ST. JOHNS COUNTY

Visitor Tracking and Beach Study
April to June 2025

TABLE OF CONTENTS

METHODOLOGY

- Interviews were completed in person and online with **797** visitors between April 1 and June 30, 2025

- Surveying locations included:

  - Butler Beach

  - Cresent Beach

  - Creston House Vacation Rentals at Butler Beach

  - Downtown St. Augustine

  - Downtown St. Augustine Visitor Information Center

  - Holiday Inn Express & Suites at Vilano Beach

  - Old Town Trolley Tour Stops

  - Ponte Vedra Beach

  - St. Augustine Beach

  - St. Augustine Food and Wine Festival

  - St. Augustine Lighthouse & Maritime Museum

  - St. Augustine Romanza Festival

  - Vilano Beach

EXECUTIVE ECONOMIC IMPACT SUMMARY

KEY PERFORMANCE INDICATORS
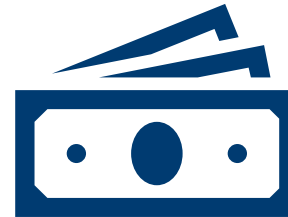
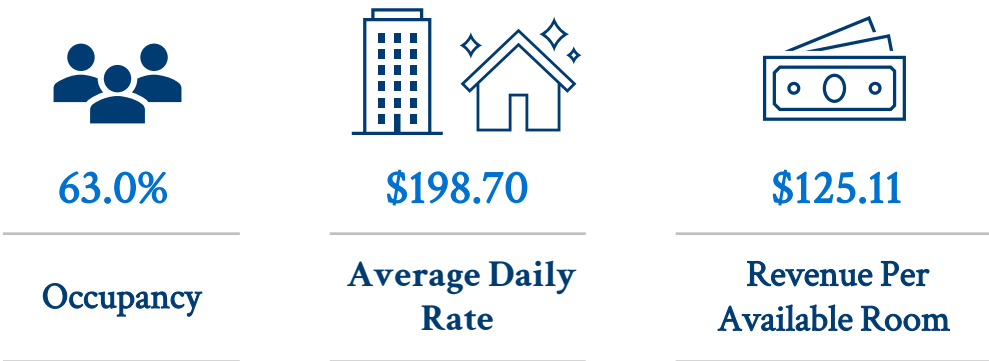|			
921,500	**638,300**	**$420,820,500**	**$6,849,000**
TOTAL VISITORS	**ROOM NIGHTS**	**DIRECT SPENDING**	**TOURISM DEVELOPMENT TAX**[1]

[1] Source: St. Johns County Tourism Development Council. June TDT is estimated.

LODGING METRICS

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

63.0%	$198.70	$125.11
Occupancy	Average Daily Rate	Revenue Per Available Room

HOTELS[1]

66.6%	$171.52	$114.18
Occupancy	Average Daily Rate	Revenue Per Available Room

VACATION RENTALS[2]

56.3%	$248.13	$139.81
Occupancy	Average Daily Rate	Revenue Per Available Room

ST. JOHNS COUNTY — FLORIDA AT FIRST SIGHT — EST. 1821

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

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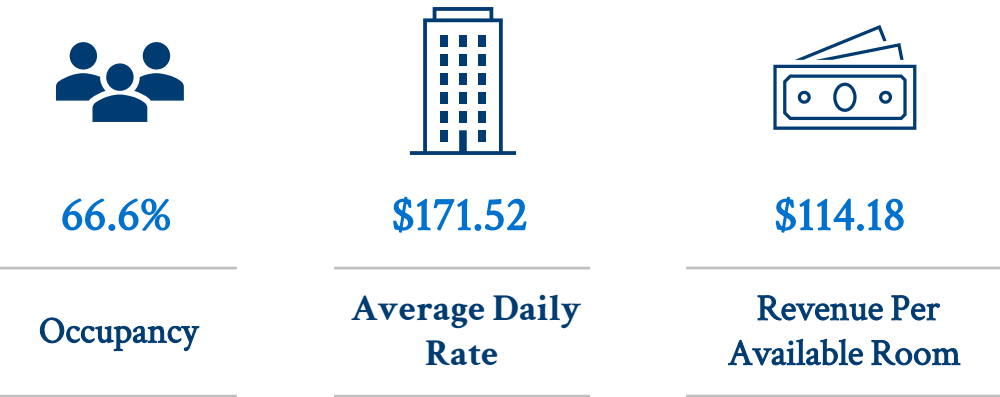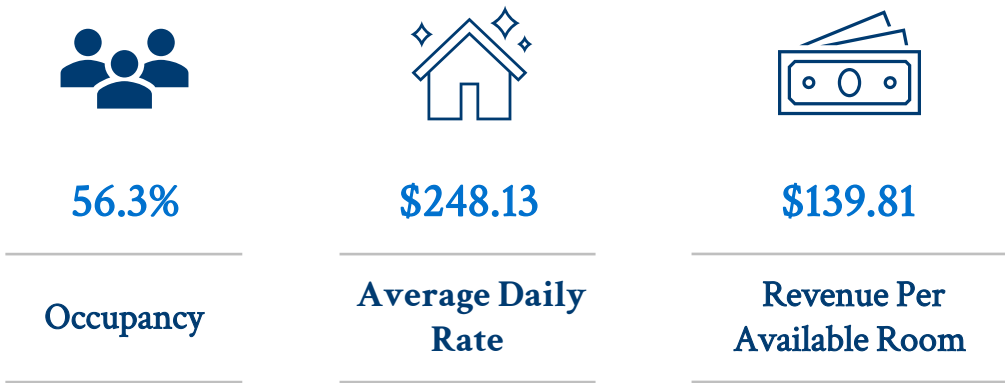
[1] Source: Smith Travel Research.
[2] Source: Key Data.

downs & st. germain RESEARCH

EXECUTIVE VISITOR PROFILE SUMMARY

47
Median Age

36%
First-time Visitor

3.4
Travel Party Size[2]

$113,800
Median Household Income

60%
Traveled without Children[1]

3.6
Length of Stay[2]

[1]Children are defined as people under 18 years old.
[2]Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

Paid accommodations[2]
63%

Day trippers
25%

Nonpaid accommodations[3]
12%

[1]See Appendix II for data comparisons by visitor type.
[2]Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast.
[3]Visitors staying in a second home, timeshare, or with friends/relatives.

TRIP PLANNING AND BOOKING CYCLE

APRIL TO JUNE 2025

The typical visitor **planned** their trip **52 days** in advance and **booked** their trip **43 days** in advance.

	Planning Window	Booking Window
Less than a month	39%	43%
1 to 3 months	38%	40%
4 to 6 months	14%	9%
Over 6 months	9%	8%

Planning Window | Booking Window
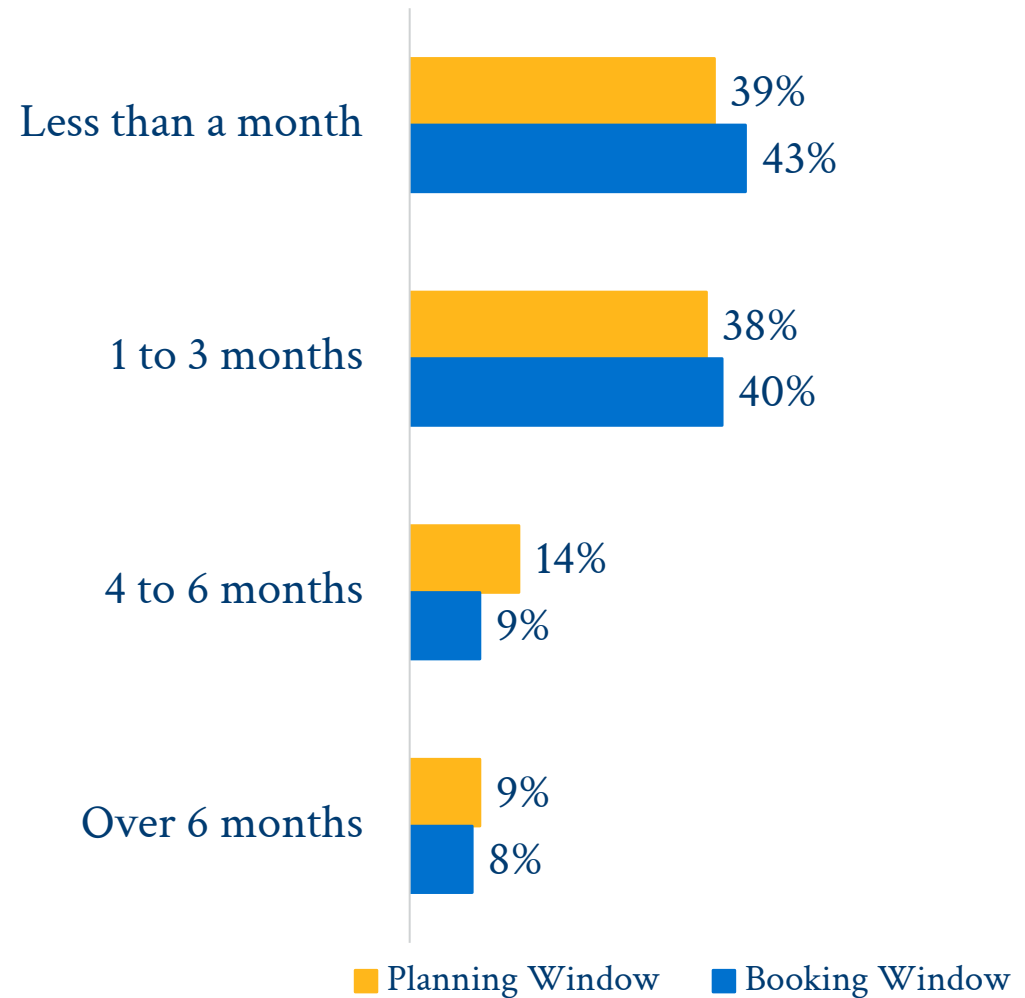
Beach vacation/leisure trip
55%

Visit historical sites
21%

Visit friends/relatives
18%

*Multiple responses permitted

TOP VISITOR ACTIVITIES

APRIL TO JUNE 2025

Dining out
79%

Beach
79%

Visit Downtown St. Augustine
72%

Visit historical sites
60%

Shopping
50%

*Multiple responses permitted

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BEACH RATINGS

- On average, **beach cleanliness**, **safety**, and **overall quality** was rated* as **very good** by visitors

- On average, **availability of beach amenities** and **parking availability at the beach** was rated* as **good** by visitors

Category	Rating
Beach cleanliness	4.8
Beach safety	4.7
Overall beach quality	4.7
Availability of beach amenities	4.1
Parking availability at the beach	3.7

*Visitors were asked to rate their experience on a scale from 1-5, with 1 being "Very Poor" and 5 being "Very Good".

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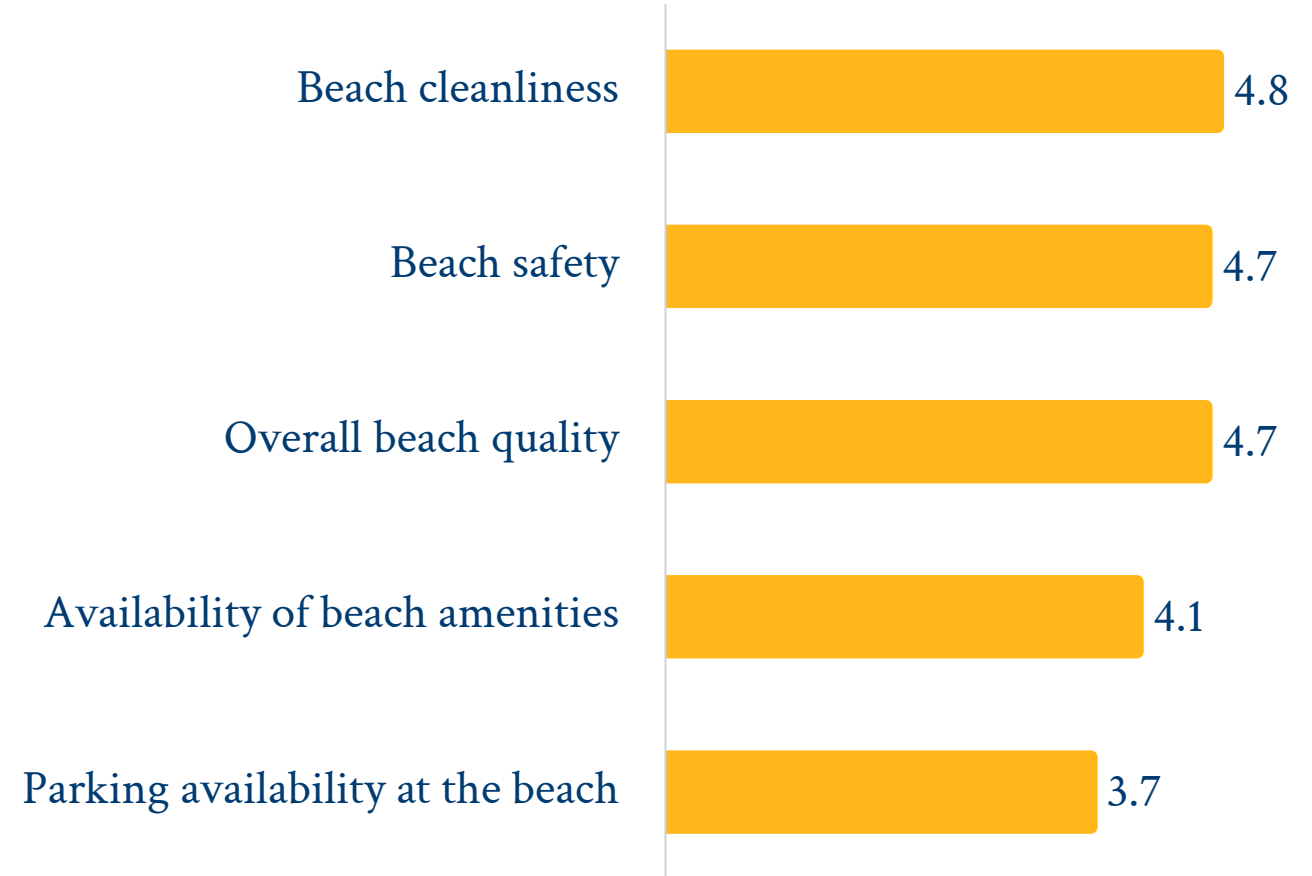
VISITOR PROFILE INSIGHTS

APRIL TO JUNE 2025

INSIGHTS	ACTIONABLE ITEMS
Visitors have short trip planning and booking windows.	Launch campaigns about 2 months in advance to match planning window.
Visitors come to the area for the beach, for the history, and to visit friends/relatives.	Continue focusing on the areas historic charm and serene beaches.
As beach visitation increased, the rating of parking availability at the beach decreased significantly.	Reach out to private properties within walking distance to the beach to ask if they have parking spots that could be designated for beach visitors (e.g., allowing parking outside of business hours).
Visitors mostly traveled as a family or couple. Although more visitors traveled with children this quarter compared last, most still traveled without children.	Investigate travel deterrents for families with children; consider kid-friendly promotions.
While most visitors are repeat travelers, over a third of visitors were visiting for the first time.	Incentivize referrals and return trips.
Compared to last quarter, visitors had a shorter length of stay which contributed to a decrease in spending.	Consider incentives (e.g., lodging discounts for staying x nights or more) to encourage longer length of stay.

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RESEARCH

VISITOR PROFILE DETAILED FINDINGS

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

- **Overnight visitors** to the St. Augustine/Ponte Vedra area have short trip **planning** windows, as **over 3 in 4** overnight visitors planned their trip to the St. Augustine/Ponte Vedra area **3 months or less in advance**

- On the other hand, **nearly 1 in 4 overnight visitors** planned their trip **at least 4 months in advance**

- The typical **overnight visitor** planned their trip **52 days (about 2 months)** in advance

Planning window	Percentage
Less than a month	39%
1 to 3 months	38%
4 to 6 months	14%
Over 6 months	9%

*Excludes day trippers.

