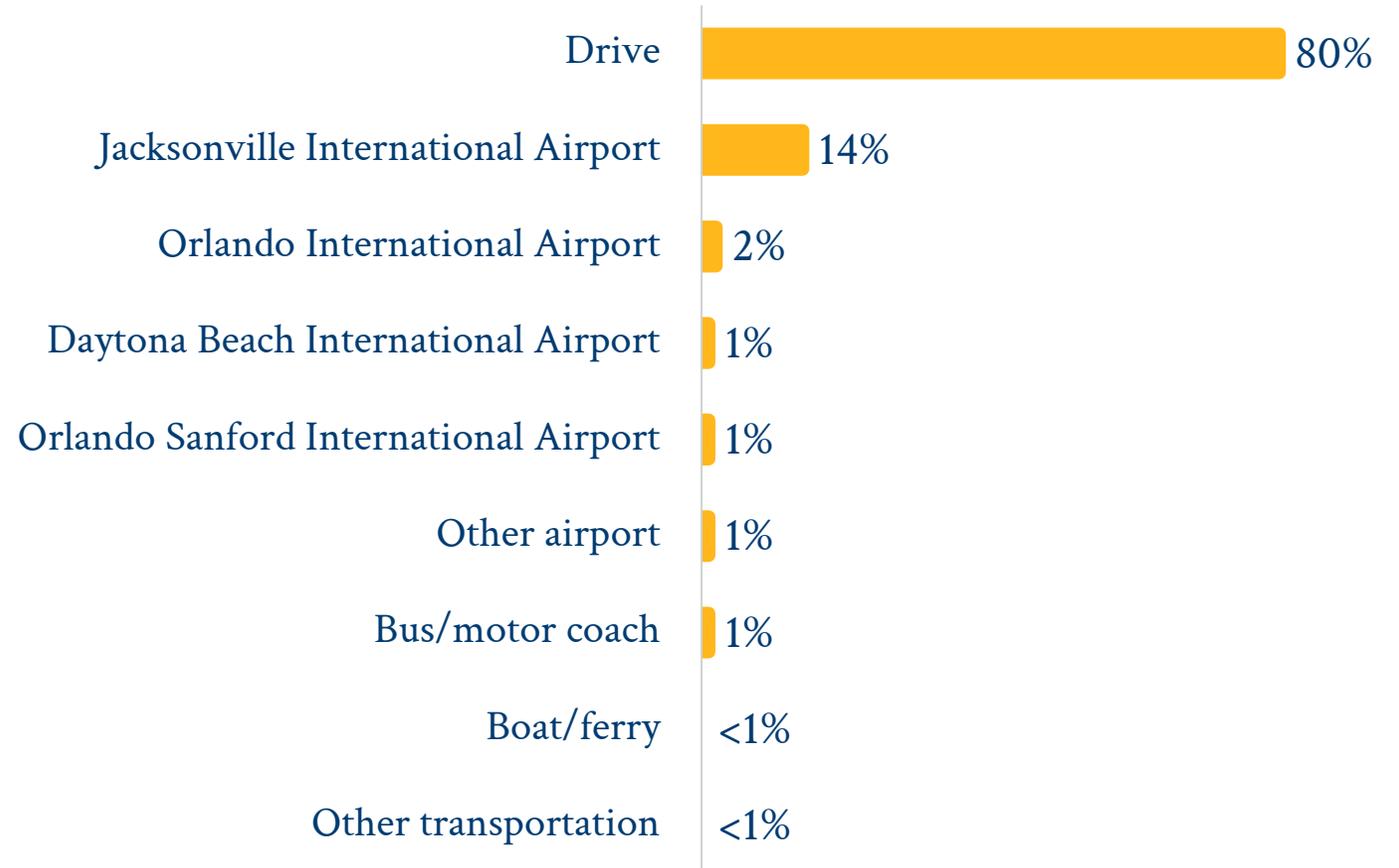
VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

CY 2025

- **4 in 5** visitors **drove** to the St. Augustine/Ponte Vedra area
- Of the **19%** of visitors who **flew** to the St. Augustine/Ponte Vedra area, **nearly 3 in 4** used **Jacksonville International Airport**
- **1%** of visitors traveled via bus/motor coach

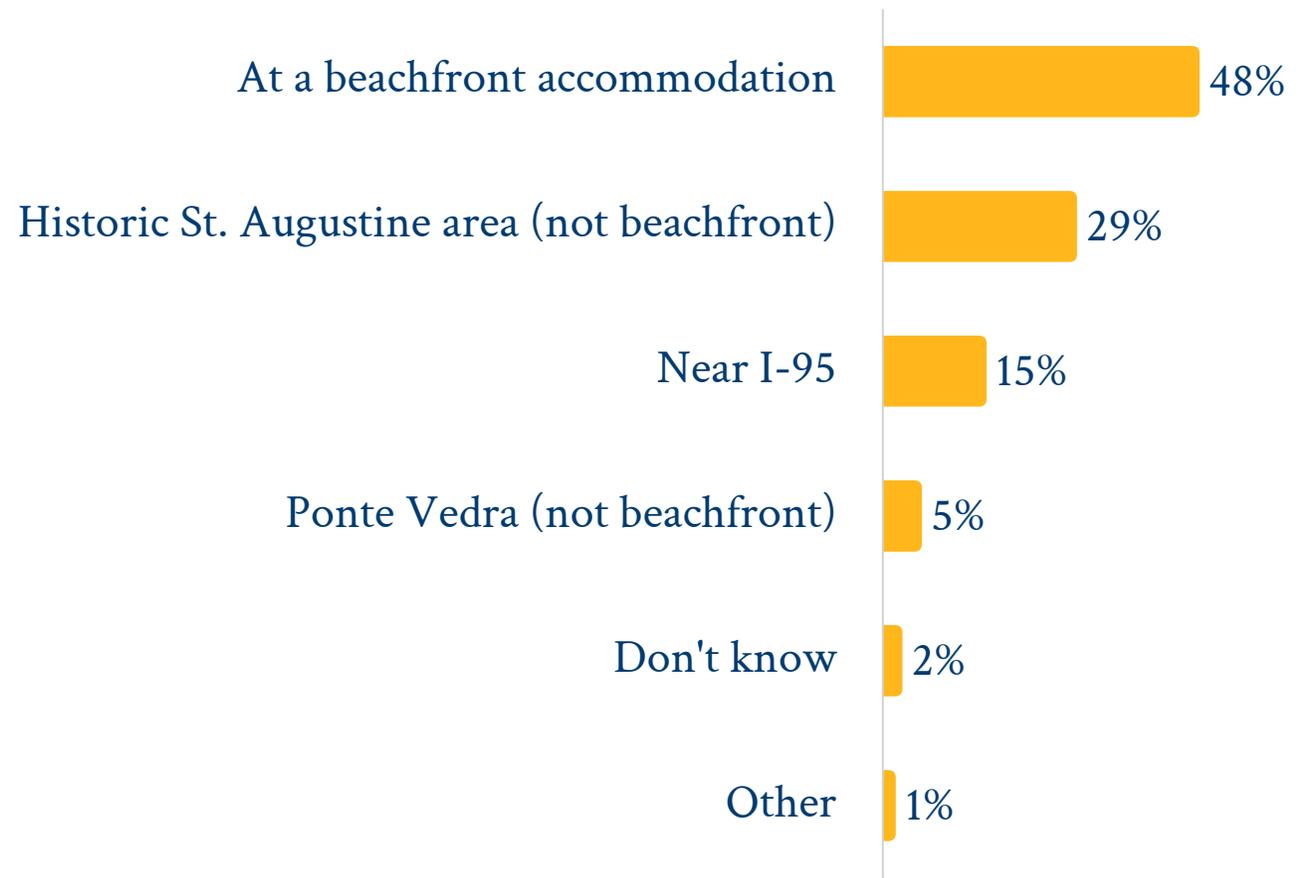


ST. AUGUSTINE
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ACCOMMODATION LOCATION

