ST. JOHNS COUNTY
TOURIST DEVELOPMENT COUNCIL MEETING
MAY 19, 2025 1:30 PM
COUNTY AUDITORIUM

1. CALL TO ORDER – Irving Kass, Chair

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL

4. APPROVAL OF AGENDA (Action Required)

5. APPROVAL OF MINUTES (Action Required) (Pages 2 – 7)
   - Regular Meeting Minutes – April 21, 2025

6. PUBLIC COMMENT – 3 minutes, not related to agenda items

7. FOLLOW-UP FROM PRIOR MEETING
   - Use of TDT funds for public safety
   - TDT revenue collections update (Pages 8 – 9)

8. INITIAL DISCUSSION OF FY26 TOURISM BUDGET – Jesse Dunn (Pages 10 – 19)

9. DISCUSSION OF FIVE (5) SEASONS TO DRIVE YEAR-ROUND BUSINESS – Irving Kass

10. SJC VISITOR TRACKING STUDY REPORT (Pages 20 – 79)

11. MONTHLY REPORTS PROVIDED IN PACKETS (Pages 80 – 134)

12. MEMBER COMMENTS

13. NEXT MEETING DATE – June 16, 2025

14. ADJOURN

TDC Regular Meeting – May 19, 2025

Agenda Item 5 – Approval of Minutes (Action Required)

- Regular Meeting Minutes – April 21, 2025
- Public Comment

Minutes of Meeting
Tourist Development Council
St. Johns County, Florida
County Administration Building
500 San Sebastian View
St. Augustine, Florida 32084
April 21, 2025 - 1:30 p.m.

1. CALL TO ORDER

Kass called the meeting to order at 1:30 p.m.

Present: Irving Kass, District 2, Chair
Troy Blevins, District 5, Vice Chair
Regina G. Phillips, District 2
Krista Joseph, BCC Representative
Nancy Sikes-Kline, Mayor, City of St. Augustine Representative
Dylan Rumrell, Mayor, St. Augustine Beach City Commission, Seat 2
Charles Cox, District 3
Michael Gordon, District 4

Absent: Michael Wicks, District 4

Staff Present: Dena Masters, Senior Tourist Development Council Program Specialist
Jesse Dunn, Deputy County Administrator
Lex Taylor, Deputy County Attorney
Artricia Allen, Deputy Clerk

2. PLEDGE OF ALLEGIANCE

Kass led the Pledge of Allegiance.

3. ROLL CALL

Masters called the roll. Council members Gordon, Phillips, Joseph, Sikes-Kline, Rumrell, Kass, Cox, and Blevins were present. Wicks was absent.

4. APPROVAL OF AGENDA

Motion by Rumrell, seconded by Blevins, carried 8/0, with Wicks absent, to approve the Agenda, as submitted.

Yea: Rumrell, Blevins, Kass, Phillips, Joseph, Sikes-Kline, Gordon, Cox
Nay: None
Absent: Wicks

draft

5. APPROVAL OF MINUTES

Motion by Rumrell, seconded by Cox, carried 8/0, with Wicks absent, to approve the minutes for the March 10, 2025, meeting, as submitted.

Yea: Rumrell, Cox, Kass, Blevins, Phillips, Joseph, Sikes-Kline, Gordon
Nay: None
Absent: Wicks

6. PUBLIC COMMENT

There was none.

7. REVENUE ANALYSIS REPORT

Masters provided the details of the revenue analysis report.

Discussion ensued on the Airbnb breakdown, the year bed taxes increased, trends compared to previous years, the amount of Tourist Development dollars spent per zip code, and peak season.

Dunn provided additional information on how the funds were appropriated by category and noted that collections could be monitored by zip code. He also stated that the trending amount was 2.5 percent higher than the previous year and would continue to be monitored through the budget process.

8. SPORTS TOURISM GRANT POLICY

Masters provided an overview of the project and introduced Teddy Meyer, Parks and Recreation Facility Manager, who presented details on the sports tourism grant policy update. Discussion ensued on excluding groups from funding if their events involved hotel stays outside St. Johns County as part of the evaluation process and on making videos and logos accessible to groups before submitting their grant applications.

Blevins informed the council that he had attended the Parks and Recreation workshop.

Public Comment: There was none.

Motion by Rumrell, seconded by Cox, carried 8/0 to approve the sports tourism grant policy, with item E, including hotels in St. Johns County, to know the application requirements upfront, as amended.

Yea: Rumrell, Cox, Kass, Blevins, Gordon, Sikes-Kline, Joseph, Phillips
Nay: None
Absent: Wicks

draft

9. NIGHTS OF LIGHTS UPDATE/DISCUSSION

Kass introduced David Birchim, City of St. Augustine Manager, who provided an update on the Nights of Lights event.

Discussion ensued on the presentation, noting that shuttle trips mirrored those of 2019 in terms of the number of people, differences between now and 2019, including the placement of staging stations for trash, the Smart Path systems, and staging areas for the medical and police departments to improve response times, hotel stays being the same as the previous year, managing local residents, having the project extended out, upcoming challenges related to the King Street bridge closure, and the timing of crosswalk lights near the Hilton. Birchim addressed the Council's concerns, mentioning plans to post a traffic guard, shuttle stops, keep the parking garage closed once occupancy reached its limit near the 200-car threshold, concentrate parking, enhance traffic controls on the north end, and manage pedestrian traffic on San Marco.

Chief Carlos Aviles of the St. Augustine Fire Department provided additional information on transport, future turnaround times, and the station's current workforce shortage.

Kass presented on the Nights of Lights, highlighting logistics and parking, operation and experience, and marketing and communication. He proposed extending the event to 78 days, suggesting that it could generate additional funding, positively impact the economy, and benefit both the community and visitors.

Dunn responded that although public safety expenses were generally not eligible for Tourist Development Tax (TDT) funding, they would be considered as the project progressed. Taylor suggested that they would look into defining it as an event versus day-to-day operations and clarified the Tourist Development Council's (TDC) role as an advisory board and providing technical support. He noted there were no new court cases permitting the use of TDT funds for public safety or event funding. He indicated that the City's request for additional parking days and event coverage could be funded through TDT.

Discussion ensued on collaborating with staff on funding, developing a local incentives and promotional plan, creating an active working plan, bus lanes, making permitting changes, park and ride incentives, and addressing more complex challenges related to the mobility plan.

Public Comment:

Steven Layt spoke in support of the Nights of Lights event and expressed concerns about residents' experiences downtown. He suggested a more substantial police presence and the implementation of street closures.

Tom Day expressed concerns about resident safety and suggested hiring the Red Jacket program.

Martha Mickler expressed safety concerns, thanked the Council for thinking of the event, and looked forward to helping with a solution.

Discussion ensued on safety concerns and how to fund safety without becoming a taxpayer burden.

MONTHLY REPORTS PROVIDED IN PACKETS

Susan Phillips, President of the St. Augustine, Ponte Vedra, and The Beaches Visitors and Convention Bureau (VCB) provided the VCB monthly report. She highlighted the upcoming State of the Tourism event on May 8th at the Embassy Suites in St Augustine Beach, noting that the advertising agency would be available to speak with the Council at this event and the Save The Summer campaigning event.

Jeff Potts, Executive Director of the Cultural Council, provided details of the St. Johns Cultural Council product development, highlighted grant funding events, and provided monthly cultural plan reports. He also responded to questions regarding the James Beard Foundation.

10. MEMBER COMMENTS

Rumrell thanked Masters for her new role on the Tourist Development Council (TDC) and offered to support the Mayor with Nights of Lights in any way he could. He announced the ribbon cutting for Fort Mose on May 9, 2025, and invited the Council to attend.

Sikes-Kline requested a report on how data is collected by zip code with the Florida Department of Transportation (FDOT) and asked for more granular reporting and flexibility in reporting it to the Council.

Blevins suggested that staff use the keyword “Exhibits” for events to help expand the city’s efforts.

Phillips reported on the 130th Anniversary of the Excelsior High School construction project.

Cox advised reaching out to David and the City to move the Nights of Lights project forward and address any necessary concerns to serve visitors and residents better.

Gordon thanked the Council and staff for their efforts during the TDC meeting.

Joseph thanked the Council for the TDC meeting, progress, and steps moving forward.

Dunn formally announced that Dena Masters would be the Tourism Council Executive conducting the meetings. Masters thanked the Council and looked forward to working with the council members.

Dunn also informed the Council that the Budget workshops would be held during May.

11. NEXT MEETING DATE

Kass stated that the next meeting was scheduled for May 19, 2025. He referred to the "five buckets" or "five different seasons" concept and expressed interest in further workshopping the idea at the May 19th meeting. He explained that if the concept proved valuable, it could help Susan develop the 2026 marketing plan in collaboration with the agency. If the idea lacked merit, it would be set aside. Kass noted that initial feedback had been positive and showed enthusiasm for exploring the potential of using the five buckets to create microbrands.

12. ADJOURN

With there being no further business to come before the Council, the meeting adjourned at 4:04 p.m.

Approved _____, 2025

TOURIST DEVELOPMENT COUNCIL
OF ST. JOHNS COUNTY, FLORIDA

By: _____
Irving Kass, Chair

ATTEST: BRANDON J. PATTY,
CLERK OF THE CIRCUIT COURT & COMPTROLLER

By: _____
Deputy Clerk

draft

TDC Regular Meeting – May 19, 2025

Agenda Item 7 – Follow-up from Prior Meeting of April 21, 2025

- Use of TDT Funds for Public Safety
- TDT Revenue Collections Update (Information Only)

Net TDT Revenue to the Tourism Department by Fiscal Year

	FY18	+ /-	FY19	+ /-	FY20	+ /-	FY21	+ /-	FY22	+ /-	FY23	+ /-	FY24	+ /-	FY25	+ /-
October	$ 763,934	38.8%	$ 791,701	3.6%	$ 748,068	-5.5%	$ 764,027	2.1%	$ 1,433,249	87.6%	$ 1,472,774	2.8%	$ 1,502,822	2.0%	$ 1,293,718	-13.9%
November	$ 755,703	18.1%	$ 734,460	-2.8%	$ 828,129	12.8%	$ 734,256	-11.3%	$ 1,411,921	92.3%	$ 1,419,713	0.6%	$ 1,554,762	9.5%	$ 1,681,780	8.2%
December	$ 825,934	15.0%	$ 888,565	7.6%	$ 964,804	8.6%	$ 900,241	-6.7%	$ 1,848,637	105.3%	$ 1,878,754	1.6%	$ 2,089,638	11.2%	$ 2,245,861	7.5%
January	$ 765,515	12.6%	$ 827,594	8.1%	$ 904,473	9.3%	$ 754,128	-16.6%	$ 1,339,161	77.6%	$ 1,707,915	27.5%	$ 1,731,678	1.4%	$ 1,825,237	5.1%
February	$ 902,098	3.9%	$ 1,004,681	11.4%	$ 1,012,638	0.8%	$ 950,746	-6.1%	$ 1,829,297	92.4%	$ 1,947,956	6.5%	$ 1,994,649	2.4%	$ 1,869,355	-6.7%
March	$ 1,256,045	12.8%	$ 1,435,691	14.3%	$ 691,517	-51.8%	$ 1,479,331	113.9%	$ 2,580,026	74.4%	$ 2,778,964	7.7%	$ 2,903,360	4.5%	$ 2,748,197	-5.6%
April	$ 1,095,414	8.2%	$ 1,191,039	8.7%	$ 254,852	-78.6%	$ 1,437,785	464.2%	$ 2,337,424	62.6%	$ 2,439,606	4.4%	$ 2,109,250	-13.5%		
May	$ 1,006,706	2.6%	$ 1,037,134	3.0%	$ 424,308	-59.1%	$ 1,430,279	237.1%	$ 1,862,167	30.2%	$ 1,899,752	2.0%	$ 2,005,957	5.6%		
June	$ 1,145,753	26.3%	$ 1,230,856	7.4%	$ 988,383	-19.7%	$ 1,702,388	72.2%	$ 2,188,339	28.5%	$ 2,263,926	3.5%	$ 2,248,389	-0.7%		
July	$ 1,247,647	4.8%	$ 1,334,808	7.0%	$ 1,143,383	-14.3%	$ 1,954,847	71.0%	$ 2,517,580	28.8%	$ 2,584,377	2.7%	$ 2,413,376	-6.6%		
August	$ 783,857	14.4%	$ 805,973	2.8%	$ 765,057	-5.1%	$ 1,331,818	74.1%	$ 1,515,709	13.8%	$ 1,405,773	-7.3%	$ 1,467,943	4.4%		
September	$ 736,935	32.0%	$ 563,578	-23.5%	$ 708,515	25.7%	$ 946,292	33.6%	$ 1,336,608	41.2%	$ 1,392,580	4.2%	$ 1,162,523	-16.5%		
Total	**$ 11,285,541**		**$ 11,846,081**		**$ 9,434,127**		**$ 14,386,139**		**$ 22,200,117**		**$ 23,192,091**		**$ 23,184,347**		**$ 11,664,148**	
Per Penny	$ 2,821,385		$ 2,961,520		$ 2,358,532		$ 3,596,535		$ 4,440,023		$ 4,638,418		$ 4,636,869			
Per Penny Growth	13.9%		5.0%		-20.4%		52.5%		23.5%		4.5%		0.0%			

Red indicates months in which the TDT collections were less than the collections of the same month in the prior year

TDC Regular Meeting – May 19, 2025

Agenda Item 8 – Initial discussion of FY26 Budget

Tourism and Cultural Development FY26 Budget Discussion





Tourist Development Tax (TDT)

- The TDT revenue is governed by both F.S. 125.0104 and County Ordinance 2024-42
- St. Johns County is currently eligible for and levies 5% of TDT
- TDT revenue must be utilized for qualifying tourism oriented expenses
- The SJC Tourist Development Plan (Ordinance 2024-42) establishes five categories of use for TDT

Category 1 Destination Marketing	Category 2 Arts, Culture, Heritage	Category 3 Leisure and Recreation	Category 4 Admin and Special Uses	Category 5 Beach Assets
1.6	0.6	0.6	0.8	1.4

Historical TDT Revenue

Net TDT Revenue to the Tourism Department by Fiscal Year

	FY19	FY20	FY21	FY22	FY23	FY24	FY25
October	$ 791,701	$ 748,068	$ 764,027	$ 1,433,249	$ 1,472,774	$ 1,502,822	$ 1,293,718
November	$ 734,460	$ 828,129	$ 734,256	$ 1,411,921	$ 1,419,713	$ 1,554,762	$ 1,681,780
December	$ 888,565	$ 964,804	$ 900,241	$ 1,848,637	$ 1,878,754	$ 2,089,638	$ 2,245,861
January	$ 827,594	$ 904,473	$ 754,128	$ 1,339,161	$ 1,707,915	$ 1,731,678	$ 1,825,237
February	$ 1,004,681	$ 1,012,638	$ 950,746	$ 1,829,297	$ 1,947,956	$ 1,994,649	$ 1,869,355
March	$ 1,435,691	$ 691,517	$ 1,479,331	$ 2,580,026	$ 2,778,964	$ 2,903,360	$ 2,748,197
April	$ 1,191,039	$ 254,852	$ 1,437,785	$ 2,337,424	$ 2,439,606	$ 2,109,250	
May	$ 1,037,134	$ 424,308	$ 1,430,279	$ 1,862,167	$ 1,899,752	$ 2,005,957	
June	$ 1,230,856	$ 988,383	$ 1,702,388	$ 2,188,339	$ 2,263,926	$ 2,248,389	
July	$ 1,334,808	$ 1,143,383	$ 1,954,847	$ 2,517,580	$ 2,584,377	$ 2,413,376	
August	$ 805,973	$ 765,057	$ 1,331,818	$ 1,515,709	$ 1,405,773	$ 1,467,943	
September	$ 563,578	$ 708,515	$ 946,292	$ 1,336,608	$ 1,392,580	$ 1,162,523	
Total	**$ 11,846,081**	**$ 9,434,127**	**$ 14,386,139**	**$ 22,200,117**	**$ 23,192,091**	**$ 23,184,347**	**$ 11,664,148**
Per Penny	$ 2,961,520	$ 2,358,532	$ 3,596,535	$ 4,440,023	$ 4,638,418	$ 4,636,869	
Per Penny Growth	5.0%	-20.4%	21.4%*	23.5%	4.5%	0.0%	1.0%

Yellow = Introduction of Category 5 and reallocation of 4% TDT revenue

Green = 5% TDT Levied

***FY21 per penny growth is compared to FY19 per penny growth**

TDT Revenue

Suggesting that projected TDT revenue increase for FY25 b
modified to 3%

Suggesting 3% increase in projected TDT revenue for FY26

The anticipated FY26 TDT revenue is approximately $24.6 million which will be allocated between the five categories of use as defined by Ordinance 2022-24



Category 1 Destination Marketing	Category 2 Arts, Culture, Heritage	Category 3 Leisure and Recreation	Category 4 Admin and Special Uses	Category 5 Beach Assets
1.6	0.6	0.6	0.8	1.4

Budget Suggestions for Consideration

Category 1 – Destination Marketing

- VCB Core Services Contract
- Tourism Marketing Contract
- Cultural Events Inc Allocation

Category 2 – Arts, Culture and Heritage

- Cultural Council Contract
- Arts Culture and Heritage Grants*
- Cultural Events Inc Allocation



Budget Suggestions for Consideration

Category 3 – Leisure and Recreation

- Ball Field Maintenance
- Water Access and Artificial Reef Maintenance
- Sports Marketing Grants
- Parks and Recreation Department Staff



Budget Suggestions for Consideration

Category 4 – Admin and Special Uses

- Visitor Information Centers
- Holiday Lights and Fireworks
- Events and Beach Shuttles
- Cultural Events Inc Allocation
- TPC Support
- Tourism Department Staff

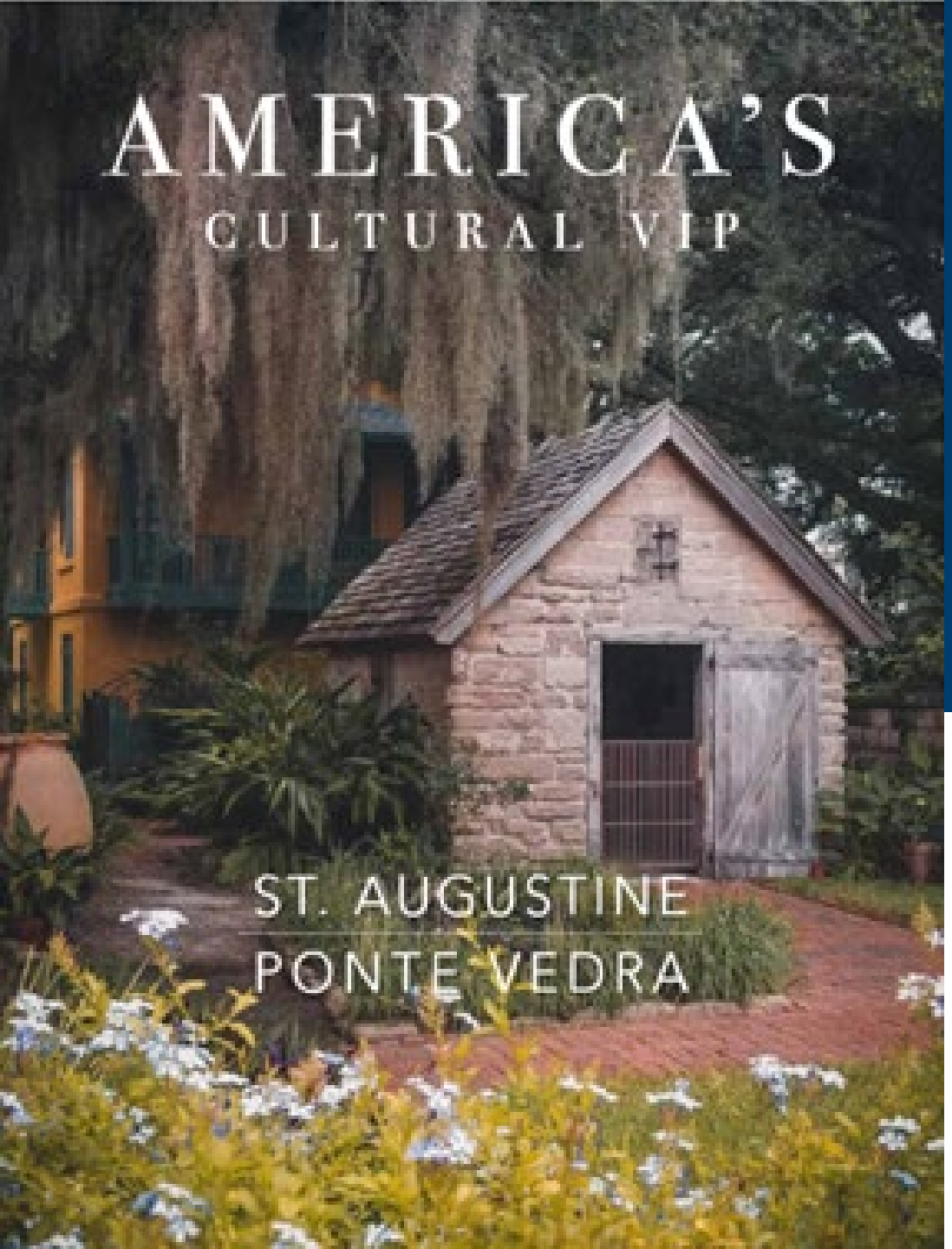
Category 5 – Beach Assets

- Beach Operations
- Beach Access Maintenance
- Beach Renourishment



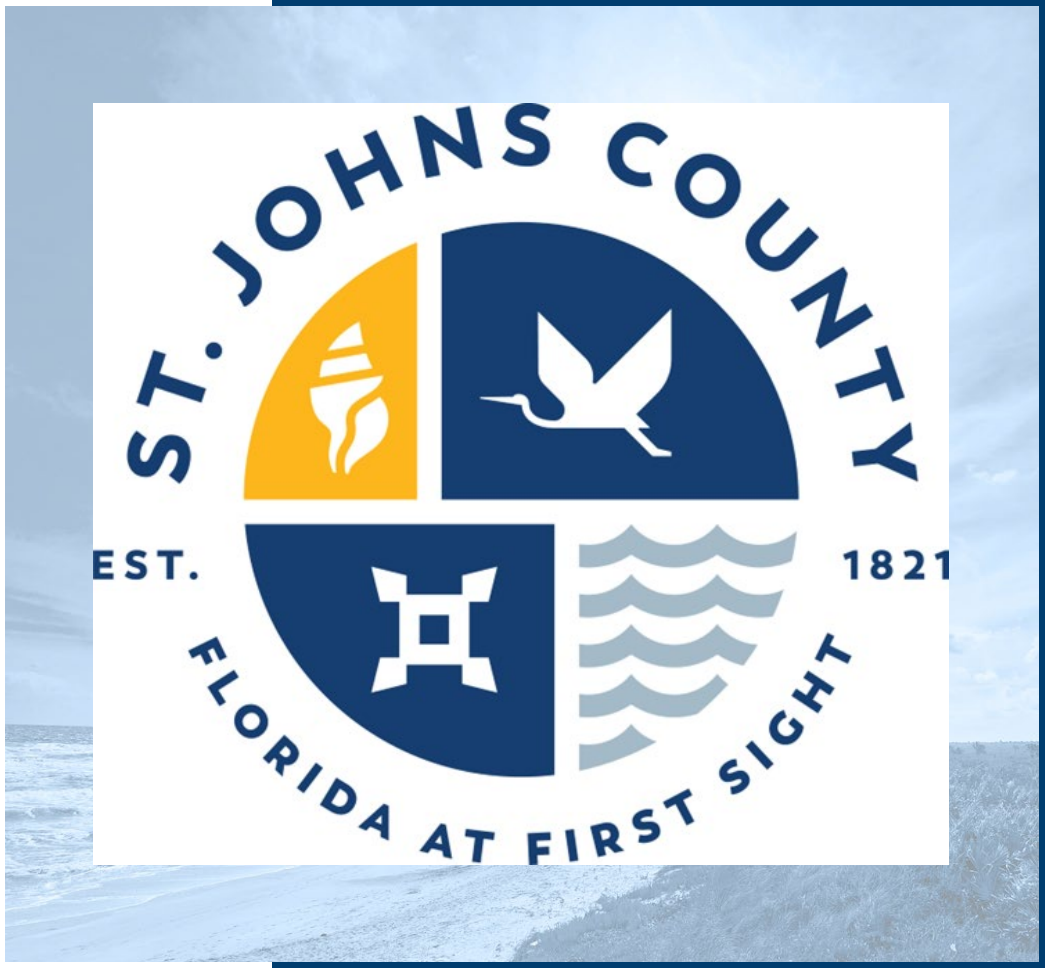






Tourist Development Council Budget Recommendations

The TDC will review the Tourism Budget in May and June and make recommendations to the Board of County Commissioners


ST. JOHNS COUNTY
EST.
1821
FLORIDA AT FIRST SIGHT

TDC Regular Meeting – May 19, 2025

Agenda Item 10 – SJC Visitor Tracking Study Quarterly Report

This project is part of the Beach Sand Renourishment initiative and is supported by Disaster Recovery funding. The following report, prepared by Downs and St. Germain, presents findings from local surveys conducted in St. Johns County between January and March 2025.

ST. JOHNS COUNTY

Visitor Tracking and Beach Study
January to March 2025



ST. AUGUSTINE PONTE VEDRA FLORIDA'S HISTORIC COAST®

downs & st. germain RESEARCH

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46	Post-Trip Evaluation
50	Beach Visitor Detailed Findings

METHODOLOGY



- Interviews were completed in person and online with 692 visitors between January 1 and March 31, 2025
- Surveying locations included:
  - Butler Beach
  - Cresent Beach
  - Downtown St. Augustine
  - Holiday Inn Express & Suites at Vilano Beach
  - Old Town Trolley Tour Stops
  - Ponte Vedra Beach
  - St. Augustine Beach
  - St. Augustine Lighthouse & Maritime Museum
  - St. Patrick's Day Parade/Celtic Festival
  - Vilano Beach

EXECUTIVE ECONOMIC IMPACT SUMMARY



KEY PERFORMANCE INDICATORS

JANUARY TO MARCH 2025



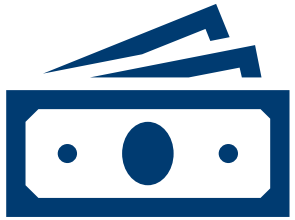
444,500

TOTAL VISITORS



666,330

ROOM NIGHTS



$481,791,200

DIRECT SPENDING



$6,914,600

TOURISM DEVELOPMENT TAX[1]

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

ST. AUGUSTINE PONTE VEDRA FLORIDA'S HISTORIC COAST®

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LODGING METRICS

JANUARY TO MARCH 2025

COMBINED

67.9%	$182.22	$123.67
Occupancy	Average Daily Rate	Revenue Per Available Room

HOTELS[1]

69.9%	$187.75	$131.21
Occupancy	Average Daily Rate	Revenue Per Available Room

VACATION RENTALS[2]

64.3%	$172.46	$110.89
Occupancy	Average Daily Rate	Revenue Per Available Room

ST. AUGUSTINE PONTE VEDRA FLORIDA'S HISTORIC COAST®

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

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EXECUTIVE VISITOR PROFILE SUMMARY



VISITOR PROFILE

JANUARY TO MARCH 2025



50
Median Age

$112,500
Median Household Income

31%
First-time Visitor

74%
Traveled without Children[1]

3.1
Travel Party Size[2]

6.0
Length of Stay[2]

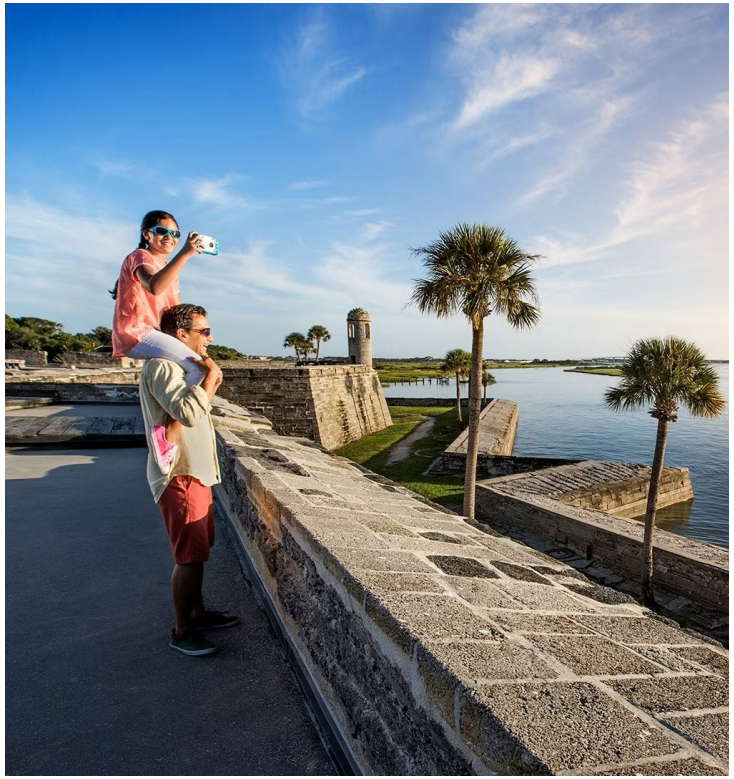
[1]Children are defined as people under 18 years old.
[2]Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

VISITOR TYPE

JANUARY TO MARCH 2025



Paid accommodations[1]
64%



Day trippers
22%



Nonpaid accommodations[2]
14%

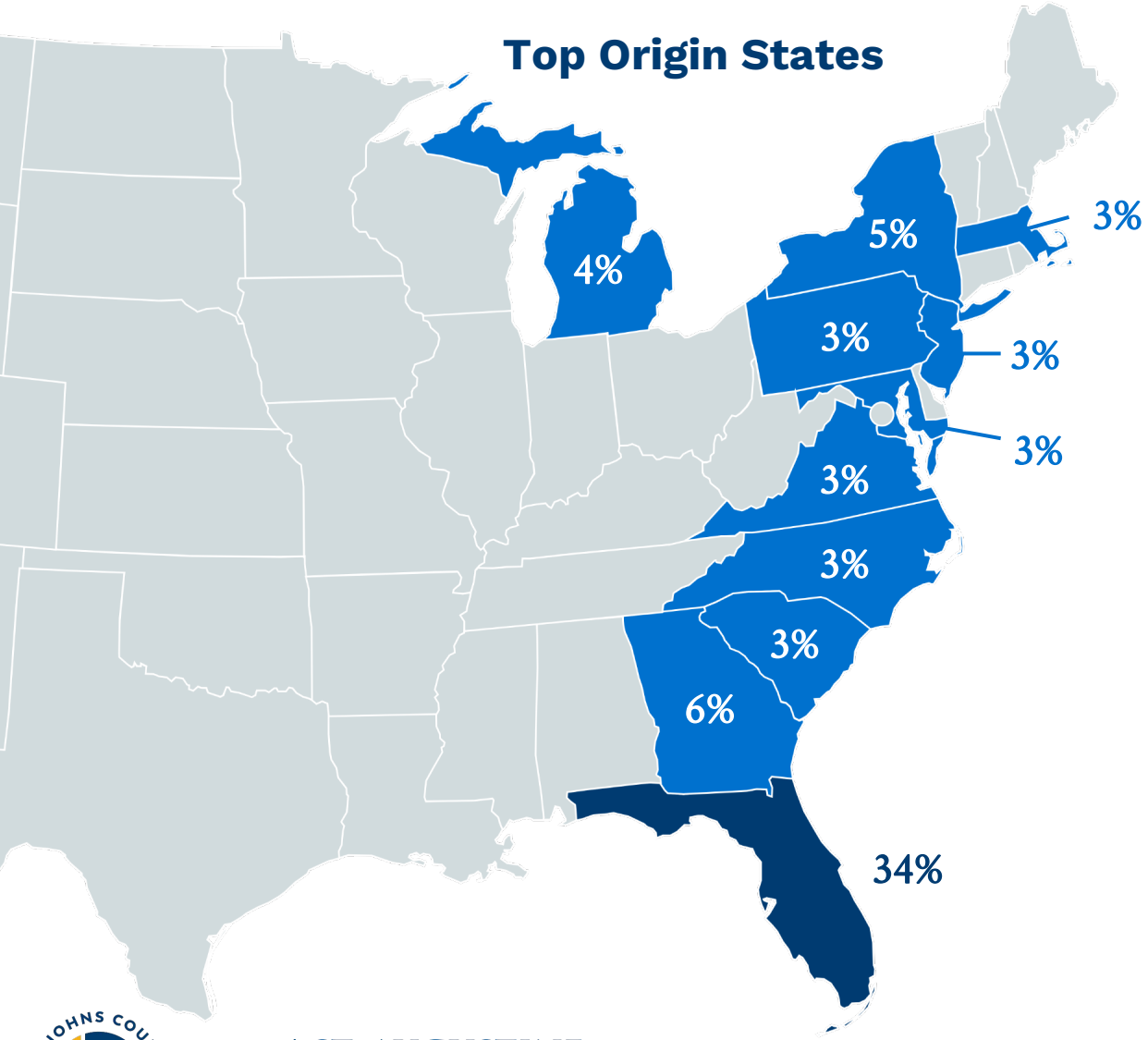
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FLORIDA'S HISTORIC COAST®

[1]Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast.
[2]Visitors staying in a second home, timeshare, or with friends/relatives.