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RESEARCH
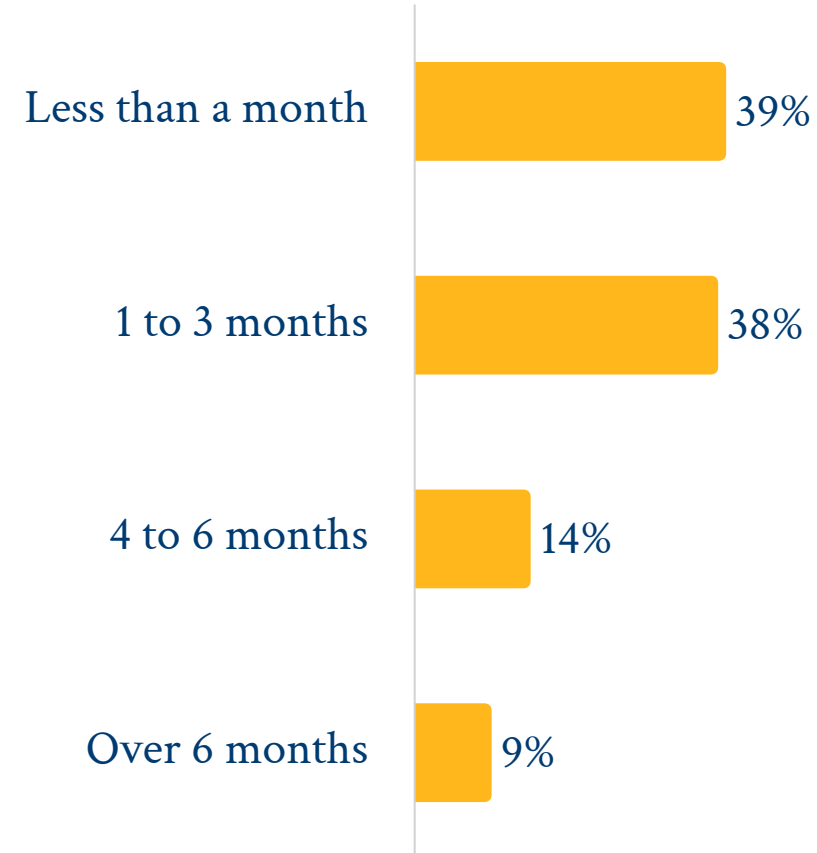
TRIP BOOKING CYCLE: OVERNIGHT VISITORS*

- **Overnight visitors** to the St. Augustine/Ponte Vedra area have short **booking** windows, as **over 4 in 5** overnight visitors booked their trip to the St. Augustine/Ponte Vedra area **3 months or less in advance**

- On the other hand, **1 in 6 overnight visitors** booked their trip **at least 4 months in advance**

- The typical **overnight visitor** booked their trip **43 days (a little over one month)** in advance

Booking window	Percentage
Less than a month	43%
1 to 3 months	40%
4 to 6 months	9%
Over 6 months	8%

*Excludes day trippers

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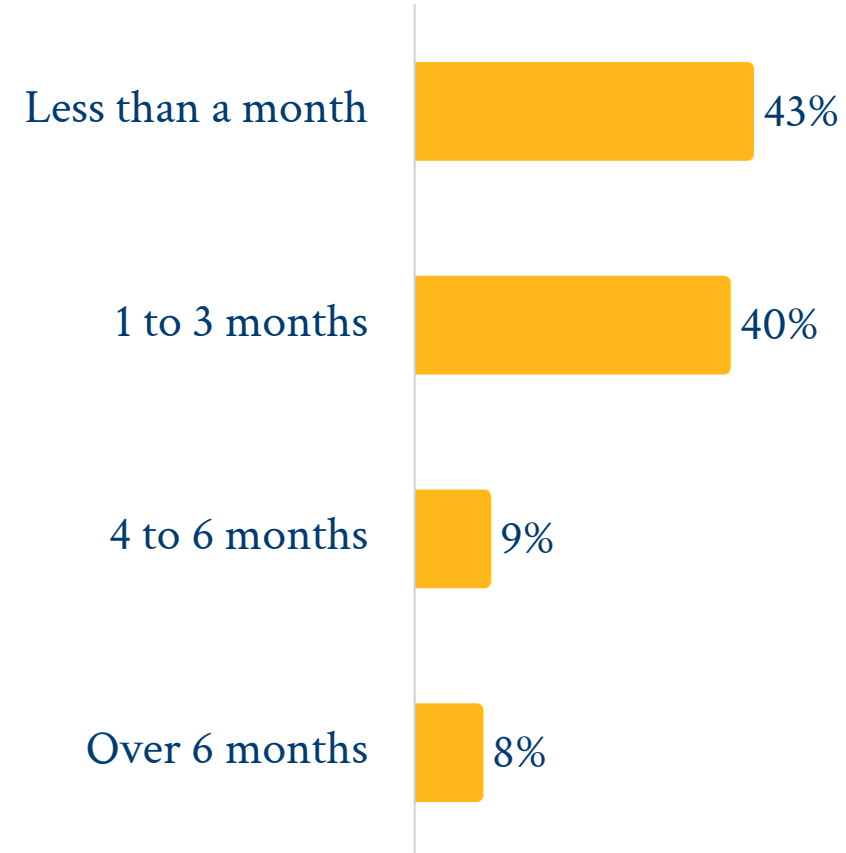
TRIP PLANNING DESTINATIONS

APRIL TO JUNE 2025

- **2 in 3** visitors **only considered the St. Augustine/Ponte Vedra area** when planning their trip
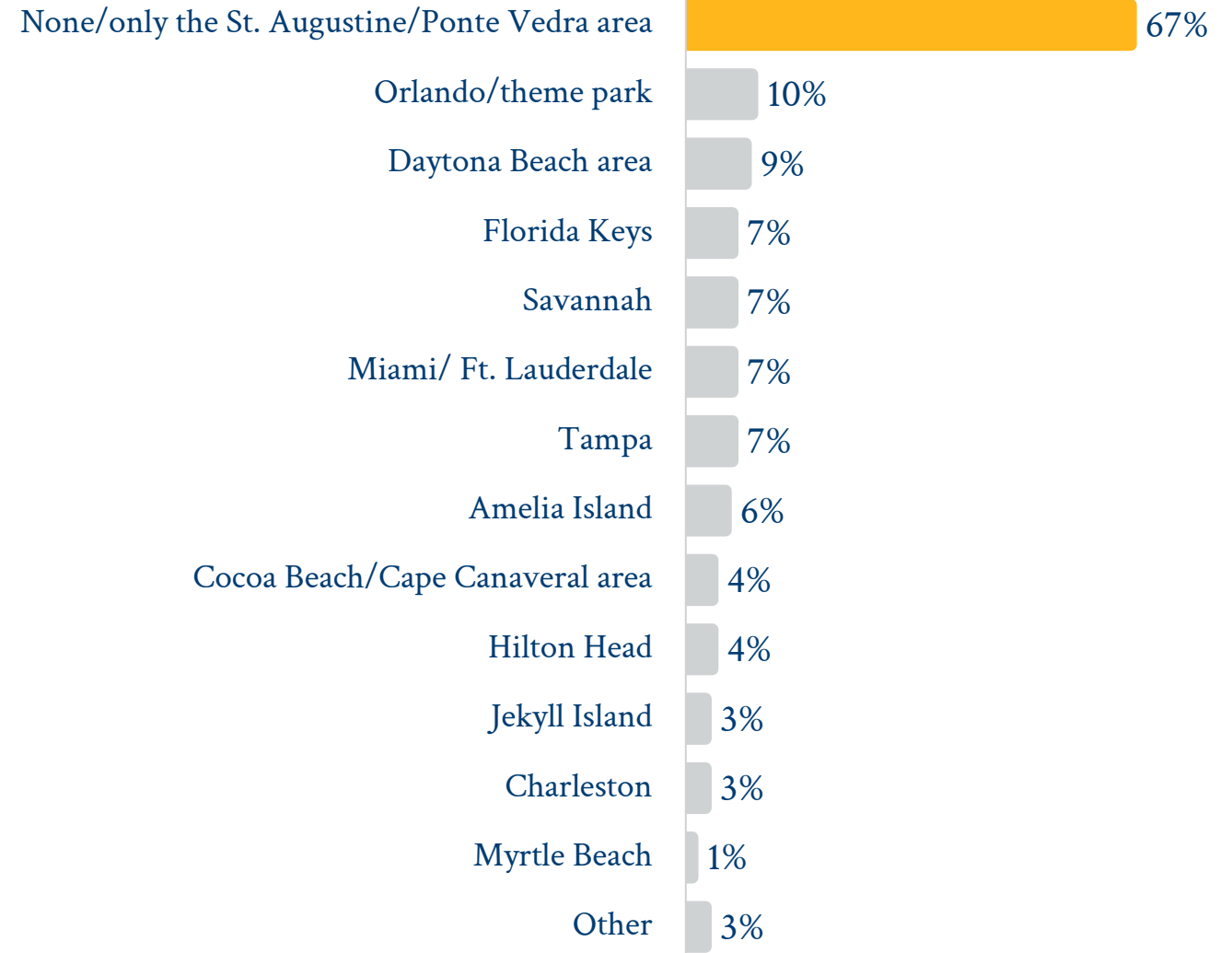
Destination	Percentage
None/only the St. Augustine/Ponte Vedra area	67%
Orlando/theme park	10%
Daytona Beach area	9%
Florida Keys	7%
Savannah	7%
Miami/ Ft. Lauderdale	7%
Tampa	7%
Amelia Island	6%
Cocoa Beach/Cape Canaveral area	4%
Hilton Head	4%
Jekyll Island	3%
Charleston	3%
Myrtle Beach	1%
Other	3%

*Multiple responses permitted

- **1 in 3** visitors used **mapping websites (Google maps, etc.)** as an online planning source for their trip to the St. Augustine/Ponte Vedra area

- **About 1 in 4** visitors planned their trip via a **review website/app (Tripadvisor, Google reviews, etc.), hotel website/app, and video streaming service (YouTube, Hulu, etc.)**

- **1 in 5** visitors used **destination websites* and a vacation rental company (Airbnb, Vrbo, etc.)** to plan their trip

Source	%
Mapping websites	34%
Review website/app	27%
Hotel website/app	24%
Video streaming services	23%
Destination websites*	21%
Vacation rental company	20%
Online travel agency	15%
Online travel reviews	14%
St. Augustine/Ponte Vedra social media	10%
Personal social media	9%
AI websites/apps	4%
Accessibility/special needs travel resource sites	3%
Rental management companies	1%
Music streaming services	<1%
Other	6%
None	23%

[1]Multiple responses permitted
*Includes VisitStAugustine.com, FloridasHistoricCoast.com, and HistoricCoastCulture.com

OTHER TRIP PLANNING SOURCES*

APRIL TO JUNE 2025

- **Nearly 2 in 5** visitors planned their trip to the St. Augustine/Ponte Vedra area through **friends/family**

- **Nearly 3 in 10** visitors planned their trip based on a **previous visit** to the St. Augustine/Ponte Vedra area

- **1 in 8** visitors used a **visitor guide/brochure** to plan their trip

Source	Percentage
Friends/family	39%
Previous visit	28%
Visitor guide/brochure	12%
Television	6%
Podcast	5%
Travel agent	3%
Magazine	2%
Radio	2%
Other	<1%
None	31%
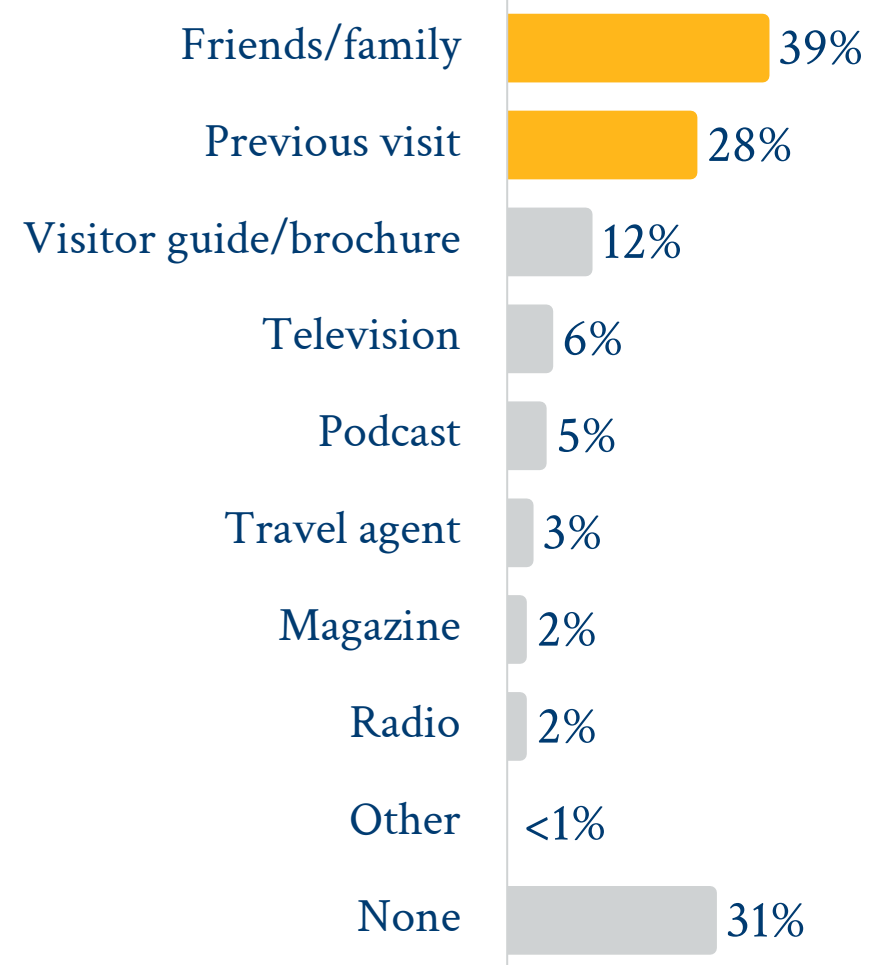
*Multiple responses permitted

REASONS FOR VISITING*

- **Over half** of visitors visited the St. Augustine/Ponte Vedra area for a **beach vacation**

- **Over 1 in 5** visitors came to **visit historical sites**

- **Nearly 1 in 5** visitors came to **visit friends/relatives**

Reason	%
Vacation/leisure trip (Beach)	55%
Visit historical sites	21%
Visit friends/relatives	18%
Foodie/culinary	10%
Shopping	9%
Art galleries and museums	7%
Girls/guys trip	5%
Wedding/honeymoon	3%
Hiking	3%
Fishing	3%
Anniversary	3%
Festival	3%
Convenient stop on way to another destination	3%
Biking	3%
Conference/convention/trade show	3%
Boating, water skiing, etc.	2%
Kayaking	2%
Company/government business	2%
Bird watching	2%
Graduation	2%
Flagler College-related trip	1%
Breweries/distilleries	1%
Ecotours	1%
Concert	1%
Agritourism	1%
Golf	1%
Reunion	1%
Other	8%

*Multiple responses permitted

Less than 1% of visitors stated their reason for visiting was the following: medical reasons, tennis or pickleball, sporting event, and performing arts.