CY 2025

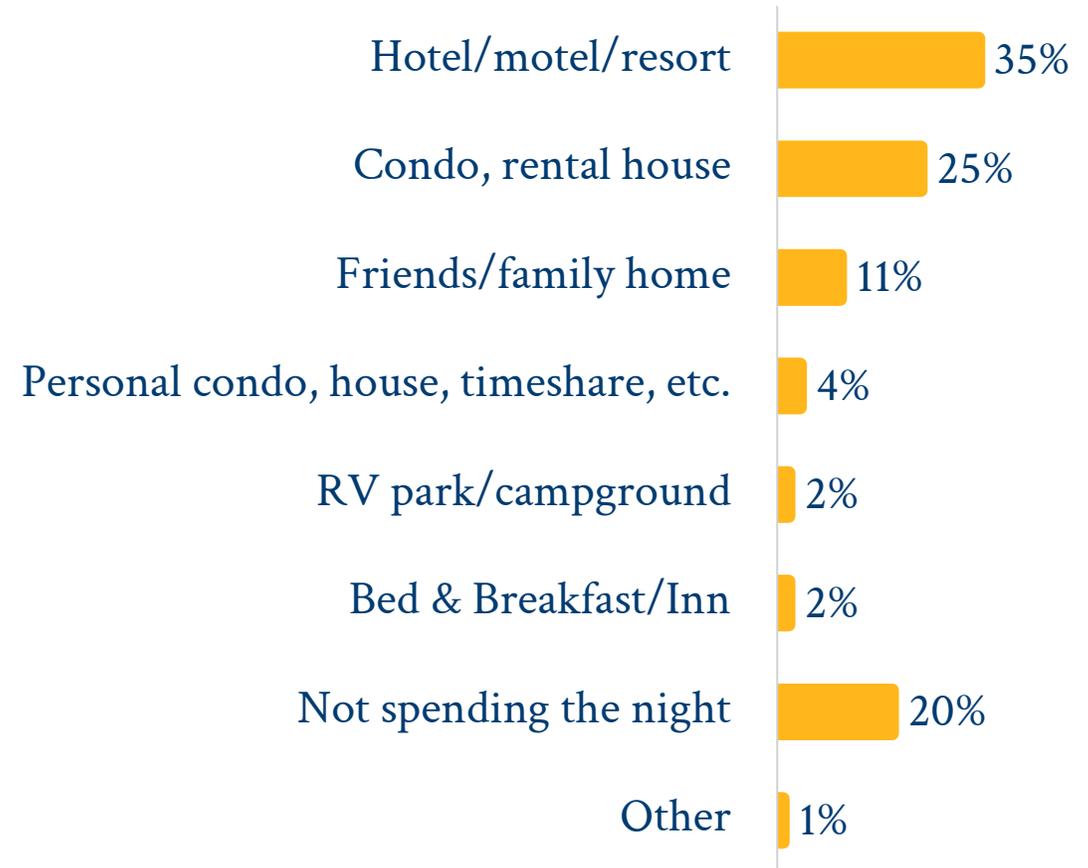
- **Nearly half** of overnight visitors stayed at a **beachfront accommodation** in the St. Augustine/Ponte Vedra area
- **Nearly 3 in 10** overnight visitors stayed in the **Historic St. Augustine area**



ACCOMMODATION TYPE

CY 2025

- Nearly 2 in 3 visitors stayed overnight in **paid accommodations**¹ in the St. Augustine/Ponte Vedra area
- The average **length of stay**² was **4.0 nights**
- Visitors staying in **paid accommodations** stayed an average of **4.3 nights**



¹Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast.

²Includes visitors staying in paid accommodations, unpaid accommodations, and day trippers.



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ACCOMMODATION BOOKING

CY 2025

- **Over 2 in 5** overnight visitors booked **directly with the hotel/condo/RV park**
- **Over 1 in 3** overnight visitors booked their accommodations through a **vacation rental company (Airbnb, Vrbo, etc.)**

Directly with the hotel, condo, RV park, etc.