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VISITOR ORIGIN

JANUARY TO MARCH 2025



Top Origin Markets	Jan-Mar 2025
Jacksonville, FL	13%
Orlando – Daytona Beach – Melbourne, FL	8%
Tampa – St. Petersburg, FL	4%
New York, NY[1]	4%
Atlanta, GA	3%
Detroit, MI	3%
Washington, DC – Hagerstown, MD[2]	3%
Tallahassee – Thomasville, FL	3%
Boston, MA	3%
Miami – Fort Lauderdale, FL	3%

Top International Markets	Jan-Mar 2025
Canada	3%
Other	1%

[1]New York market includes some areas Connecticut, New Jersey, and Pennsylvania.
[2]Washington, DC market includes some areas in Maryland, Pennsylvania, Virginia, and West Virginia.

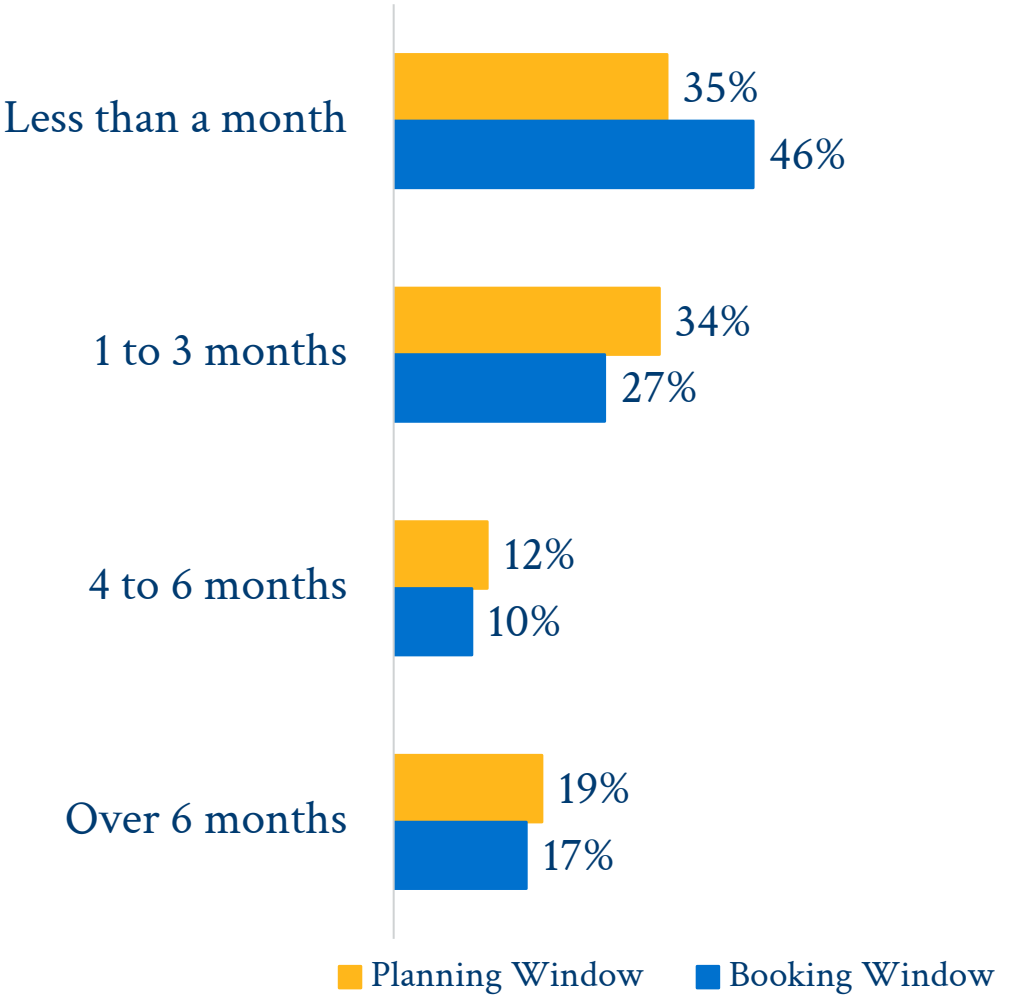
ST. AUGUSTINE PONTE VEDRA FLORIDA'S HISTORIC COAST®

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TRIP PLANNING AND BOOKING CYCLE

JANUARY TO MARCH 2025

The typical visitor **planned** their trip **63 days** in advance and **booked** their trip **41 days** in advance.



TOP TRIP PLANNING SOURCES

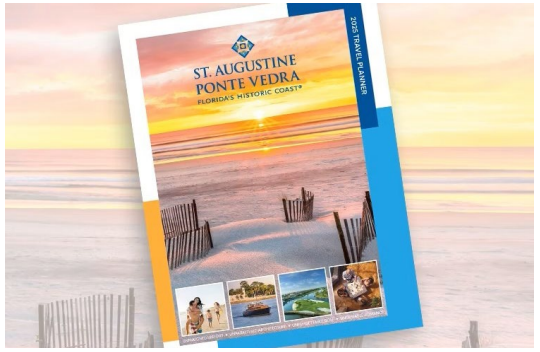
JANUARY TO MARCH 2025



Friends/relatives/co-workers
42%



Previous Visit
35%



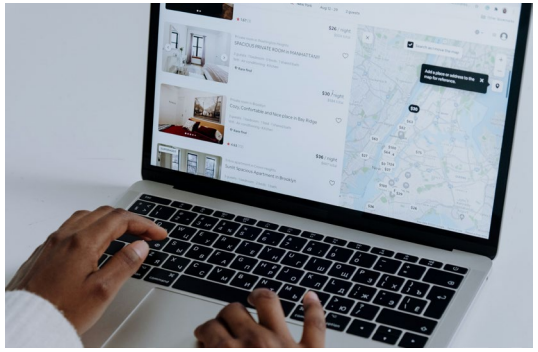
Visitor guide/brochure
35%



Hotel websites/apps
24%



Mapping websites
24%



Vacation rental company
23%



Review website/app
22%



VisitStAugustine.com
18%

*Multiple responses permitted

TOP ADVERTISING SOURCES

JANUARY TO MARCH 2025

Base: 30% of visitors who recalled advertising



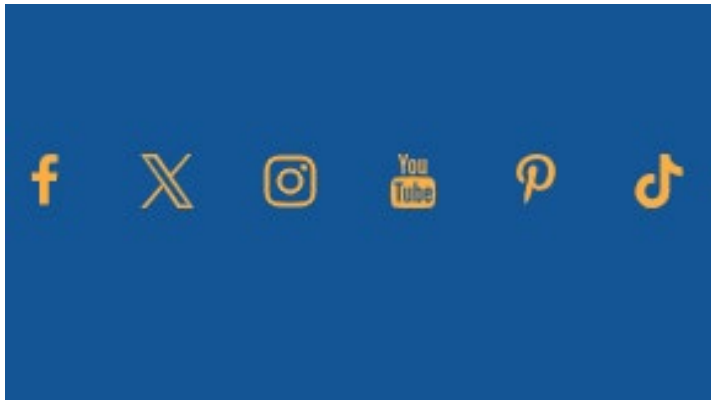
Friends/relatives/co-workers social media
48%



Online article
30%



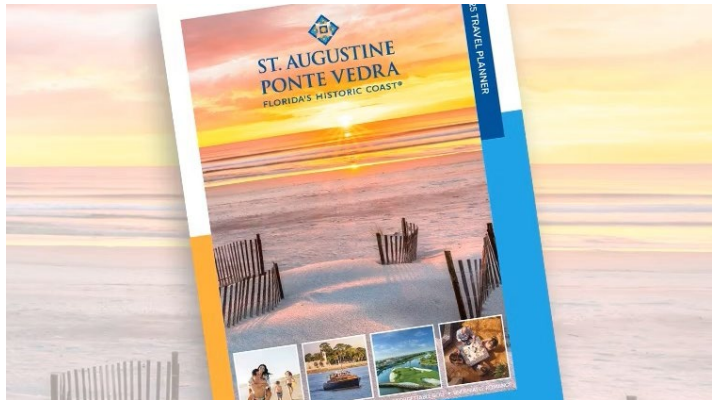
Online travel reviews, blogs, stories
30%



St. Augustine/Ponte Vedra social media
28%



Ad on a website
27%



Visitor guide/brochure
21%

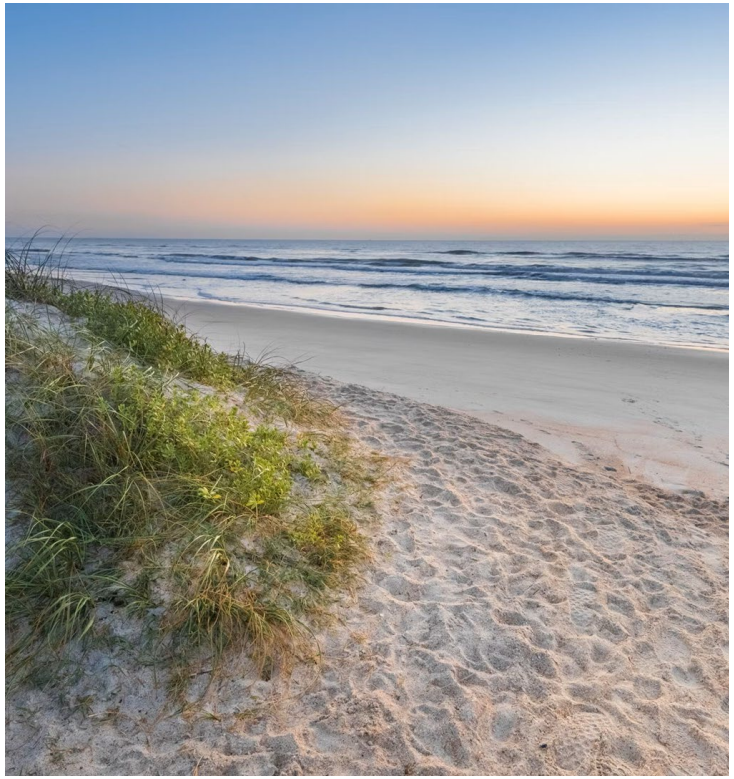
*Multiple responses permitted

ST. AUGUSTINE PONTE VEDRA FLORIDA'S HISTORIC COAST®

downs & st. germain RESEARCH

MAIN REASONS FOR VISITING

JANUARY TO MARCH 2025



Beach vacation/leisure trip
45%



Visit friends/relatives
33%



Visit historical sites
22%

*Multiple responses permitted

TOP VISITOR ACTIVITIES

JANUARY TO MARCH 2025



Visit Downtown St. Augustine
72%



Dining out
70%



Beach
62%



Visit historical sites
58%



Shopping
55%

*Multiple responses permitted

VISITOR PROFILE INSIGHTS

JANUARY TO MARCH 2025

INSIGHTS	ACTIONABLE ITEMS
Visitors mostly travel as a couple or family and without children	Investigate travel deterrents for families with children; consider kid-friendly promotions
Visitors are mostly from the Southeast and Northeast	Target marketing campaigns along the east coast
Visitors have short trip planning and booking windows	Launch campaigns about 2 months in advance to match planning window
Visitors are influenced by friends/relatives and previous visits	Encourage visitors to share their experience on social media and tag the VCB
Visitors come to the area for the beach, to visit friends/relatives, and for the history	Continue focusing on the areas historic charm and serene beaches
Most visitors are repeat travelers	Incentivize referrals and return trips

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

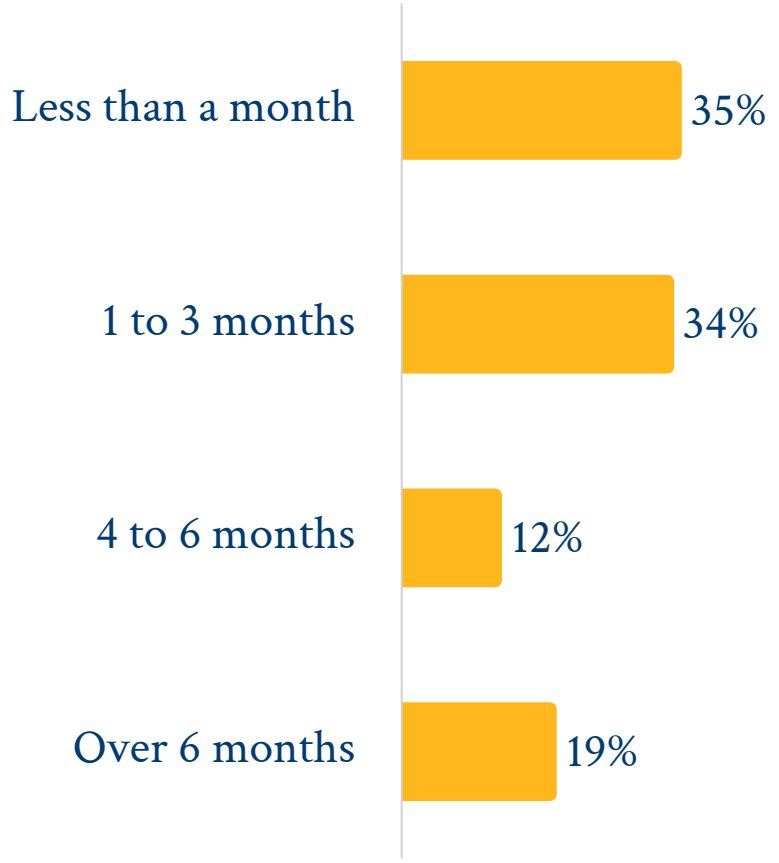
VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

JANUARY TO MARCH 2025

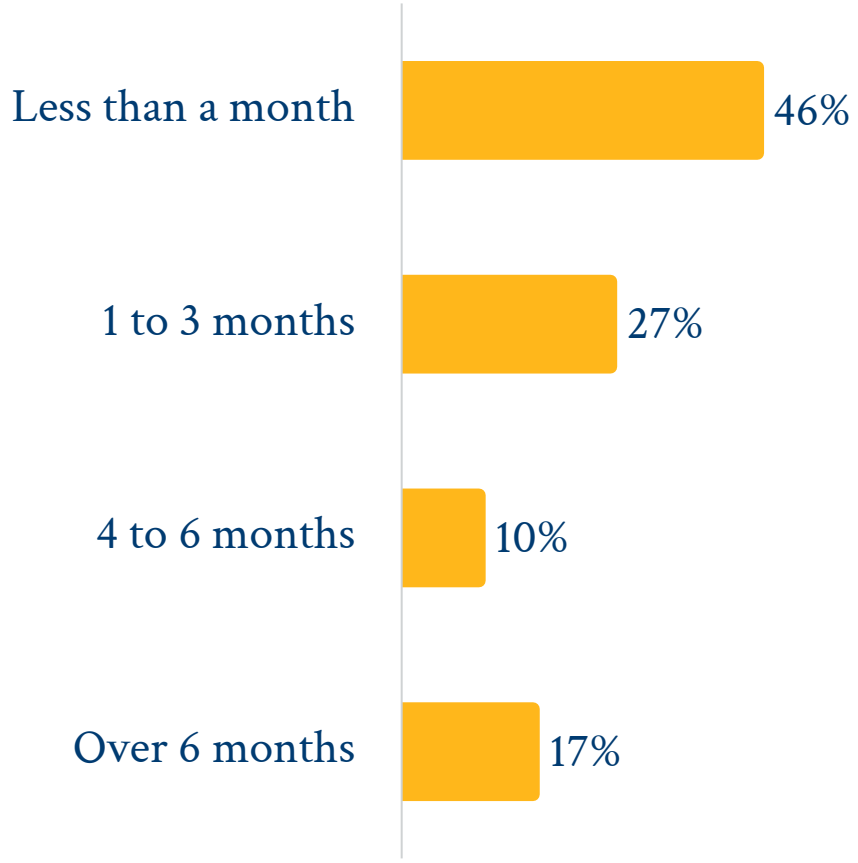
- Visitors to the St. Augustine/Ponte Vedra area have short trip **planning** windows, as over **2 in 3** visitors planned their trip to the St. Augustine/Ponte Vedra area **3 months or less in advance**
- On the other hand, nearly **1 in 3** visitors planned their trip at least **4 months in advance**
- The typical visitor planned their trip **63 days (about 2 months)** in advance



TRIP BOOKING CYCLE

JANUARY TO MARCH 2025

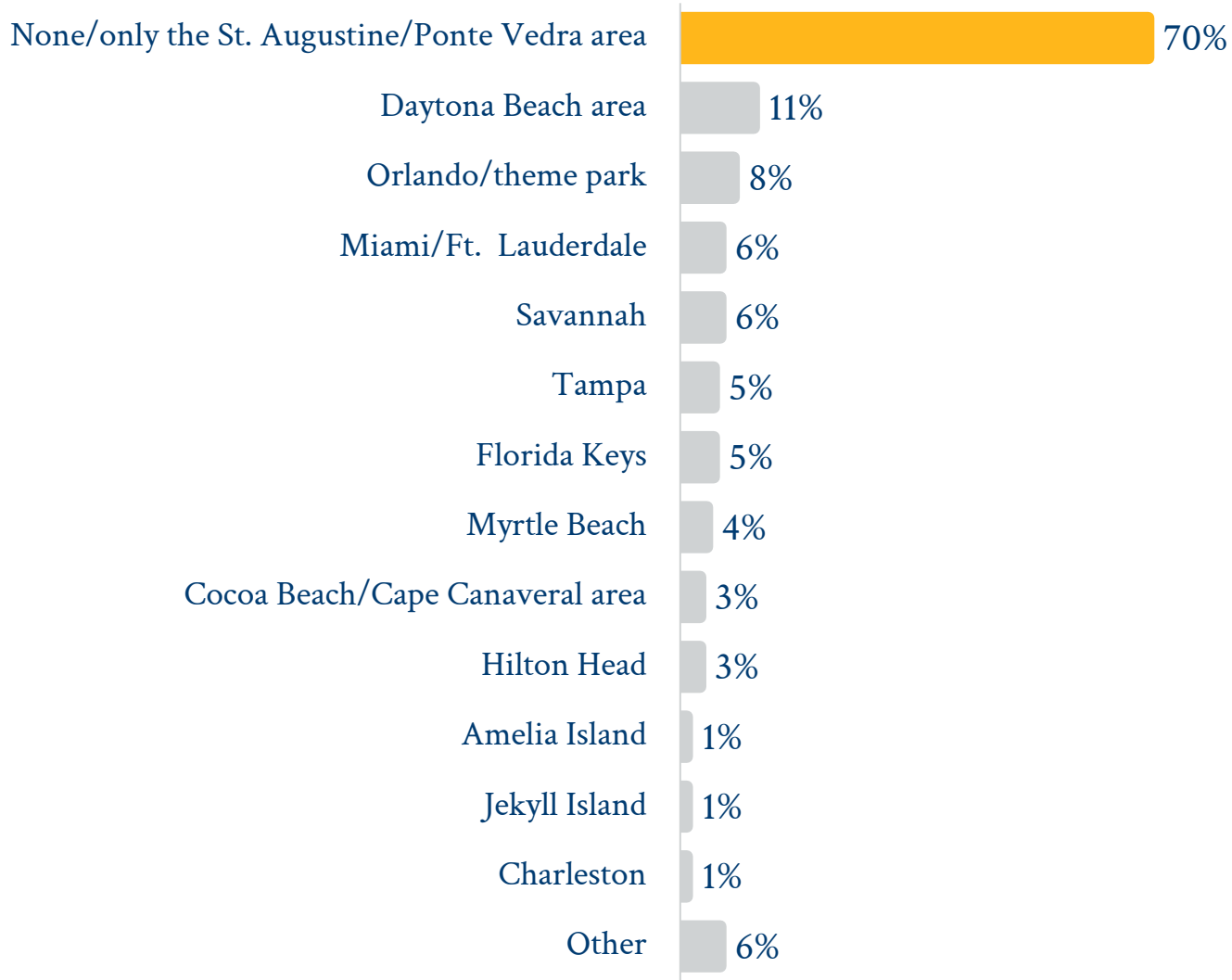
- Visitors to the St. Augustine/Ponte Vedra area have short booking windows, as nearly half of visitors booked their trip to the St. Augustine/Ponte Vedra area a month or less in advance
- On the other hand, over 1 in 4 visitors planned their trip at least 1 to 3 months in advance
- The typical visitor booked their trip 41 days (a little over one month) in advance



TRIP PLANNING DESTINATIONS

JANUARY TO MARCH 2025

- 7 in 10 visitors only considered the St. Augustine/Ponte Vedra area when planning their trip

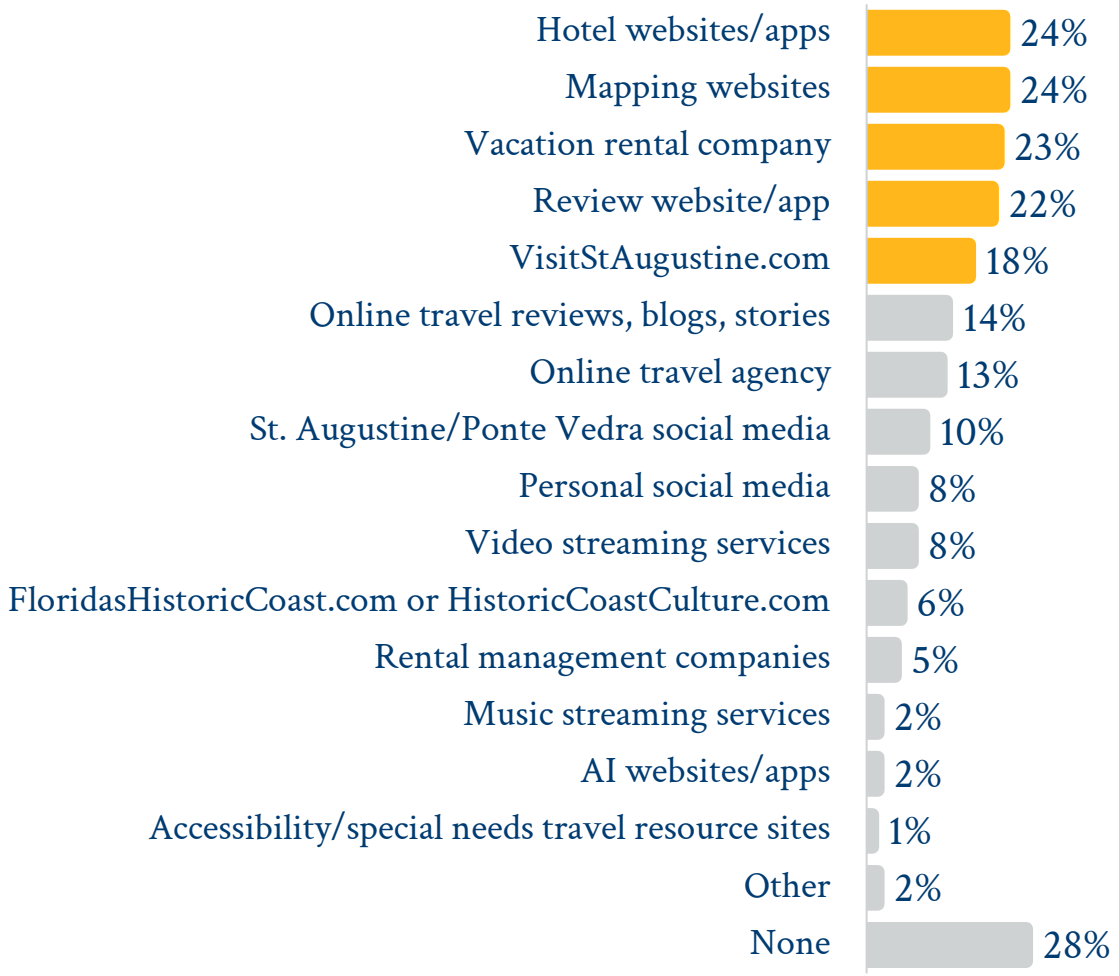


*Multiple responses permitted

ONLINE TRIP PLANNING SOURCES*

JANUARY TO MARCH 2025

- Nearly 1 in 4 visitors used hotel websites/apps and mapping websites (Google maps, etc.) as an online planning source for their trip to the St. Augustine/Ponte Vedra area
- Over 1 in 5 visitors planned their trip via a vacation rental company (Airbnb, Vrbo, etc.) and a review website/app (Tripadvisor, Google reviews, etc.)
- Nearly 1 in 5 visitors used VisitStAugustine.com to plan their trip



*Multiple responses permitted

OTHER TRIP PLANNING SOURCES*

JANUARY TO MARCH 2025

- Over **2 in 5** visitors planned their trip to the St. Augustine/Ponte Vedra area through **friends/family**
- Over **1 in 3** visitors planned their trip based on a previous visit to the St. Augustine/Ponte Vedra area
- Over **1 in 4** visitors used a **visitor guide/brochure** to plan their trip

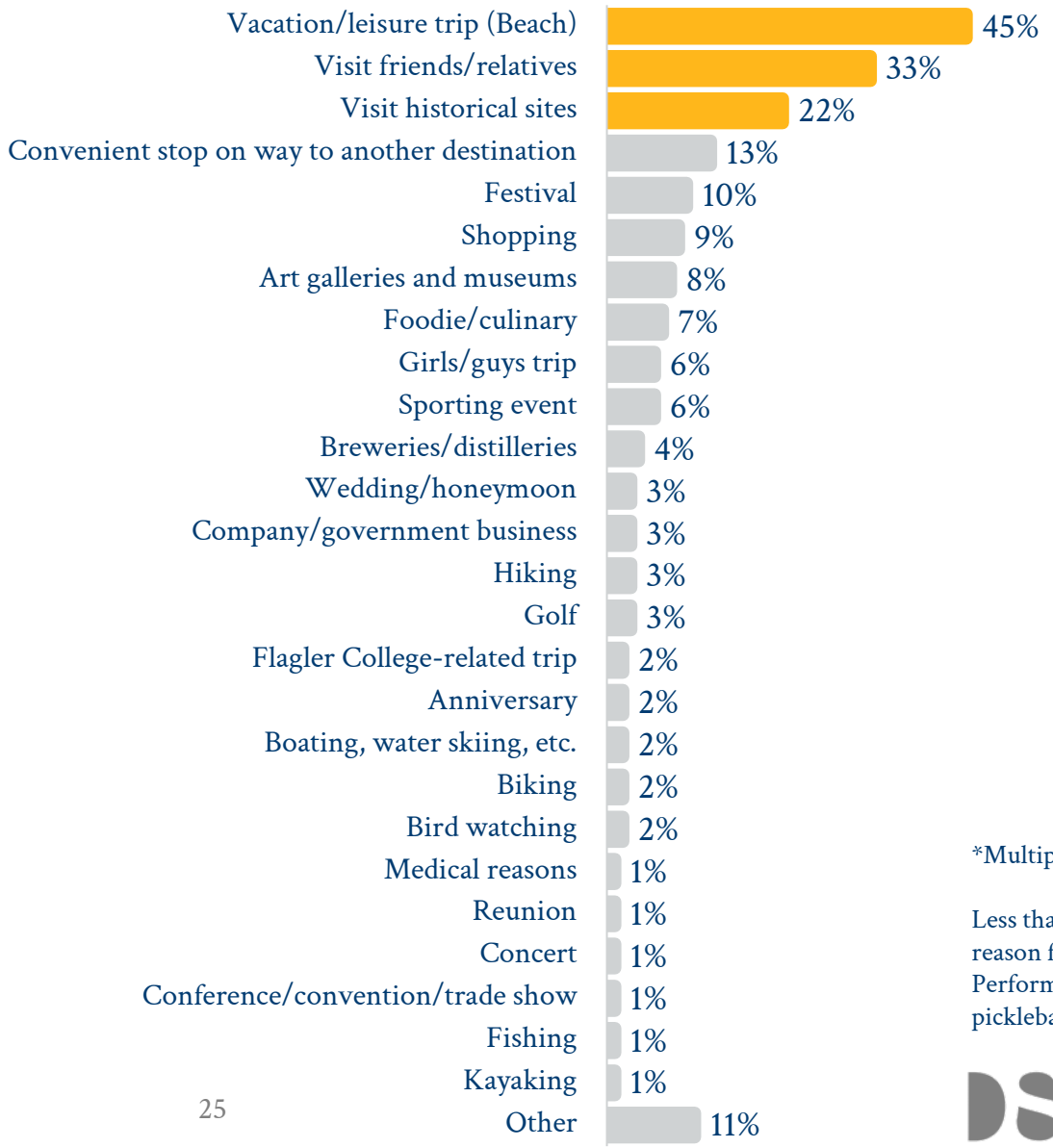


*Multiple responses permitted

REASONS FOR VISITING*

JANUARY TO MARCH 2025

- Nearly **half** of visitors visited the St. Augustine/Ponte Vedra area for a **beach vacation**
- **1 in 3** visitors came to **visit friends/relatives**
- Over **1 in 5** visitors came to **visit historical sites**



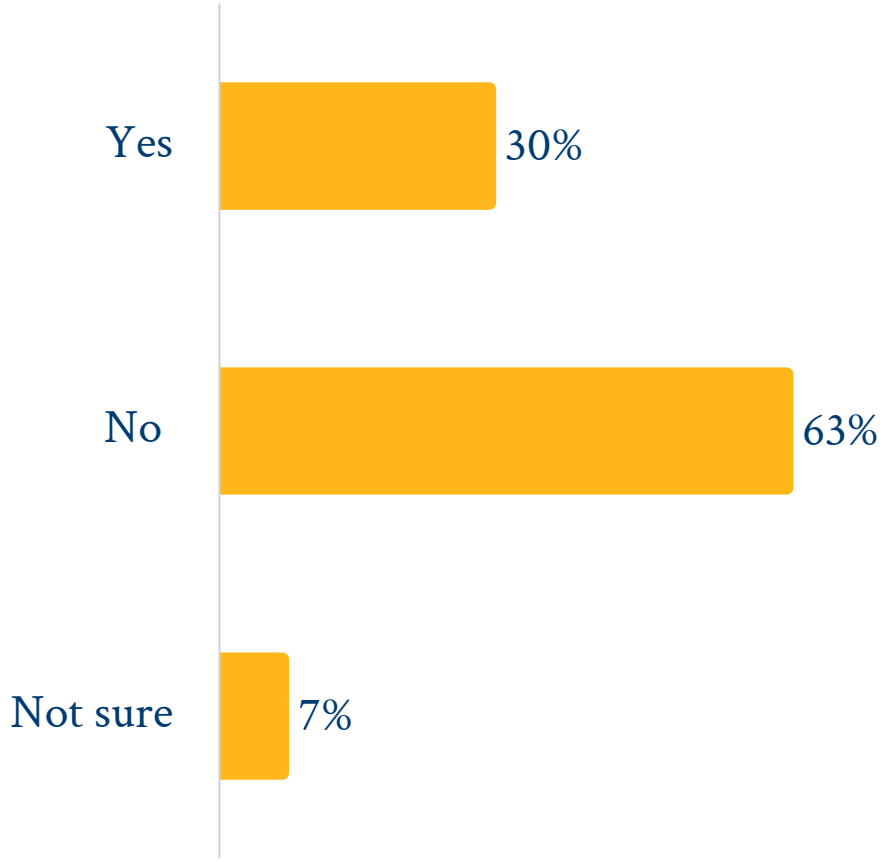
*Multiple responses permitted

Less than 1% of visitors stated their reason for visiting was the following: Performing arts, graduation, tennis or pickleball, agritourism, and ecotours.