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ADVERTISING RECALL

- **Over 1 in 4** visitors **recalled advertising** about the St. Augustine/Ponte Vedra area
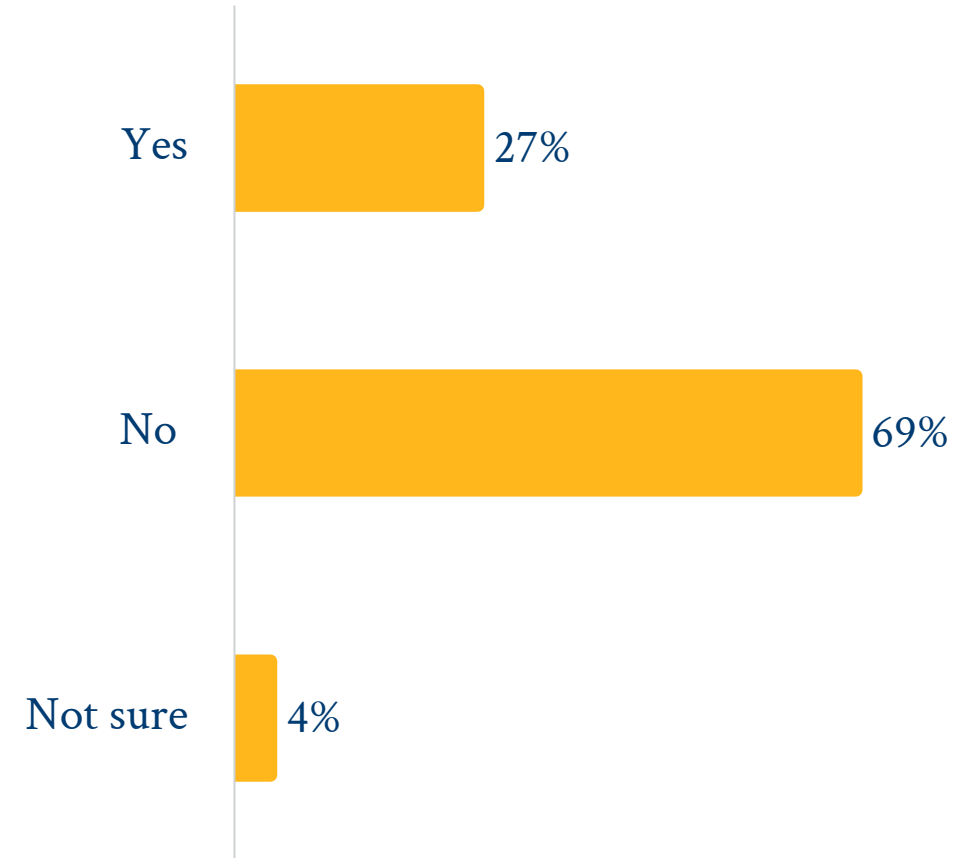
- This information **influenced 22%** of **all visitors** to visit the St. Augustine/Ponte Vedra area

Yes — 27%

No — 69%

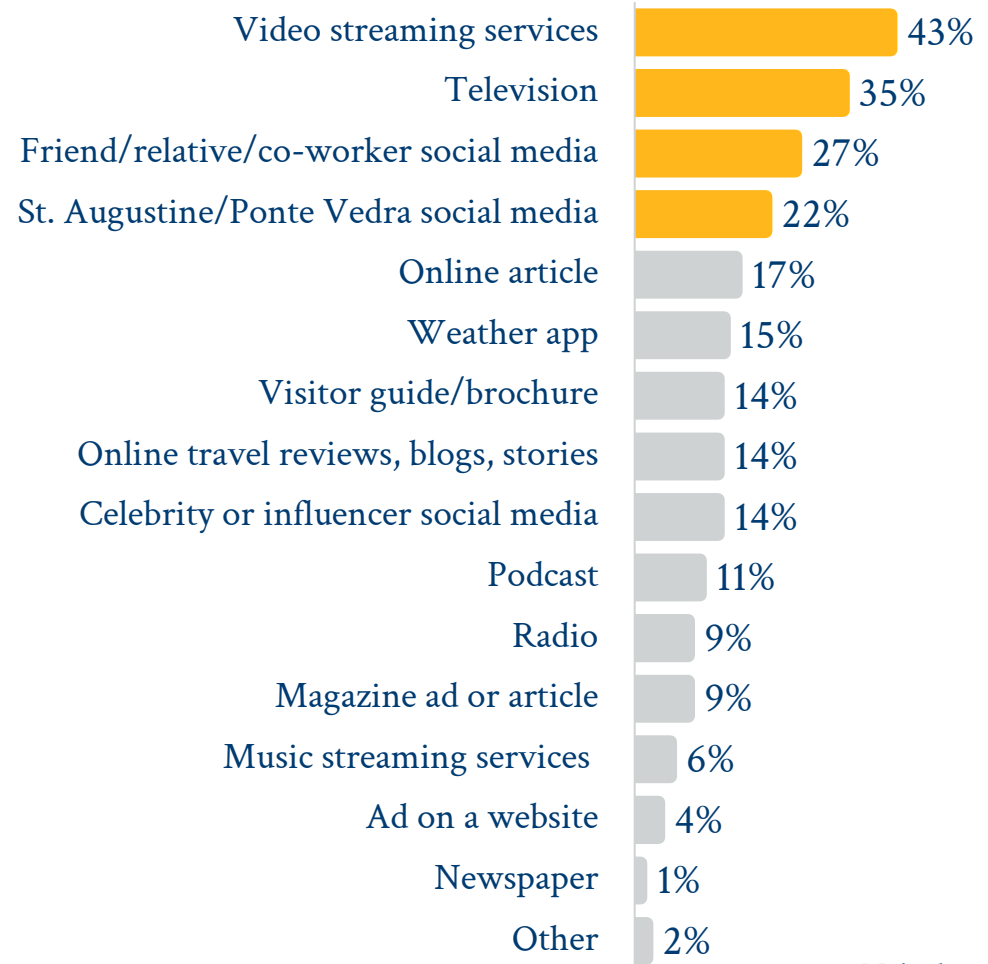Not sure — 4%

Base: **27%** of visitors who recalled advertising

Of the **27%** 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.)**

- **Over 1 in 3** noticed it on television

- **Over 1 in 4** noticed it on a **friend/relative/co-worker's social media**

- **Over 1 in 5** noticed it on **St. Augustine/Ponte Vedra social**

This information influenced **22% of all visitors to visit** the St. Augustine/Ponte Vedra area

Source	%
Video streaming services	43%
Television	35%
Friend/relative/co-worker social media	27%
St. Augustine/Ponte Vedra social media	22%
Online article	17%
Weather app	15%
Visitor guide/brochure	14%
Online travel reviews, blogs, stories	14%
Celebrity or influencer social media	14%
Podcast	11%
Radio	9%
Magazine ad or article	9%
Music streaming services	6%
Ad on a website	4%
Newspaper	1%
Other	2%

*Multiple responses permitted

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PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

REGION OF ORIGIN

Midwest
8%

Northeast
9%

West
5%

Florida
44%
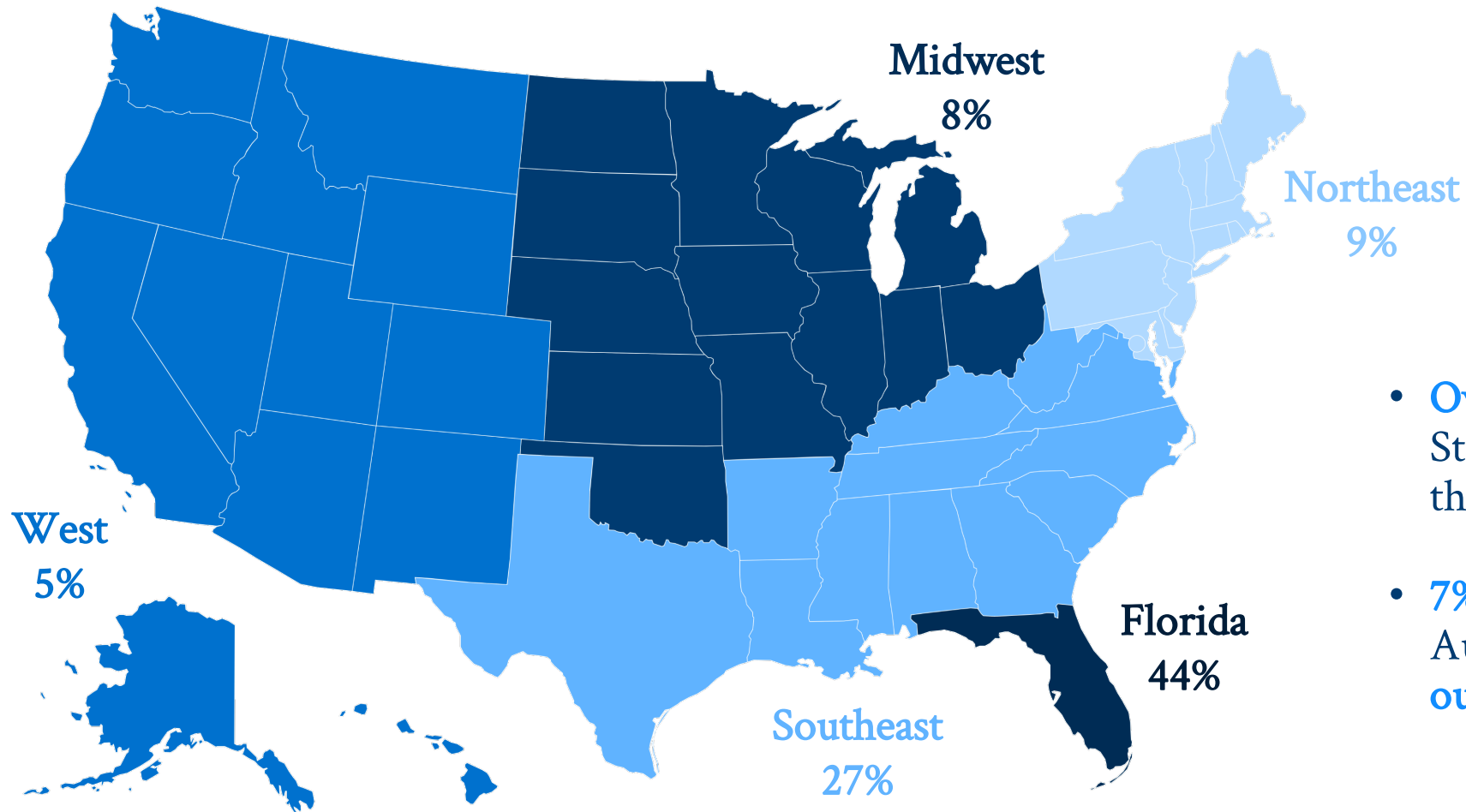
Southeast
27%

- **Over 7 in 10** visitors traveled to the St. Augustine/Ponte Vedra area from the **Southeast**, including Florida

- **7%** of visitors traveled to the St. Augustine/Ponte Vedra area from **outside of the U.S.***

*The majority of international visitors came from the United Kingdom (3%) and Canada (1%)

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State of Origin	Apr-Jun 2025
Florida	44%
Georgia	10%
North Carolina	4%
South Carolina	3%
Tennessee	3%
New York	3%
Virginia	2%
California	2%
New Jersey	2%
Ohio	2%
Texas	2%
Michigan	2%

79% of visitors came from **12** states
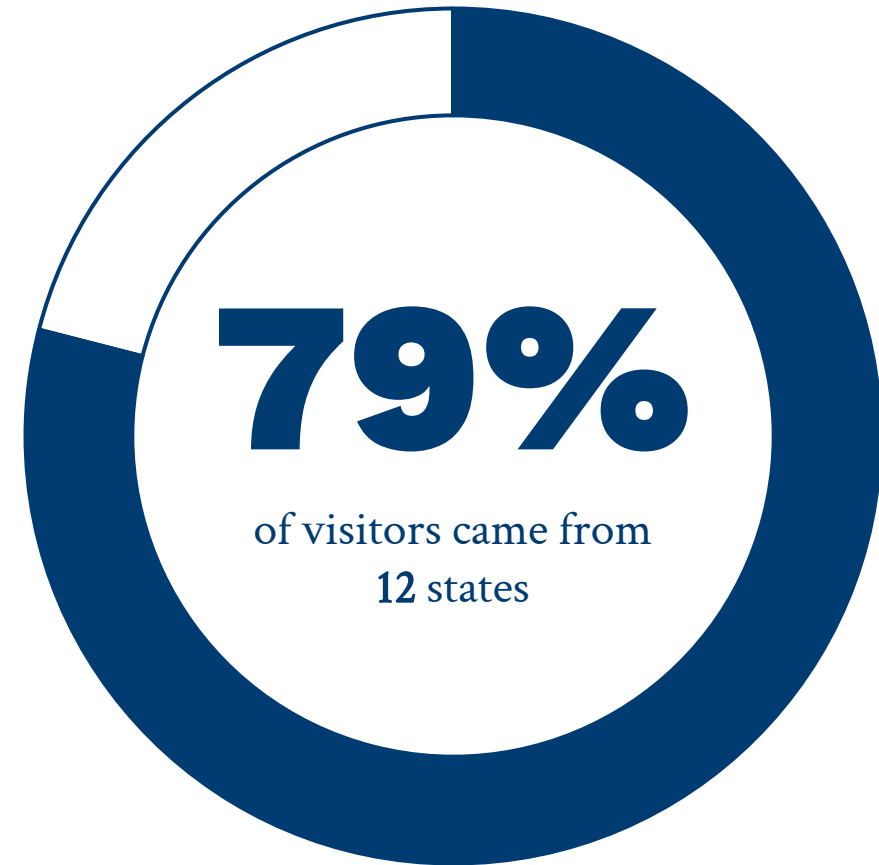
TOP ORIGIN MARKETS

APRIL TO JUNE 2025

Markets	Apr-Jun 2025
Jacksonville	16%
Orlando – Daytona Beach – Melbourne	11%
Atlanta	6%
Tampa – St. Petersburg	5%
Miami – Fort Lauderdale	4%
Gainesville	4%
New York[1]	4%
Savannah	2%
Charlotte	2%
Nashville	2%

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

55% of visitors came from **10 markets**
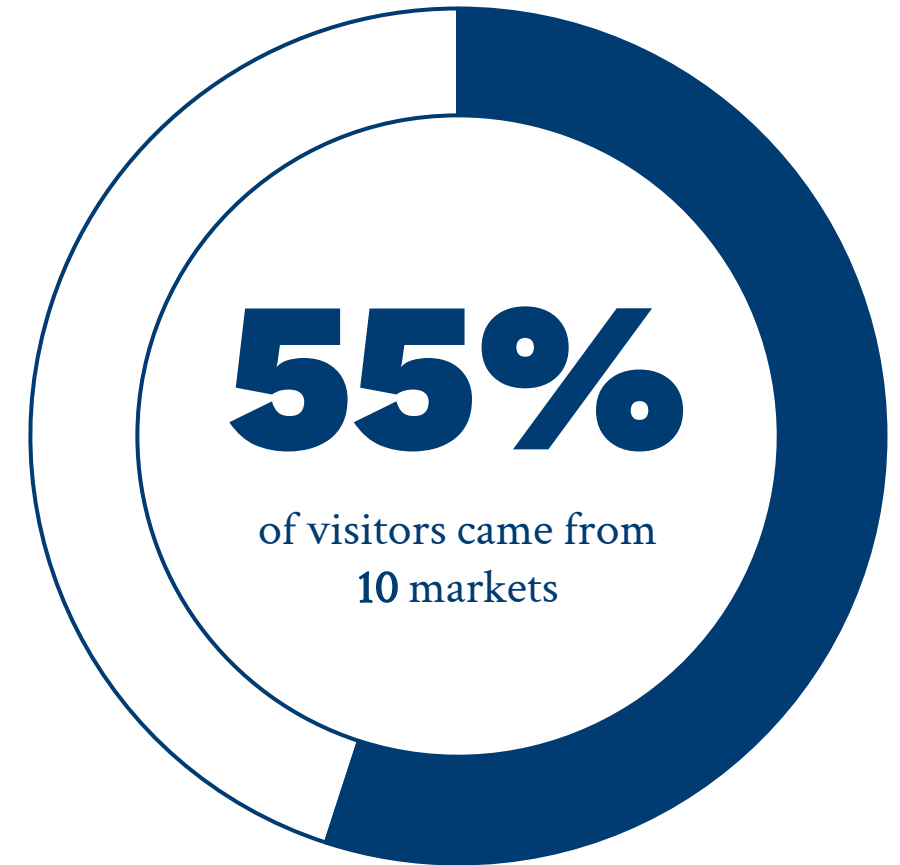
TRAVEL PARTIES