45%

Vacation rental company

35%

Online travel agency

19%

Other

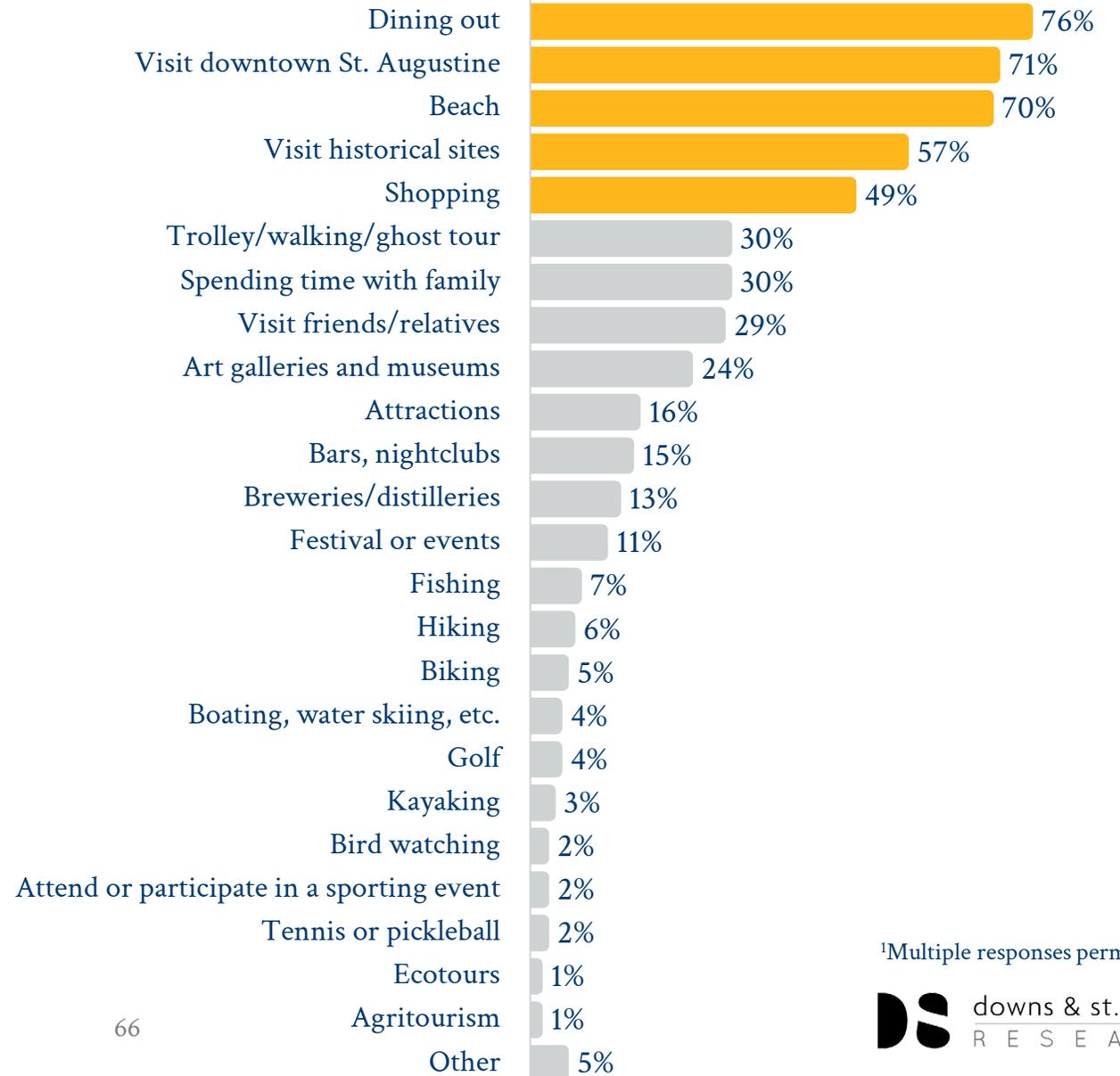
1%



VISITOR ACTIVITIES¹

CY 2025

- Top activities enjoyed by visitors include:
 - Dining out at restaurants
 - Visiting downtown St. Augustine
 - Visiting the beach
 - Visiting historical sites
 - Shopping



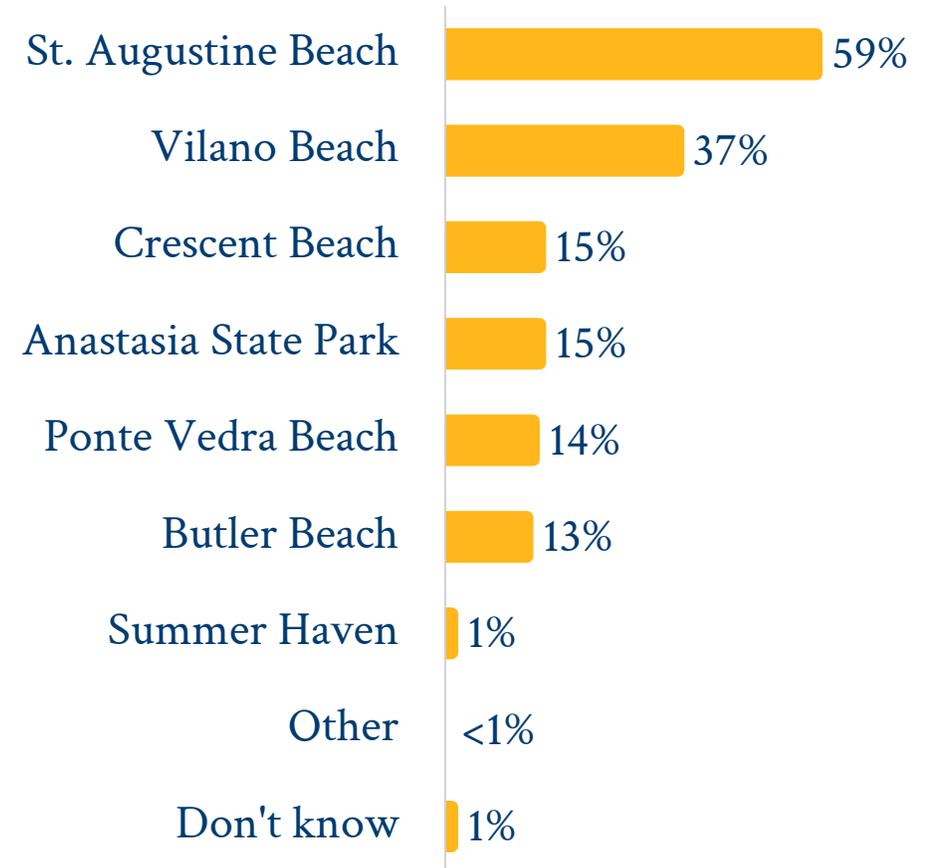
¹Multiple responses permitted.

BEACH VISITATION¹

CY 2025

Of the visitors who went to the beach:

- **Nearly 3 in 5** visitors visited **St. Augustine Beach**
- **Over 1 in 3** visitors visited **Vilano Beach**



¹Multiple responses permitted.
Out of visitors who selected "beach" as an activity.