ADVERTISING RECALL

JANUARY TO MARCH 2025

- 3 in 10 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



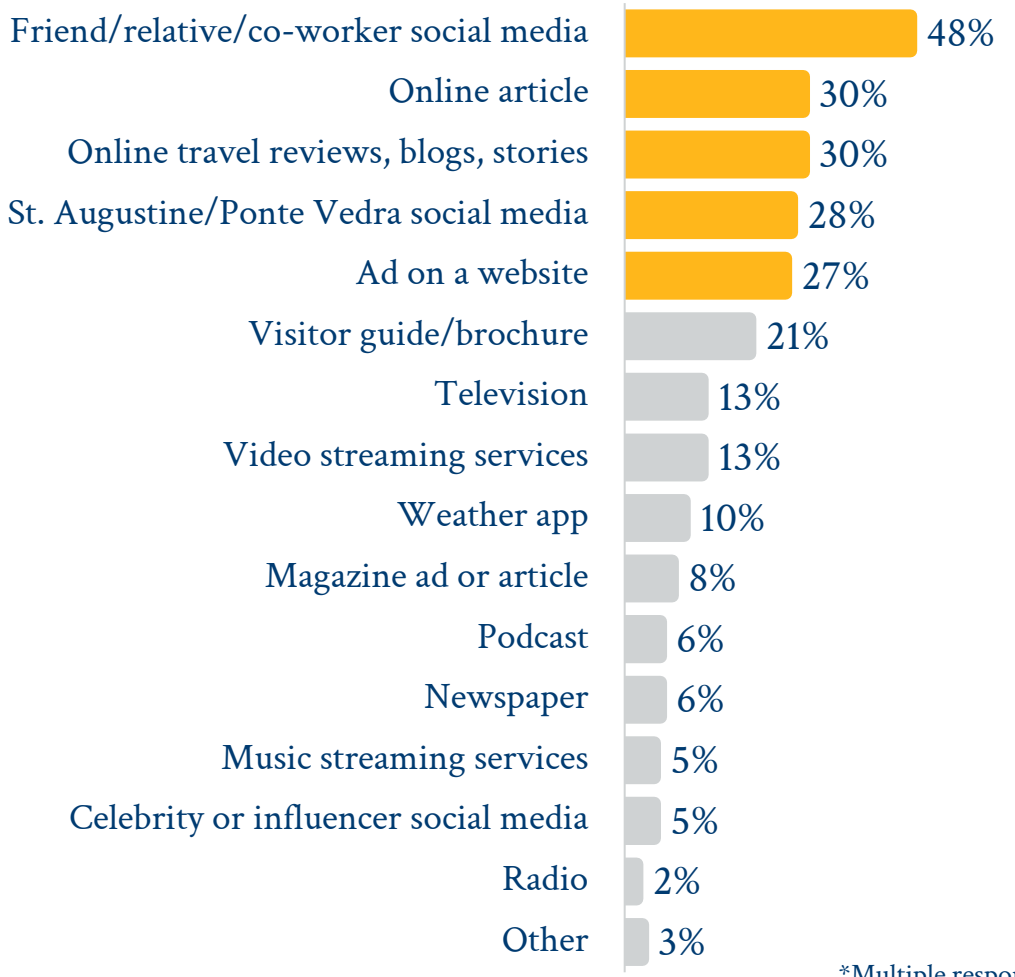
ADVERTISING RECALL*

JANUARY TO MARCH 2025

Of the 30% of visitors who recalled advertising about the St. Augustine/Ponte Vedra area:

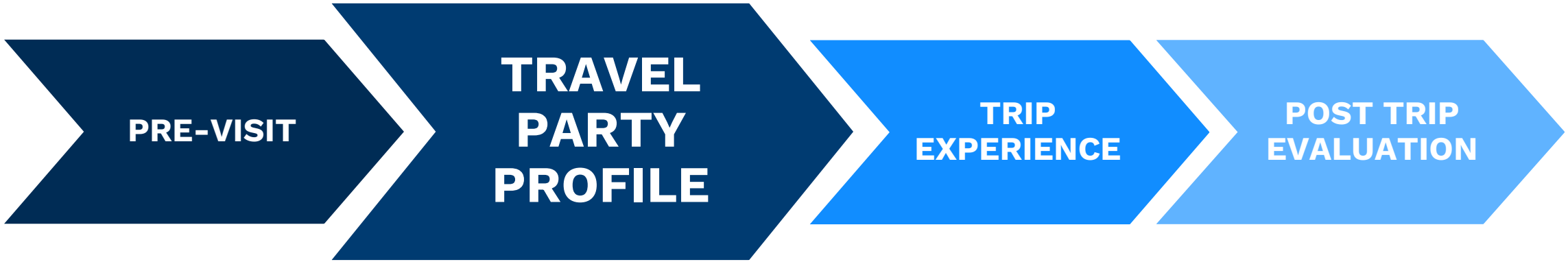
- Nearly half noticed it on a friend, relative, co-worker, etc. social media
- 3 in 10 noticed it on an online article or online travel reviews, blogs, stories, etc.
- Over 1 in 4 noticed it on St. Augustine/Ponte Vedra social media or from an ad on a website

Base: 30% of visitors who recalled advertising



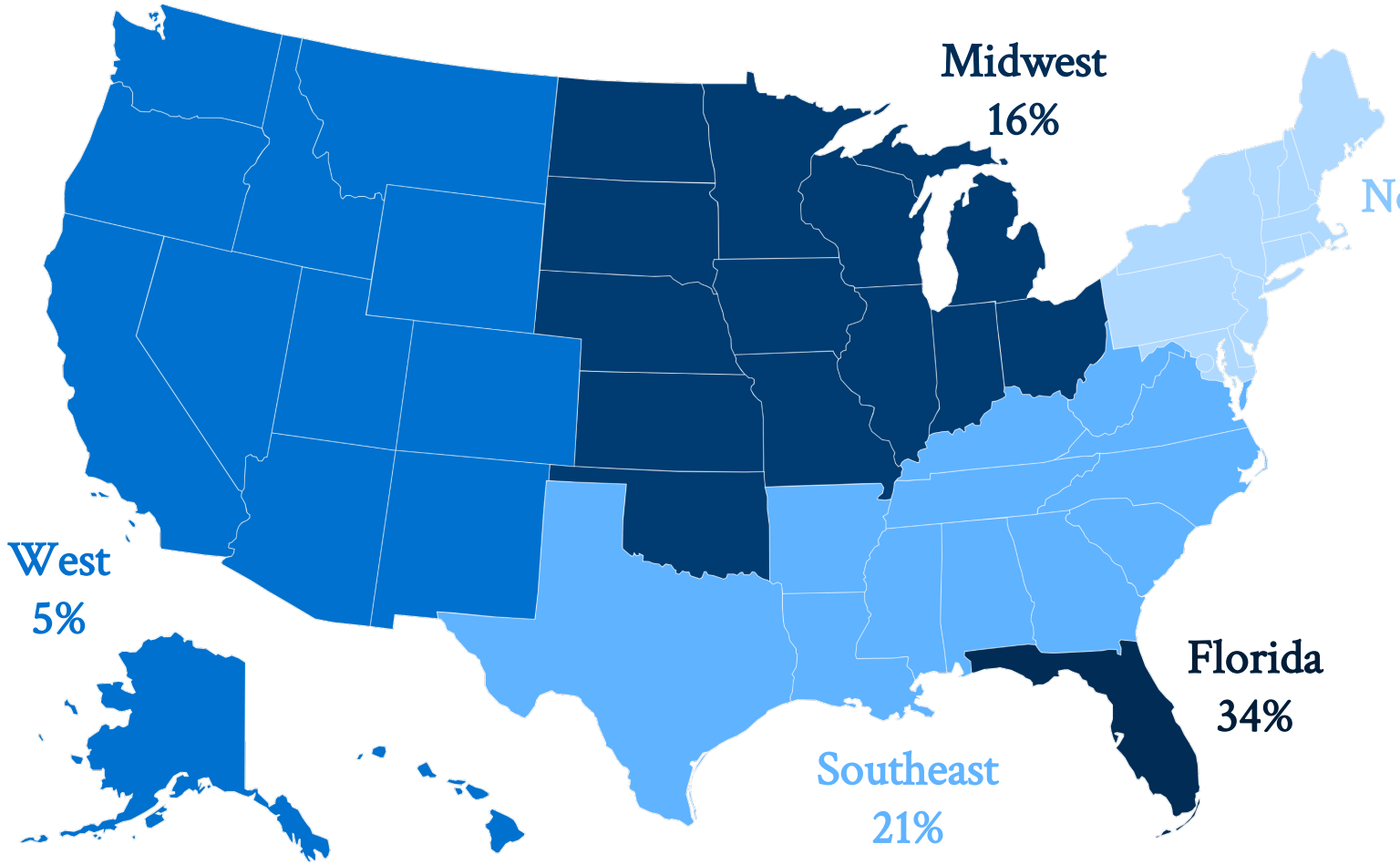
*Multiple responses permitted

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN

JANUARY TO MARCH 2025



- Over **half** of visitors traveled to the St. Augustine/Ponte Vedra area from the **Southeast**, including Florida
- **4%** of visitors traveled to the St. Augustine/Ponte Vedra area from **outside of the U.S.***

*The majority of international visitors came from Canada (3%)

TOP ORIGIN STATES

JANUARY TO MARCH 2025

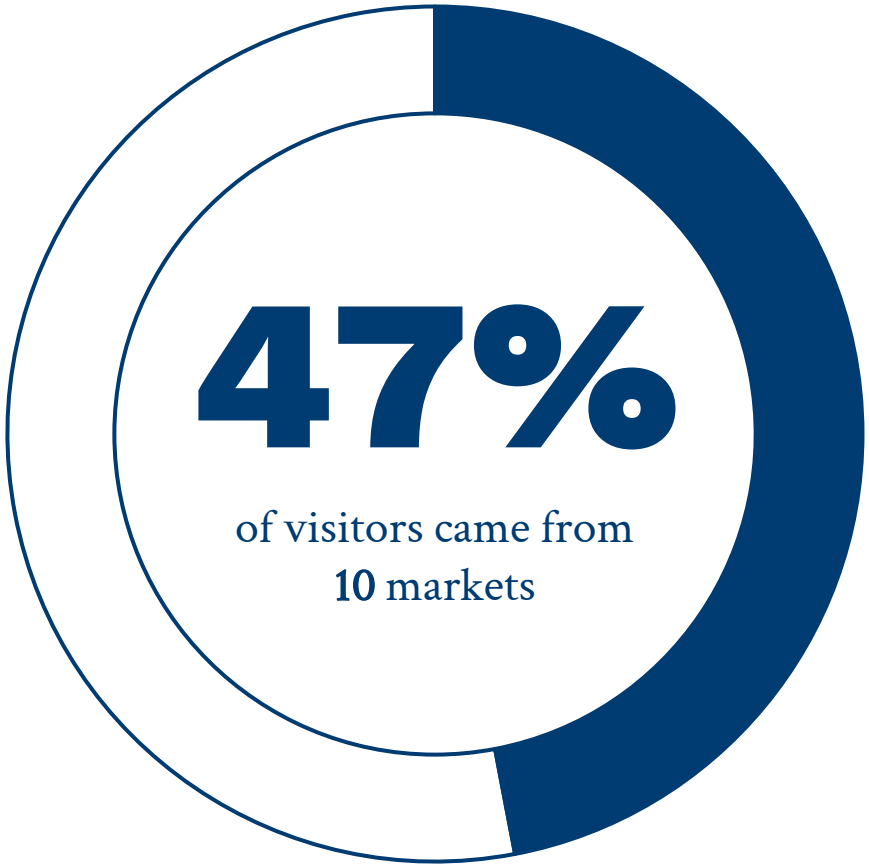
State of Origin	Jan-Mar 2025
Florida	34%
Georgia	6%
New York	5%
Michigan	4%
Virginia	3%
North Carolina	3%
South Carolina	3%
Maryland	3%
New Jersey	3%
Massachusetts	3%
Pennsylvania	3%



TOP ORIGIN MARKETS

JANUARY TO MARCH 2025

Markets	Jan-Mar 2025
Jacksonville, FL	13%
Orlando – Daytona Beach – Melbourne, FL	8%
Tampa – St. Petersburg, FL	4%
New York, NY[1]	4%
Atlanta, GA	3%
Detroit, MI	3%
Washington, DC – Hagerstown, MD[2]	3%
Tallahassee – Thomasville, FL	3%
Boston, MA	3%
Miami – Fort Lauderdale, FL	3%

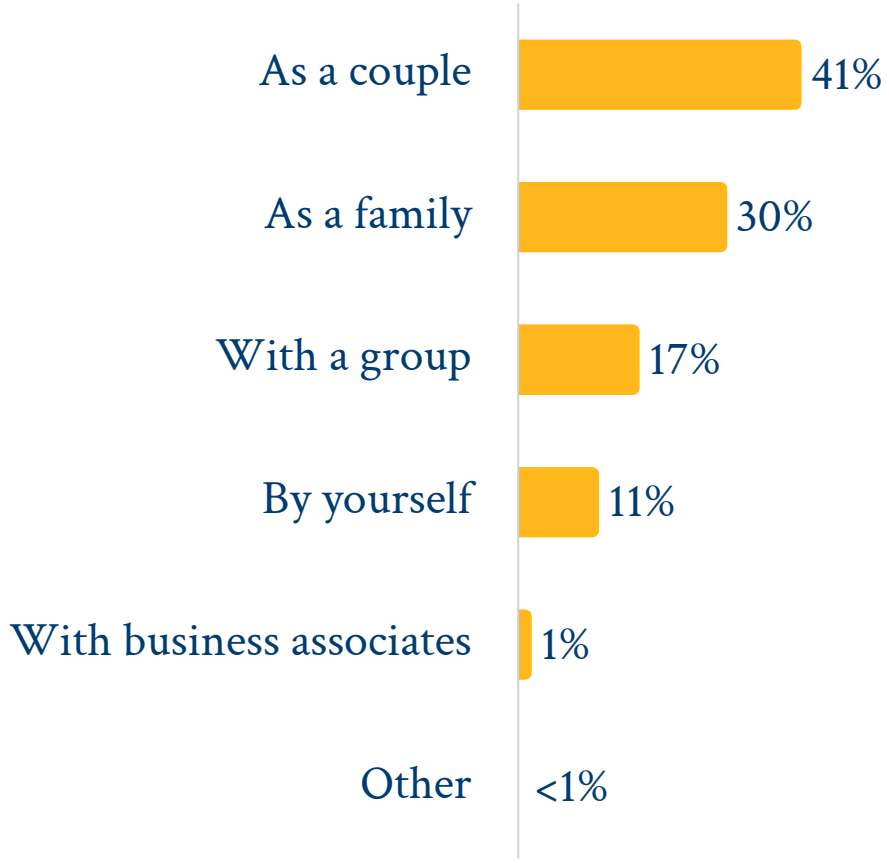


[1]New York market includes some areas Connecticut, New Jersey, and Pennsylvania.
[2]Washington, DC market includes some areas in Maryland, Pennsylvania, Virginia, and West Virginia.

TRAVEL PARTIES

JANUARY TO MARCH 2025

- Over 7 in 10 visitors traveled as a couple or a family
- Nearly 3 in 4 travel parties did not include children under 18
- For all visitors, the typical travel party size was 3.1

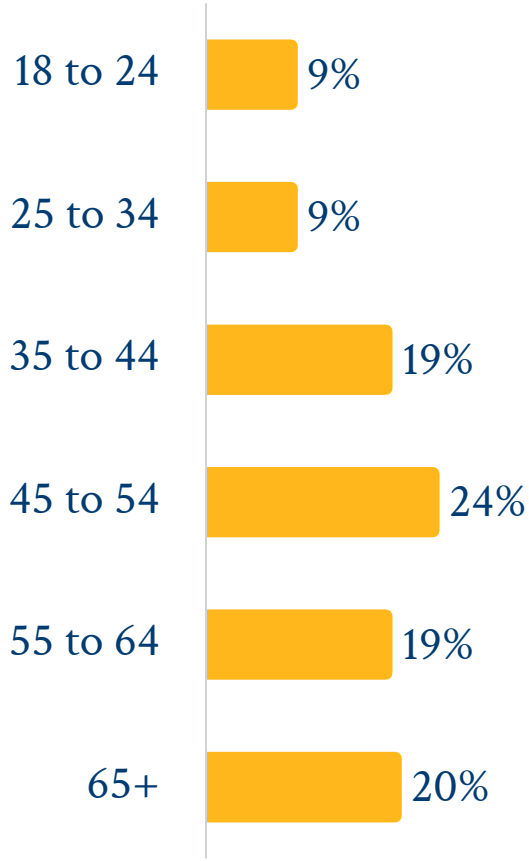


*Children are defined as people under 18 years old

AGE

JANUARY TO MARCH 2025

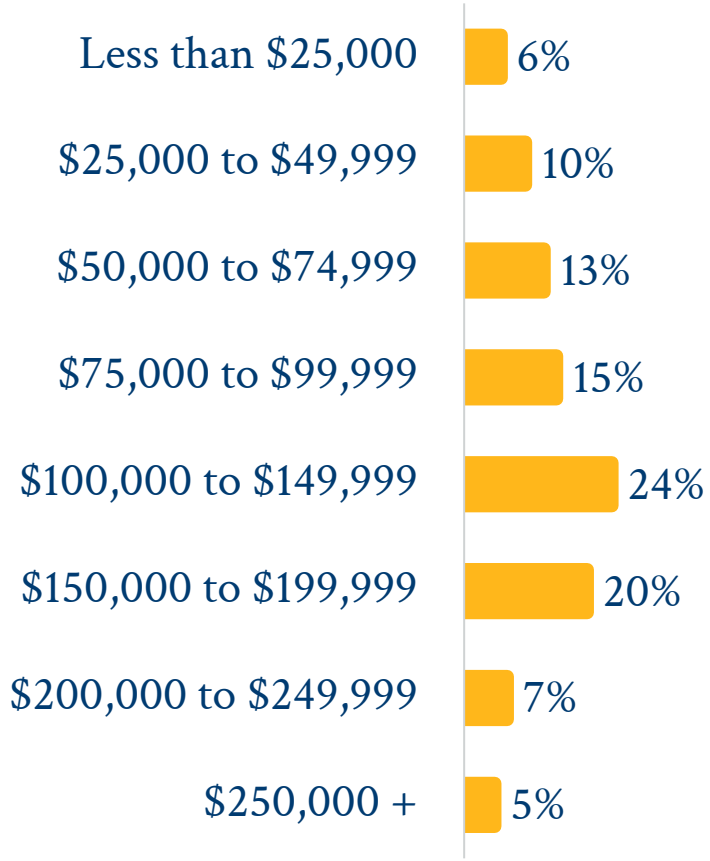
- The median age of visitors to the St. Augustine/Ponte Vedra area was **50**



HOUSEHOLD INCOME

JANUARY TO MARCH 2025

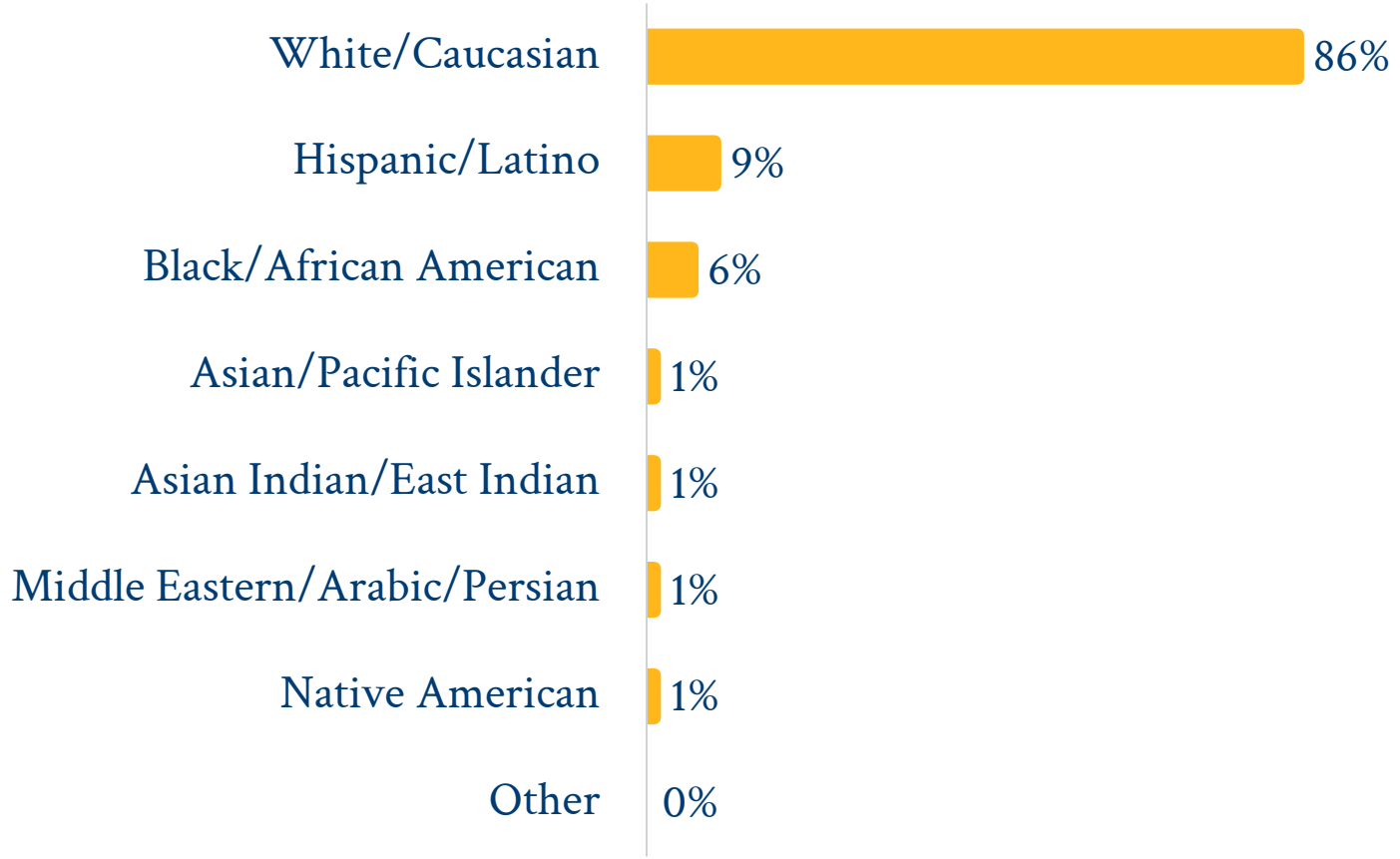
- Visitors to the St. Augustine/Ponte Vedra area had a median household income of **$112,500** per year
- **56%** of visitors had household incomes over **$100,000**



RACE/ETHNICITY*

JANUARY TO MARCH 2025

- Nearly 9 in 10 visitors to the St. Augustine/Ponte Vedra area identified as White/Caucasian

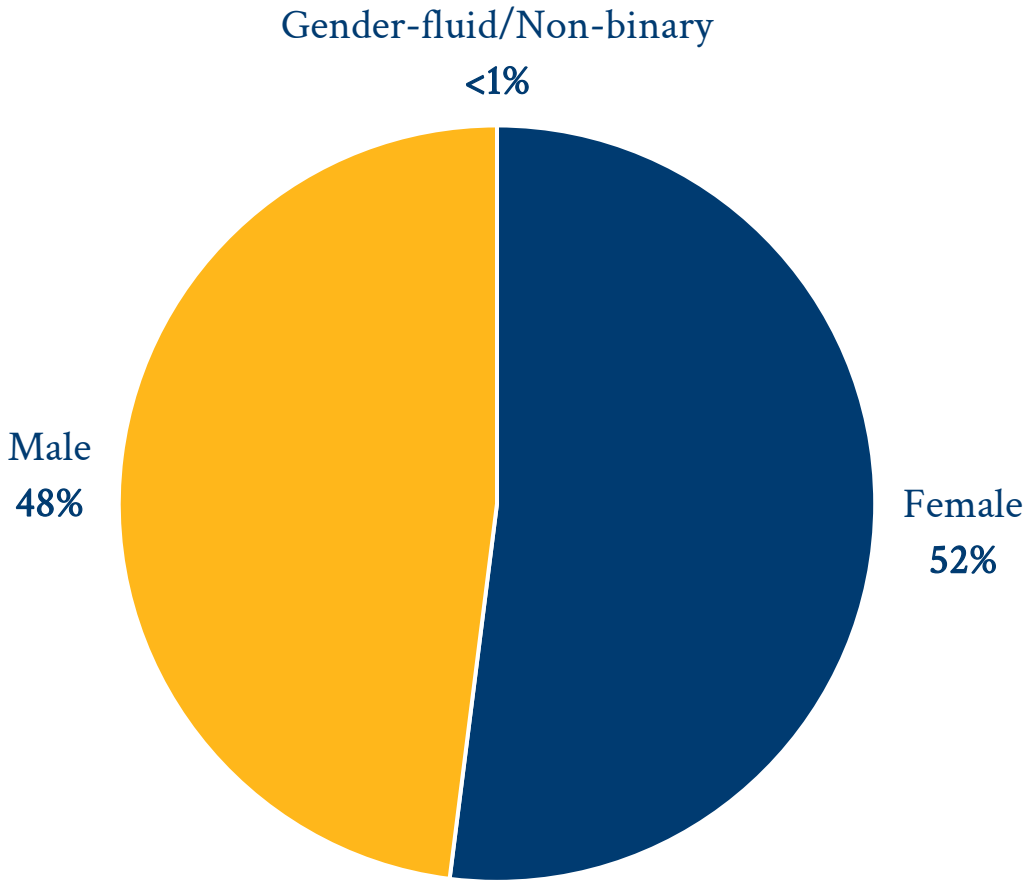


*Multiple responses permitted

GENDER*

JANUARY TO MARCH 2025

- 52% of visitors to the St. Augustine/Ponte Vedra area were female

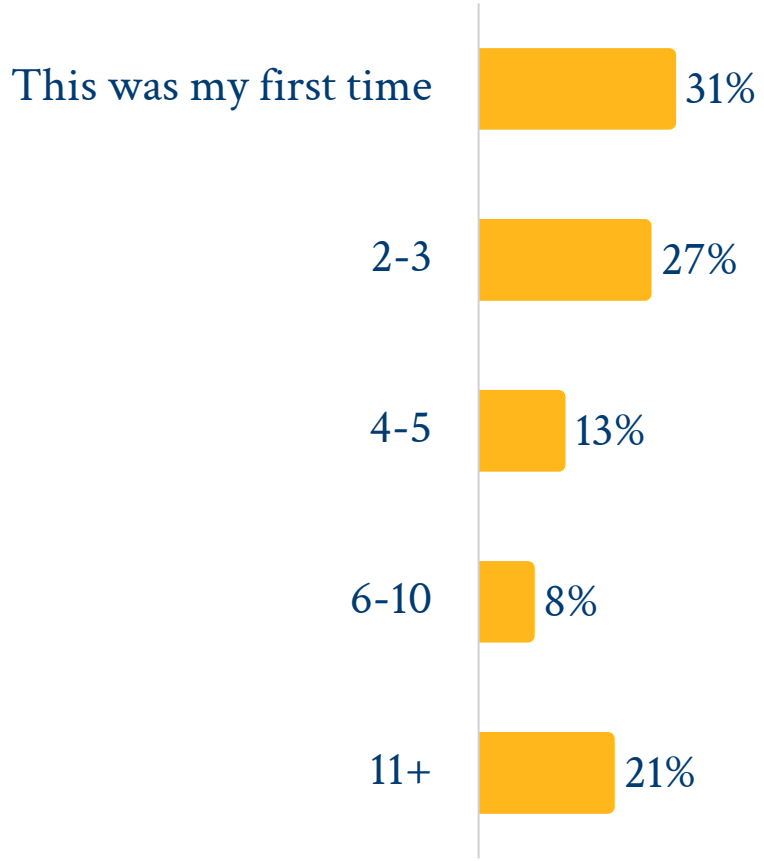


*May be influenced by visitor's willingness to complete a survey

NEW & RETURNING VISITORS

JANUARY TO MARCH 2025

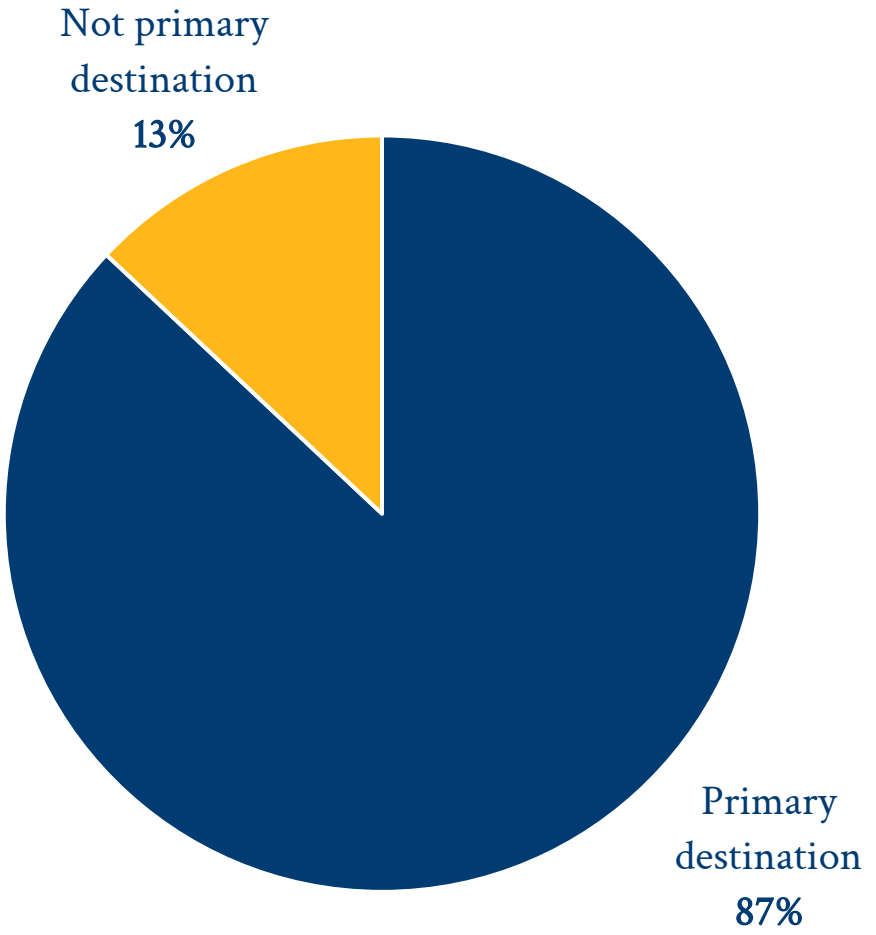
- Nearly 1 in 3 visitors said this was their first time visiting the St. Augustine/Ponte Vedra area
- Over 1 in 5 visitors were loyalists having visited over 10 times



PRIMARY TRIP DESTINATION

JANUARY TO MARCH 2025

- 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, Daytona Beach, and Jacksonville**.*



*Coded open-ended responses; multiple responses permitted.