- **4 in 5** visitors traveled as a **couple** or a **family**

- **3 in 5** travel parties **did not include children** under 18 years old

- For all visitors, the typical travel party size was **3.4**

As a family — 47%
As a couple — 33%
With a group — 13%
By yourself — 6%
With business associates — 1%
Other — <1%

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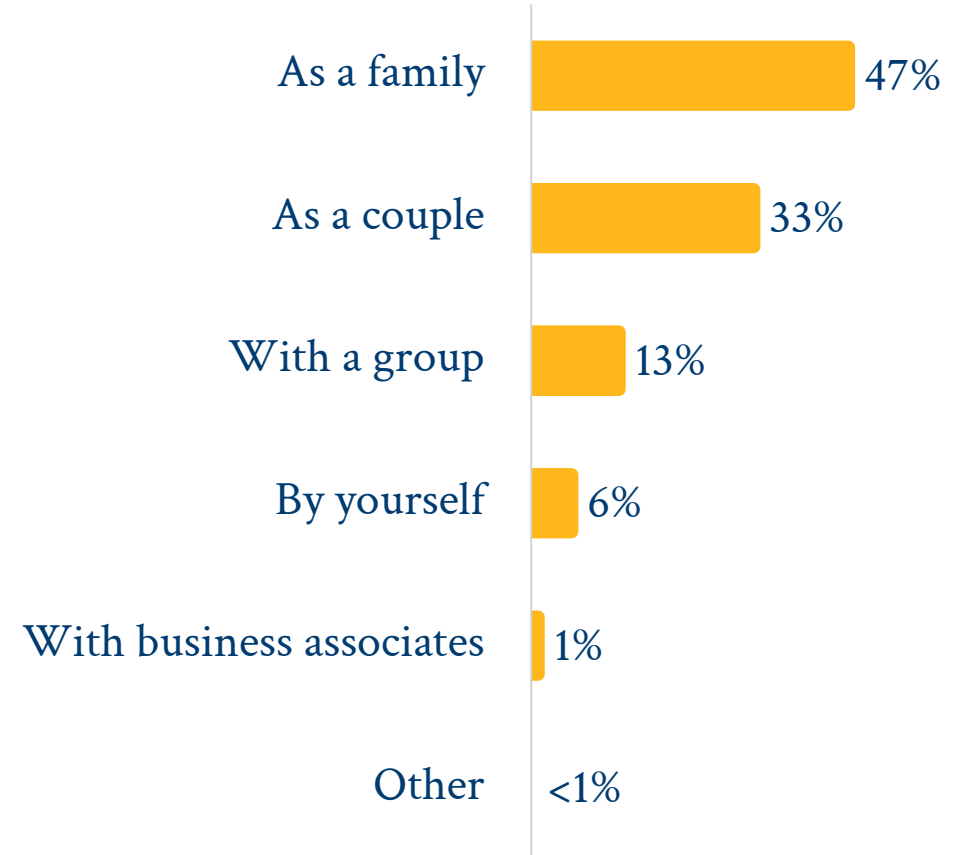
- The **median age** of visitors to the St. Augustine/Ponte Vedra area was **47**

Age	Percent
18 to 24	8%
25 to 34	17%
35 to 44	21%
45 to 54	16%
55 to 64	19%
65+	19%
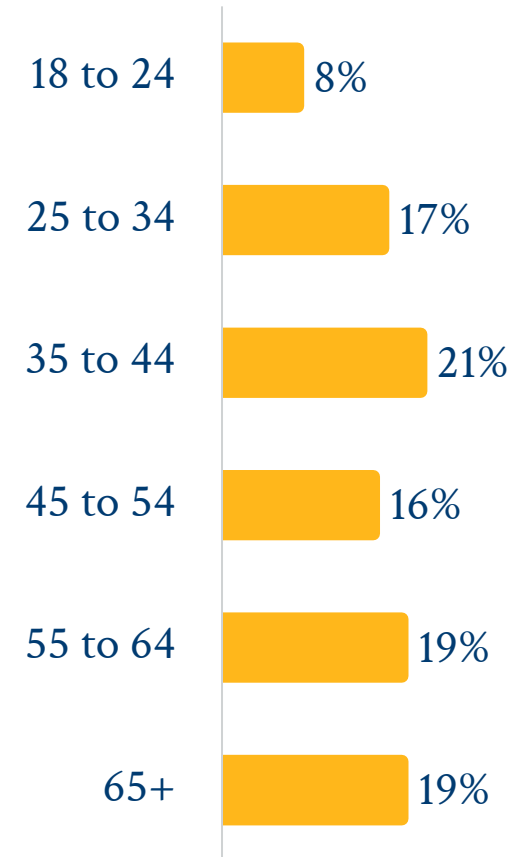
- Visitors to the St. Augustine/Ponte Vedra area had a **median household income of $113,800** per year

- **58%** of visitors had household incomes over **$100,000**

Income	Percentage
Less than $25,000	7%
$25,000 to $49,999	8%
$50,000 to $74,999	14%
$75,000 to $99,999	13%
$100,000 to $149,999	29%
$150,000 to $199,999	17%
$200,000 to $249,999	7%
$250,000 +	5%

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RESEARCH

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

White/Caucasian — 82%
Hispanic/Latino — 12%
Black/African American — 8%
Asian Indian/East Indian — 3%
Asian/Pacific Islander — 2%
Native American — 1%
Middle Eastern/Arabic/Persian — <1%
Other — 2%

*Multiple responses permitted

GENDER*
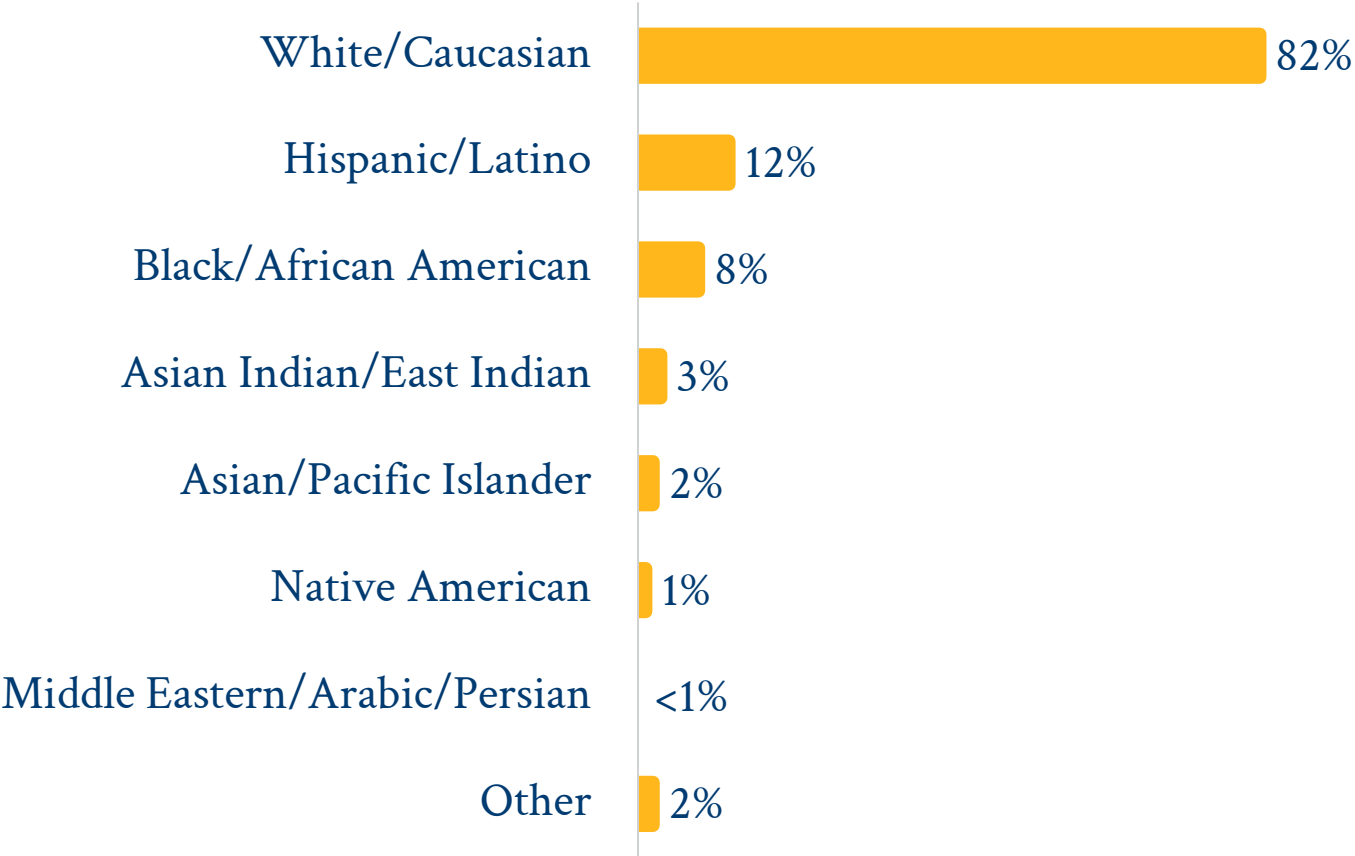
APRIL TO JUNE 2025

- **54%** of visitors to the St. Augustine/Ponte Vedra area were female

Gender-fluid/Non-binary
<1%

Male
46%

Female
54%
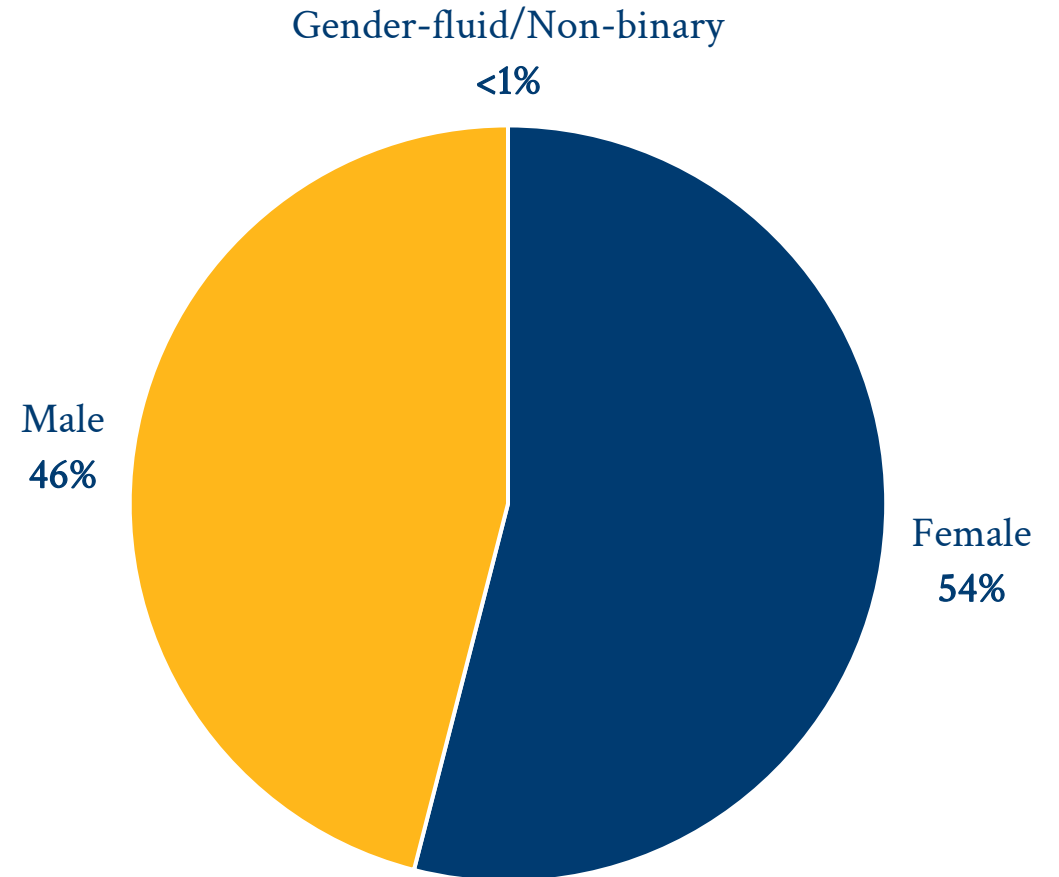
*May be influenced by visitor's willingness to complete a survey

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- **Over 1 in 3** visitors said this was their **first time visiting** the St. Augustine/Ponte Vedra area

- **Nearly 1 in 6** visitors were loyalists having visited **over 10 times**

This was my first time	36%
2-3	30%
4-5	11%
6-10	7%
11+	16%
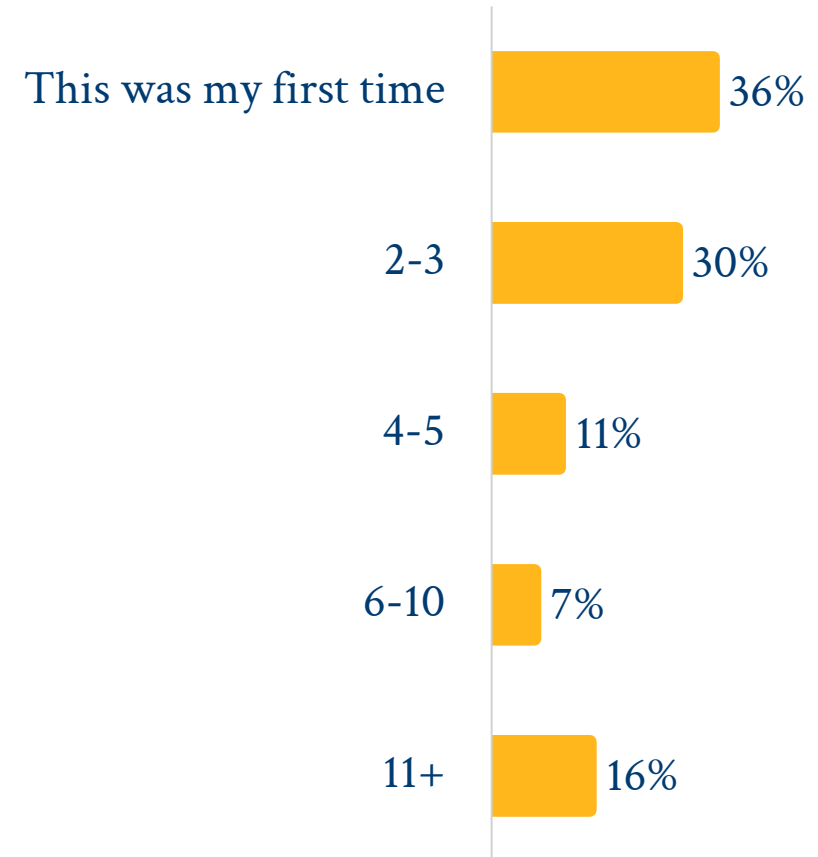
*See Appendix I for data comparison of first time and repeat visitors.