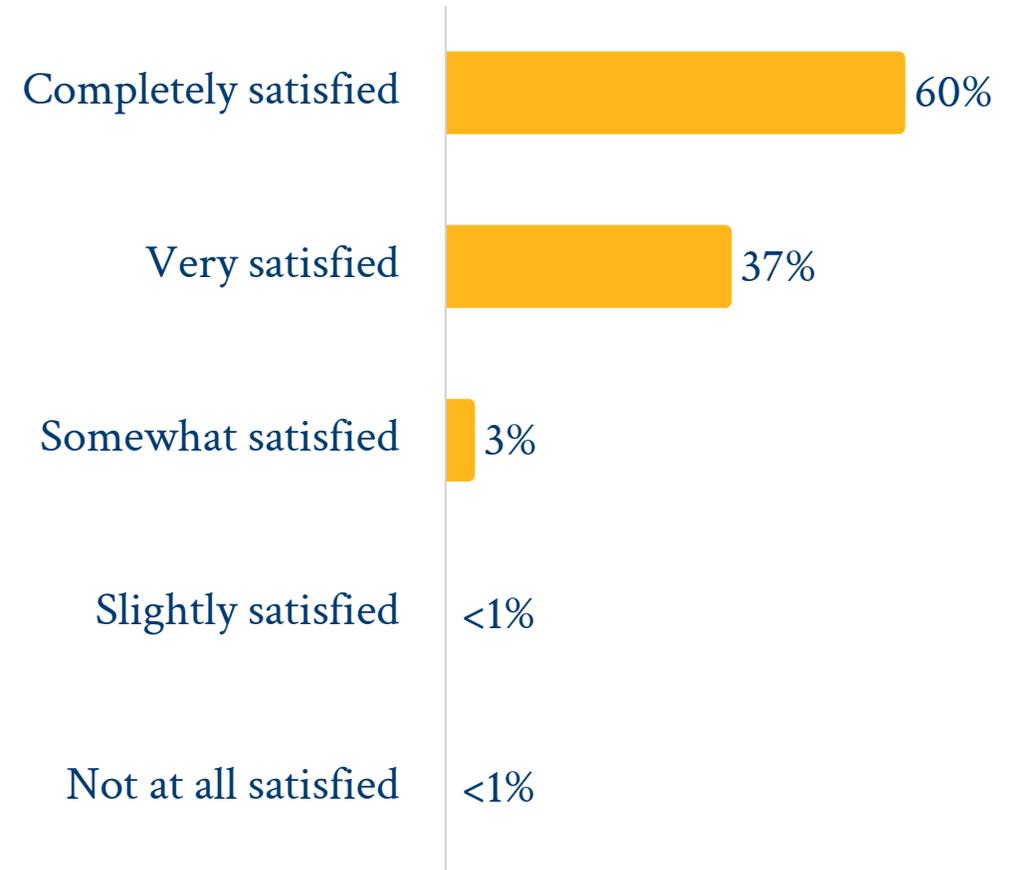
TRIP PLANNING CYCLE: POST-TRIP



VISITOR SATISFACTION

CY 2025

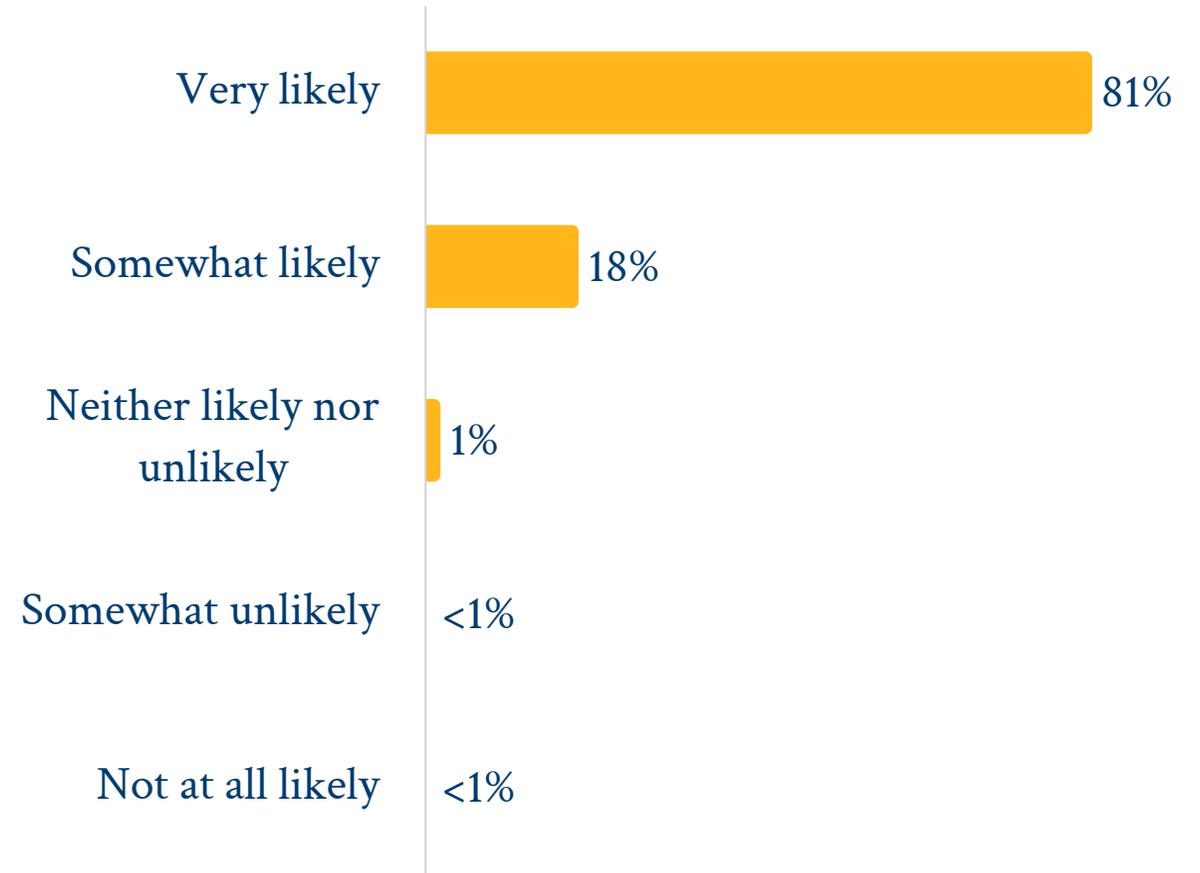
- **97%** of visitors were **satisfied** with their trip to the St. Augustine/Ponte Vedra area
- **3 in 5** were **completely satisfied** with their trip to the St. Augustine/Ponte Vedra area



RECOMMENDATION

CY 2025

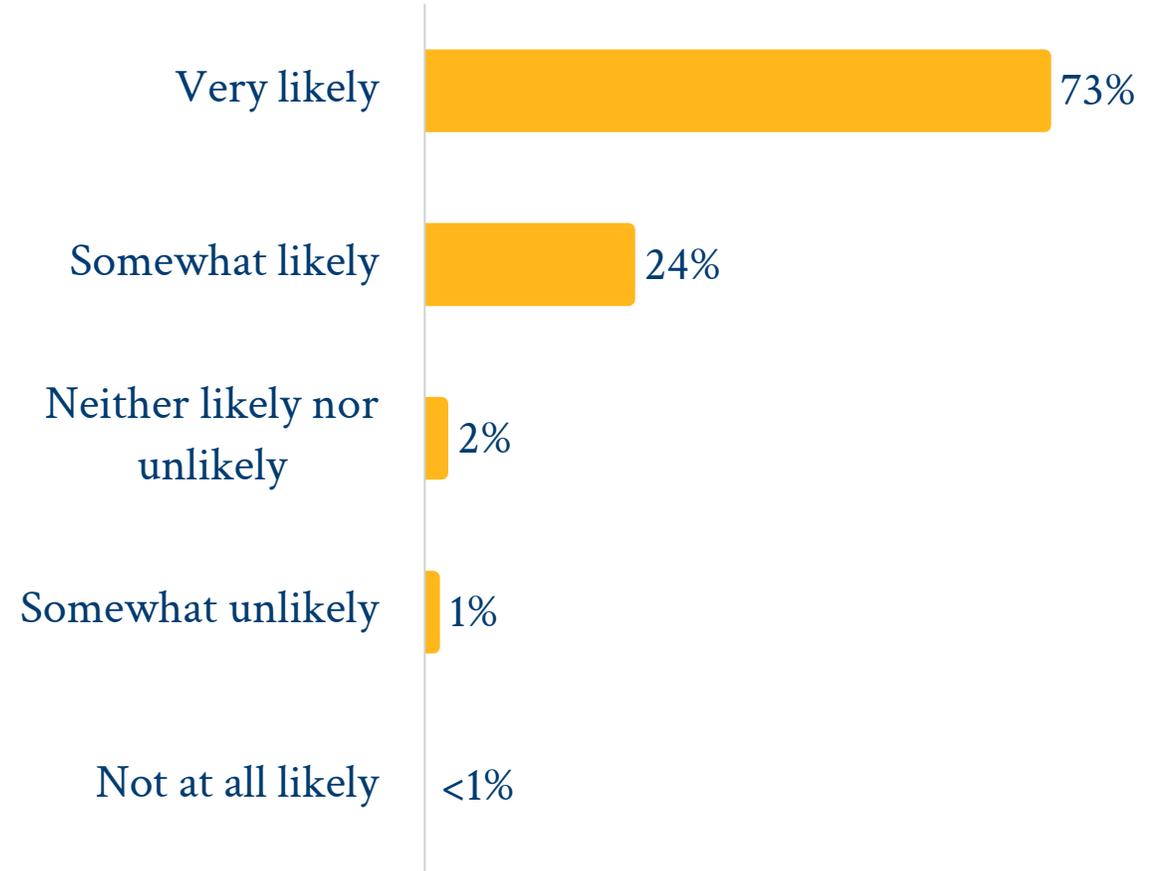
- Over 4 in 5 visitors are very likely to recommend the St. Augustine/Ponte Vedra area to others



LIKELIHOOD OF RETURNING

CY 2025

- **97%** of visitors are **likely** to return to the St. Augustine/Ponte Vedra area
- **Nearly 3 in 4** visitors are **very likely** to return to the St. Augustine/Ponte Vedra area
- The **3%** of visitors who said they are **unsure/unlikely to return** were asked why they were uncertain, the most common reason being they found **no reason to return**.