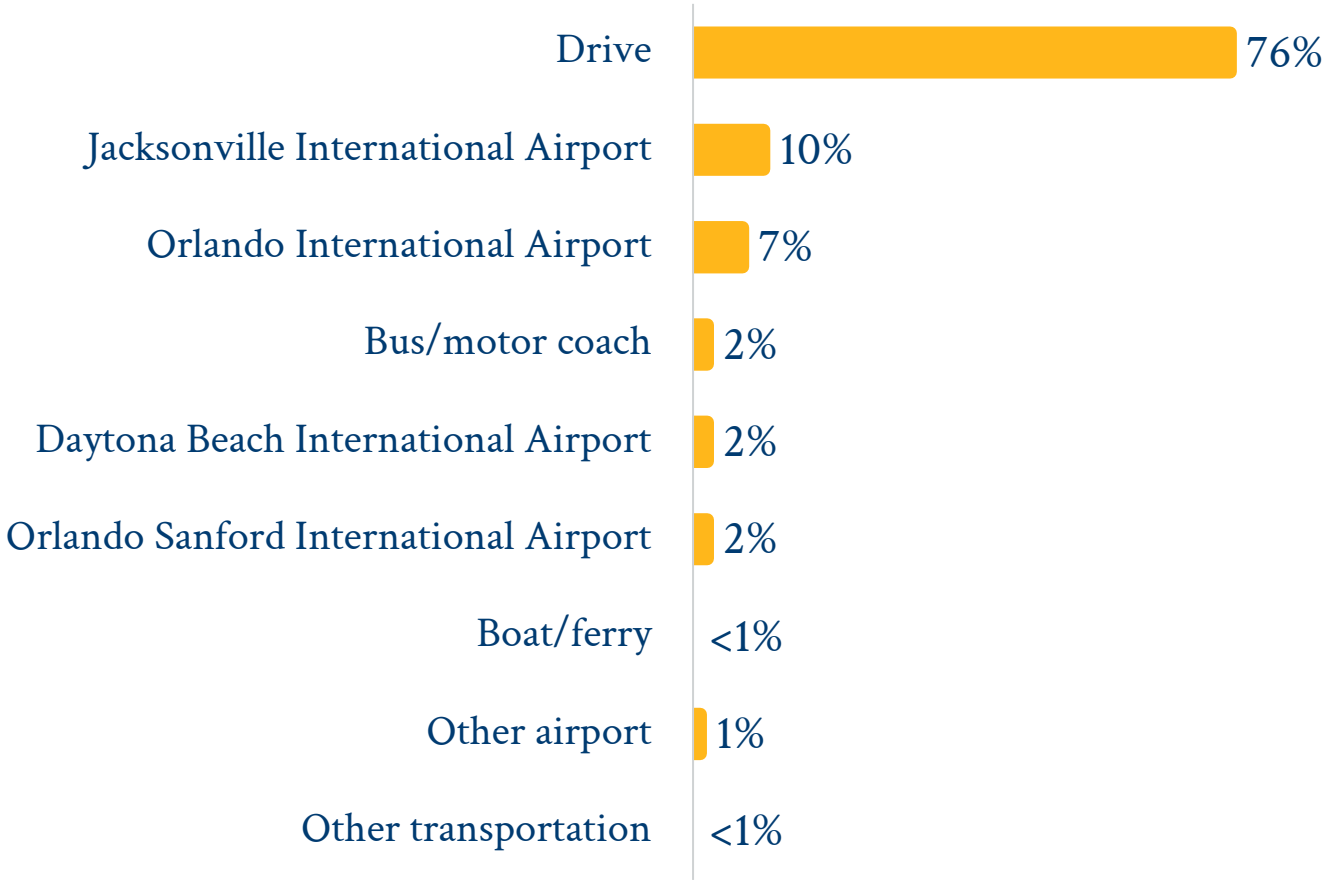
VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

JANUARY TO MARCH 2025

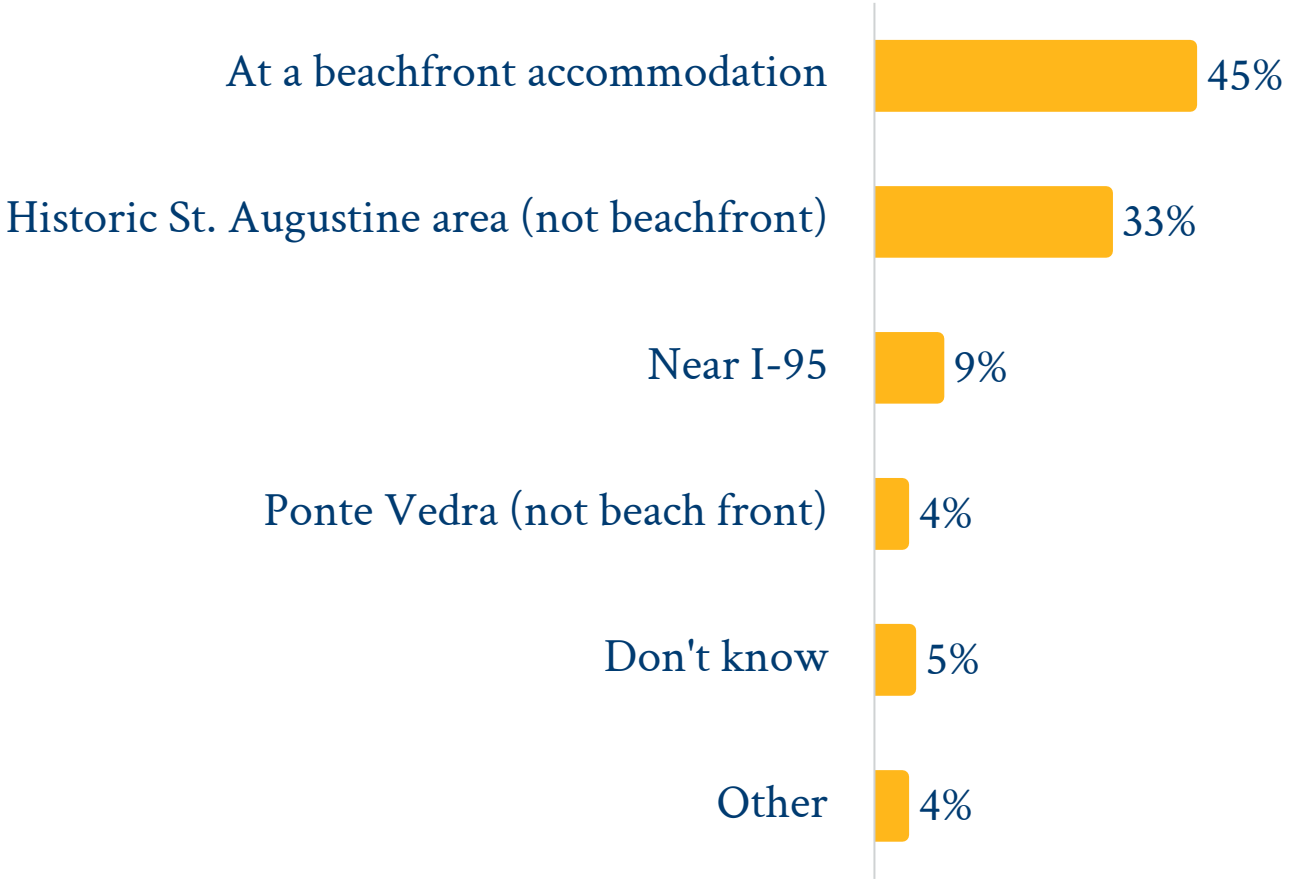
- Over 3 in 4 visitors drove to the St. Augustine/Ponte Vedra area
- Of the 22% of visitors who flew to the St. Augustine/Ponte Vedra area, over 3 in 4 used Jacksonville International Airport or Orlando International Airport



ACCOMMODATION LOCATION

JANUARY TO MARCH 2025

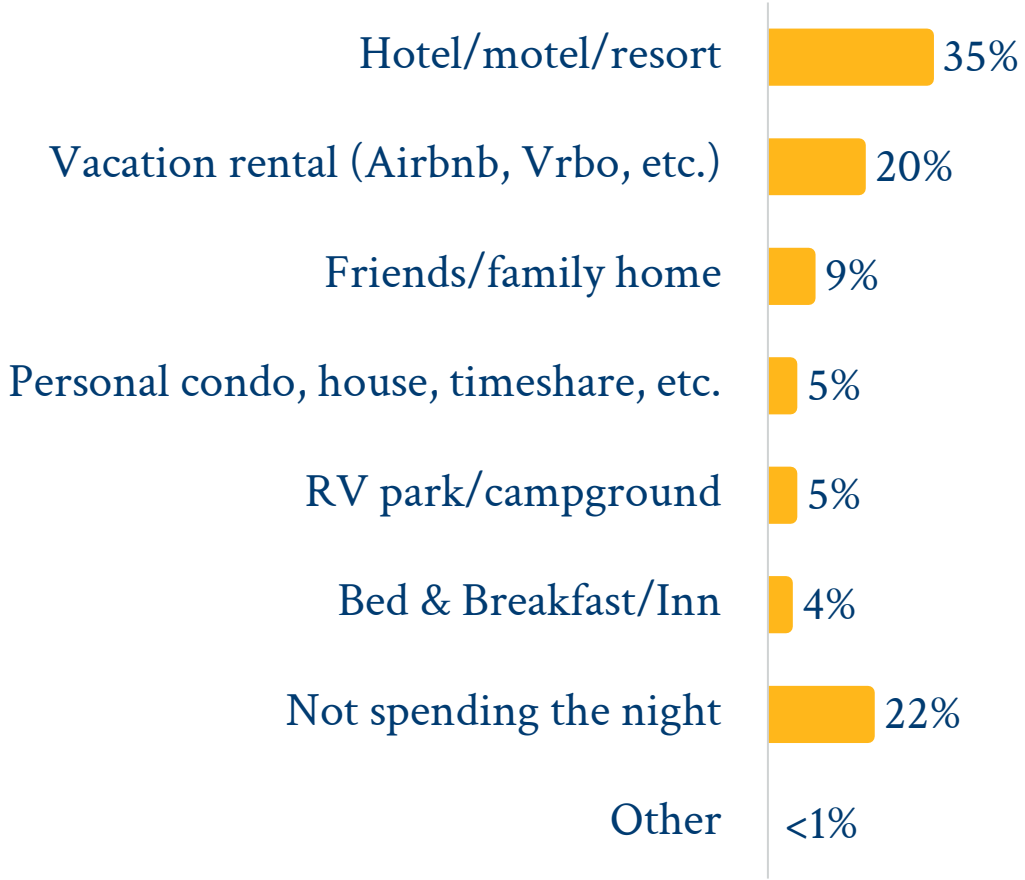
- Nearly **half** of visitors stayed overnight at a beachfront accommodation in the St. Augustine/Ponte Vedra area
- **1 in 3** visitors stayed overnight in the historic St. Augustine area



ACCOMMODATION TYPE

JANUARY TO MARCH 2025

- Nearly **2 in 3** visitors stayed overnight in **paid accommodations*** in the St. Augustine/Ponte Vedra area
- The average length of stay across all visitors was **6.0 nights**
- Visitors staying in paid accommodations stayed an average of **7.0 nights**

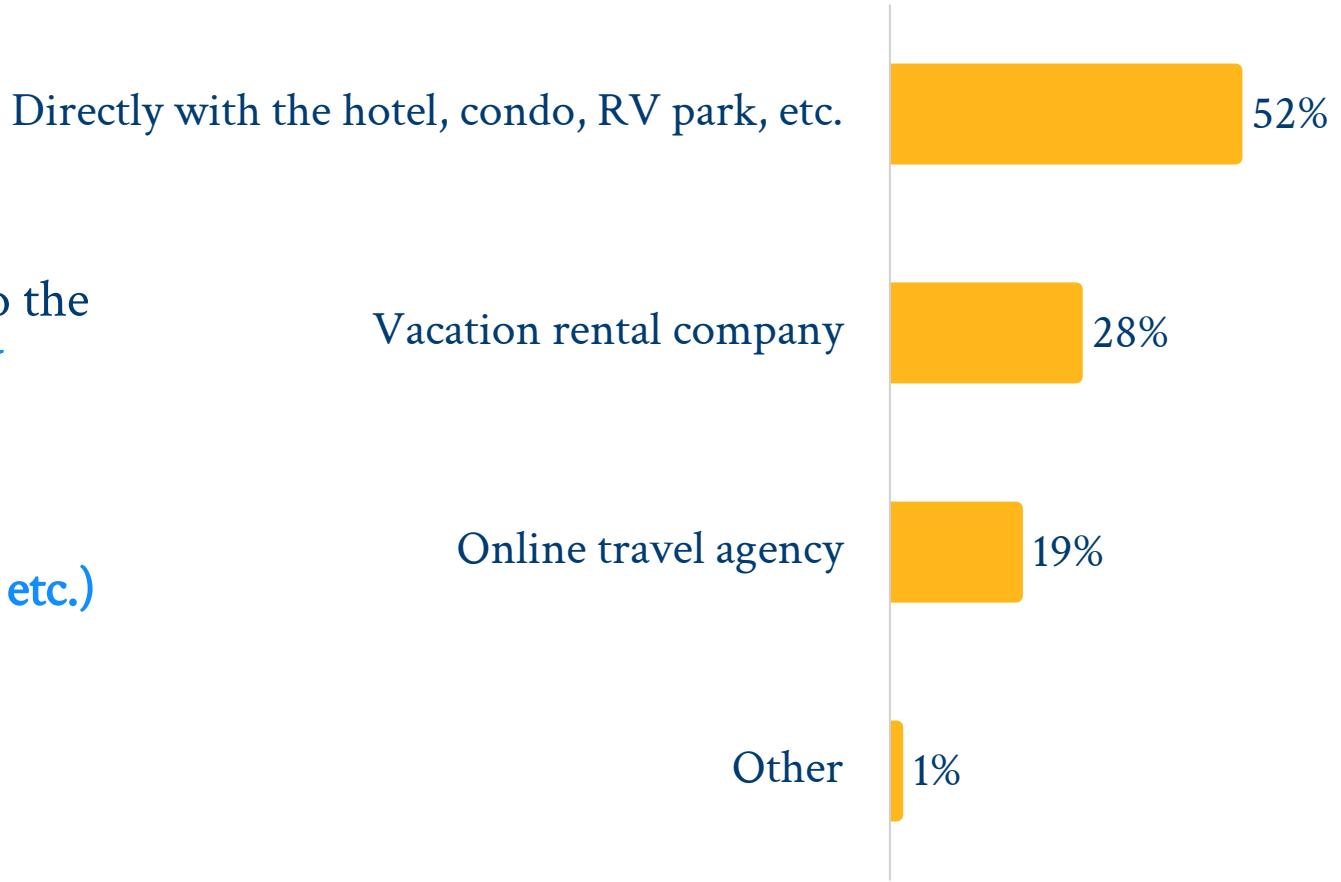


*Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast

ACCOMODATION BOOKING

JANUARY TO MARCH 2025

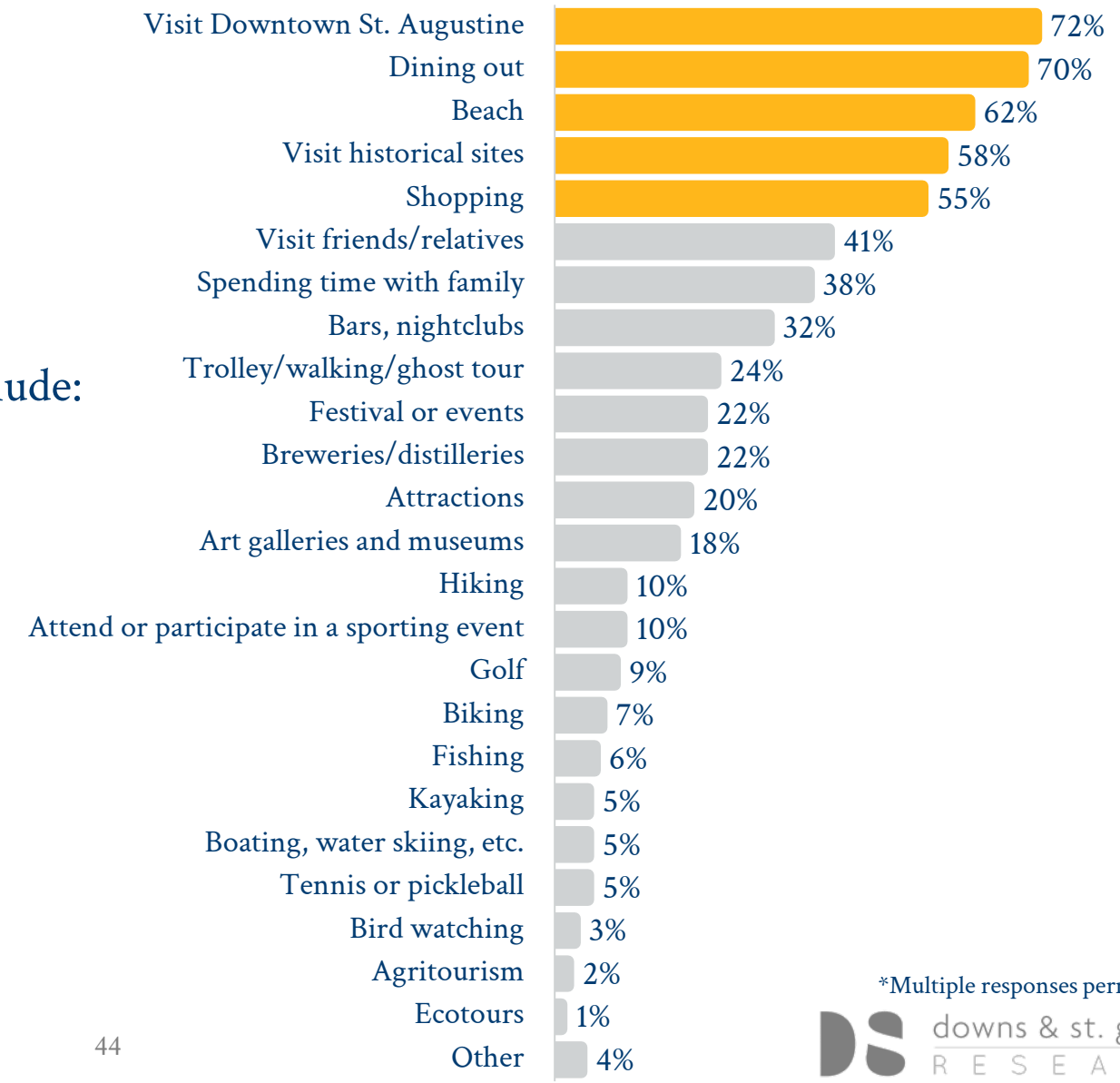
- Over **half** of visitors booked their trip to the St. Augustine/Ponte Vedra area **directly with the hotel/condo/RV park**
- Over **1 in 4** visitors booked through a **vacation rental company (Airbnb, Vrbo, etc.)**



VISITOR ACTIVITES*

JANUARY TO MARCH 2025

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



*Multiple responses permitted

TRAVEL PARTY SPENDING*

JANUARY TO MARCH 2025

	Daily Travel Party Spend	Total Travel Party Spend
Accommodations	$130	$760
Restaurants	$90	$560
Groceries	$40	$220
Shopping	$60	$380
Entertainment	$80	$480
Transportation	$60	$330
Other	$20	$140
Total	**$480**	**$2,870**

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

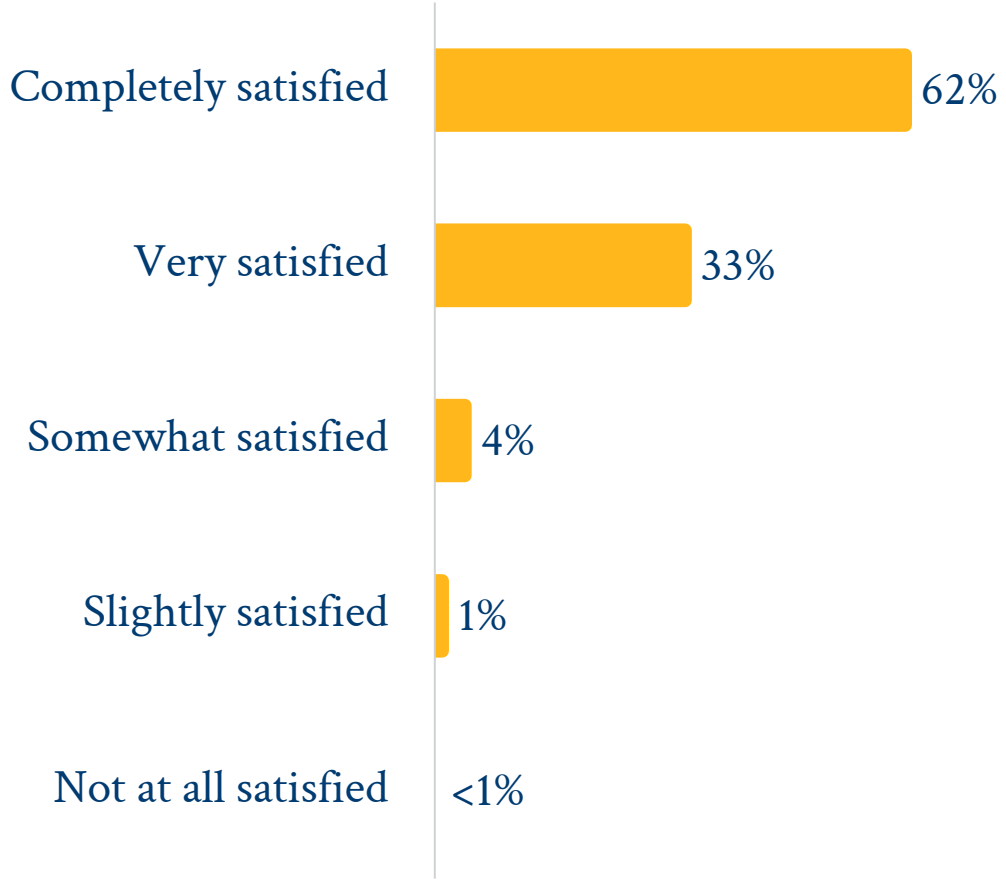
TRIP PLANNING CYCLE: POST-TRIP



VISITOR SATISFACTION

JANUARY TO MARCH 2025

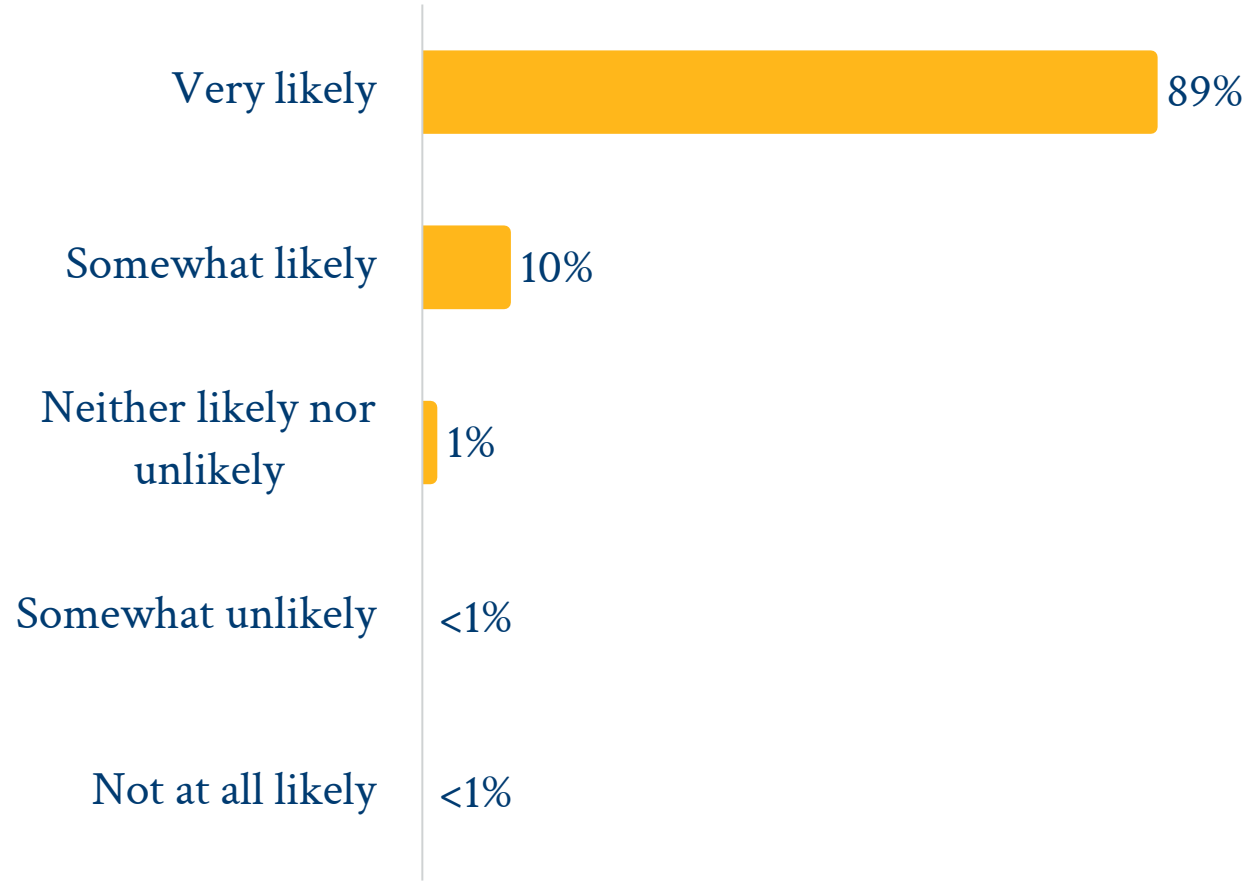
- 95% of visitors were satisfied with their trip to the St. Augustine/Ponte Vedra area
- Over 3 in 5 were completely satisfied with their trip to the St. Augustine/Ponte Vedra area



RECOMMENDATION

JANUARY TO MARCH 2025

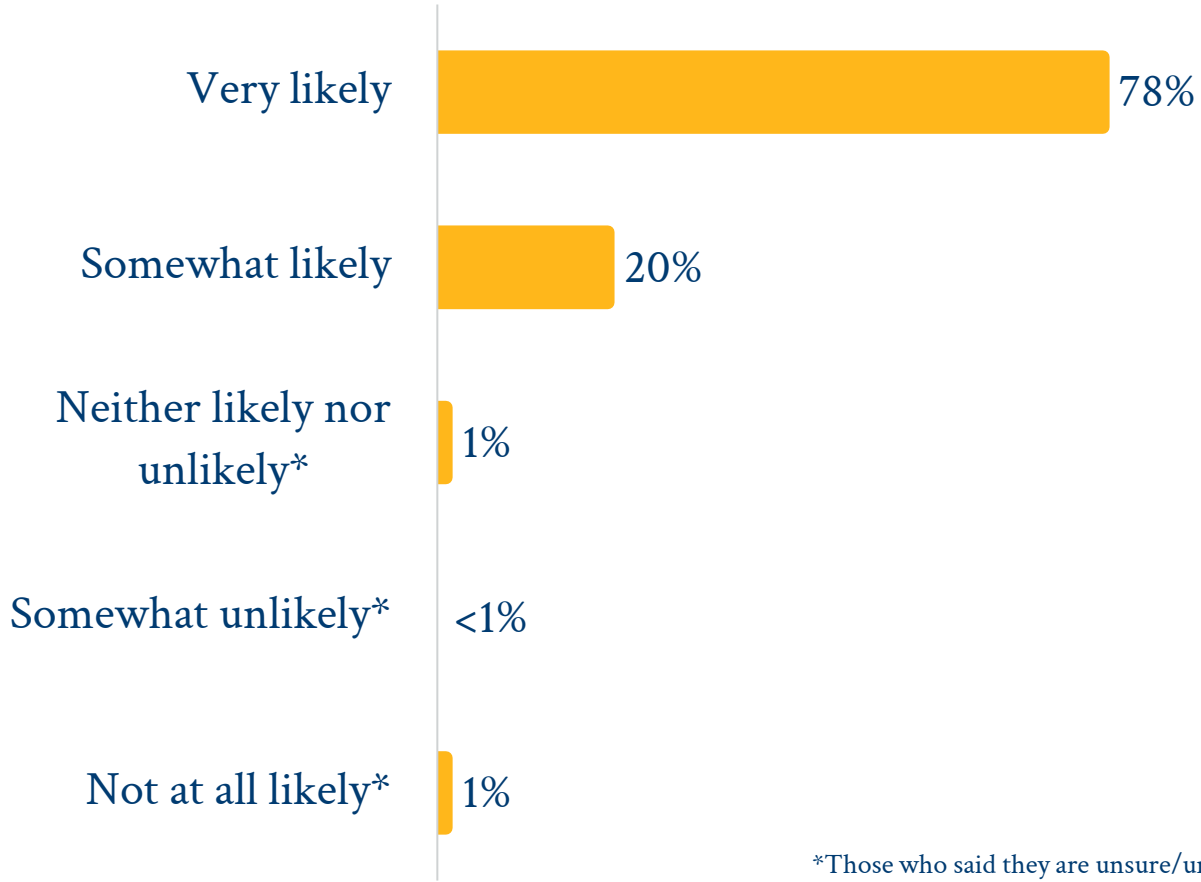
- Nearly 9 in 10 are very likely to recommend the St. Augustine/Ponte Vedra area to others



LIKELIHOOD OF RETURNING

JANUARY TO MARCH 2025

- 98% of visitors are likely to return to the St. Augustine/Ponte Vedra area
- Over 3 in 4 visitors are very likely to return to the St. Augustine/Ponte Vedra area



*Those who said they are unsure/unlikely to return were asked why they were uncertain, the most common reasons being no reason to return and too expensive.