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- The St. Augustine/Ponte Vedra area was the primary destination for nearly 9 in 10 visitors

- Visitors whose primary destination was not the St. Augustine/Ponte Vedra area, the top primary destinations included Orlando, Jacksonville, Tampa, Daytona, and Savannah.*

Not primary destination
13%

Primary destination
87%
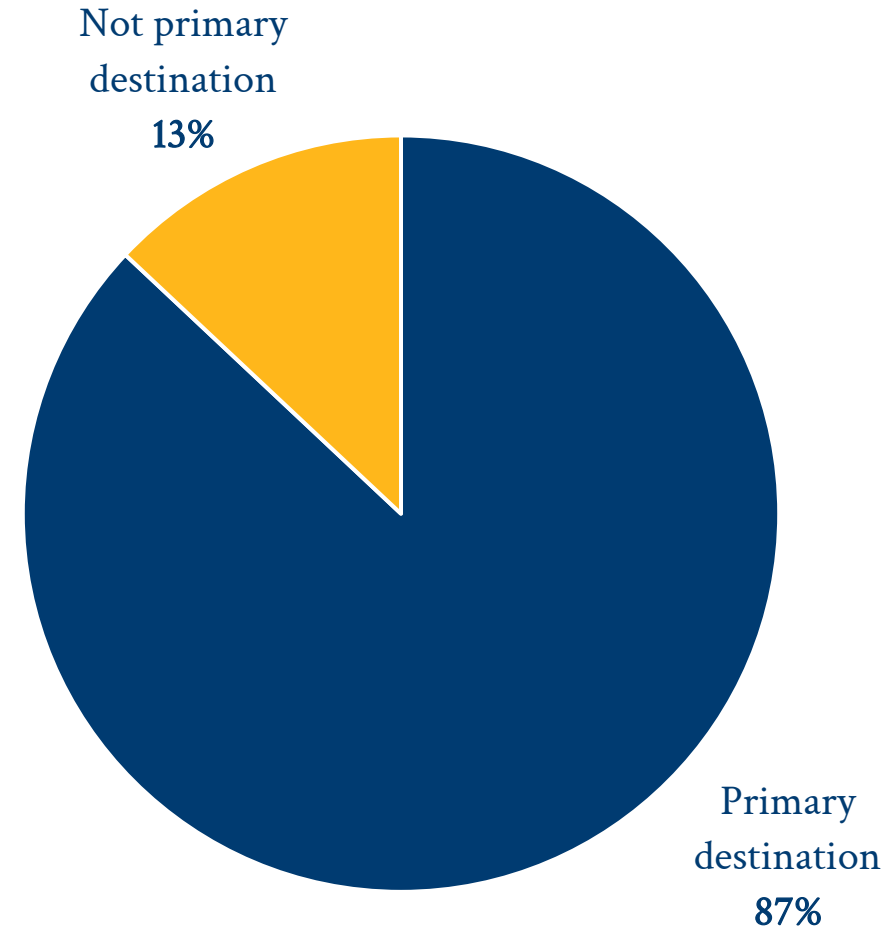
*Coded open-ended responses; multiple responses permitted.

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VISITOR JOURNEY: TRIP EXPERIENCE

PRE-VISIT → TRAVEL PARTY PROFILE → TRIP EXPERIENCE → POST TRIP EVALUATION

TRANSPORTATION

- **Over 3 in 4** 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**

Drive	78%
Jacksonville International Airport	14%
Orlando International Airport	2%
Orlando Sanford International Airport	1%
Bus/motor coach	1%
Boat/ferry	1%
Daytona Beach International Airport	1%
Other airport	1%
Other transportation	1%
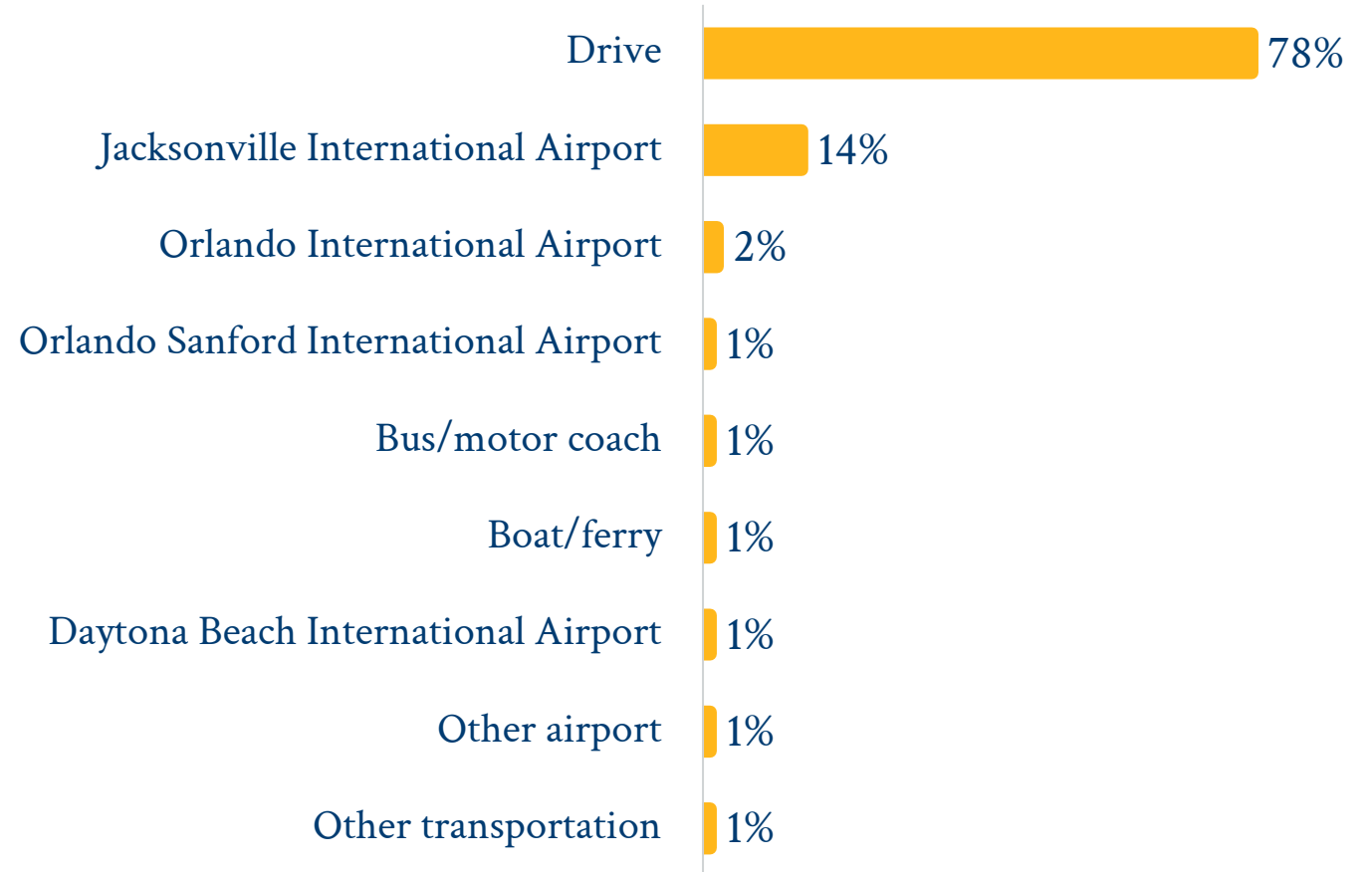
ACCOMMODATION LOCATION

- **Over 2 in 5** visitors stayed overnight at a **beachfront accommodation** in the St. Augustine/Ponte Vedra area

- **Over 1 in 4** visitors stayed overnight in the **historic St. Augustine area**

Location	Percentage
At a beachfront accommodation	43%
Historic St. Augustine area (not beachfront)	27%
Near I-95	18%
Ponte Vedra (not beach front)	8%
Don't know	3%
Other	1%
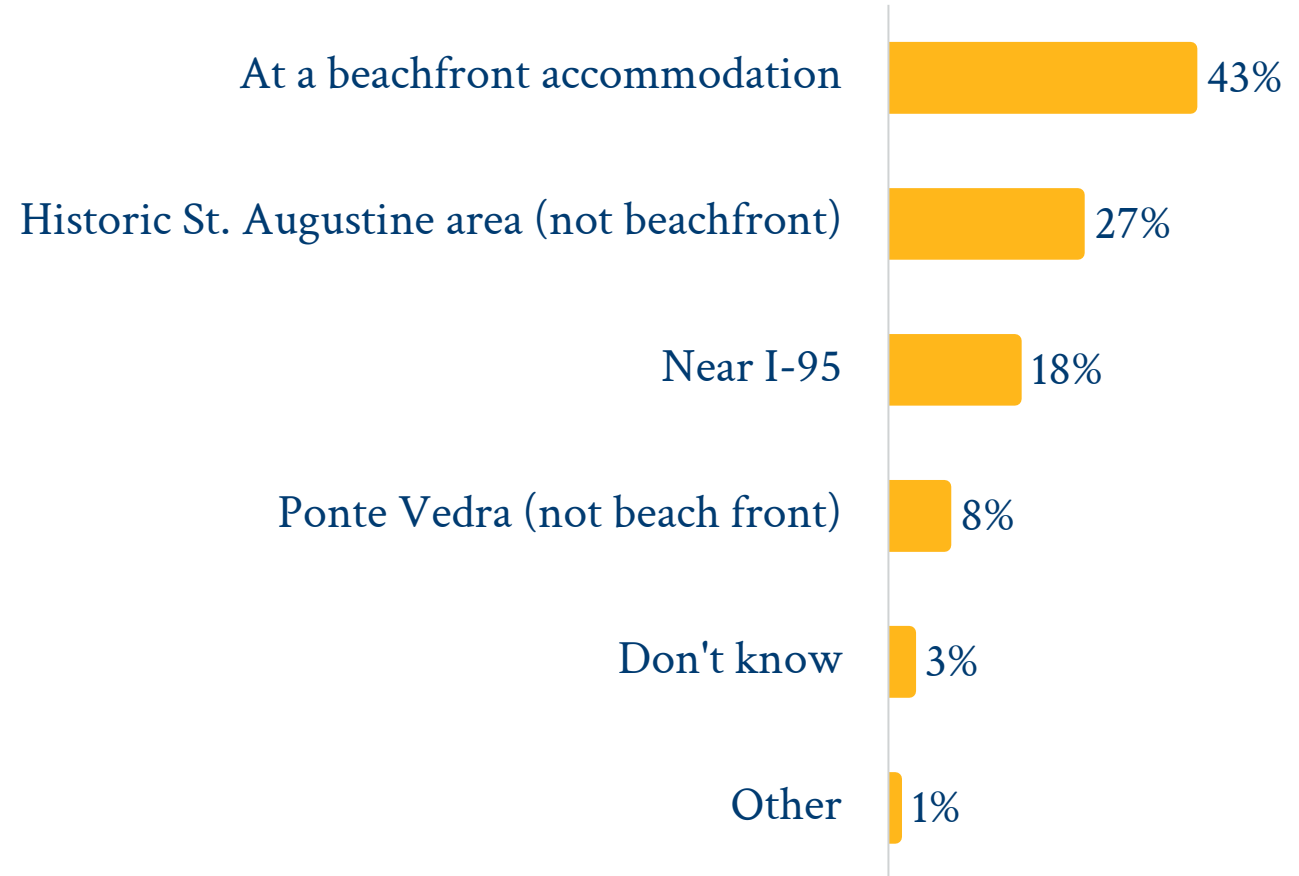
ACCOMMODATION TYPE

- **Over 3 in 5** visitors stayed overnight in **paid accommodations*** in the St. Augustine/Ponte Vedra area

- The average length of stay across all visitors was **3.6 nights**

- Visitors staying in paid accommodations stayed an average of **3.9 nights**
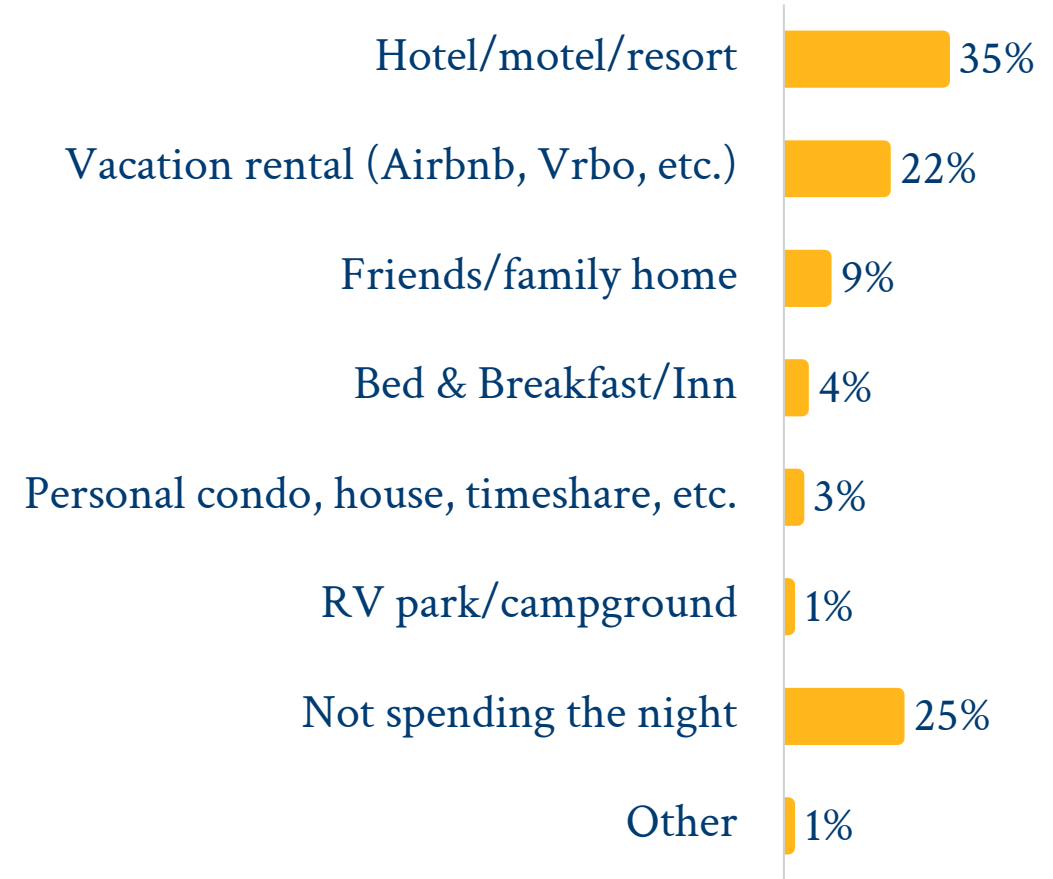
Accommodation Type	Percentage
Hotel/motel/resort	35%
Vacation rental (Airbnb, Vrbo, etc.)	22%
Friends/family home	9%
Bed & Breakfast/Inn	4%
Personal condo, house, timeshare, etc.	3%
RV park/campground	1%
Not spending the night	25%
Other	1%

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

ACCOMODATION BOOKING

- **Over half** of visitors booked their trip to the St. Augustine/Ponte Vedra area **directly with the hotel/condo/RV park**

- **Over 1 in 4** visitors booked through a **vacation rental company (Airbnb, Vrbo, etc.)**

Category	Percentage
Directly with the hotel, condo, RV park, etc.	53%
Vacation rental company	27%
Online travel agency	18%
Other	2%