APPENDIX I: DATA COMPARISON OF FIRST-TIME AND REPEAT VISITORS



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FLORIDA'S HISTORIC COAST®

TRIP PLANNING & BOOKING CYCLE: OVERNIGHT VISITORS¹

CY 2025

PLANNING CYCLE	FIRST-TIME VISITOR	REPEAT VISITOR
Less than 1 month	43%	45%
1 to 3 months	36%	32%
4 to 6 months	14%	12%
Over 6 months	7%	11%
Median Days	45 days prior to visit	42 days prior to visit

BOOKING CYCLE	FIRST-TIME VISITOR	REPEAT VISITOR
Less than 1 month	49%	49%
1 to 3 months	35%	35%
4 to 6 months	9%	6%
Over 6 months	7%	10%
Median Days	32 days prior to visit	32 days prior to visit

¹Excludes day trippers.



TOP TRIP PLANNING SOURCES¹

CY 2025

ONLINE SOURCES	FIRST-TIME VISITOR	REPEAT VISITOR
Mapping websites	46%	32%
Destination websites ²	33%	34%
Video streaming services	28%	21%
Vacation rental company	28%	25%
Hotel websites/apps	28%	28%
Review website/app	26%	26%
Online travel agency	17%	19%
Online travel reviews, blogs, stories	16%	15%
St. Augustine/Ponte Vedra social media	15%	15%
Personal social media	15%	12%
None	14%	22%

OTHER SOURCES	FIRST-TIME VISITOR	REPEAT VISITOR
Friends/relatives	49%	34%
Visitor guide/brochure	22%	21%
None	28%	21%



¹Multiple responses permitted.

²Includes VisitStAugustine.com, FloridasHistoricCoast.com, and HistoricCoastCulture.com.



ADVERTISING RECALL

CY 2025

	FIRST-TIME VISITOR	REPEAT VISITOR
Recalled advertising	30%	43%

TOP AD SOURCES ¹	FIRST-TIME VISITOR ²	REPEAT VISITOR ²
Video streaming services	47%	39%
Friends/relatives	37%	41%
Television	33%	27%
Online travel reviews, blogs, stories	25%	25%
Visitor guide/brochure	24%	26%
St. Augustine/Ponte Vedra social media	24%	25%

	FIRST-TIME VISITOR ³	REPEAT VISITOR ³
Ad influenced visitation	28%	34%

¹Multiple responses permitted. Small sample size, interpret data with caution.

²Base: Visitors who recalled advertising

³Base: All visitors



VISITOR PROFILE

CY 2025

	FIRST-TIME VISITOR	REPEAT VISITOR
Travel Party Size ¹	3.4	3.4
Length of Stay ¹	3.8	4.0

	FIRST-TIME VISITOR	REPEAT VISITOR
Paid accommodations	75%	61%
Nonpaid accommodations	11%	15%
Day tripper	14%	24%

	FIRST-TIME VISITOR	REPEAT VISITOR
Traveled as a family	45%	46%
Traveled as a couple	36%	34%
Traveled with a group	13%	13%
Traveled by yourself	5%	6%
Traveled with business associates	1%	1%



¹Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.



TOP AREAS OF ORIGIN

CY 2025

REGION OF ORIGIN	FIRST-TIME VISITOR	REPEAT VISITOR
Florida	26.1%	50.2%
Southeast	26.4%	23.9%
Northeast	17.8%	10.0%
Midwest	10.9%	9.8%
West	7.4%	3.0%
International	11.4%	3.1%

STATE OF ORIGIN	FIRST-TIME VISITOR	REPEAT VISITOR
Florida	26.1%	50.2%
New York	7.2%	3.2%
Georgia	5.4%	7.8%
North Carolina	4.8%	2.6%
Tennessee	3.9%	3.5%
Texas	3.7%	2.0%
South Carolina	3.6%	3.9%
New Jersey	3.5%	2.6%
California	2.9%	1.1%
Virginia	2.2%	1.9%
Ohio	1.9%	1.9%
Michigan	1.7%	1.4%
Pennsylvania	1.7%	0.8%
Kentucky	1.5%	0.8%
Missouri	1.5%	0.9%



TOP AREAS OF ORIGIN

CY 2025

MARKETS	FIRST-TIME VISITOR	REPEAT VISITOR
New York City ¹	9.2%	4.5%
Orlando – Daytona Beach – Melbourne	7.5%	13.7%
Tampa – St. Petersburg	5.7%	4.9%
Miami – Fort Lauderdale	4.8%	5.3%
Atlanta	4.1%	4.2%
Jacksonville	3.6%	16.6%
Philadelphia	2.2%	1.1%
Raleigh – Durham	2.2%	0.8%
Dallas – Fort Worth	1.8%	1.1%
Charleston, SC	1.6%	1.5%
West Palm Beach – Fort Pierce	1.6%	1.5%
Washington, DC - Hagerstown	1.5%	1.4%

¹New York City market includes some areas in Connecticut, New Jersey, and Pennsylvania.



APPENDIX II: DATA COMPARISON BY VISITOR TYPE



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FLORIDA'S HISTORIC COAST®

VISITOR PROFILE

CY 2025

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Travel Party Size	3.4	3.2	3.3
Length of Stay	4.3	6.7	-

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
First-Time Visitor	45%	32%	28%
Repeat Visitor	55%	68%	72%

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Traveled as a family	46%	52%	42%
Traveled as a couple	37%	28%	32%
Traveled with a group	11%	12%	17%
Traveled by yourself	5%	8%	8%
Traveled with business associates	1%	<1%	<1%
Other	<1%	<1%	1%



TOP VISITOR ACTIVITIES¹

CY 2025

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Dining out	81%	73%	42%
Visit Downtown St. Augustine	77%	72%	36%
Beach	67%	71%	59%
Visit historical sites	65%	51%	23%
Shopping	55%	48%	19%
Trolley/walking/ghost tour	35%	26%	9%
Spending time with family	30%	45%	12%
Art galleries and museums	28%	23%	5%
Visit friends/relatives	27%	55%	10%

¹Multiple responses permitted.



QUARTERLY COMPARISONS



ST. AUGUSTINE
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FLORIDA'S HISTORIC COAST®

KEY PERFORMANCE INDICATORS

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Visitors	456,400	921,500	736,300	677,000	2,791,200
Direct Spending	\$489,468,100	\$418,062,900	\$347,325,300	\$338,620,700	\$1,593,477,000
Room Nights ¹	675,910	638,290	539,140	517,170	2,370,510
TDT ²	\$6,838,174	\$6,711,074	\$5,336,023	\$5,763,786	\$24,649,055

¹ Source: Smith Travel Research, Key Data and Department of Business and Professional Regulation.

² Source: St. Johns County Tourist Development Council.



LODGING METRICS

CY 2025

COMBINED LODGING METRICS	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Occupancy	67.9%	63.0%	51.9%	50.5%	58.3%
ADR	\$182.36	\$198.70	\$186.83	\$180.61	\$187.14
RevPAR	\$123.88	\$125.11	\$96.96	\$91.21	\$109.10

HOTEL METRICS ¹	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Occupancy	69.9%	66.6%	54.6%	62.0%	63.2%
ADR	\$187.75	\$171.52	\$151.95	\$177.02	\$171.99
RevPAR	\$131.21	\$114.18	\$82.96	\$109.79	\$108.76

VACATION RENTAL METRICS ²	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Occupancy	64.3%	56.3%	46.5%	28.9%	49.0%
ADR	\$172.46	\$248.13	\$249.17	\$187.35	\$214.44
RevPAR	\$110.89	\$139.81	\$115.86	\$54.19	\$105.06

Note: Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the **ADR of vacation rentals may appear inflated** in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.