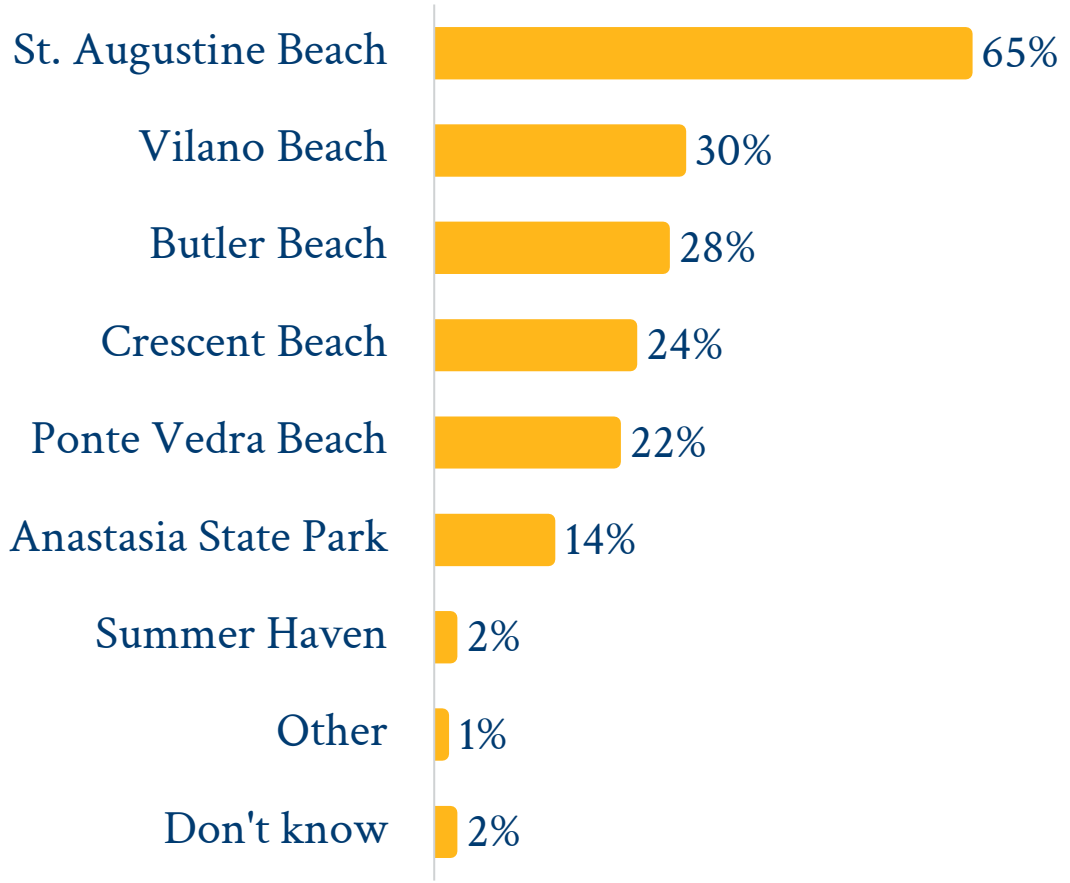
BEACH VISITOR DETAILED FINDINGS



BEACHES VISITED*

JANUARY TO MARCH 2025

- Nearly 2 in 3 visitors who visited the beach went to St. Augustine Beach

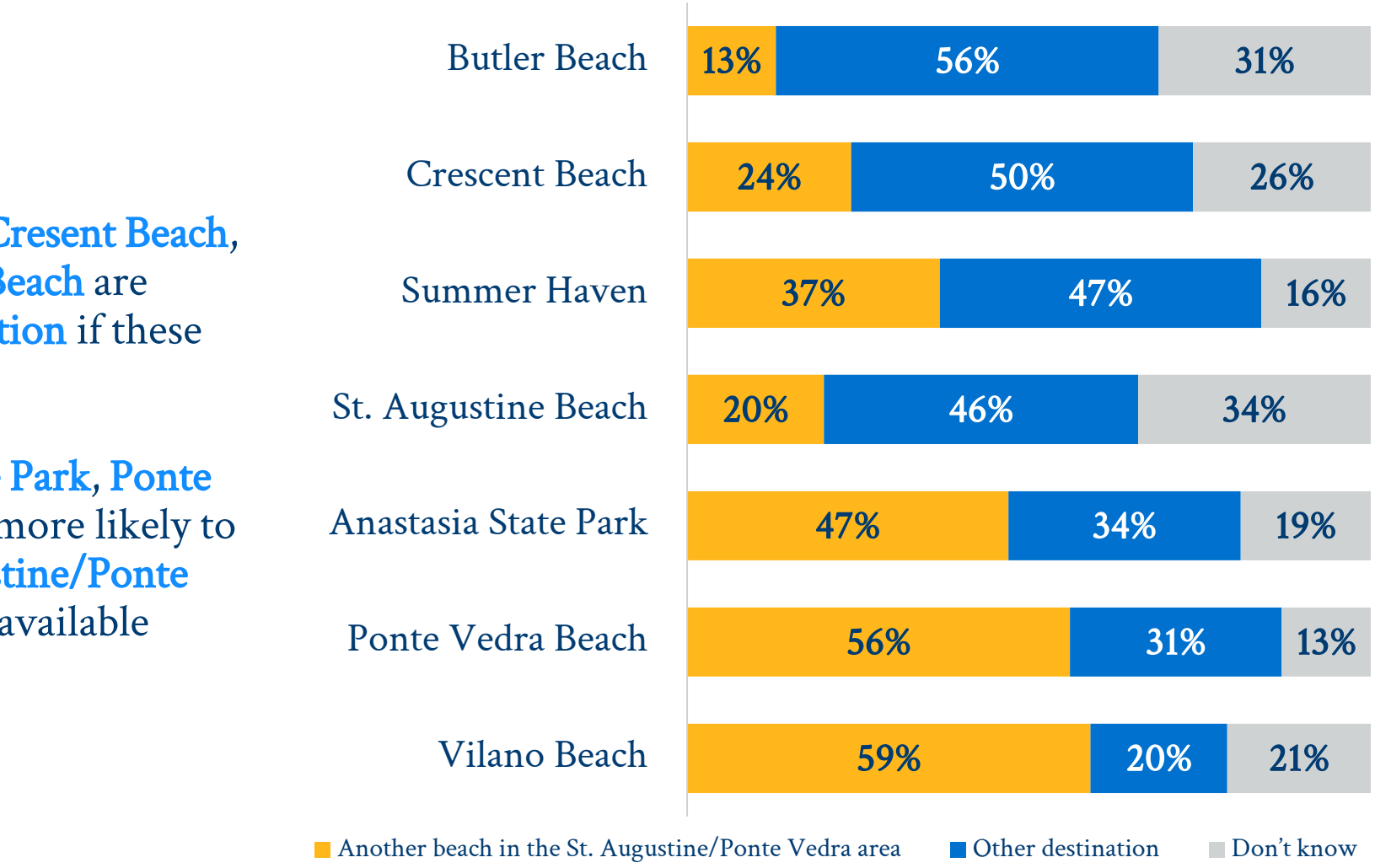


*Multiple responses permitted

VISITOR BEHAVIOR IF BEACHES ARE UNAVAILABLE

JANUARY TO MARCH 2025

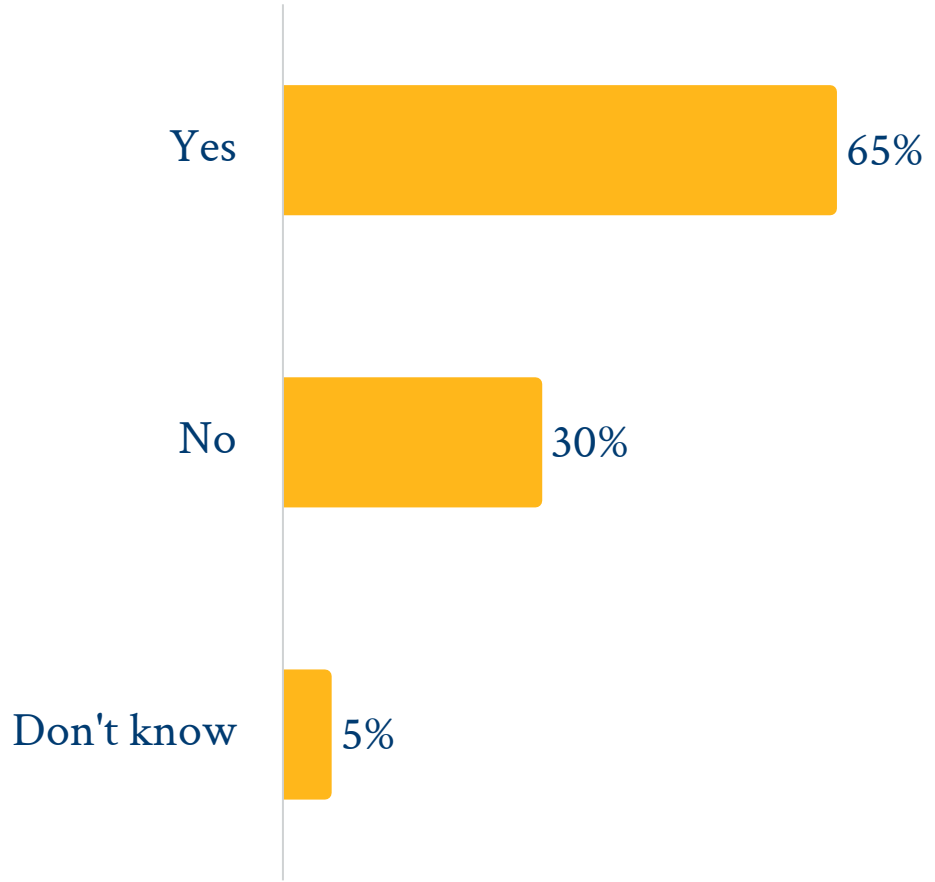
- Visitors who visited Butler Beach, Cresent Beach, Summer Haven, and St. Augustine Beach are more likely to go to another destination if these beaches were unavailable
- Visitors who visited Anastasia State Park, Ponte Vedra Beach, and Vilano Beach are more likely to go to another beach in the St. Augustine/Ponte Vedra area if these beaches were unavailable



ON-BEACH DRIVING

JANUARY TO MARCH 2025

- Nearly **2 in 3** visitors who visited the beach went to beach that allowed **on-beach driving**
- Of the visitors who visited a beach that allows on-beach driving, **25%** drove on the beach
- The average experience rating for **visitors who drove on the beach** was **4.8***, indicating most visitors had a **very good** experience
- The average experience for visitors who visited a beach that allowed on-beach driving but **did not drive on the beach** was **4.7***, indicating their experience did not differ much from those who drove on the beach

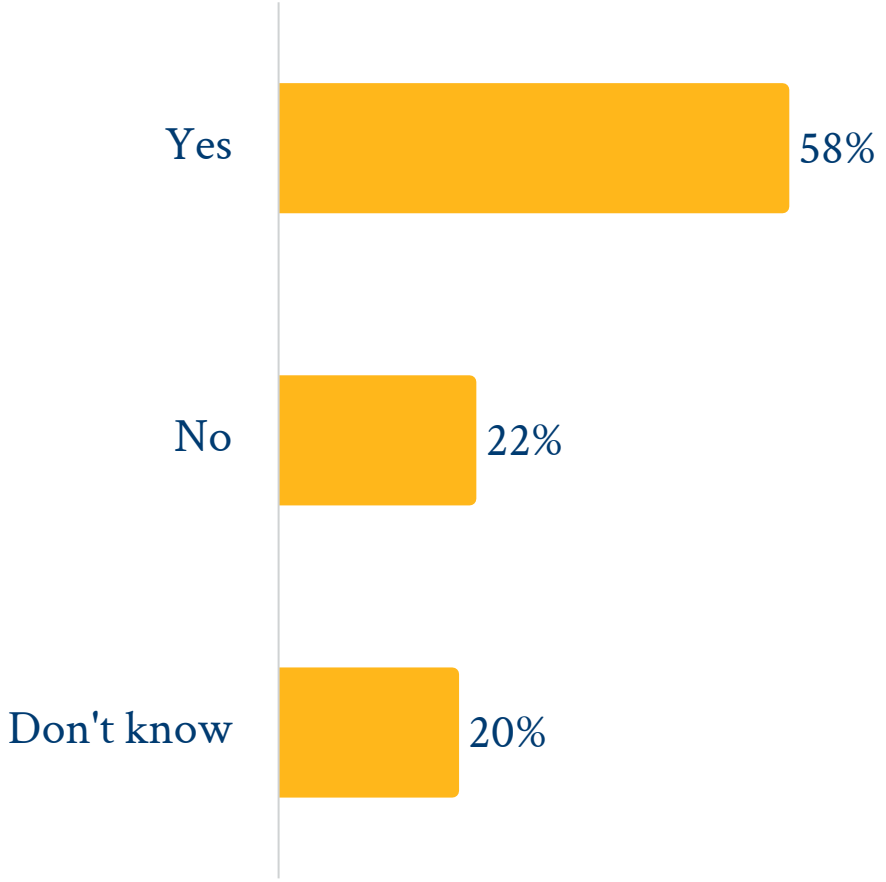


*Visitors were asked to rate their experience on a scale from 1-5, with 1 being "Very Poor" and 5 being "Very Good".

USE OF ADA ACCESIBLE BEACHES

JANUARY TO MARCH 2025

- Of the **4%** of visitors who required ADA accessible beach facilities, over **half** used an **ADA accessible beach**
- The average experience rating for **visitors who used an ADA accessible beach** was **3.6***, indicating most visitors had an **average to satisfactory** experience

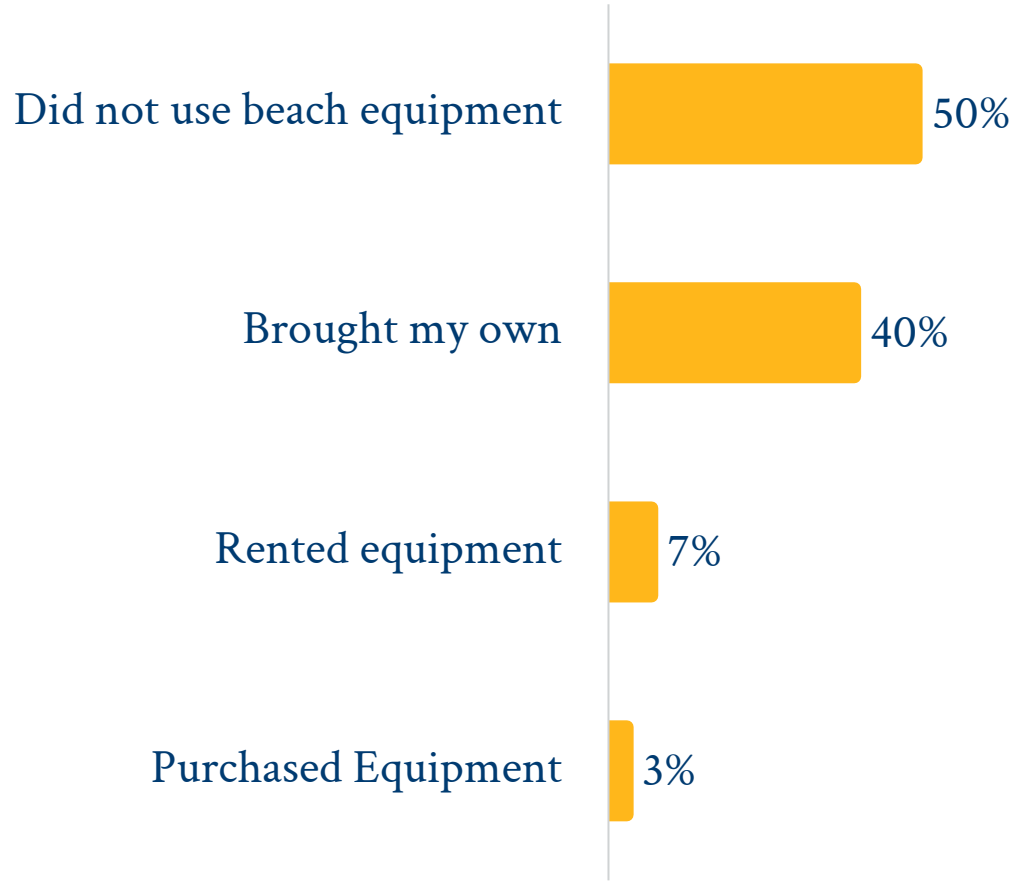


*Visitors were asked to rate their experience on a scale from 1-5, with 1 being "Very Unsatisfactory" and 5 being "Very Satisfactory".

BEACH EQUIPMENT

JANUARY TO MARCH 2025

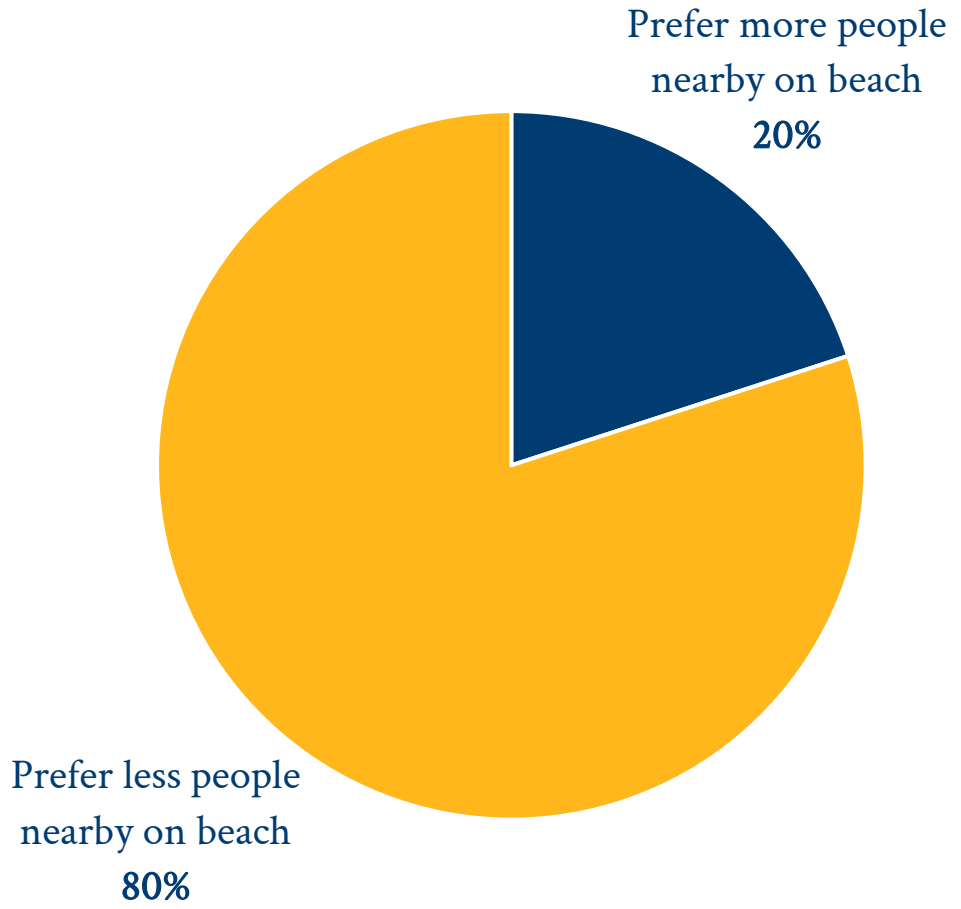
- **Half** of visitors who visited the beach **did not use beach equipment**
- **2 in 5** visitors who visited the beach brought their own equipment



BEACH SPACE

JANUARY TO MARCH 2025

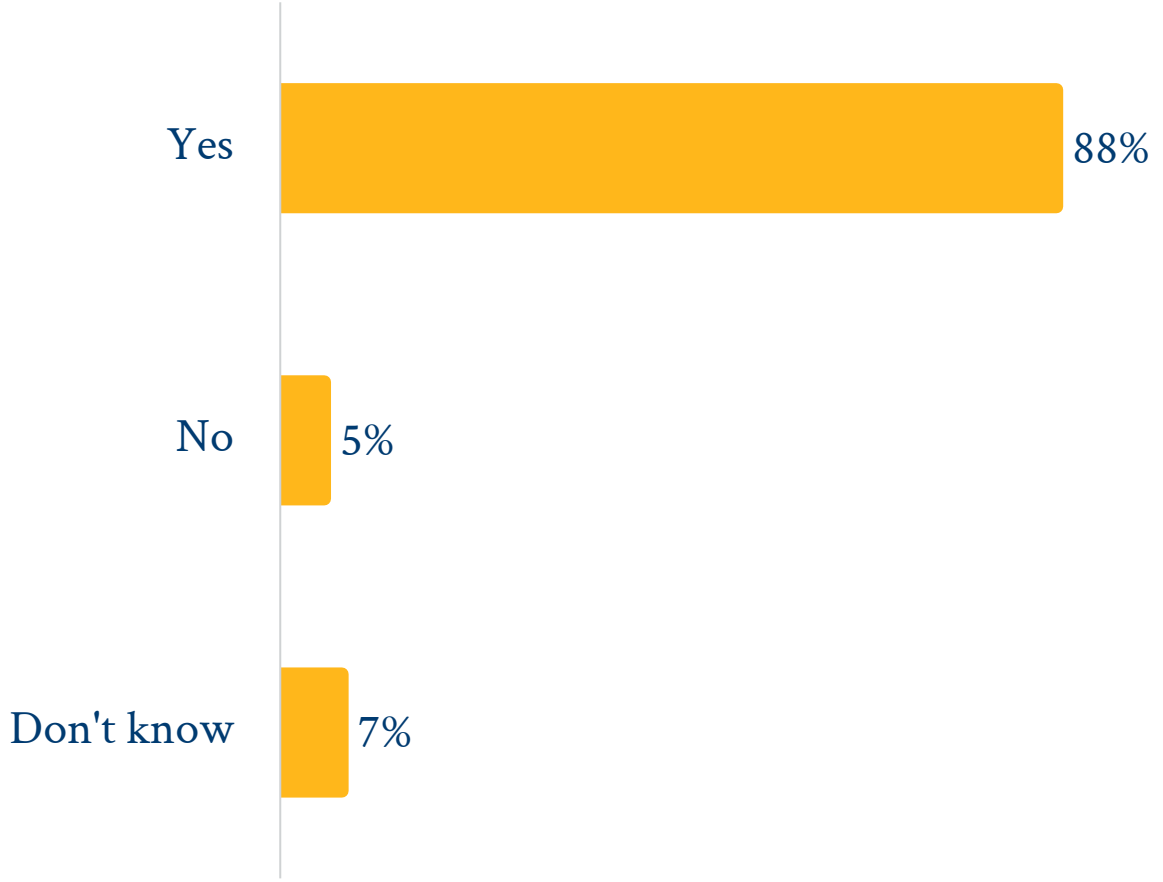
- 4 in 5 visitors prefer to have less people nearby when visiting the beach
- 93% of visitors who visited the beach felt the beach had enough space for their group and equipment



BEACH ACCESS POINTS

JANUARY TO MARCH 2025

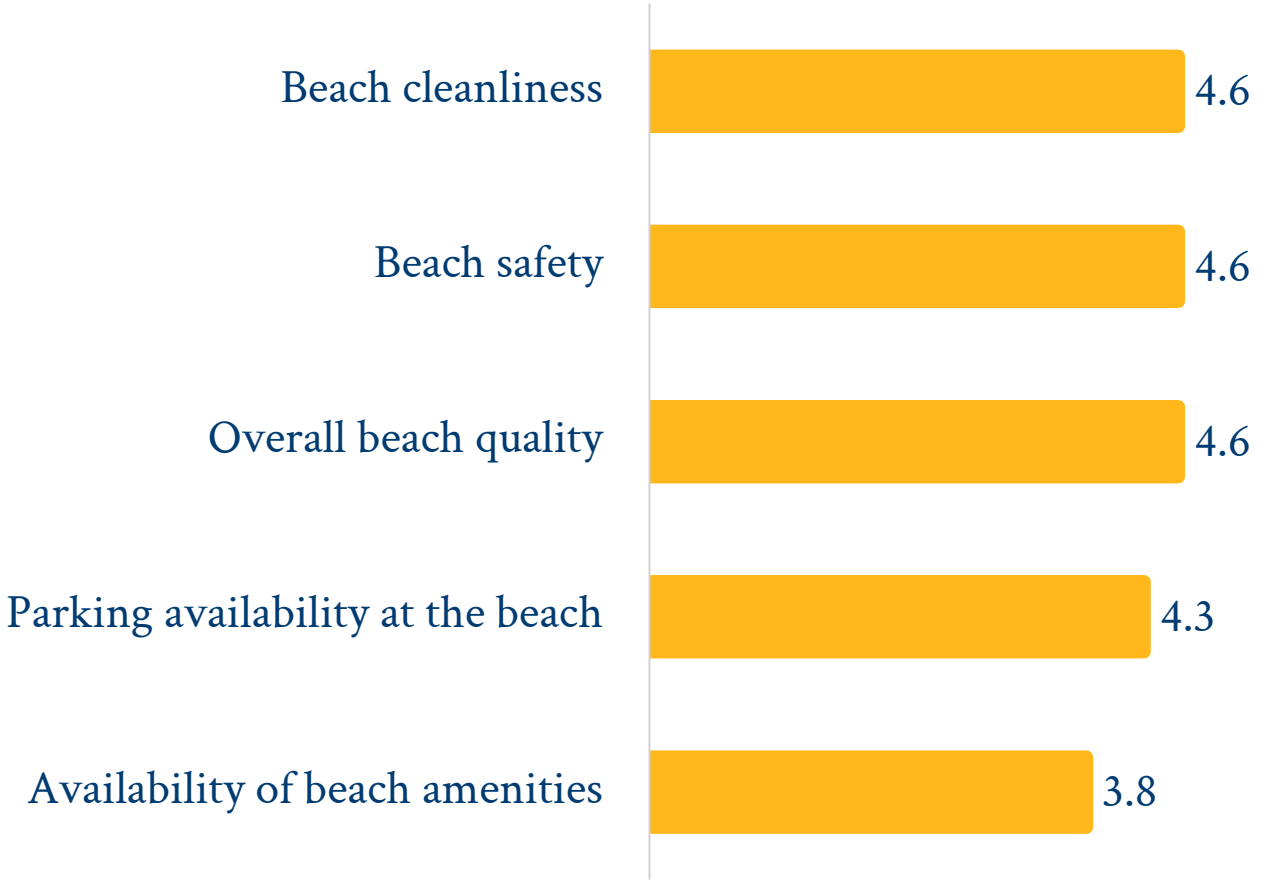
- Nearly 9 in 10 visitors who visited the beach felt the pedestrian beach access points were clearly identified



BEACH RATINGS

JANUARY TO MARCH 2025

- On average, **beach cleanliness**, **safety**, and **overall quality** was rated* as **very good** by visitors
- On average, **parking availability at the beach** and **availability of beach amenities** was rated* as **good** by visitors



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

ST. JOHNS COUNTY

Visitor Tracking and Beach Study
January to March 2025

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



ST. AUGUSTINE PONTE VEDRA
FLORIDA'S HISTORIC COAST®

downs & st. germain RESEARCH

TDC Regular Meeting – May 19, 2025

Monthly Reports

- Bed Tax Collection Reports for March Occupancy
- Visitors and Convention Bureau Monthly Report

FY2025 MONTHLY LOTDT DASHBOARD

Occupancy Month		Net to TDC	+/- PY
March	$	2,748,197	-5.3%
FYTD	$	11,664,148	1.0%
% OF BUDGET			50.0%
% OF FY			46.5%

BUDGETED $ $25,084,566

March 25 Collection Accounts

Description	Count
RV/MH Park or Campground	26
Hotel or Motel	89
Condo / COOP	2350
Apartment / House / Mobile Home	2301
Bed & Breakfast	31
Other	6
Total	4803