VISITOR ACTIVITES*

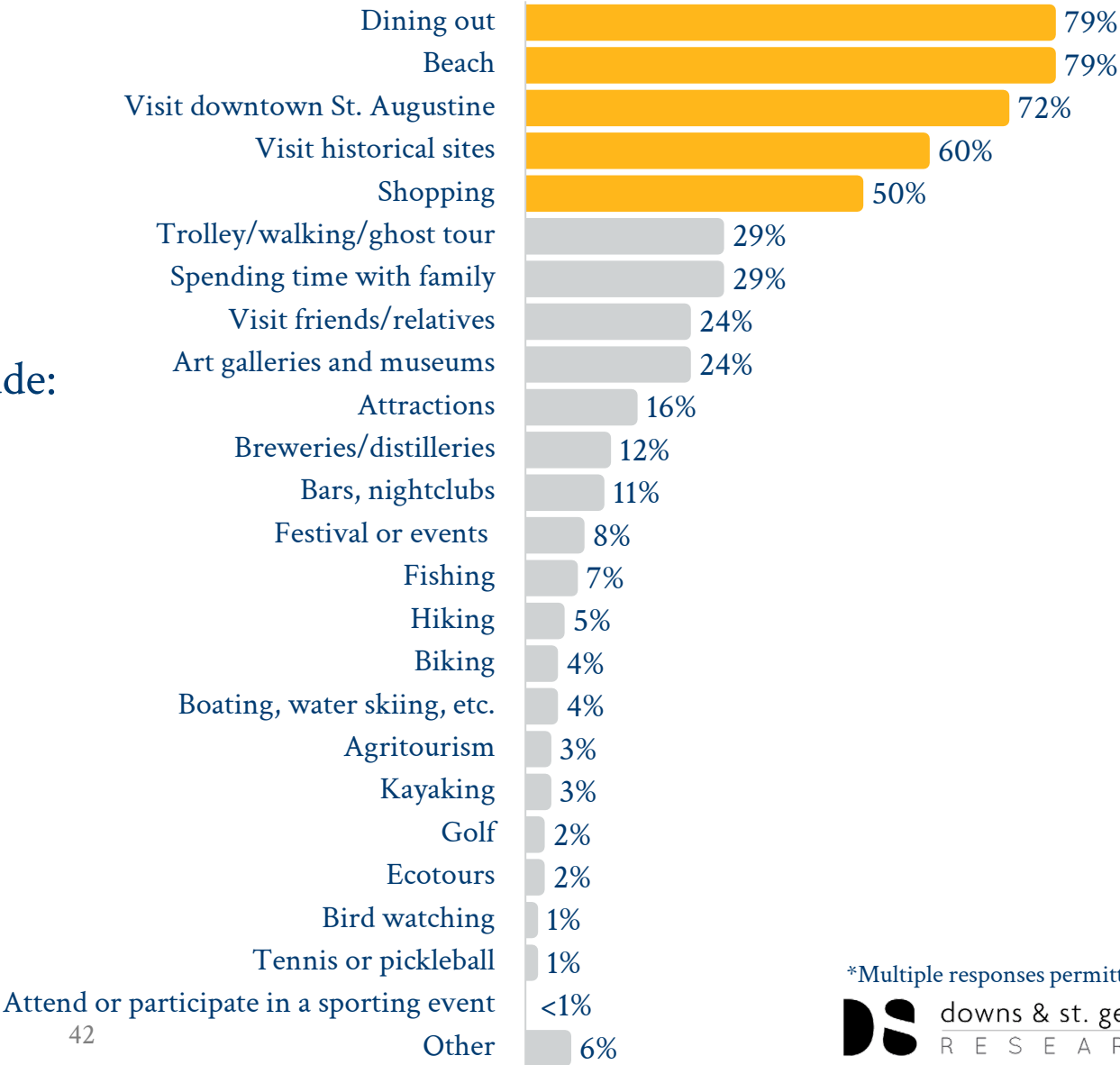APRIL TO JUNE 2025

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

Activity	Percentage
Dining out	79%
Beach	79%
Visit downtown St. Augustine	72%
Visit historical sites	60%
Shopping	50%
Trolley/walking/ghost tour	29%
Spending time with family	29%
Visit friends/relatives	24%
Art galleries and museums	24%
Attractions	16%
Breweries/distilleries	12%
Bars, nightclubs	11%
Festival or events	8%
Fishing	7%
Hiking	5%
Biking	4%
Boating, water skiing, etc.	4%
Agritourism	3%
Kayaking	3%
Golf	2%
Ecotours	2%
Bird watching	1%
Tennis or pickleball	1%
Attend or participate in a sporting event	<1%
Other	6%

*Multiple responses permitted

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TRAVEL PARTY SPENDING*

APRIL TO JUNE 2025

	Daily Travel Party Spend	Total Travel Party Spend
Accommodations	$124	$445
Restaurants	$107	$384
Groceries	$26	$93
Shopping	$44	$158
Entertainment	$58	$207
Transportation	$27	$97
Other	$8	$29
Total	**$394**	**$1,413**

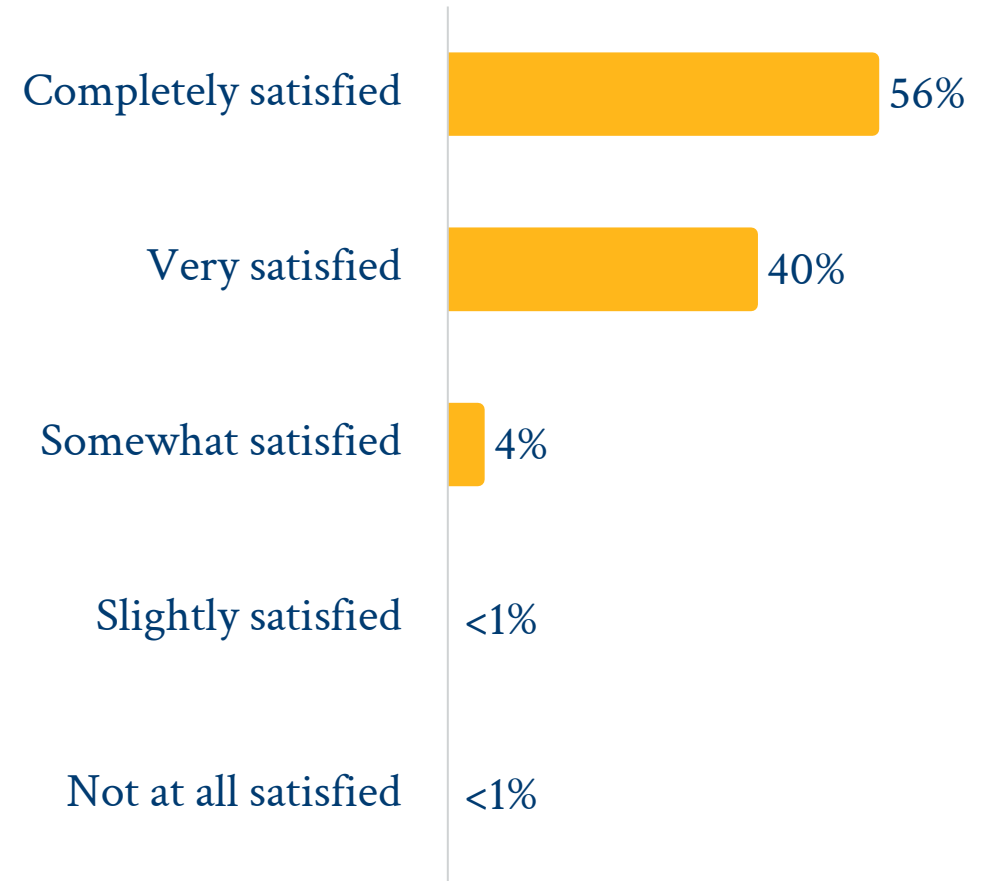*Spending includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

TRIP PLANNING CYCLE: POST-TRIP

PRE-VISIT → TRAVEL PARTY PROFILE → TRIP EXPERIENCE → POST TRIP EVALUATION
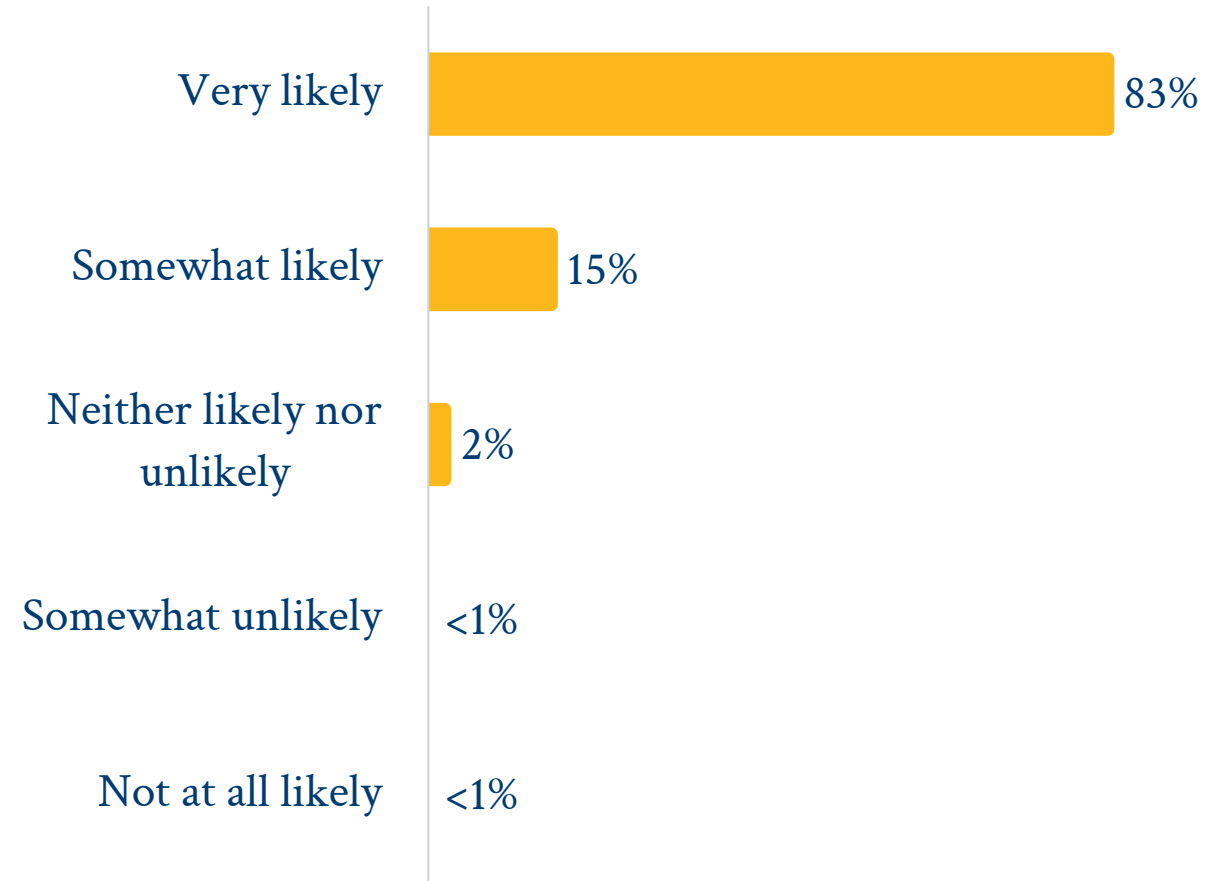
- **96%** of visitors were **satisfied** with their trip to the St. Augustine/Ponte Vedra area

- **Over half** were **completely satisfied** with their trip to the St. Augustine/Ponte Vedra area

Category	Percentage
Completely satisfied	56%
Very satisfied	40%
Somewhat satisfied	4%
Slightly satisfied	<1%
Not at all satisfied	<1%

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

Category	Percentage
Very likely	83%
Somewhat likely	15%
Neither likely nor unlikely	2%
Somewhat unlikely	<1%
Not at all likely	<1%

LIKELIHOOD OF RETURNING

- **95%** 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 **5%** of visitors who said they are **unsure/unlikely to return** were asked why they were uncertain, the most common reason being they **prefer a variety in vacation spots**.

Category	Percentage
Very likely	74%
Somewhat likely	21%
Neither likely nor unlikely	3%
Somewhat unlikely	2%
Not at all likely	<1%

47
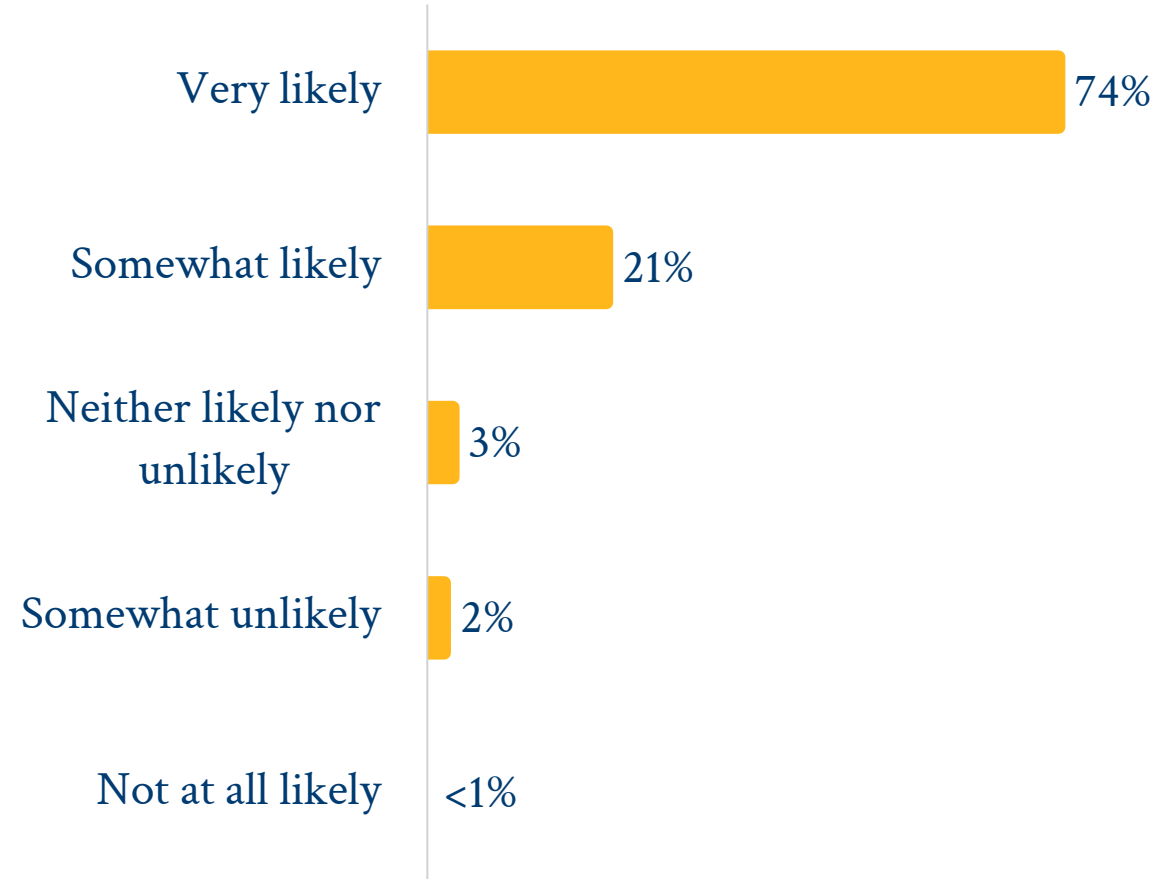
BEACH VISITOR DETAILED FINDINGS

BEACHES VISITED*

- Nearly **3 in 5** visitors who visited the beach went to **St. Augustine Beach**

Beach	Percentage
St. Augustine Beach	58%
Vilano Beach	37%
Crescent Beach	13%
Anastasia State Park	12%
Ponte Vedra Beach	11%
Butler Beach	10%
Summer Haven	2%
Other	<1%
Don't know	1%

*Multiple responses permitted

49
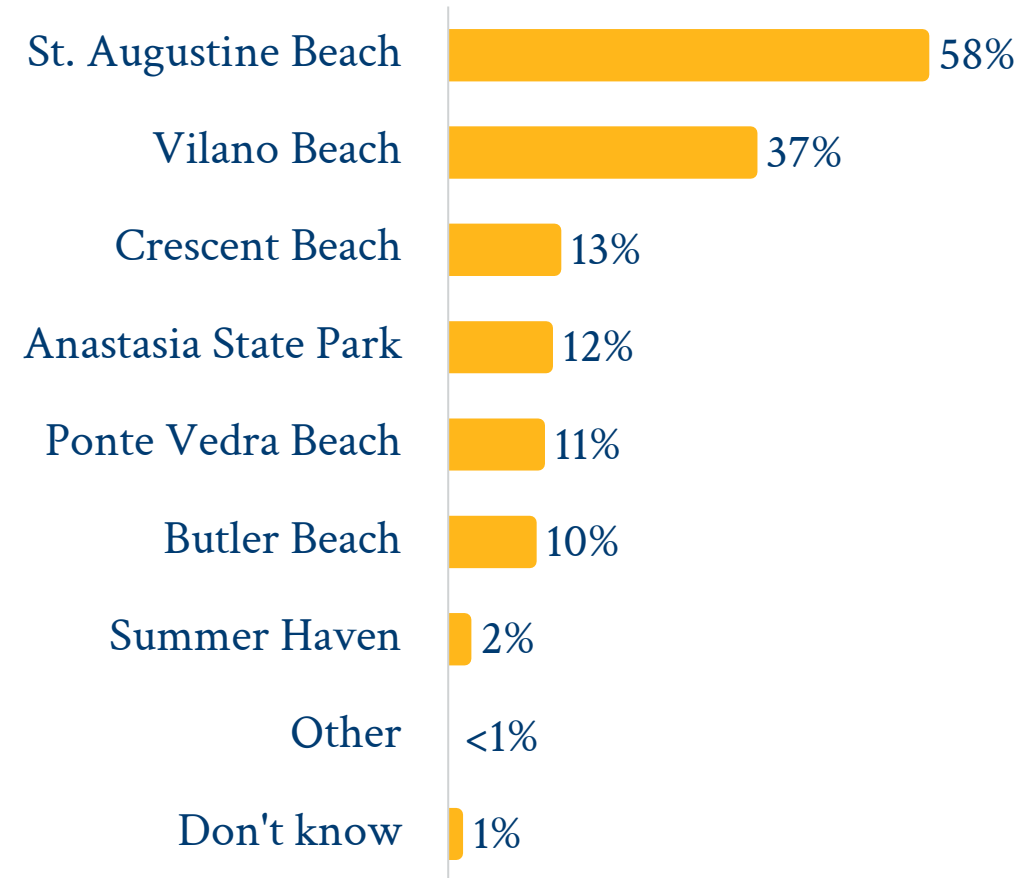
VISITOR BEHAVIOR IF BEACHES ARE UNAVAILABLE