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DAILY TRAVEL PARTY SPEND¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Accommodations	\$118	\$124	\$124	\$123	\$123
Restaurants	\$93	\$107	\$110	\$111	\$107
Groceries	\$37	\$26	\$19	\$21	\$25
Shopping	\$63	\$44	\$45	\$51	\$49
Entertainment	\$80	\$58	\$88	\$78	\$74
Transportation	\$56	\$27	\$23	\$23	\$30
Other	\$23	\$8	\$10	\$6	\$10
Spend per Travel Party per Day	\$470	\$394	\$419	\$413	\$417

¹Spending includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.



TOTAL TRAVEL PARTY SPEND

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Accommodations	\$705	\$445	\$456	\$423	\$486
Restaurants	\$559	\$384	\$404	\$382	\$422
Groceries	\$224	\$93	\$69	\$73	\$98
Shopping	\$380	\$158	\$166	\$174	\$194
Entertainment	\$480	\$207	\$325	\$267	\$295
Transportation	\$334	\$97	\$86	\$78	\$117
Other	\$135	\$29	\$36	\$20	\$41
Spend per Travel Party per Trip	\$2,817	\$1,413	\$1,542	\$1,417	\$1,653

¹Spending includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.



VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE: OVERNIGHT VISITORS¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Less than 1 month	30%	39%	52%	56%	45%
1 to 3 months	36%	38%	31%	36%	35%
4 to 6 months	15%	14%	9%	3%	10%
Over 6 months	19%	9%	8%	5%	10%
Median Planning Cycle	72	52	28	26	41

¹Excludes day trippers.



TRIP BOOKING CYCLE: OVERNIGHT VISITORS¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Less than 1 month	40%	43%	57%	57%	50%
1 to 3 months	29%	40%	30%	34%	34%
4 to 6 months	13%	9%	5%	3%	7%
Over 6 months	18%	8%	8%	6%	9%
Median Booking Cycle	56	43	25	25	30

¹Excludes day trippers.



TRIP PLANNING DESTINATIONS¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Only St. Augustine/Ponte Vedra area	70%	67%	79%	69%	71%
Orlando/theme park	8%	10%	7%	10%	9%
Daytona Beach area	11%	9%	5%	4%	7%
Florida Keys	5%	7%	5%	11%	7%
Savannah	6%	7%	6%	8%	7%
Tampa	5%	7%	4%	7%	6%
Miami/Fort Lauderdale	6%	7%	5%	7%	6%
Amelia Island	1%	6%	3%	3%	4%
Hilton Head	3%	4%	4%	3%	4%
Charleston	1%	3%	3%	7%	4%
Cocoa Beach/Cape Canaveral area	3%	4%	5%	1%	3%
Myrtle Beach	4%	1%	3%	3%	3%
Jekyll Island	1%	3%	5%	3%	3%
Other	6%	3%	3%	4%	4%

¹Multiple responses permitted.



ONLINE TRIP PLANNING SOURCES¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Mapping websites	24%	34%	49%	36%	37%
Destination websites ²	24%	21%	43%	46%	33%
Hotel websites/apps	24%	24%	34%	30%	28%
Vacation rental company	23%	20%	39%	24%	27%
Review website/app	22%	27%	29%	23%	26%
Video Streaming services	8%	23%	36%	22%	24%
Online Travel Agency	13%	15%	27%	18%	19%
Online travel reviews, blogs, stories	14%	14%	16%	18%	16%
St. Augustine/Ponte Vedra social media	10%	10%	21%	17%	15%
Personal social media	8%	9%	17%	17%	13%
AI websites/apps	2%	4%	1%	8%	4%
Rental Management Companies	5%	1%	4%	1%	2%
Accessibility/special needs travel resource sites	1%	3%	1%	1%	2%
Music streaming services	2%	<1%	<1%	2%	1%
Other	2%	6%	4%	2%	4%
None	28%	23%	14%	16%	20%



¹Multiple responses permitted.

²Includes VisitStAugustine.com, FloridasHistoricCoast.com, and HistoricCoastCulture.com.



OTHER TRIP PLANNING SOURCES¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Friends/relatives	42%	39%	41%	37%	40%
Previous visit	35%	28%	39%	33%	33%
Visitor guide/brochure	27%	12%	27%	22%	21%
Television	1%	6%	13%	7%	7%
Magazine	4%	2%	3%	3%	3%
Podcast	1%	5%	5%	1%	3%
Travel agent	4%	3%	<1%	4%	3%
Radio	1%	2%	4%	1%	2%
Other	<1%	<1%	<1%	1%	<1%
None	25%	31%	13%	23%	23%

¹Multiple responses permitted.



REASONS FOR VISITING¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Beach vacation/leisure trip	45%	55%	54%	35%	48%
Visit friends/relatives	33%	18%	21%	21%	22%
Visit historical sites	22%	21%	25%	13%	20%
Shopping	9%	9%	12%	5%	9%
Foodie/culinary	7%	10%	13%	4%	9%
Art galleries and museums	8%	7%	9%	3%	7%
Festival	10%	3%	8%	7%	6%
Girls/guys trip	6%	5%	11%	2%	6%
Wedding/honeymoon	3%	3%	6%	5%	4%
Anniversary	2%	3%	5%	5%	4%
Convenient stop on way to another destination	13%	3%	1%	3%	4%
Flagler College-related trip	2%	1%	6%	3%	3%
Fishing	1%	3%	5%	1%	3%
Company/government business	3%	2%	1%	2%	2%
Breweries/distilleries	4%	1%	1%	2%	2%
Golf	3%	1%	2%	1%	2%



¹Multiple responses permitted.
Reasons for visiting continues onto the next slide.



REASONS FOR VISITING¹ CONTINUED

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Kayaking	1%	2%	2%	1%	2%
Biking	2%	3%	3%	1%	2%
Hiking	3%	3%	2%	1%	2%
Boating, water skiing, etc.	2%	2%	2%	<1%	2%
Reunion	1%	1%	1%	2%	1%
Medical reasons	1%	<1%	1%	1%	1%
Sporting event	6%	<1%	<1%	1%	1%
Conference/convention/trade show	1%	3%	<1%	1%	1%
Bird watching	2%	2%	1%	1%	1%
Ecotours	<1%	1%	1%	1%	1%
Concert	1%	1%	1%	<1%	1%
Graduation	<1%	2%	<1%	<1%	1%
Performing arts	<1%	<1%	<1%	<1%	<1%
Tennis or pickleball	<1%	<1%	<1%	<1%	<1%
Agritourism	<1%	1%	<1%	<1%	<1%
Nights of Lights	-	-	-	32%	-
Other	11%	8%	6%	6%	7%



¹Multiple responses permitted.



ADVERTISING RECALL

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Recalled advertising	30%	27%	49%	46%	38%
Did not recall advertising	63%	69%	46%	48%	57%
Not sure	7%	4%	5%	6%	5%



ADVERTISING RECALL SOURCES¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Video streaming services	13%	43%	53%	44%	41%
Friend(s)/relative(s) social media	48%	27%	48%	44%	40%
Television	13%	35%	36%	20%	28%
Visitor guide/brochure	21%	14%	32%	39%	26%
Online travel reviews, blogs, stories	30%	14%	34%	27%	25%
St. Augustine/Ponte Vedra social media	28%	22%	15%	27%	22%
Online article	30%	17%	11%	18%	18%
Celebrity or influencer social media	5%	14%	13%	17%	13%
Ad on a website	27%	4%	8%	15%	11%
Podcast	6%	11%	8%	8%	9%
Magazine ad or article	8%	9%	4%	7%	7%
Weather app	10%	15%	1%	<1%	7%
Radio	2%	9%	6%	1%	5%
Music streaming services	5%	6%	1%	<1%	3%
Newspaper	6%	1%	0%	6%	3%
Other	3%	2%	2%	1%	2%

¹Multiple responses permitted.
Base: Visitors who recalled advertising.