ST. JOHNS COUNTY TOURIST DEVELOPMENT TAX

FISCAL YEAR 2025

OCCUPANCY/REPORTING MONTH	OCT	% PY	NOV	% PY	DEC	% PY	JAN	% PY
GROSS RECEIPTS	$27,592,427.26	-15.1%	$35,478,105.61	8.7%	$47,278,718.11	7.3%	$38,400,339.41	4.3%
EXEMPT RECEIPTS	-$1,181,211.46	-31.0%	$ (1,320,708.41)	39.9%	-$1,433,321.11	1.6%	-$1,194,918.21	-17.8%
TAXABLE RECEIPTS	$ 26,411,215.80	-14.2%	$ 34,157,397.20	7.8%	$ 45,845,397.00	7.5%	$ 37,205,421.20	5.2%
TOTAL TAX COLLECTED	**$ 1,320,560.79**	-14.2%	**$ 1,707,869.86**	7.8%	**$2,292,269.85**	7.5%	**$1,860,271.06**	5.2%
ADJUSTMENTS								
TOTAL TAX DUE	$ 1,320,560.79	-14.2%	$ 1,707,869.86	7.8%	$ 2,292,269.85	7.5%	$ 1,860,271.06	5.2%
LESS COLLECTION ALLOWANCE	-$10,886.83		$ (12,138.80)		-$16,438.52		-$12,995.36	
PLUS PENALTY	$10,068.36		$ 19,738.92		$15,201.82		$14,247.28	
PLUS INTEREST	$378.31		$ 631.74		$661.32		$963.78	
TOTAL AMOUNT REMITTED	**$ 1,320,120.63**	-13.9%	**$ 1,716,101.72**	8.2%	**$ 2,291,694.47**	7.5%	**$ 1,862,486.76**	5.4%
LESS TAX COLLECTOR & CLERK	$ (26,402.41)	-13.9%	$ (34,322.03)	8.2%	$ (45,833.89)	7.5%	$ (37,249.74)	5.4%
NET TO TDC	**$ 1,293,718.22**	-13.9%	**$ 1,681,779.69**	8.2%	**$ 2,245,860.58**	7.5%	**$ 1,825,237.02**	5.4%

	FEB	% PY	MAR	% PY	APR	% PY	MAY	% PY
GROSS RECEIPTS	$ 40,719,522.38	-3.5%	$57,643,609.00	-4.8%				
EXEMPT RECEIPTS	-$2,541,163.98	92.3%	-$1,328,630.80	14.2%				
TAXABLE RECEIPTS	$ 38,178,358.40	-6.6%	$ 56,314,978.20	-5.2%				
TOTAL TAX COLLECTED	**$ 1,908,917.92**	-6.6%	**$ 2,815,748.91**	-5.2%				
ADJUSTMENTS	$ -							
TOTAL TAX DUE	$ 1,908,917.92	-6.6%	$ 2,815,748.91	-5.2%				
LESS COLLECTION ALLOWANCE	-$14,216.41		-$21,684.57					
PLUS PENALTY	$ 12,500.79		$9,639.18					
PLUS INTEREST	$ 302.88		$579.14					
TOTAL AMOUNT REMITTED	**$ 1,907,505.18**	-6.3%	**$ 2,804,282.66**	-5.3%				
LESS TAX COLLECTOR & CLERK	$ (38,150.10)	-6.3%	$ (56,085.65)	-5.3%				
NET TO TDC	**$ 1,869,355.08**	-6.3%	**$ 2,748,197.01**	-5.3%				

	JUNE	% PY	JULY	% PY	AUG	% PY	SEP	% PY	YTD
GROSS RECEIPTS									**$247,112,721.77**
EXEMPT RECEIPTS									**-$8,999,953.97**
TAXABLE RECEIPTS									**$238,112,767.80**
TOTAL TAX COLLECTED									**$11,905,638.39**
ADJUSTMENTS									
TOTAL TAX DUE									**$11,905,638.39**
LESS COLLECTION ALLOWANCE									
PLUS PENALTY									
PLUS INTEREST									
TOTAL AMOUNT REMITTED									**$11,902,191.42**
LESS TAX COLLECTOR & CLERK									**-$238,043.83**
NET TO TDC									**$11,664,147.59**

Budgeted	$25,084,566
% of Budget	50.0%
% of FY	46.5%

FY 2025 TOURIST DEVELOPMENT TAX REMITTED BY ACCOMMODATIONS TYPE

OCC. MNTH	H/M	% of Ttl	PV+-	Condo	% of Ttl	PV+-	Apts	% of Ttl	PV+-
October	$831,589.44	63.0%	**-13.9%**	$150,640.19	11.4%	**-13.8%**	$258,887.70	19.6%	**-11.0%**
November	$1,118,948.60	65.2%	**12.3%**	$157,385.40	9.2%	**12.4%**	$338,867.19	19.7%	**4.4%**
December	$1,423,365.12	62.1%	**6.0%**	$196,800.91	8.6%	**-9.3%**	$507,725.79	22.2%	**21.7%**
2025 January	$1,070,233.46	57.5%	**10.1%**	$258,708.48	13.9%	**-8.4%**	$404,603.49	21.7%	**12.2%**
February	$1,089,405.16	57.1%	**-5.5%**	$323,880.55	17.0%	**-4.3%**	$357,851.32	18.8%	**-8.4%**
March	$1,577,812.82	56.3%	**-6.0%**	$466,116.13	16.6%	**-6.6%**	$598,757.85	21.4%	**-4.4%**
April									
May									
June									
July									
August									
September									
TOTAL	**$ 7,111,354.60**			**$ 1,553,531.66**			**$ 2,466,693.34**		

OCC. MNTH	Camp	% of Ttl	PV+-	B&B	% of Ttl	PV+-	TOTAL
October	$33,042.41	2.5%	**-28.0%**	$45,960.89	3.5%	**-18.2%**	$ 1,320,120.63
November	$38,680.67	2.3%	**-33.9%**	$62,219.86	3.6%	**-6.6%**	$ 1,716,101.72
December	$67,927.97	3.0%	**32.1%**	$95,874.68	4.2%	**-7.7%**	$ 2,291,694.47
2025 January	$65,609.95	3.5%	**-19.6%**	$63,331.38	3.4%	**-10.5%**	$ 1,862,486.76
February	$77,163.52	4.0%	**-6.3%**	$59,204.63	3.1%	**-16.5%**	$ 1,907,505.18
March	$85,562.96	3.1%	**18.4%**	$76,032.90	2.7%	**-10.6%**	$ 2,804,282.66
April							
May							
June							
July							
August							
September							
TOTAL	**$ 367,987.48**			**$ 402,624.34**			**$ 11,902,191.42**

FY 2025 TOURIST DEVELOPMENT TAX REMITTED BY ZIP CODE

ST. JOHNS COUNTY TOURIST DEVELOPMENT COUNCIL

	Anastasia Island			Ponte Vedra Beach			St. Augustine/Villano/N. Bch			Shores/South/207		
	32080	% TTL	+/- PY	32082	% TTL	+/- PY	32084	% TTL	+/- PY	32086	% TTL	+/- PY
Fiscal Year 2025												
OCT	**$388,397.75**	29.4%	-15.3%	**$249,063.57**	18.9%	-28.2%	**$542,600.54**	41.1%	-9.4%	**$22,125.58**	1.7%	2.8%
NOV	**$502,601.36**	29.3%	18.8%	**$304,702.42**	17.8%	-3.1%	**$774,005.27**	45.1%	7.5%	**$12,746.40**	0.7%	-56.6%
DEC	**$658,287.57**	28.7%	4.7%	**$241,630.95**	10.5%	-11.4%	**$1,186,923.21**	51.8%	10.7%	**$43,263.01**	1.9%	82.3%
JAN	**$555,175.32**	29.8%	-3.3%	**$369,761.37**	19.9%	23.1%	**$789,635.44**	42.4%	6.9%	**$33,834.34**	1.8%	-15.5%
FEB	**$664,840.53**	34.9%	-5.2%	**$317,754.18**	16.7%	-15.9%	**$762,459.53**	40.0%	-3.0%	**$39,143.53**	2.1%	-5.0%
MAR	**$1,049,553.84**	37.4%	-0.7%	**$529,032.15**	18.9%	-17.7%	$1,031,772.56	36.8%	-3.2%	$43,050.22	1.5%	54.6%
APR												
MAY												
JUN												
JUL												
AUG												
SEP												
FY YTD	**$ 3,818,856**			**$ 2,011,945**			**$ 5,087,397**			**$ 194,163**		

	WGV + west of I95			I95&SR16 + Palencia				Other			
	32092	% TTL	+/- PY	32095	% TTL	+/- PY	92+95	OTHER	% TTL	+/- PY	TOTAL
OCT	**$87,517.29**	6.6%	-3.1%	**$14,402.56**	1.1%	30.2%	7.7%	**$16,013.34**	1.2%	147.8%	**$1,320,120.63**
NOV	**$98,374.55**	5.7%	21.3%	**$16,879.96**	1.0%	23.4%	6.7%	**$6,791.76**	0.4%	37.7%	**$1,716,101.72**
DEC	**$120,448.10**	5.3%	12.1%	**$23,200.63**	1.0%	32.2%	6.3%	**$17,941.00**	0.8%	79.9%	**$2,291,694.47**
JAN	**$91,329.46**	4.9%	5.6%	**$13,512.13**	0.7%	-5.7%	5.6%	**$9,238.70**	0.5%	-28.3%	**$1,862,486.76**
FEB	**$95,972.78**	5.0%	-8.4%	**$16,560.17**	0.9%	-0.7%	5.9%	**$10,774.46**	0.6%	42.7%	**$1,907,505.18**
MAR	$116,438.45	4.2%	-16.3%	**$22,518.54**	0.8%	16.0%	5.0%	$11,916.90	0.4%	19.7%	**$2,804,282.66**
APR											
MAY											
JUN											
JUL											
AUG											
SEP											
FY YTD	**$ 610,081**			**$ 107,074**				**$ 72,676**			**$ 11,902,191**

VCB Report to the Tourist Development Council May 19, 2025



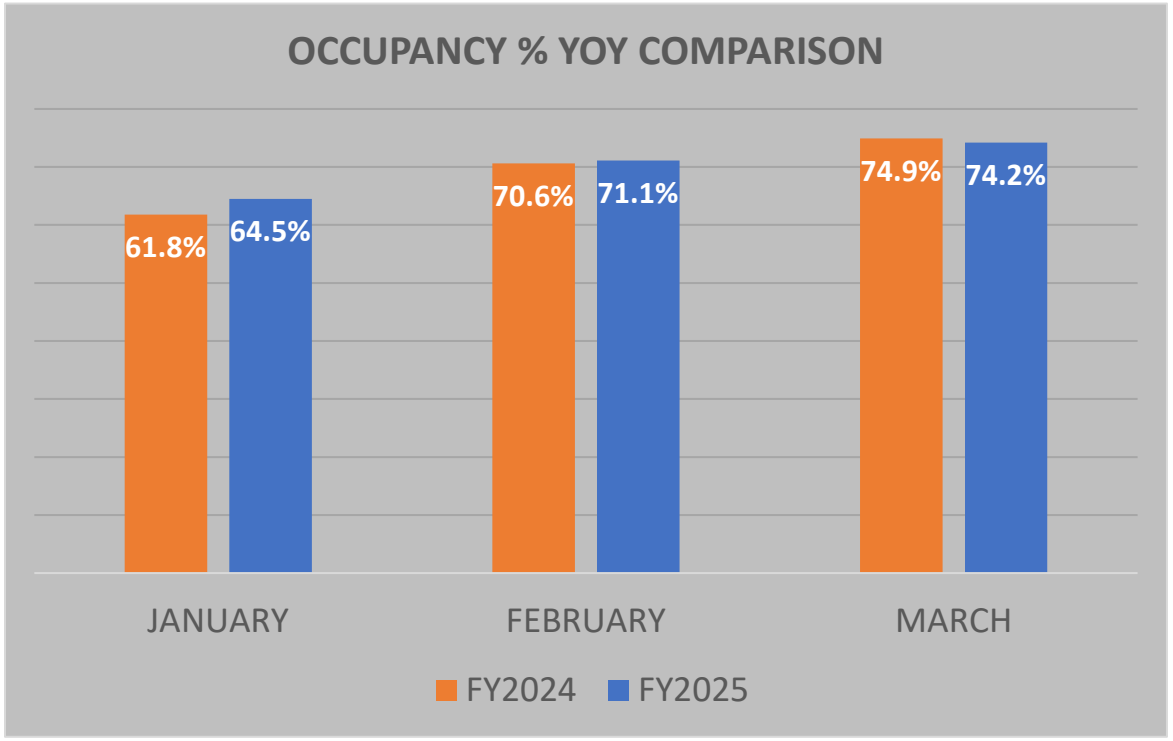
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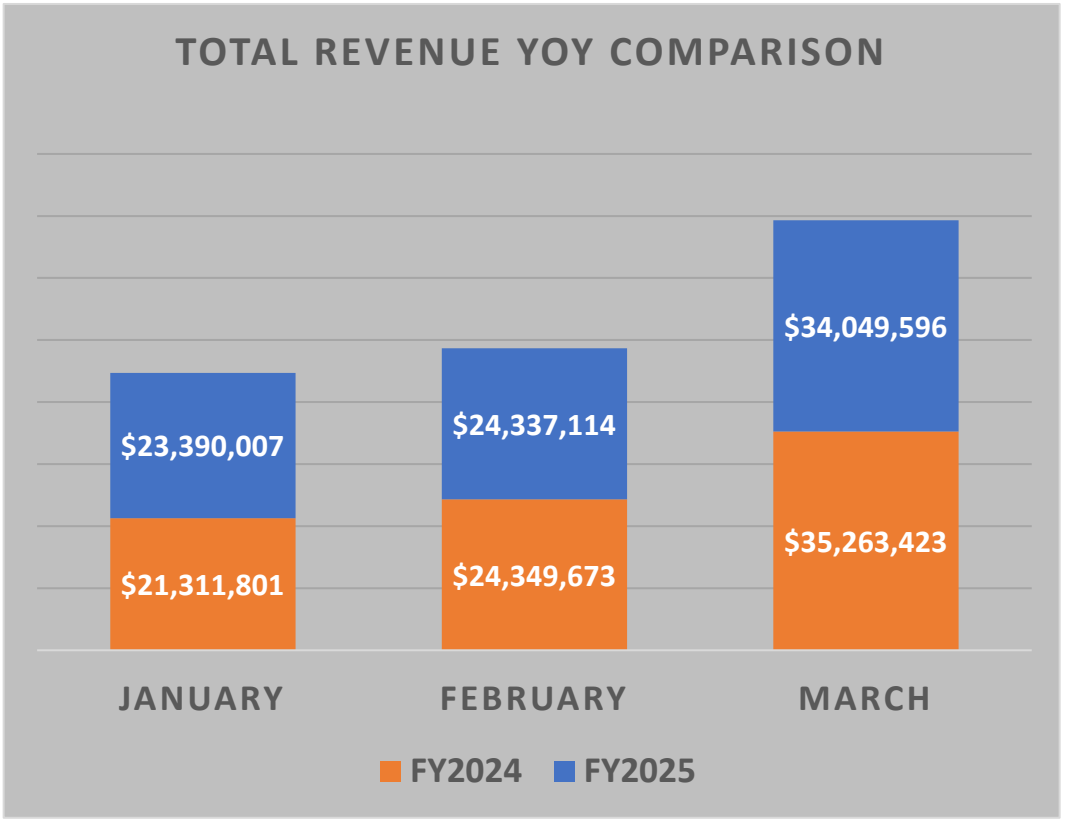
Smith Travel Research

Smith Travel Research
March 2025

Occupancy % March 2025

- **March 2025 Occupancy %** decreased **-0.9% YOY**

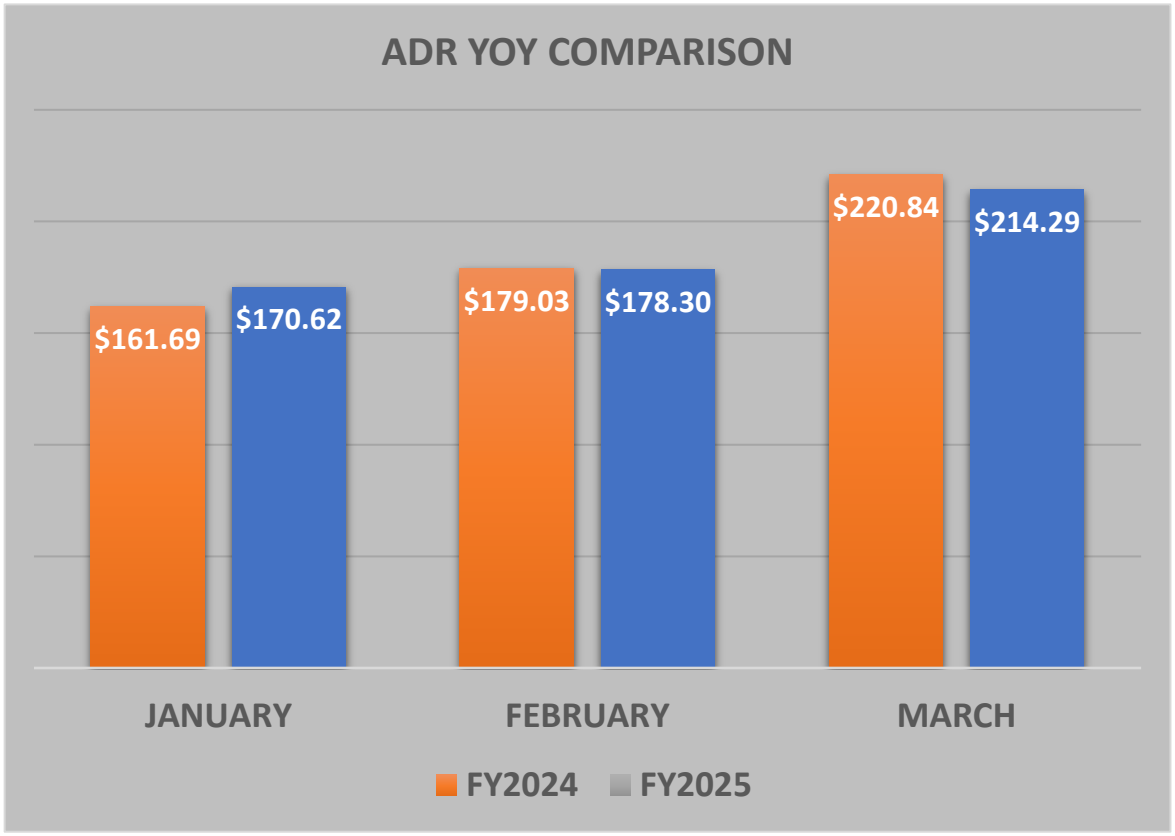




Total Revenue March 2025

- **March 2025 Total Revenue** decreased -3.4% **YOY**

Smith Travel Research
March 2025

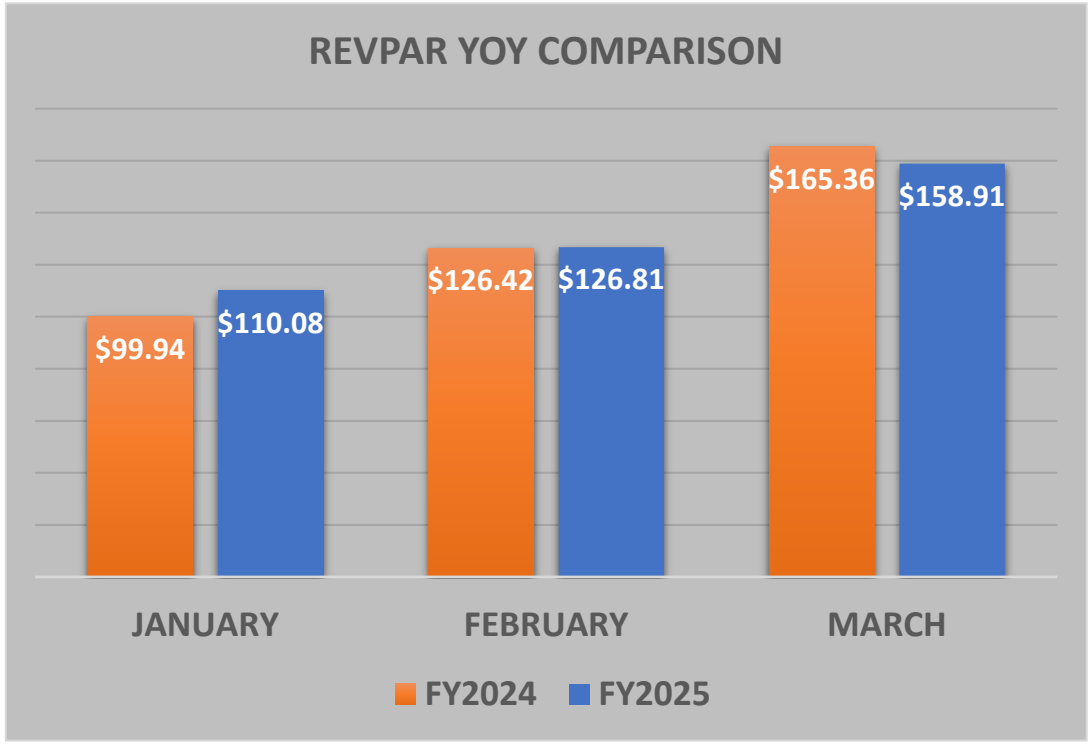


ADR March 2025

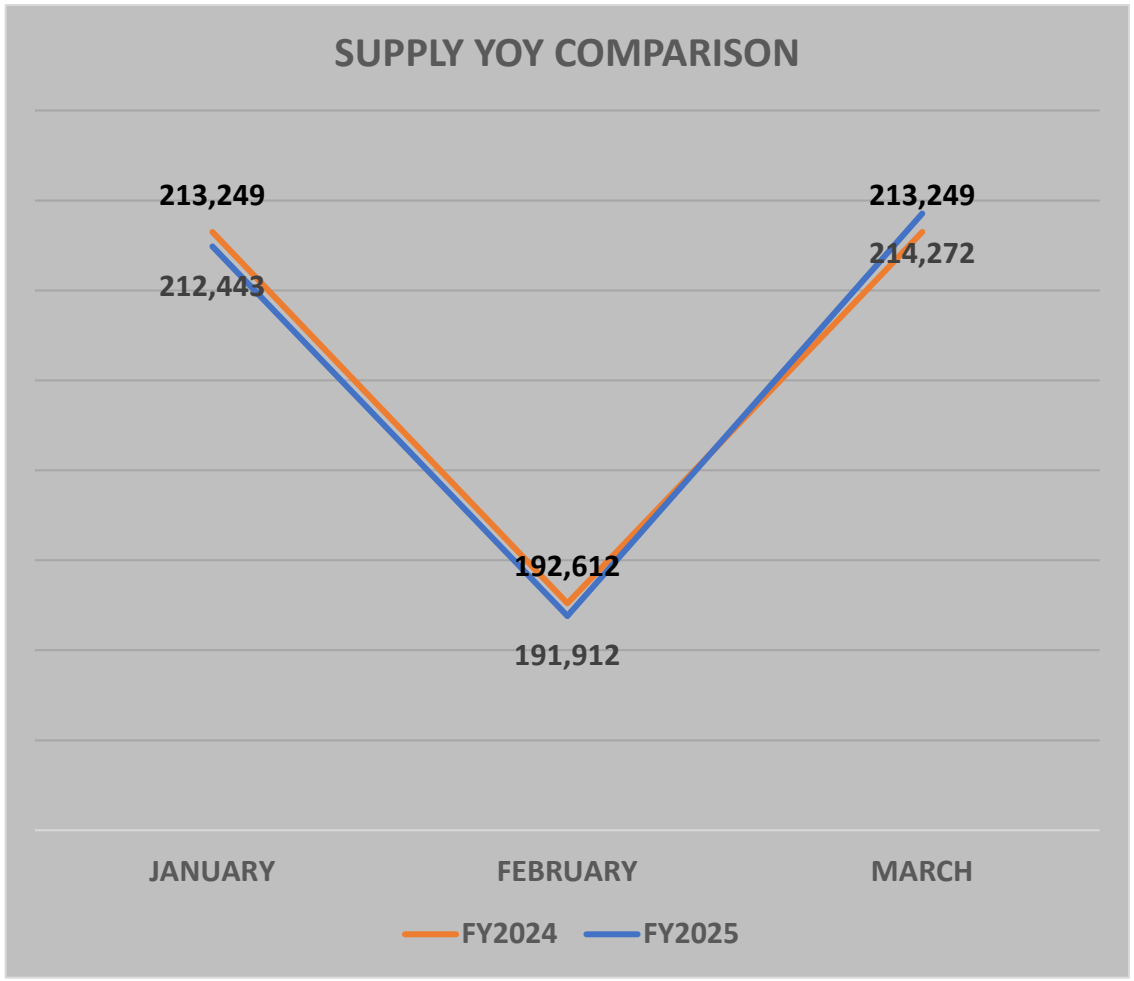
- **ADR** for **March 2025** decreased -3% **YOY**

RevPAR March 2025

- **RevPAR** for **March 2025** decreased -3.9% **YOY**



Smith Travel Research
March 2025

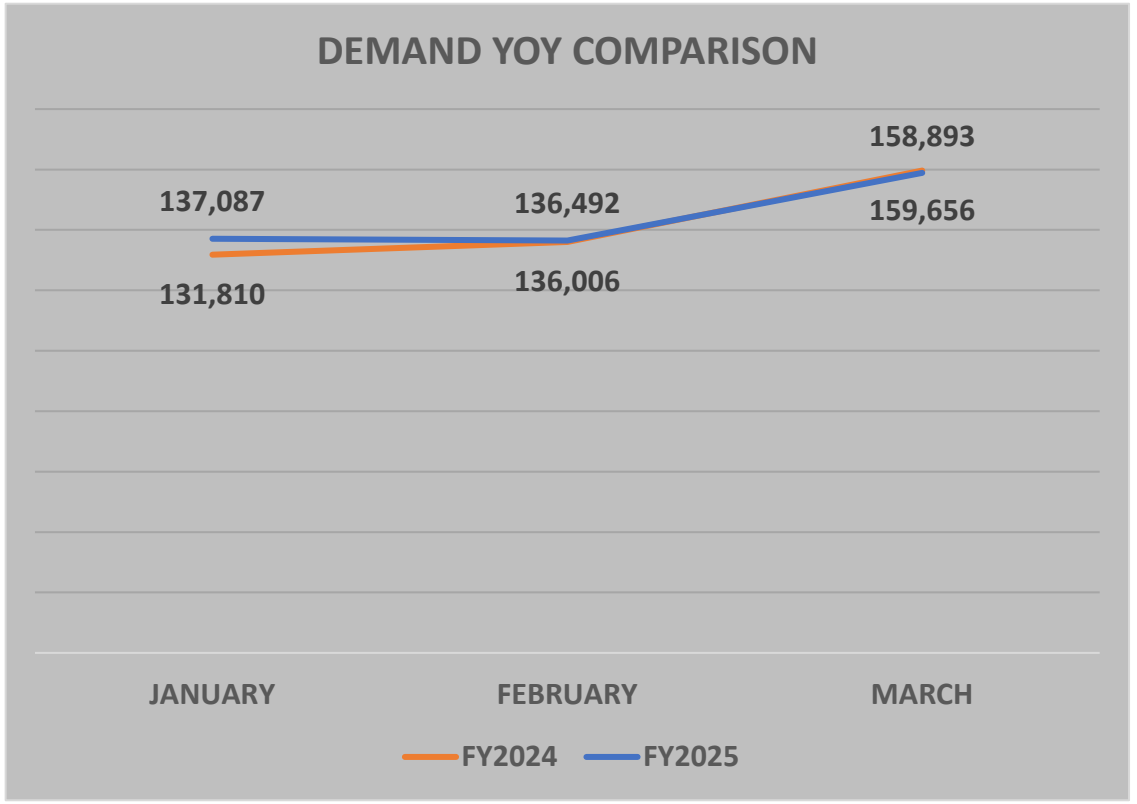


Supply March 2025

- **March 2025 Supply** increased **+0.5% YOY**

Demand March 2025

- **March 2025 Demand** decreased **-0.5% YOY**



March 2025 vs. March 2024 Comp Set

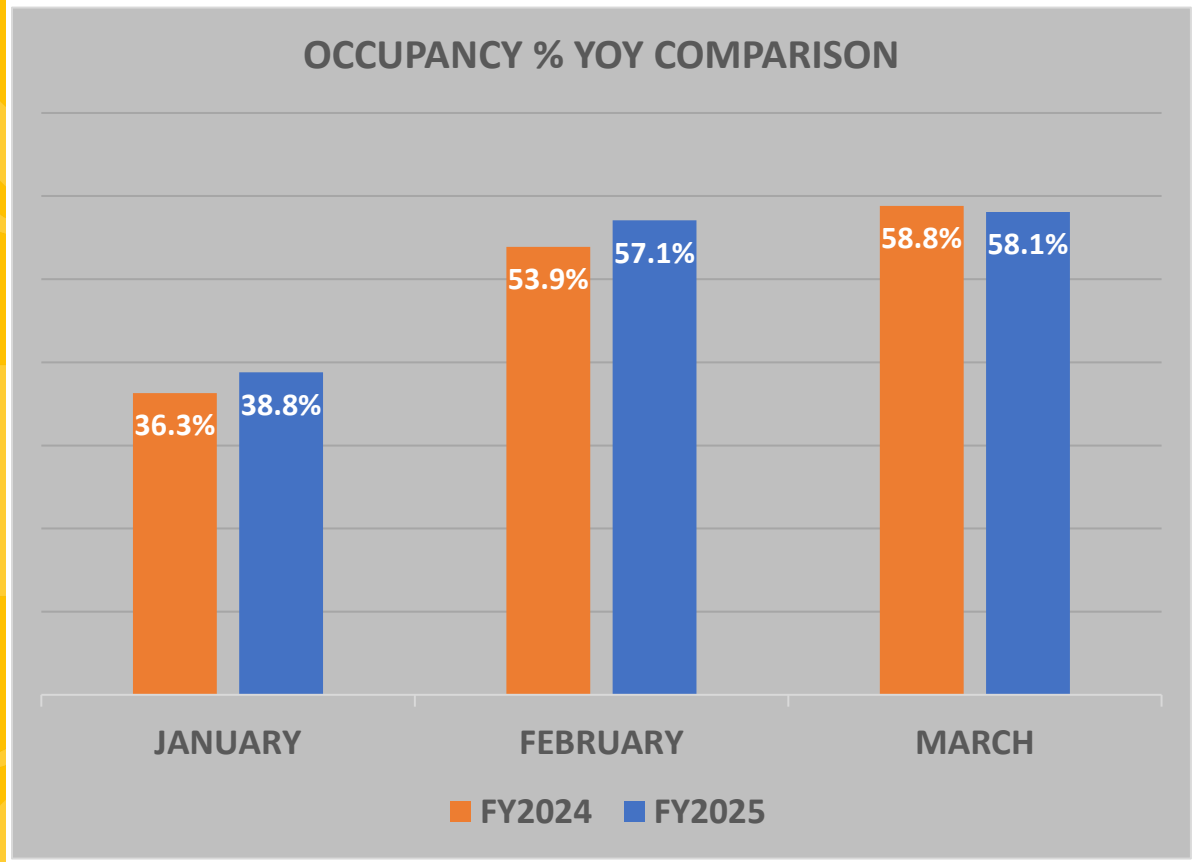
	Current Month - March 2025 vs March 2024					
	Occ %	ADR	Percent Change from March 2024			
	2025	2025	Occ	ADR	RevPAR	Room Rev
Hillsborough County, FL	81.7	205.29	-0.1	5.9	5.9	6.8
Nassau County, FL	77.0	310.81	4.9	-5.5	-0.9	-0.9
Pinellas County, FL	83.6	268.33	0.2	-0.9	-0.6	-4.1
St Johns County, FL	74.2	214.29	-1.0	-3.0	-3.9	-3.5
Charleston, SC	76.0	186.00	-2.7	1.1	-1.6	-3.2
Jacksonville, FL	75.3	164.63	0.7	-1.3	-0.7	0.5
Myrtle Beach, SC	50.8	109.53	-10.6	2.3	-8.6	-8.5
Orlando, FL	76.6	230.62	-4.6	0.7	-4.0	-3.3
Sarasota, FL	80.7	286.28	-2.3	1.9	-0.4	2.8
Savannah, GA	75.9	164.95	-3.3	-3.0	-6.1	-3.6
Fort Walton Beach, FL	62.7	165.59	0.7	-1.7	-1.1	0.7
Daytona Beach, FL	68.7	172.71	-3.0	-2.7	-5.7	-5.0
Zip Code 32084+	77.9	186.98	-1.7	-0.5	-2.2	-0.3
Zip Code 32080+	77.0	195.67	1.5	-1.6	-0.1	-0.1
Zip Code 32092+	69.3	131.35	-0.2	-0.8	-1.0	-1.0
Ponte Vedra+	66.3	447.28	-7.2	-1.7	-8.8	-11.0