- For the beaches listed, visitors are most likely to **go to another beach in the St. Augustine/Ponte Vedra area** if these beaches were unavailable

Beach	Another beach in the St. Augustine/Ponte Vedra area	Other destination	Don't know
Crescent Beach	56%	25%	19%
Ponte Vedra Beach	66%	18%	16%
St. Augustine Beach	68%	15%	17%
Anastasia State Park	81%	12%	7%
Vilano Beach	70%	9%	21%
Butler Beach	85%	4%	11%
Summer Haven	51%	<1%	49%

Legend: ■ Another beach in the St. Augustine/Ponte Vedra area ■ Other destination ■ Don't know

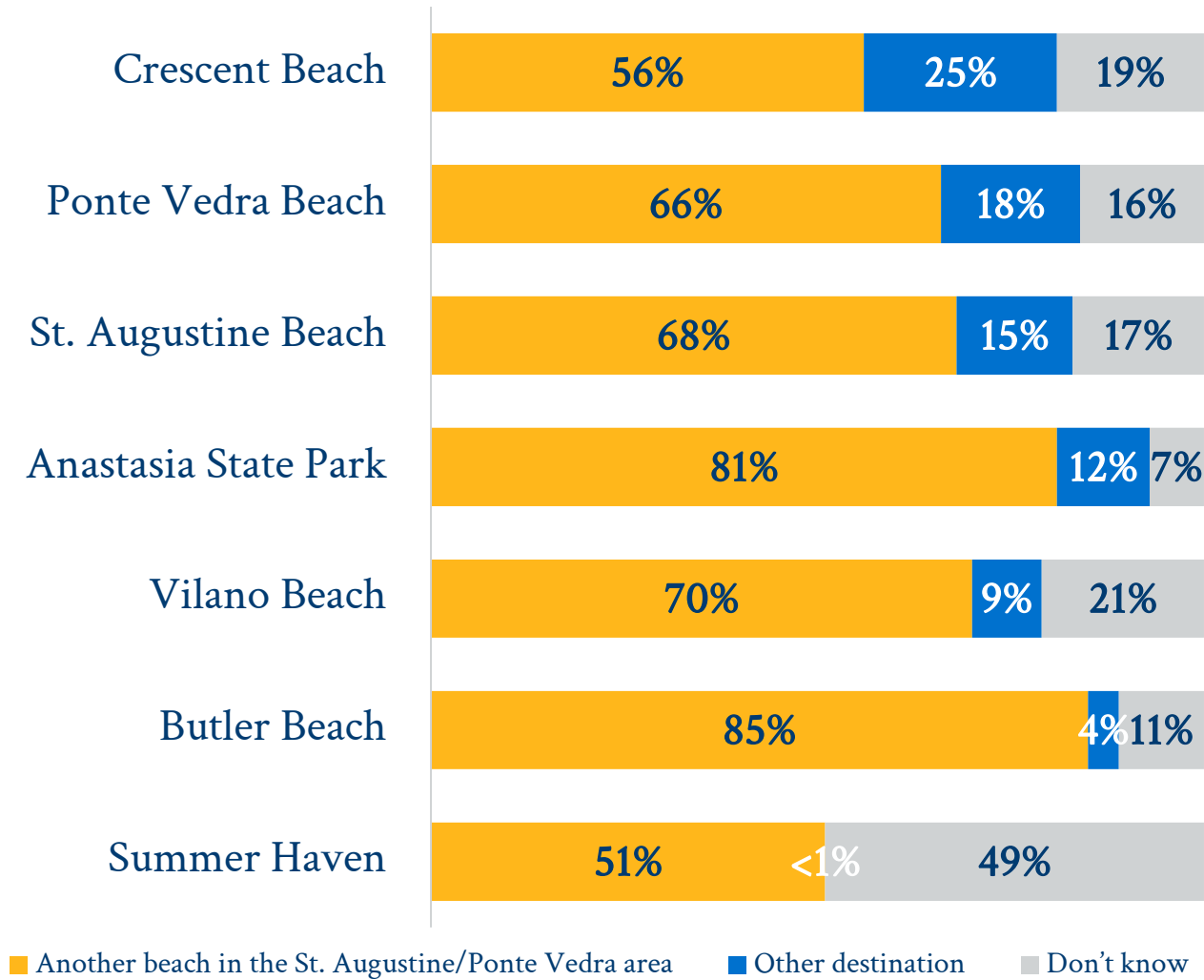ST. JOHNS COUNTY — FLORIDA AT FIRST SIGHT — EST. 1821

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

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ON-BEACH DRIVING

- **Over 1 in 3** visitors who visited the beach went to beach that allowed **on-beach driving**

- Of the **35%** of visitors who visited a beach that allows on-beach driving, **14%** drove on the beach

- The average experience rating for **visitors who drove on the beach** was **4.2***, indicating most visitors had a **good** experience

- The average experience for visitors who visited a beach that allowed on-beach driving but **did not drive on the beach** was **4.8***, indicating most visitors had a **very good** experience
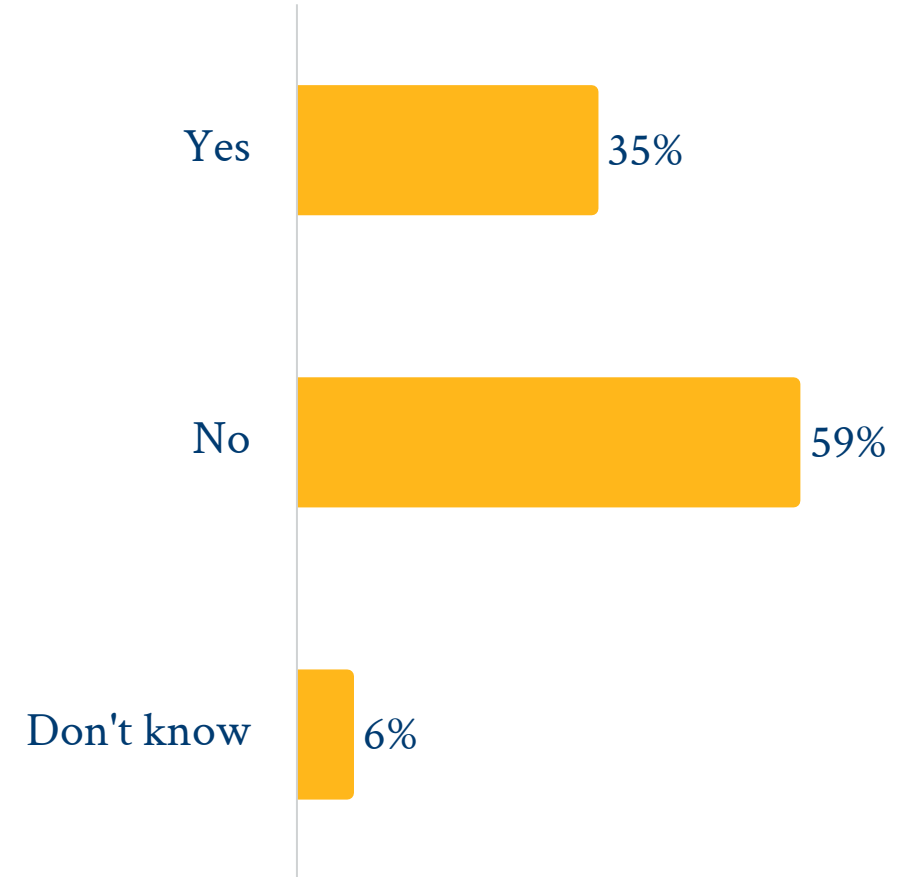
Yes	35%
No	59%
Don't know	6%

*Visitors were asked to rate their experience on a scale from 1-5, with 1 being "Very Poor" and 5 being "Very Good".

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USE OF ADA ACCESIBLE BEACHES

Base: **5%** of visitors who required ADA accessible beach facilities

- Of the **5%** of visitors who required ADA accessible beach facilities, nearly **half** used an **ADA accessible beach**

- The average experience rating for **visitors who used an ADA accessible beach** was **4.5***, indicating most visitors had a **satisfactory to very satisfactory** experience
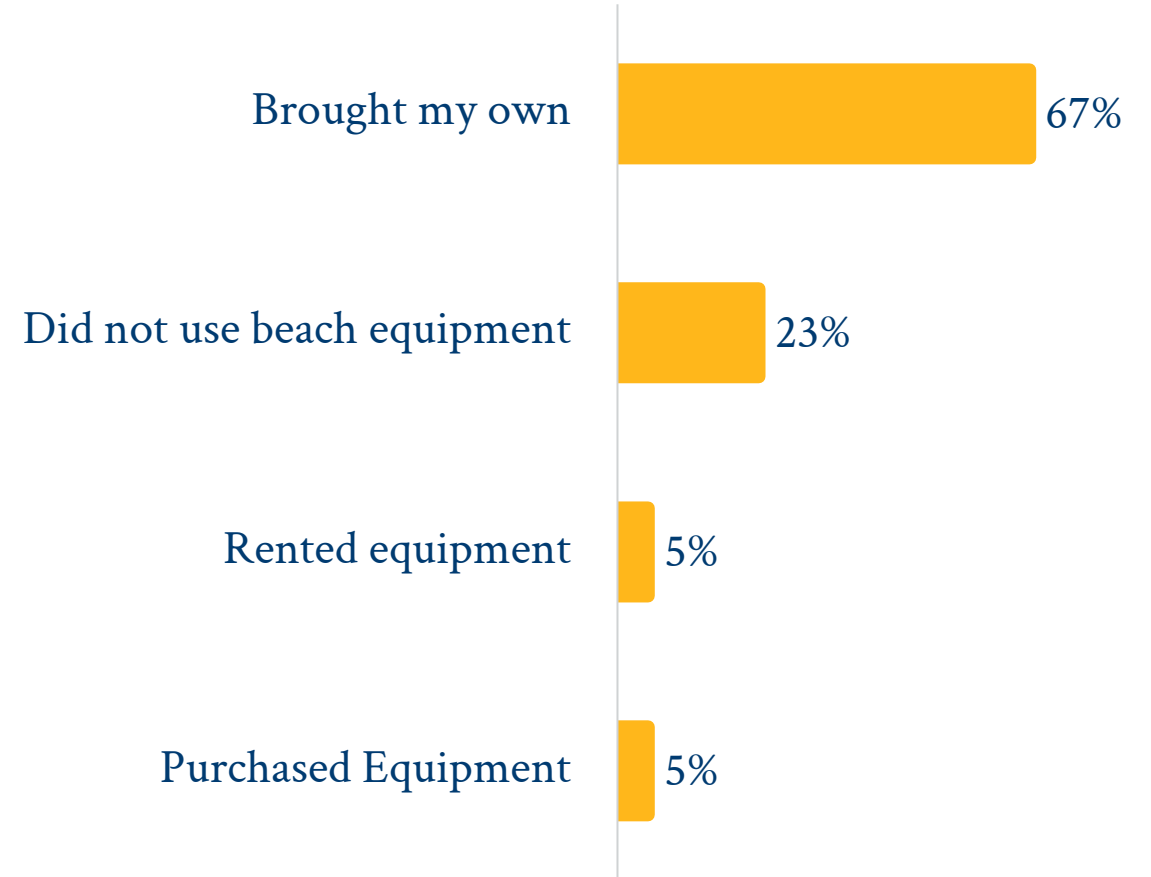
Yes — 46%

No — 50%

Don't know — 4%
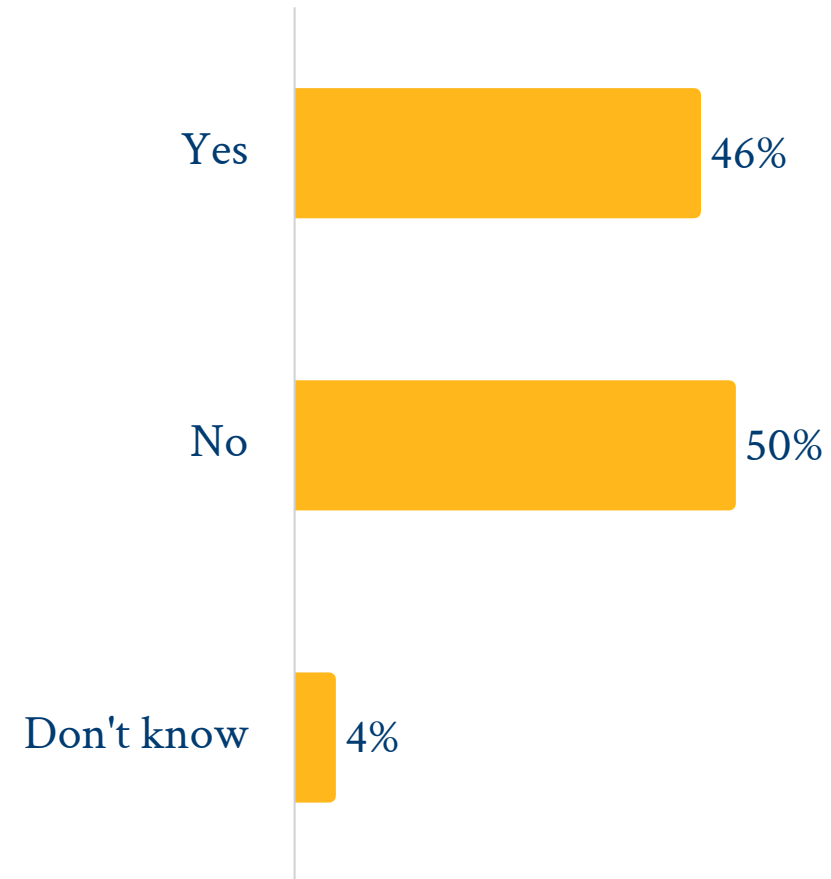
*Visitors were asked to rate their experience on a scale from 1-5, with 1 being "Very Unsatisfactory" and 5 being "Very Satisfactory".