ADVERTISING INFLUENCE

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Advertising influenced visit	22%	22%	43%	38%	31%
Advertising did not influenced visit	7%	4%	4%	7%	6%
Not sure if advertising influenced visit	1%	1%	2%	1%	2%
Did not recall advertising	70%	73%	51%	54%	62%



VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN

CY 2025

REGION OF ORIGIN	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Florida	34.2%	44.0%	38.9%	38.4%	39.7%
Southeast	20.6%	26.6%	28.2%	22.4%	25.1%
Northeast	20.2%	9.4%	13.8%	15.9%	13.9%
Midwest	15.6%	8.2%	8.4%	10.7%	10.0%
West	4.9%	4.4%	3.8%	3.8%	4.2%
International	4.5%	7.4%	6.9%	8.8%	7.1%

TOP INTERNATIONAL COUNTRIES	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
United Kingdom	0.1%	2.9%	1.9%	2.2%	1.9%
Canada	3.2%	1.1%	1.4%	1.6%	1.9%
Germany	0.0%	0.2%	0.9%	1.1%	0.5%
Brazil	0.0%	0.3%	0.8%	0.8%	0.4%
Other	1.2%	2.9%	1.9%	3.1%	2.4%



TOP ORIGIN STATES¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Florida	34.2%	44.0%	38.9%	38.4%	39.7%
Georgia	5.7%	9.5%	8.0%	3.7%	7.1%
New York	5.2%	2.8%	4.8%	6.5%	4.6%
North Carolina	2.7%	3.8%	4.9%	3.4%	3.8%
Tennessee	1.4%	3.3%	4.9%	3.8%	3.5%
South Carolina	2.7%	3.3%	3.2%	4.5%	3.5%
New Jersey	2.5%	2.1%	3.8%	2.5%	2.7%
Texas	1.8%	1.9%	3.0%	3.2%	2.5%
Virginia	2.7%	2.4%	1.6%	1.8%	2.1%
Ohio	1.9%	2.1%	1.1%	2.1%	1.8%
California	0.8%	2.2%	2.0%	1.3%	1.7%
Michigan	4.3%	1.6%	0.6%	0.8%	1.6%
Illinois	1.8%	0.5%	1.5%	1.6%	1.2%
Pennsylvania	2.5%	0.9%	0.6%	1.5%	1.2%
Missouri	0.6%	1.1%	2.2%	0.7%	1.2%

¹Origin states continue onto the next slide.



TOP ORIGIN STATES CONTINUED

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Maryland	2.6%	0.9%	0.8%	0.9%	1.1%
Connecticut	1.1%	0.5%	1.3%	1.8%	1.1%
Massachusetts	2.5%	0.8%	0.8%	1.0%	1.1%
Alabama	1.8%	0.7%	1.0%	1.0%	1.0%
Kentucky	1.2%	0.8%	1.1%	0.6%	0.9%
Indiana	1.2%	1.0%	0.2%	1.2%	0.9%
Minnesota	1.4%	0.1%	0.2%	1.7%	0.7%
West Virginia	0.6%	0.7%	1.0%	0.5%	0.7%
Wisconsin	1.3%	0.3%	0.3%	1.1%	0.7%
Washington	0.3%	0.5%	0.9%	0.5%	0.6%
Maine	0.5%	0.6%	0.5%	0.6%	0.6%
Colorado	1.3%	0.1%	0.3%	0.9%	0.5%
Delaware	0.1%	0.4%	0.6%	0.6%	0.5%



TOP ORIGIN MARKETS¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Jacksonville	13.2%	15.9%	12.9%	8.6%	12.9%
Orlando-Daytona Beach-Melbourne	8.5%	10.5%	11.2%	9.4%	10.1%
New York City ²	4.0%	3.8%	8.8%	9.8%	6.6%
Miami-Fort Lauderdale	2.5%	4.2%	4.8%	6.4%	4.6%
Tampa-St. Petersburg	4.4%	5.2%	4.2%	4.2%	4.5%
Atlanta	3.1%	6.3%	4.1%	1.9%	4.1%
Gainesville	0.8%	4.0%	2.4%	3.4%	2.9%
Washington, DC-Hagerstown	2.9%	0.9%	1.5%	1.5%	1.6%
Philadelphia	1.0%	1.2%	1.7%	1.6%	1.4%
Charlotte	0.9%	1.5%	1.7%	1.4%	1.4%
Savannah	1.4%	1.8%	1.5%	0.9%	1.4%
West Palm Beach-Fort Pierce	1.3%	1.0%	1.2%	1.8%	1.3%
Charleston, SC	0.2%	1.3%	1.7%	1.8%	1.3%
Fort Myers-Naples	0.6%	1.1%	1.7%	1.7%	1.3%
Dallas-Fort Worth	0.9%	1.0%	1.8%	1.4%	1.3%



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PONTE VEDRA
FLORIDA'S HISTORIC COAST®

¹Origin markets continue onto the next slide.
²New York City market includes some areas in Connecticut, New Jersey, and Pennsylvania.

TOP ORIGIN MARKETS CONTINUED

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Raleigh-Durham	0.5%	1.3%	2.0%	1.3%	1.3%
Nashville	0.5%	1.5%	1.8%	0.9%	1.3%
Knoxville	0.4%	1.1%	1.2%	1.7%	1.2%
Tallahassee-Thomasville	2.8%	1.0%	0.6%	1.0%	1.2%
Boston	2.7%	0.7%	0.9%	1.0%	1.2%



TRAVEL PARTIES

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Traveled as a family	30%	47%	51%	50%	46%
Traveled as a couple	41%	33%	32%	37%	35%
Traveled with a group	17%	13%	10%	7%	11%
Traveled alone	11%	6%	7%	5%	7%
Traveled with business associates	1%	1%	<1%	1%	1%
Other	<1%	<1%	<1%	<1%	<1%

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Traveled with children ²	24%	37%	45%	41%	38%
Traveled without children ²	76%	63%	55%	59%	62%

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Number of People in Travel Party ¹	3.1	3.2	3.5	3.2	3.3

¹Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

²Children are defined as people under 18 years old.