Glossary of Terms

- Room Night=> One room times one night, it is a basic component of calculations for occupancy, demand, supply, ADR and RevPAR/L;
- Occupancy=> Percent of available room nights that are occupied in a given period of time (Room nights sold divided by available room nights expressed as a percentage);
- ADR=> Average Daily Room Rate (Revenue from the sale of room nights divided by the number of room nights occupied);
- RevPAR/L=> Average revenue per available room night or listing night (Revenue from the sale of rooms in a specific period divided by all available room nights for the period);
- Demand=> Number of room nights sold in a given period of time;
- Supply=> Total number of room nights or listing nights available for sale in a given period (Smith Travel Research (STR) requires that a room be out of order for at least six months before it can be taken out of available room counts);
- Gross Revenue=> Revenue from the sale of rooms in a given period;
- FYTD=> Fiscal year to date

Vacation Rental Analytics (Key Data)
+
Tourist Development Tax Collections

Vacation Rental Analytics
March 2025

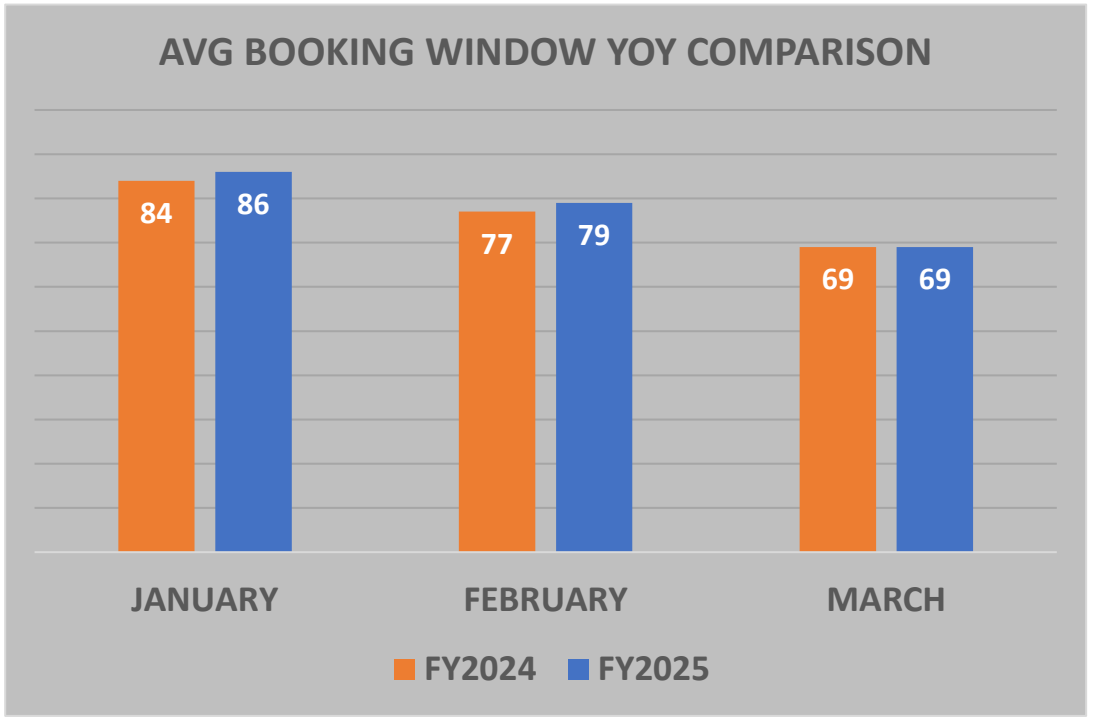


Paid Occupancy % March 2025

- **Paid Occupancy %** for **March 2025** decreased **-1.2% YOY**

Average Booking Window March 2025

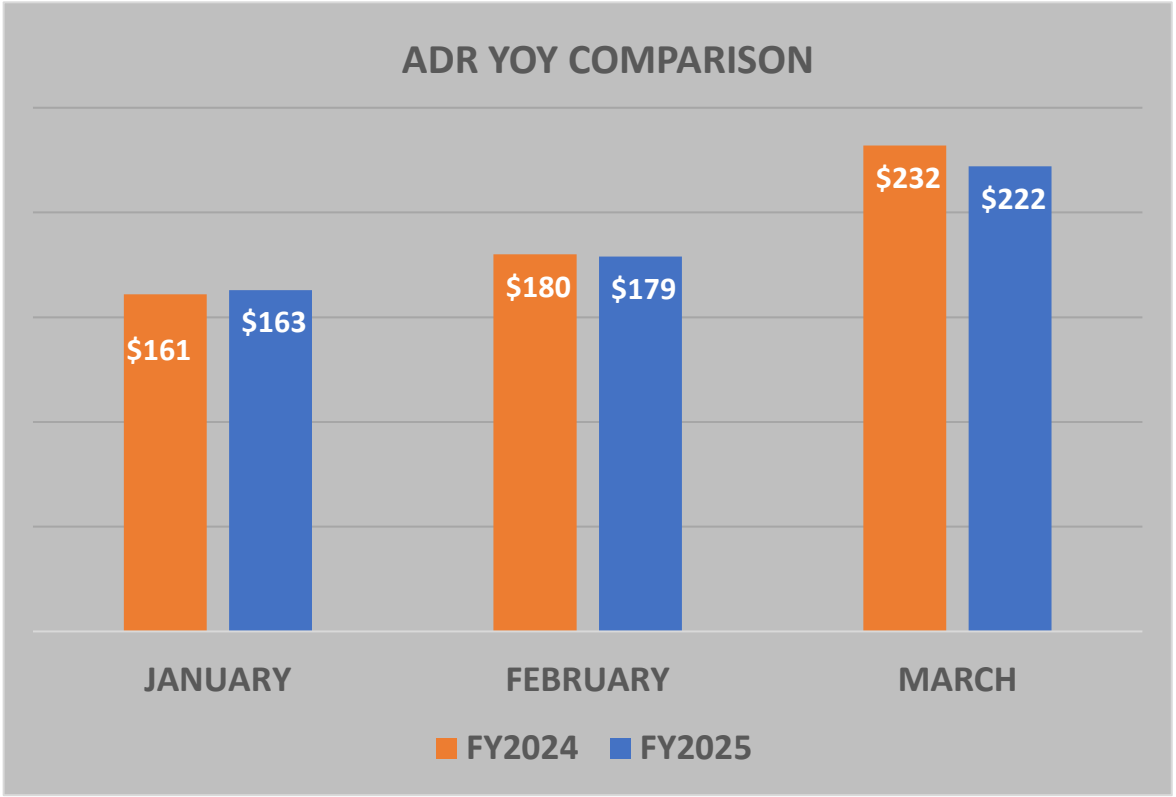
- **Average Booking Window** for **March 2025** was FLAT

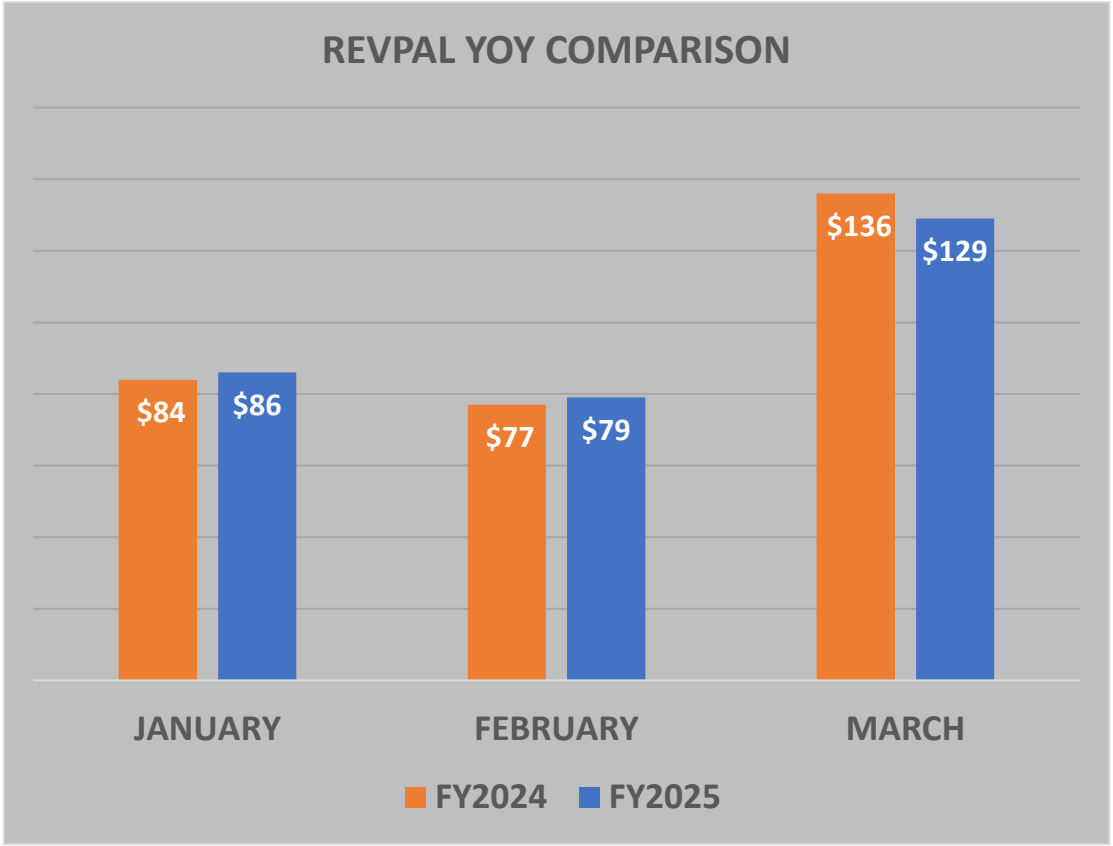


Vacation Rental Analytics
March 2025

ADR March 2025

- **ADR YOY** decreased -4.3% for **March 2025**

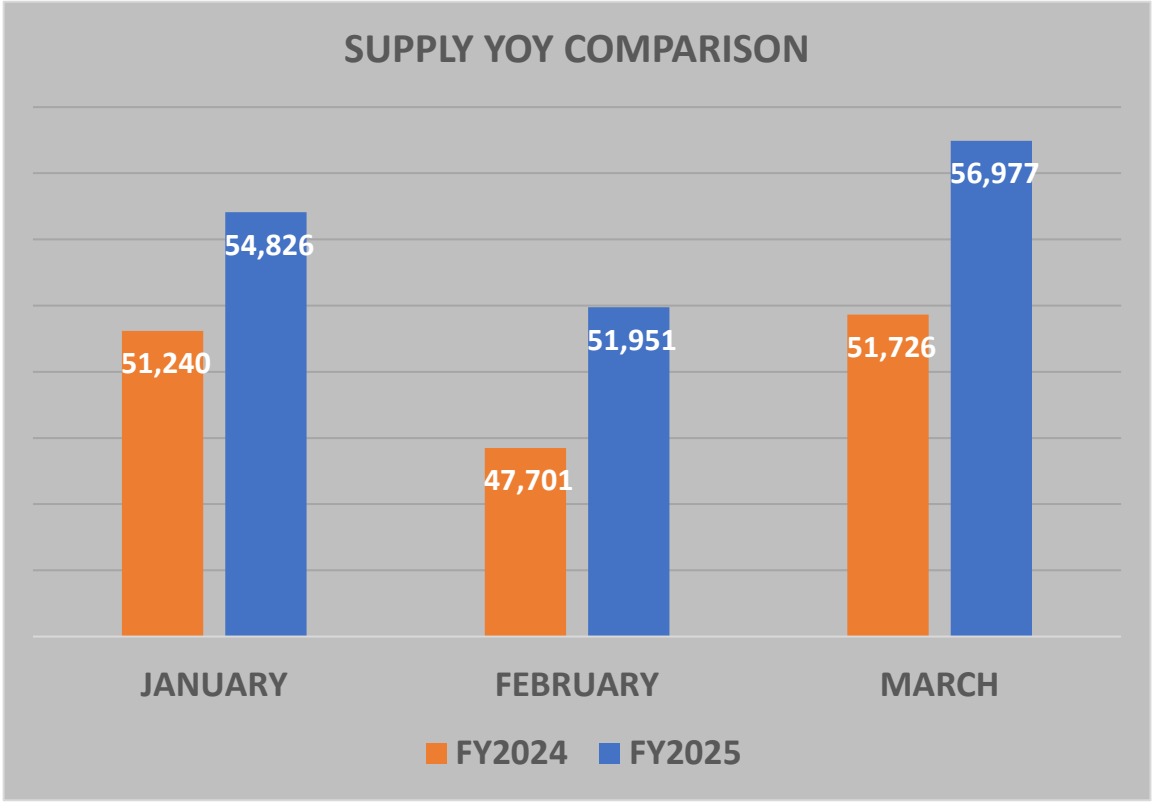




RevPAL March 2025

- **RevPAL** decreased -5.1% **YOY** in **March 2025**

Vacation Rental Analytics
March 2025

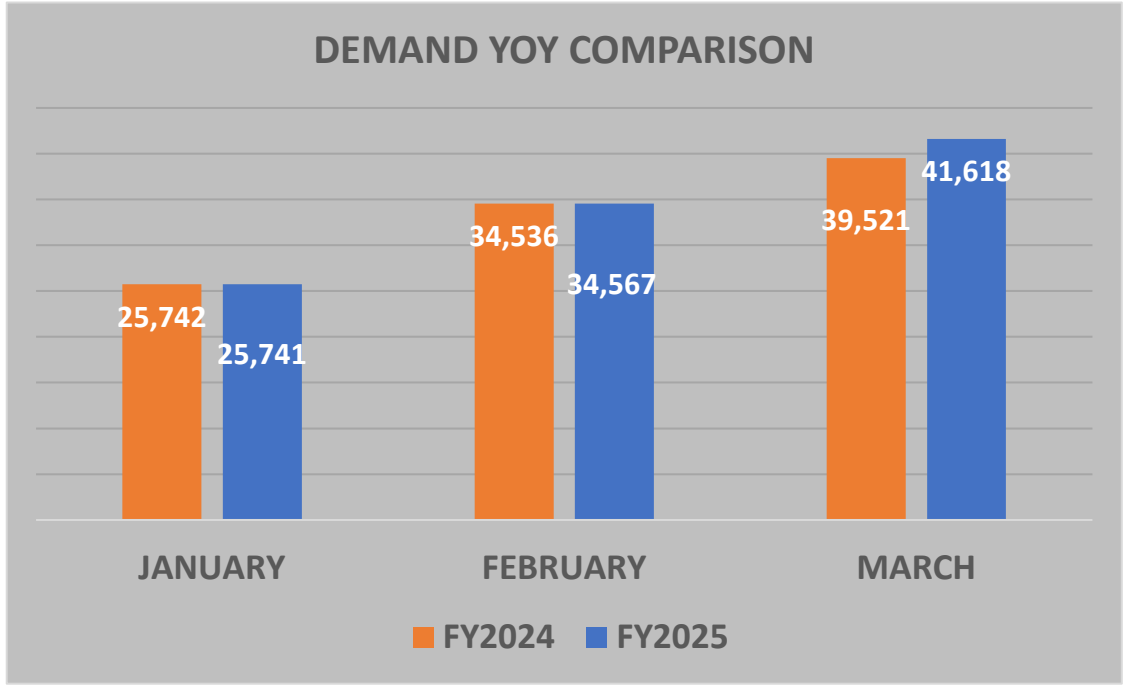


Supply March 2025

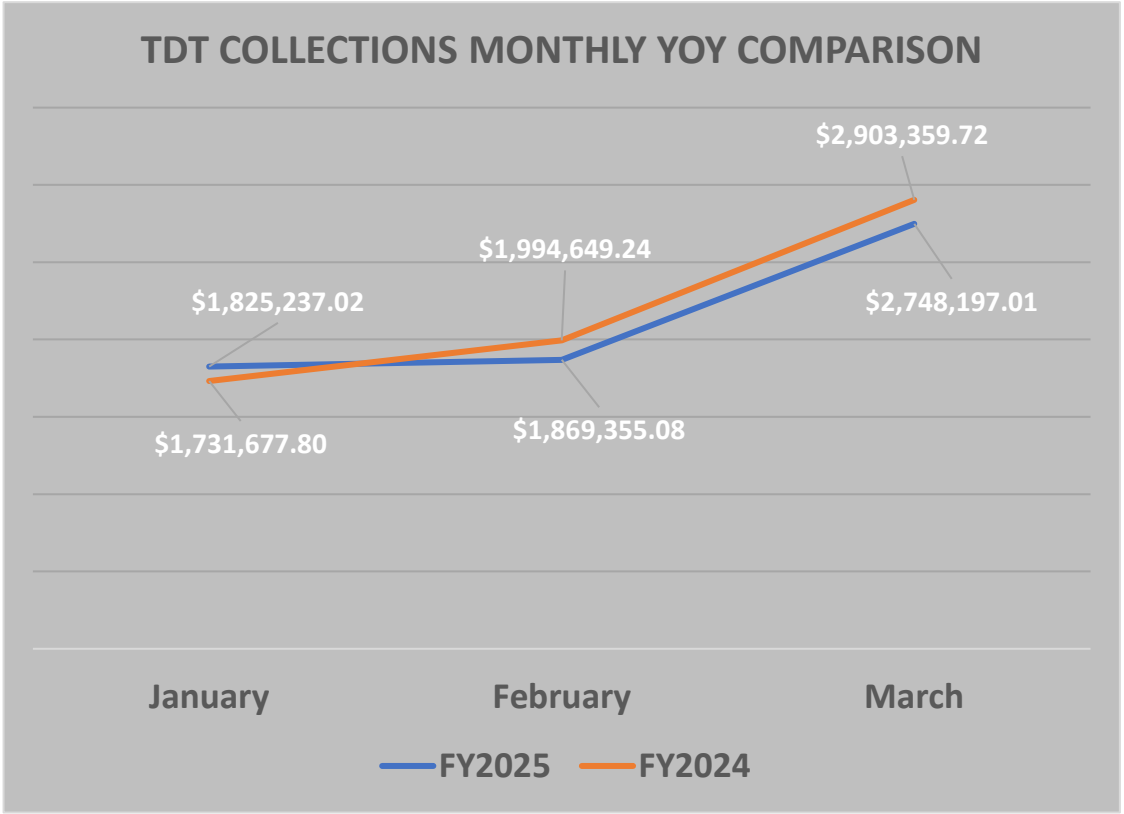
- **March 2025 Supply** increased **+10.15% YOY**