BEACH EQUIPMENT

- **Over 2 in 3** visitors who visited the beach brought their own beach equipment

- **Nearly 1 in 4** visitors who visited the beach did not use beach equipment

Category	Percentage
Brought my own	67%
Did not use beach equipment	23%
Rented equipment	5%
Purchased Equipment	5%

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- **Nearly 9 in 10** visitors **prefer to have less people nearby** when visiting the beach

- **96%** of visitors who visited the beach felt the beach had **enough space** for their group and equipment

Prefer more people
nearby on beach
12%

Prefer less people
nearby on beach
88%
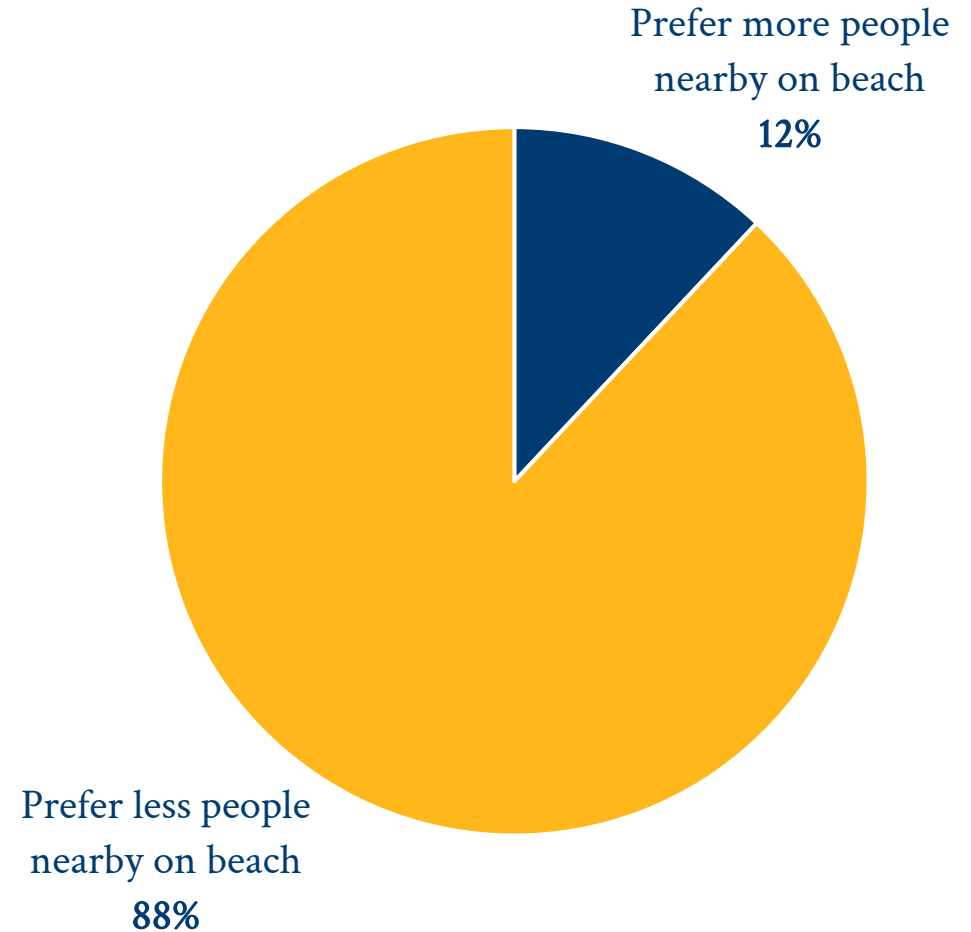
BEACH ACCESS POINTS

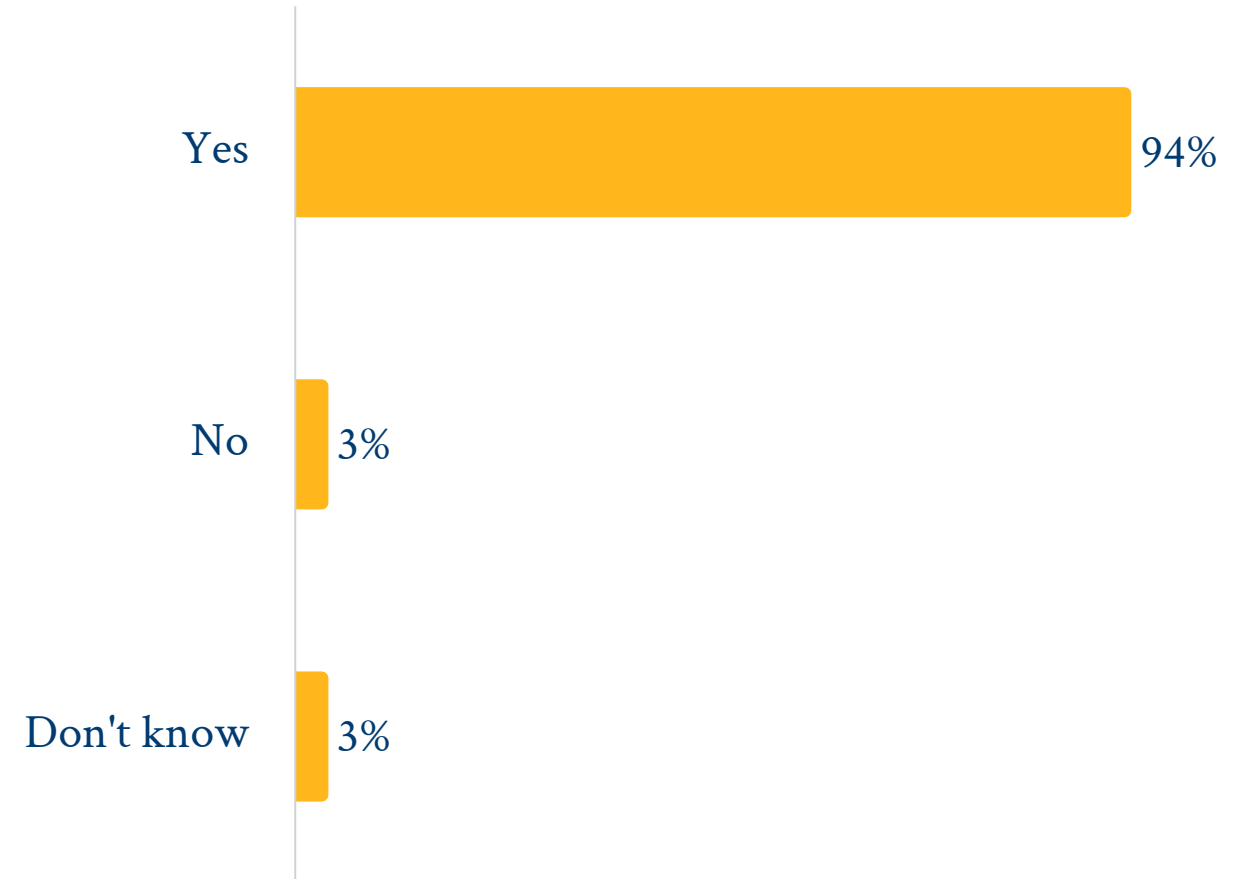- **Over 9 in 10** visitors who visited the beach felt the **pedestrian beach access points were clearly identified**

Yes **94%**

No **3%**

Don't know **3%**

BEACH RATINGS

- On average, **beach cleanliness**, **safety**, and **overall quality** was rated* as **very good** by visitors

- On average, **availability of beach amenities** and **parking availability at the beach** was rated* as **good** by visitors

Rating	Score
Beach cleanliness	4.8
Beach safety	4.7
Overall beach quality	4.7
Availability of beach amenities	4.1
Parking availability at the beach	3.7

*Visitors were asked to rate their experience on a scale from 1-5, with 1 being "Very Poor" and 5 being "Very Good".

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FLORIDA AT FIRST SIGHT
EST. 1821

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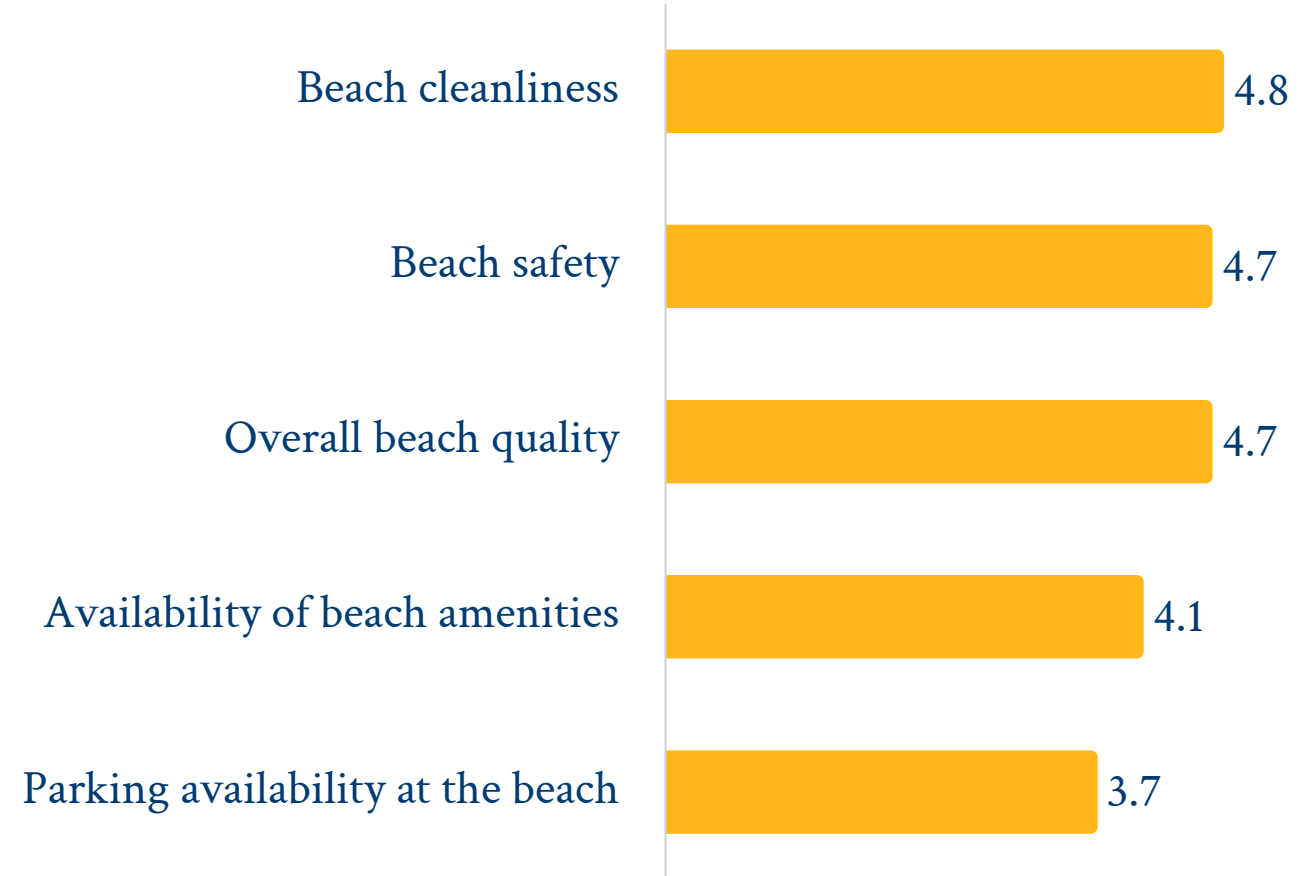
APPENDIX I: DATA COMPARISON OF FIRST TIME AND REPEAT VISITORS

TRIP PLANNING & BOOKING CYCLE: OVERNIGHT VISITORS*

APRIL TO JUNE 2025

PLANNING CYCLE	FIRST TIME VISITOR	REPEAT VISITOR
Less than 1 month	32%	44%
1 to 3 months	45%	32%
4 to 6 months	17%	12%
Over 6 months	6%	12%
Median Days	60 days prior to visit	44 days prior to visit

BOOKING CYCLE	FIRST TIME VISITOR	REPEAT VISITOR
Less than 1 month	36%	49%
1 to 3 months	46%	35%
4 to 6 months	14%	5%
Over 6 months	4%	11%
Median Days	53 days prior to visit	32 days prior to visit

TOP TRIP PLANNING SOURCES

ONLINE SOURCES*	FIRST TIME VISITOR	REPEAT VISITOR
Mapping websites	45%	28%
Review website/app	30%	26%
Hotel websites/apps	28%	21%
Video streaming services	25%	21%
VisitStAugustine.com	19%	19%
Online travel agency	17%	14%
Vacation rental company	15%	22%
Personal social media	14%	7%
Online travel reviews, blogs, stories	13%	14%
St. Augustine/Ponte Vedra social media	12%	9%
None	14%	28%

OTHER SOURCES*	FIRST TIME VISITOR	REPEAT VISITOR
Friends/relatives	48%	34%
Visitor guide/brochure	11%	13%
Previous Visit	-	43%
None	40%	26%

*Multiple responses permitted

ADVERTISING RECALL

APRIL TO JUNE 2025

	FIRST TIME VISITOR	REPEAT VISITOR
Recalled advertising	19%	33%

TOP AD SOURCES[1]	FIRST TIME VISITOR[2]	REPEAT VISITOR[2]
Television	50%	31%
Video streaming services	50%	40%
Visitor guide/brochure	17%	13%
Podcast	13%	10%
St. Augustine/Ponte Vedra social media	13%	25%
Friends/relatives	13%	32%
Online article	8%	20%
Online travel reviews, blogs, stories	8%	15%
Radio	4%	10%
Celebrity or influencer social media	4%	16%
Weather app	<1%	20%

	FIRST TIME VISITOR[3]	REPEAT VISITOR[3]
Ad influenced visitation	17%	24%

[1]Multiple responses permitted. Small sample size, interpret data with caution.
[2]Base: Visitors who recalled advertising
[3]Base: All visitors

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VISITOR PROFILE

	FIRST TIME VISITOR	REPEAT VISITOR
Travel Party Size*	3.4	3.5
Length of Stay*	3.5	3.6

	FIRST TIME VISITOR	REPEAT VISITOR
Paid accommodations	81%	62%
Nonpaid accommodations	6%	14%
Day tripper	13%	24%

	FIRST TIME VISITOR	REPEAT VISITOR
Traveled as a family	40%	48%
Traveled as a couple	38%	33%
Traveled with a group	16%	14%
Traveled by yourself	5%	5%
Traveled with business associates	1%	<1%

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

TOP AREAS OF ORIGIN

REGION OF ORIGIN	FIRST TIME VISITOR	REPEAT VISITOR
Southeast	31%	26%
Florida	27%	52%
Northeast	12%	8%
West	10%	3%
Midwest	8%	8%
International	12%	3%

MARKETS	FIRST TIME VISITOR	REPEAT VISITOR
Orlando – Daytona Beach - Melbourne	7%	13%
Atlanta	7%	7%
Tampa – St. Petersburg	6%	6%
Miami – Fort Lauderdale	6%	5%
New York	5%	3%
Jacksonville	4%	18%

STATE OF ORIGIN	FIRST TIME VISITOR	REPEAT VISITOR
Florida	27%	52%
Georgia	9%	11%
North Carolina	5%	2%
Tennessee	5%	3%
New York	4%	2%
California	4%	2%
Texas	3%	2%
New Jersey	3%	2%
Indiana	3%	<1%
South Carolina	3%	5%

APPENDIX II: DATA COMPARISON BY VISITOR TYPE

VISITOR PROFILE

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Travel Party Size	3.5	3.2	3.3
Length of Stay	3.9	7.3	-

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
First Time Visitor	43%	19%	23%
Repeat Visitor	57%	81%	77%

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Traveled as a family	47%	54%	44%
Traveled as a couple	34%	27%	32%
Traveled with a group	13%	8%	15%
Traveled by yourself	4%	11%	8%
Traveled with business associates	1%	<1%	1%

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TOP VISITOR ACTIVITIES*

APRIL TO JUNE 2025

	PAID ACCOMMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Dining out	77%	69%	47%
Visit Downtown St. Augustine	69%	76%	39%
Beach	69%	75%	61%
Visit historical sites	62%	52%	26%
Shopping	52%	44%	23%
Trolley/walking/ghost tour	33%	18%	9%
Art galleries and museums	26%	20%	7%
Spending time with family	25%	45%	14%
Visit friends/relatives	18%	55%	11%
Attractions	17%	14%	5%
Breweries/distilleries	13%	12%	2%
Bars/nightclubs	11%	17%	3%

*Multiple responses permitted

ST. JOHNS COUNTY

Visitor Tracking and Beach Study
April to June 2025

Downs & St. Germain Research
850-906-3111 | www.dsg-research.com