AGE & GENDER

CY 2025

AGE ¹	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
18 to 24	9%	8%	6%	4%	7%
25 to 34	9%	17%	18%	18%	16%
35 to 44	19%	21%	24%	26%	23%
45 to 54	24%	16%	24%	27%	22%
55 to 64	19%	19%	17%	11%	16%
65 and older	20%	19%	11%	14%	16%
Median Age	50	47	46	46	47

GENDER ¹	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Female	52%	54%	50%	49%	51%
Male	48%	46%	50%	51%	49%
Gender-fluid/Non-binary	<1%	<1%	<1%	<1%	<1%

¹Age and gender of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



HOUSEHOLD INCOME

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Less than \$25,000	6%	7%	3%	5%	5%
\$25,000 to \$49,999	10%	8%	4%	2%	6%
\$50,000 to \$74,999	13%	14%	12%	8%	12%
\$75,000 to \$99,999	15%	13%	20%	20%	17%
\$100,000 to \$149,999	24%	29%	25%	27%	27%
\$150,000 to \$199,999	20%	17%	22%	20%	20%
\$200,000 to \$249,999	7%	7%	10%	10%	8%
\$250,000 or more	5%	5%	4%	8%	5%
Median Household Income	\$112,500	\$113,800	\$122,000	\$127,800	\$118,500



RACE/ETHNICITY¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
White/Caucasian	86%	82%	86%	83%	84%
Hispanic/Latino	9%	12%	15%	14%	13%
Black/African American	6%	8%	10%	7%	8%
Asian Indian/East Indian	1%	3%	4%	6%	4%
Asian/Pacific Islander	1%	2%	4%	5%	3%
Native American	1%	1%	<1%	2%	1%
Middle Eastern/Arabic/Persian	1%	<1%	<1%	<1%	<1%
Another option not listed here	<1%	2%	<1%	1%	1%

¹Multiple responses permitted

²Race/ethnicity of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



NEW & RETURNING VISITORS¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
First time visiting the area	31%	36%	38%	56%	40%
Visited 2-3 times	27%	30%	28%	20%	27%
Visited 4-5 times	13%	11%	17%	7%	12%
Visited 6-10 times	8%	7%	7%	5%	7%
Visited 11 or more times	21%	16%	10%	12%	14%



PRIMARY TRIP DESTINATION

CY 2025

PRIMARY TRIP DESTINATION	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
St. Augustine/Ponte Vedra area	87%	87%	96%	95%	91%
Other ¹	13%	13%	4%	5%	9% ²

¹Coded open-ended responses; multiple responses permitted.

²Among visitors whose primary destination was not the St. Augustine/Ponte Vedra area, top primary destinations included Orlando, Jacksonville, and Daytona.



VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Drive	76%	78%	80%	83%	80%
Jacksonville International Airport	10%	14%	18%	12%	14%
Orlando International Airport	7%	2%	1%	1%	2%
Daytona Beach International Airport	2%	1%	<1%	1%	1%
Orlando Sanford International Airport	2%	1%	<1%	1%	1%
Another airport	1%	1%	1%	1%	1%
Bus/motor coach	2%	1%	<1%	1%	1%
Boat/ferry	<1%	1%	<1%	<1%	<1%
Other transportation	<1%	1%	<1%	<1%	<1%



ACCOMMODATION LOCATION

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
At a beachfront accommodation	45%	43%	51%	51%	48%
Historic St. Augustine area (not beachfront)	33%	27%	29%	30%	29%
Near I-95	9%	18%	16%	13%	15%
Ponte Vedra (not beachfront)	4%	8%	3%	5%	5%
Don't know	5%	3%	1%	1%	2%
Other	4%	1%	<1%	<1%	1%



ACCOMMODATION TYPE

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Hotel/motel/resort	35%	35%	32%	37%	35%
Condo, rental house (Airbnb, Vrbo, etc.)	20%	22%	32%	27%	25%
Friends/family home	9%	9%	13%	14%	11%
Personal condo, house, timeshare, etc.	5%	3%	4%	2%	4%
RV park/campground	5%	1%	1%	2%	2%
Bed & Breakfast/Inn	4%	4%	1%	1%	2%
Not spending the night	22%	25%	17%	16%	20%
Other	<1%	1%	<1%	1%	1%

LENGTH OF STAY	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Paid Accommodations ¹	7.0	3.9	3.9	3.5	4.3
Nonpaid Accommodations ²	9.4	7.3	5.5	5.4	6.7
All Visitors ³	6.0	3.6	3.7	3.4	4.0

¹Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast.

²Visitors staying in a second home, timeshare, or with friends/relatives.

³Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.



ACCOMODATION BOOKING

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Directly with the hotel, condo, RV park, etc.	52%	53%	36%	41%	45%
Vacation rental company	28%	27%	46%	37%	35%
Online travel agency	19%	18%	17%	22%	19%
Other	1%	2%	1%	<1%	1%



VISITOR ACTIVITIES¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Dining out	70%	79%	74%	77%	76%
Visit downtown St. Augustine	72%	72%	69%	73%	71%
Beach	62%	79%	70%	62%	70%
Visit historical sites	58%	60%	55%	55%	57%
Shopping	55%	50%	46%	48%	49%
Trolley/walking/ghost tour	24%	29%	23%	44%	30%
Spending time with family	38%	29%	26%	31%	30%
Visit friends/relatives	41%	24%	28%	30%	29%
Art galleries and museums	18%	24%	23%	29%	24%
Attractions	20%	16%	16%	12%	16%
Bars, nightclubs	32%	11%	13%	13%	15%
Breweries/distilleries	22%	12%	10%	11%	13%
Festival or events	22%	8%	11%	9%	11%
Fishing	6%	7%	8%	5%	7%
Hiking	10%	5%	5%	5%	6%
Biking	7%	4%	5%	3%	5%



VISITOR ACTIVITIES CONTINUED¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Boating, water skiing, etc.	5%	4%	4%	5%	4%
Golf	9%	2%	5%	2%	4%
Kayaking	5%	3%	4%	2%	3%
Bird watching	3%	1%	2%	3%	2%
Attend or participate in a sporting event	10%	<1%	1%	1%	2%
Tennis or pickleball	5%	1%	1%	1%	2%
Ecotours	1%	2%	1%	1%	1%
Agritourism	2%	3%	<1%	<1%	1%
Nights of Lights	-	-	-	41%	-
Other	4%	6%	6%	2%	5%



¹Multiple responses permitted.



BEACH VISITATION¹

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
St. Augustine Beach	65%	58%	60%	55%	59%
Vilano Beach	30%	37%	36%	44%	26%
Crescent Beach	24%	13%	11%	16%	11%
Anastasia State Park	14%	12%	21%	11%	11%
Ponte Vedra Beach	22%	11%	13%	14%	10%
Butler Beach	28%	10%	11%	9%	9%
Summer Haven	2%	2%	<1%	<1%	1%
Other	1%	<1%	<1%	1%	<1%
Don't know	2%	1%	<1%	<1%	1%

¹Multiple responses permitted.
Out of visitors who selected “beach” as an activity.



TRIP PLANNING CYCLE: POST-TRIP



VISITOR SATISFACTION

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Completely satisfied	62%	56%	60%	62%	60%
Very satisfied	33%	40%	38%	35%	37%
Somewhat satisfied	4%	4%	2%	3%	3%
Slightly satisfied	1%	<1%	<1%	<1%	<1%
Not at all satisfied	<1%	<1%	<1%	<1%	<1%



RECOMMENDATION

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Very likely	89%	83%	79%	76%	81%
Somewhat likely	10%	15%	20%	23%	18%
Neither likely nor unlikely	1%	2%	1%	1%	1%
Somewhat unlikely	<1%	<1%	<1%	<1%	<1%
Not at all likely	<1%	<1%	<1%	<1%	<1%



LIKELIHOOD OF RETURNING

CY 2025

	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	OCT – DEC 2025	CY 2025
Very likely	78%	74%	72%	70%	73%
Somewhat likely	20%	21%	26%	27%	24%
Neither likely nor unlikely	1%	3%	1%	2%	2%
Somewhat unlikely	<1%	2%	1%	1%	1%
Not at all likely	1%	<1%	<1%	<1%	<1%



ST. JOHNS COUNTY

Economic Impact & Visitor Tracking Study January 2025 to December 2025

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