Demand March 2025

- **March 2025 Demand** increased **+5.3% YOY**



Tourist Development Tax Collections
March 2025

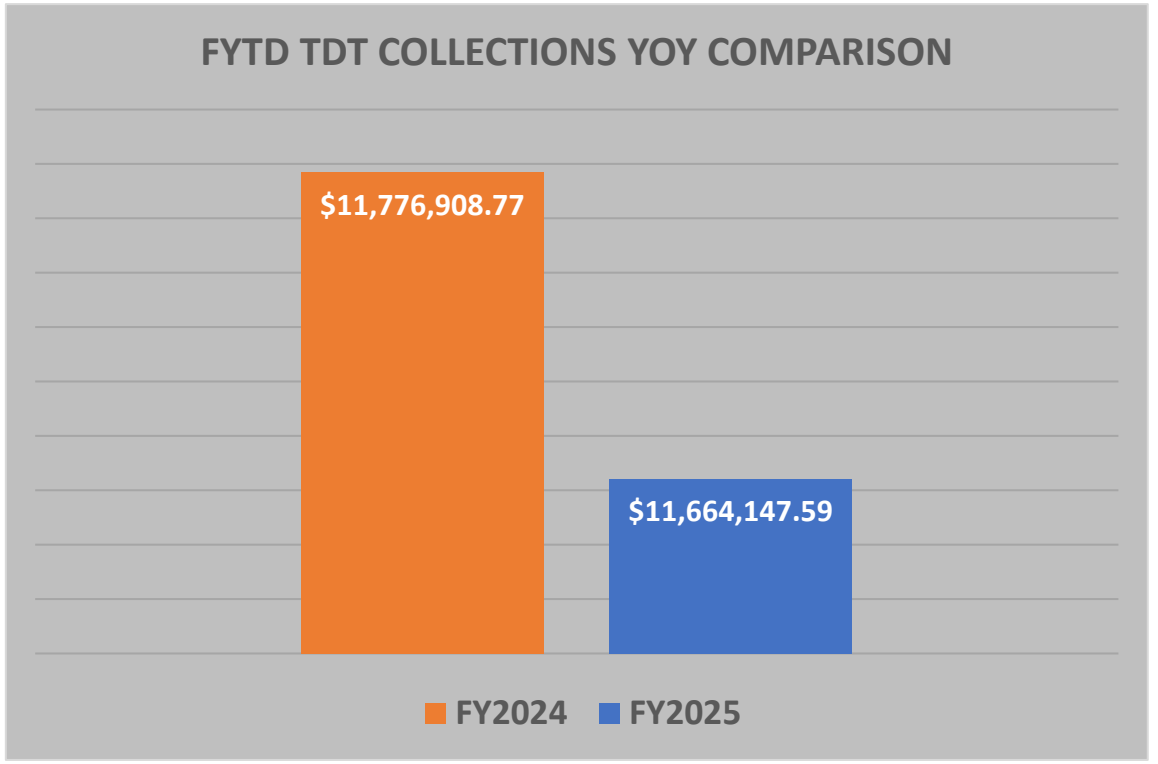


TDT Collections March 2025

- **March 2024 TDT Collections** decreased **-5.3% YOY**

FYTD TDT Collections March 2025

- **FYTD TDT Collections** decreased **-1% YOY**

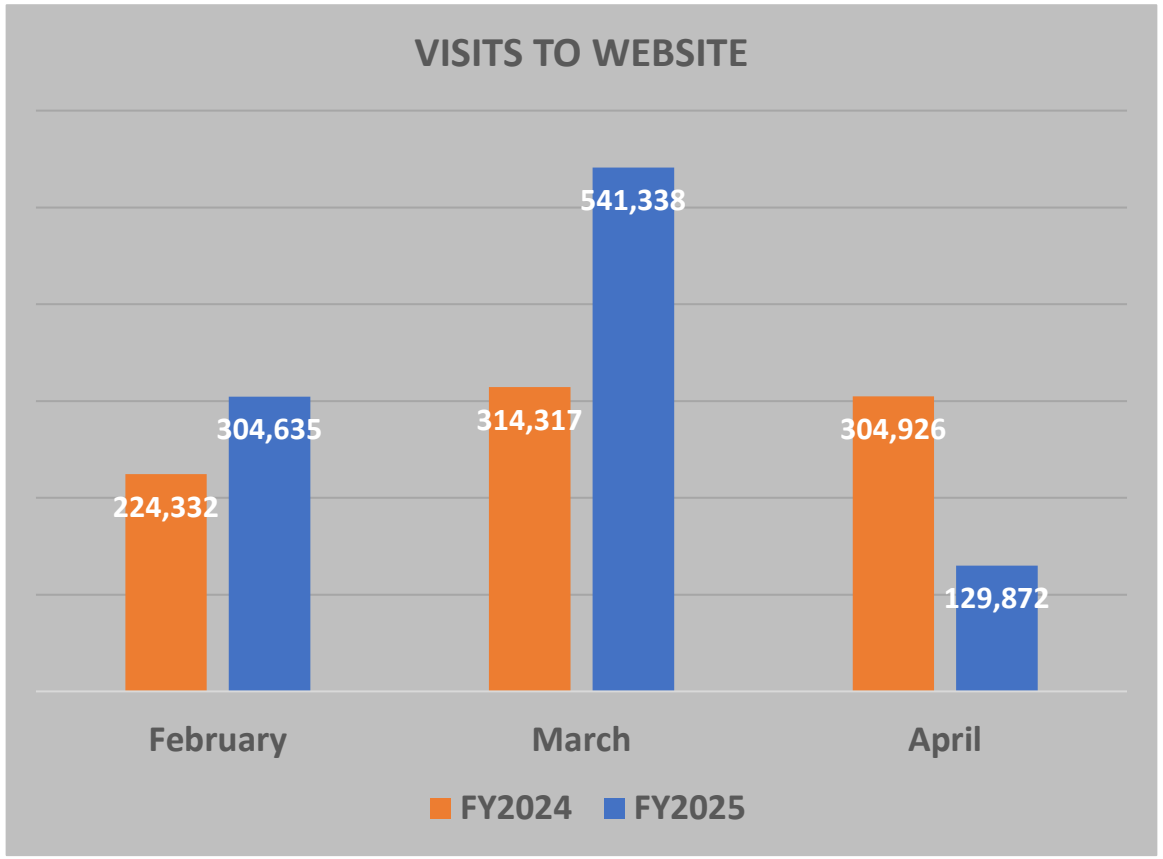


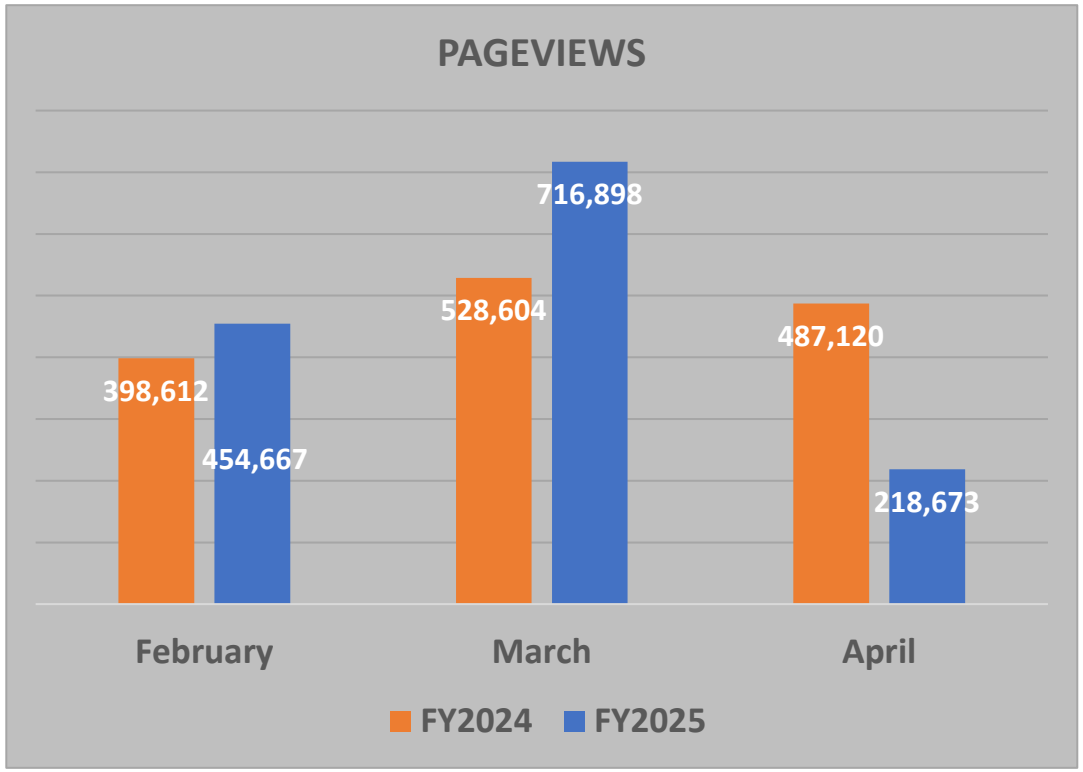
Website + eCRM

Website Report
April 2025

Website Visitation April 2025

- **VCB website visitation** decreased **-57.4% YOY for April 2025**

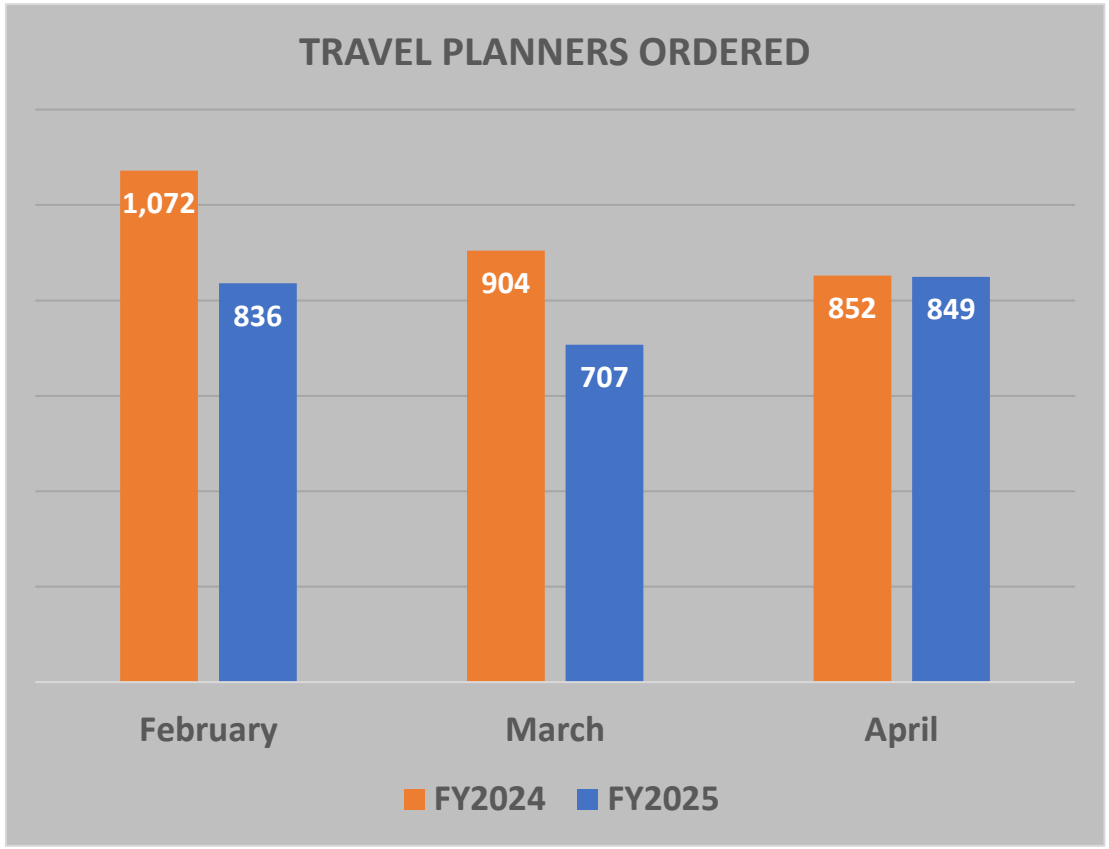




Website Page Views April 2025

- **Page Views** decreased **-55.1% YOY** in **April 2025**

Website Report
April 2025

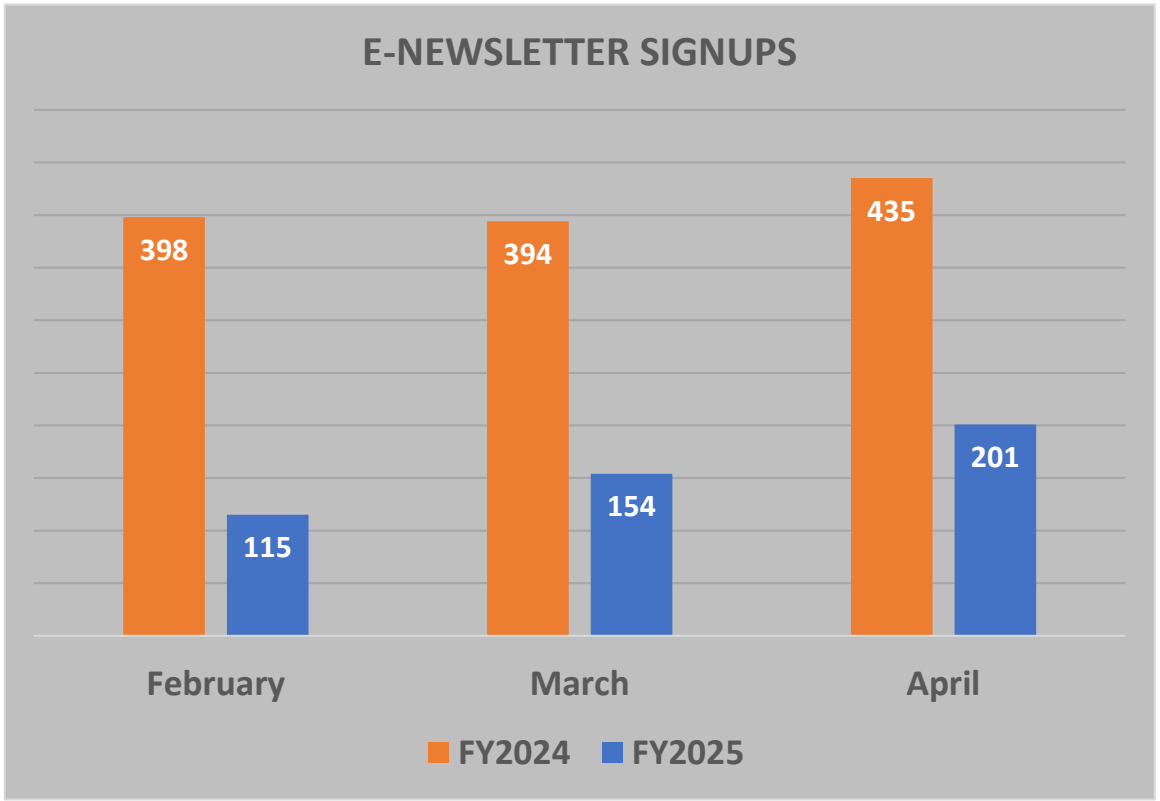


Guides Ordered April 2025

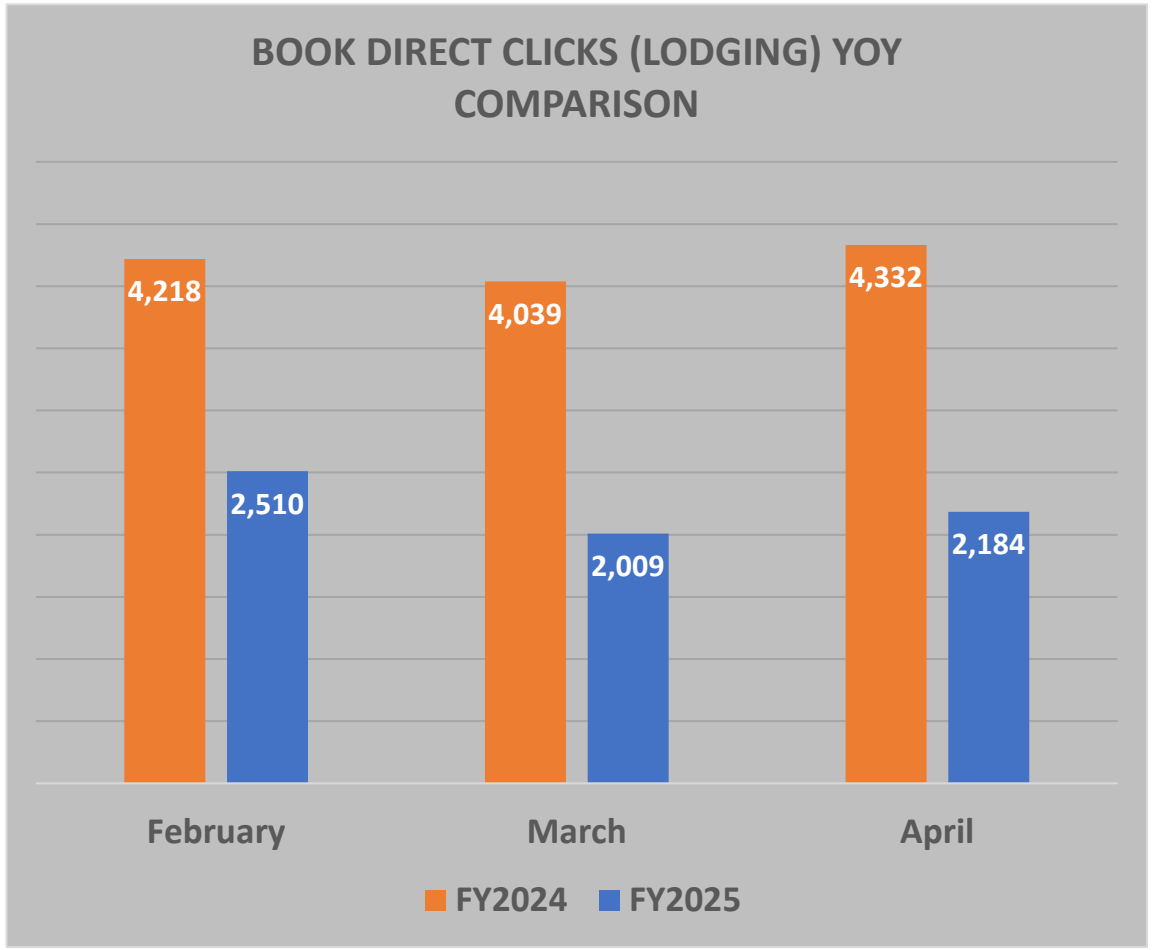
- **Guides ordered** decreased for **April 2025,** down **-0.4% YOY**

eNewsletter Signups April 2025

- **April 2025 eNewsletter signups** decreased **-53.8% YOY**



Website Report
April 2025

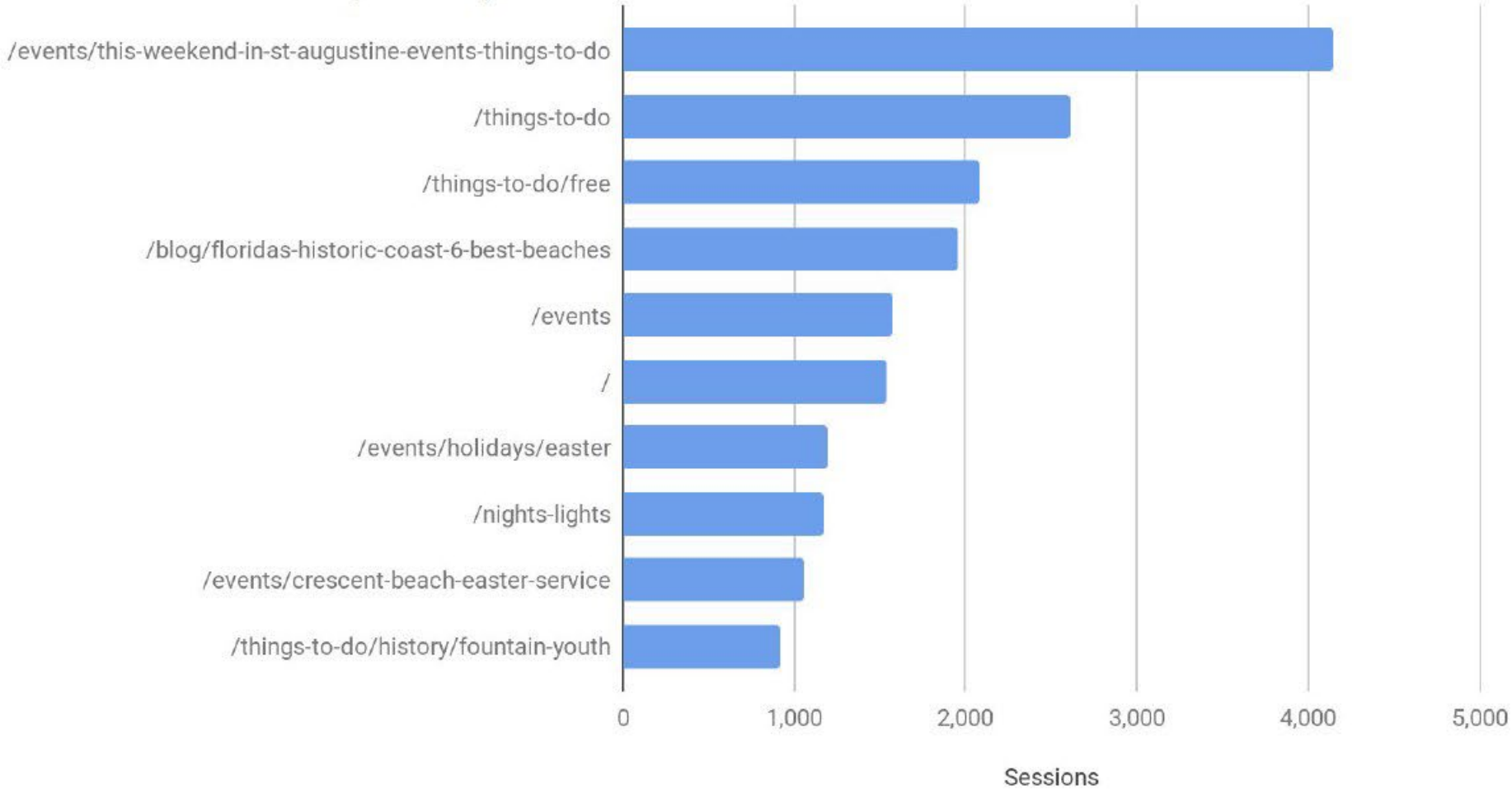


BookDirect Clicks April 2025

- BookDirect clicks decreased for **April 2025** to **2,184** clicks **(-49.6% YOY)**

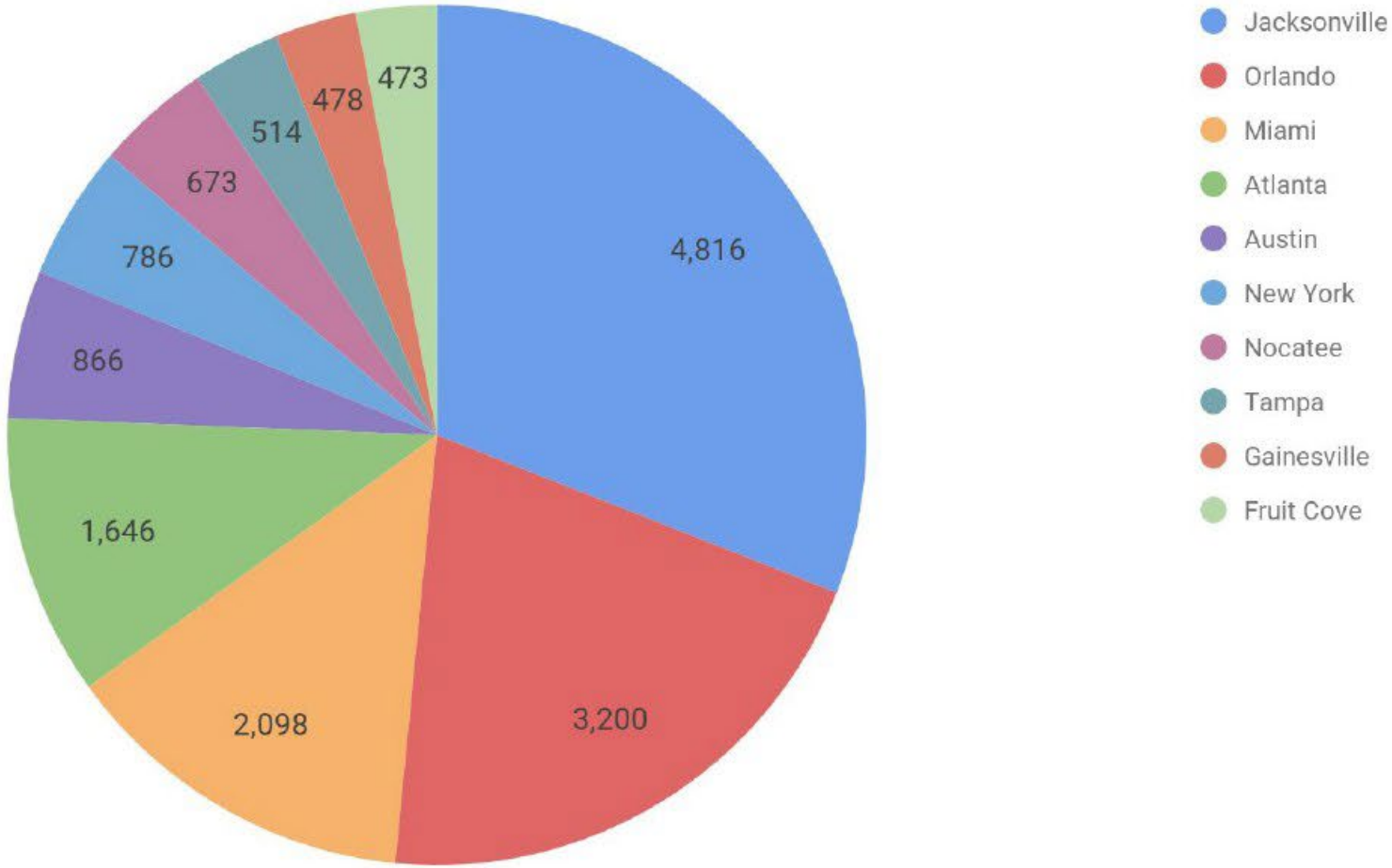
Top Landing Pages

The Easter page *(optimized in March)* increased 1,437% and the St. Augustine Craft & Brewers Fest *(optimized in April)* increased 74% year-over-year.



Sessions By City

Austin traffic increased 1k% compared to last year.



Top Level Performance

129,872
VISITS TO WEBSITE
-57% YOY

103,040
WEBSITE USERS
-60% YOY

61,021
VISIT FROM ORGANIC
-21% YOY

218,673
PAGE VIEWS
-55% YOY

0:00:58
AVERAGE ENGAGEMENT TIME PER SESSION
+41% YOY

79,868
ENGAGED SESSIONS
-40% YOY

61.50%
ENGAGEMENT RATE
+18% YOY

Hispanic Microsite Performance

849
VISITS TO WEBSITE
-23% YOY

745
TOTAL USERS
-22% YOY

712
VISIT FROM ORGANIC
-24% YOY

1,825
PAGE VIEWS
-26% YOY

0:01:34
AVERAGE ENGAGEMENT TIME PER SESSION
-12% YOY

649
ENGAGED SESSIONS
-15% YOY

76.44%
ENGAGEMENT RATE
+7% YOY

Email Performance

Opt-in Subscribers

36,609
MESSAGES SENT

32%
CTOR

1,749
SESSIONS

0:03:59
AVG. SESSION DURATION

Other Source Subscribers

162,158
MESSAGES SENT

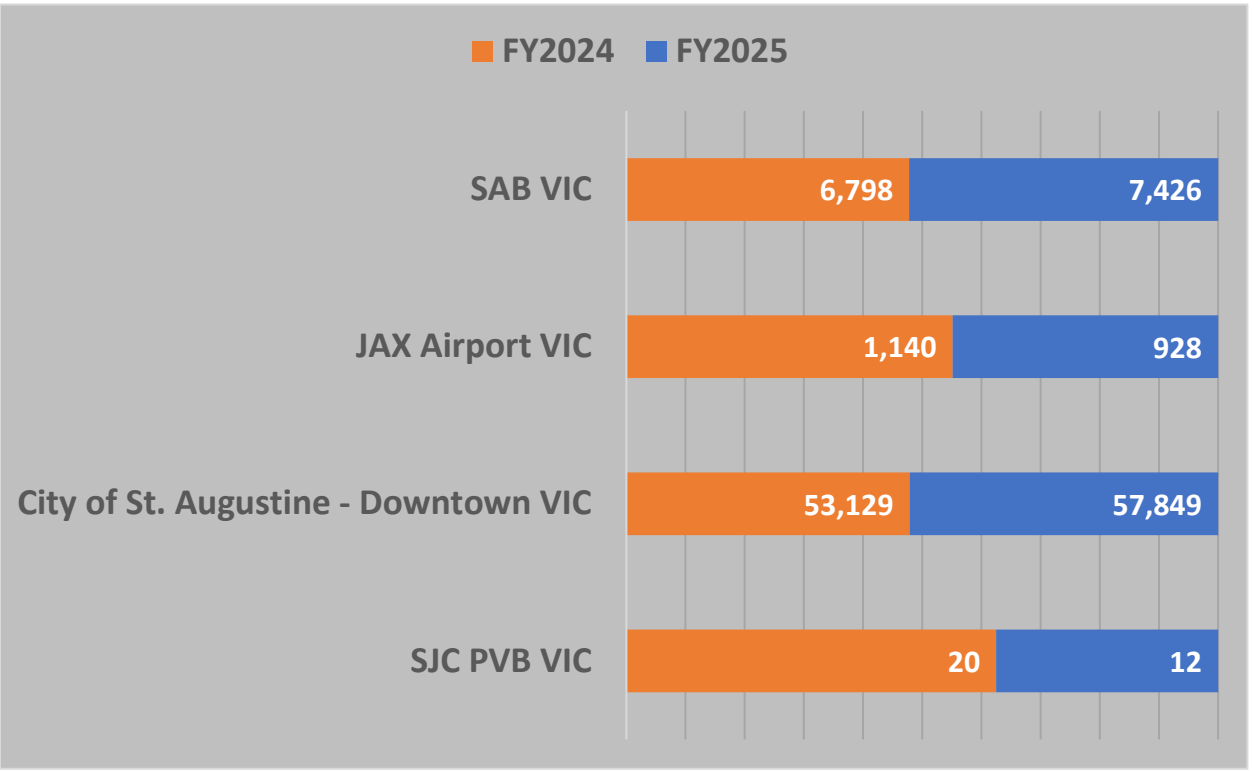
31%
CTOR

1,109
SESSIONS

0:01:40
AVG. SESSION DURATION

Visitor Information Centers Visitation

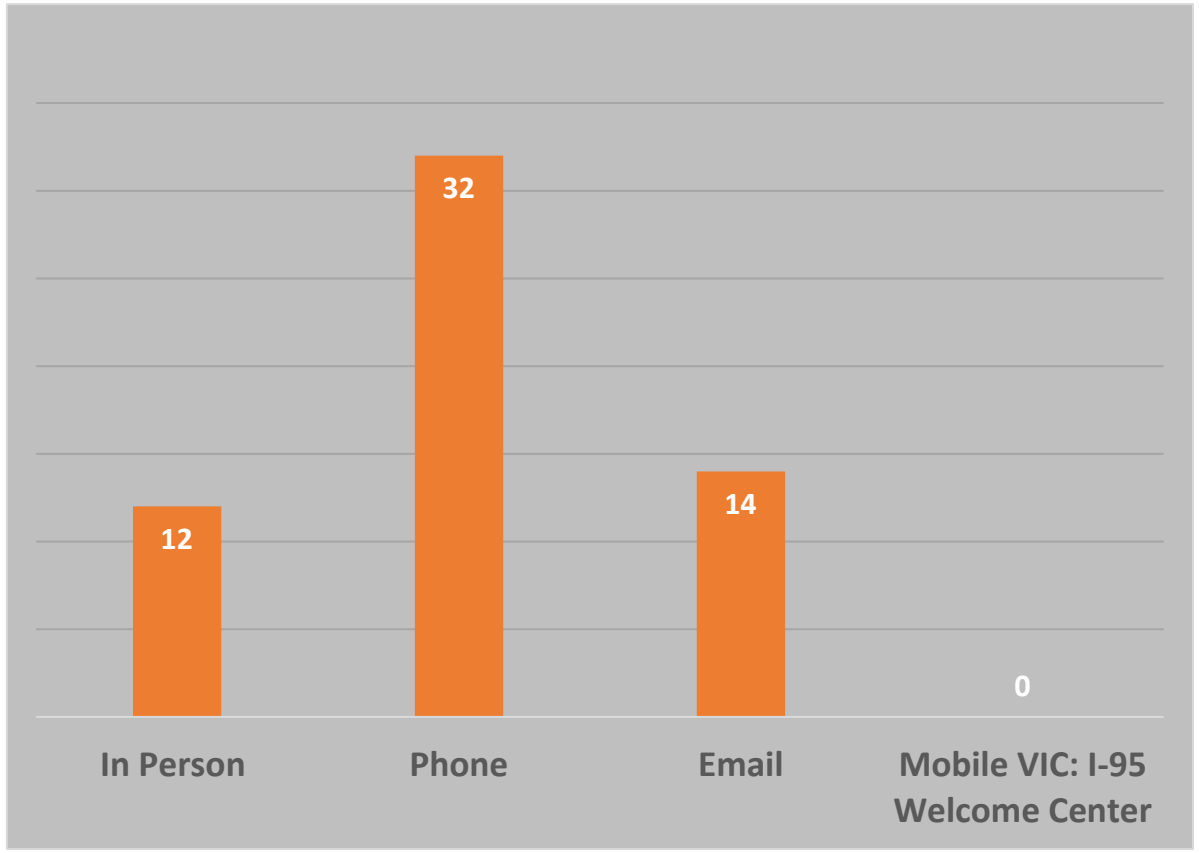
VIC Visitation
April 2025



VIC Visitation - April 2025

- Visitation to the **St. Augustine Beach Visitor Information Center** increased **+9% YOY**
- Visitation to the **Jacksonville Airport Visitor Information Center** decreased **-18.6% YOY**
- Visitation to the **City of St. Augustine Downtown Visitor Information Center** increased **+8.9% YOY**
- Visitation to the **SJC PVB Visitor Information Center** decrease **-40% YOY**

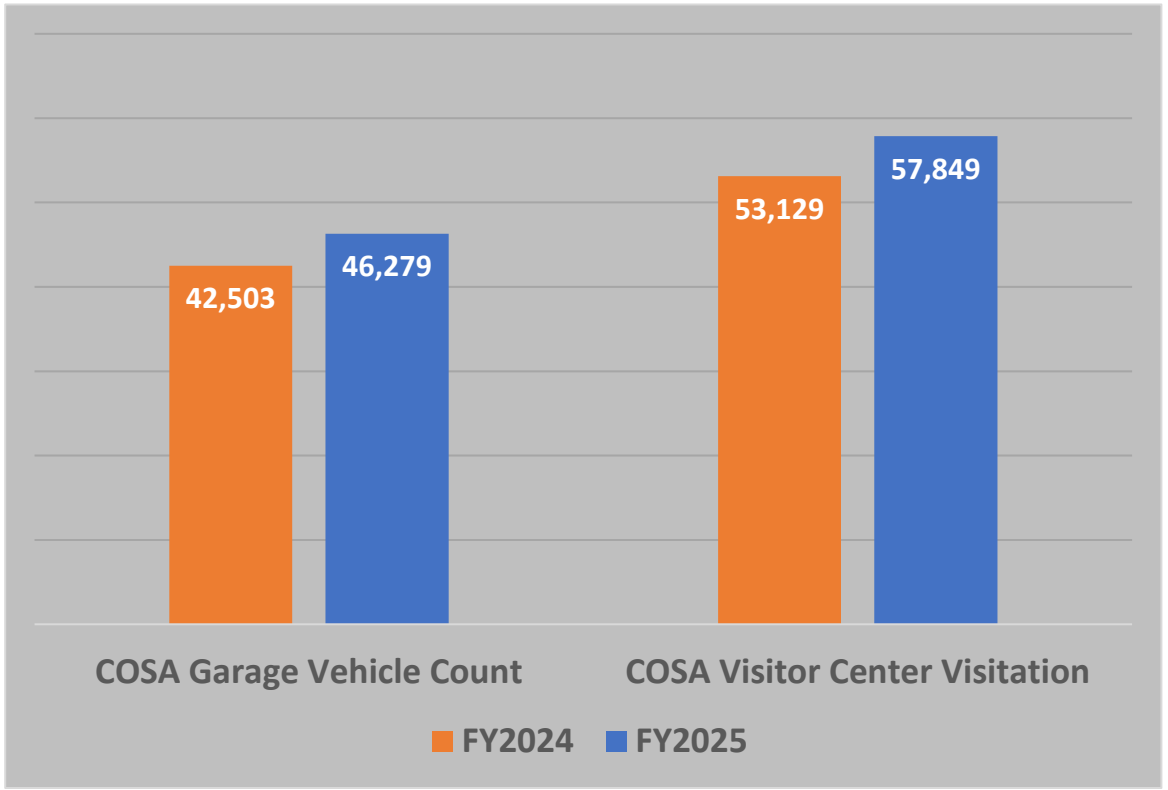
Ponte Vedra VIC Visitation
April 2025



Ponte Vedra VIC Visitation - April 2025

- **Visitors Served In-Person** **12**
- **Visitors Served by Phone** **32**
- **Visitors Served by Email** **14**
- **Mobile VIC I-95 Welcome Center** **0**

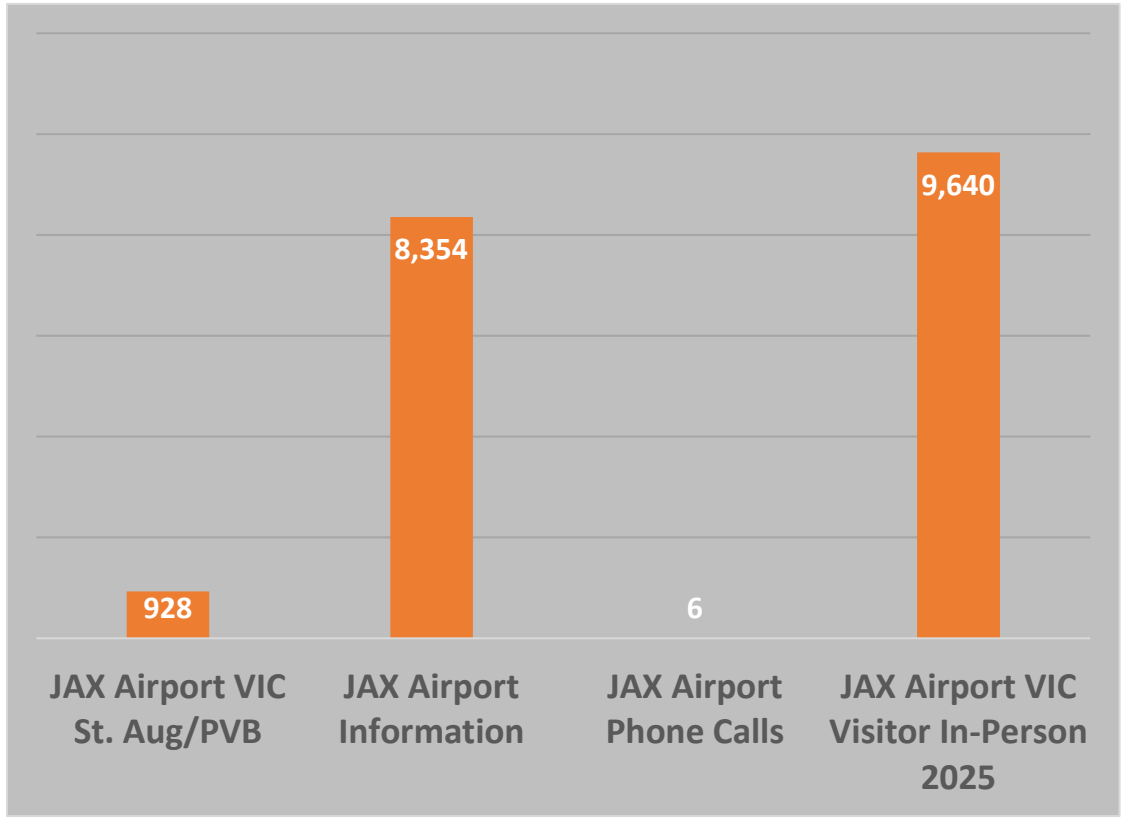
City of St Augustine Downtown VIC Visitation
April 2025



City of St Augustine Downtown VIC Visitation - April 2025

- **Visitor Information Center Vehicle Count 2024 42,503**
- **Visitor Information Center Vehicle Count 2025 46,279**
- **Visitor Information Center In-Person 2024 53,129**
- **Visitor Information Center In-Person 2025 57,849**

Jacksonville Airport VIC Visitation
April 2025

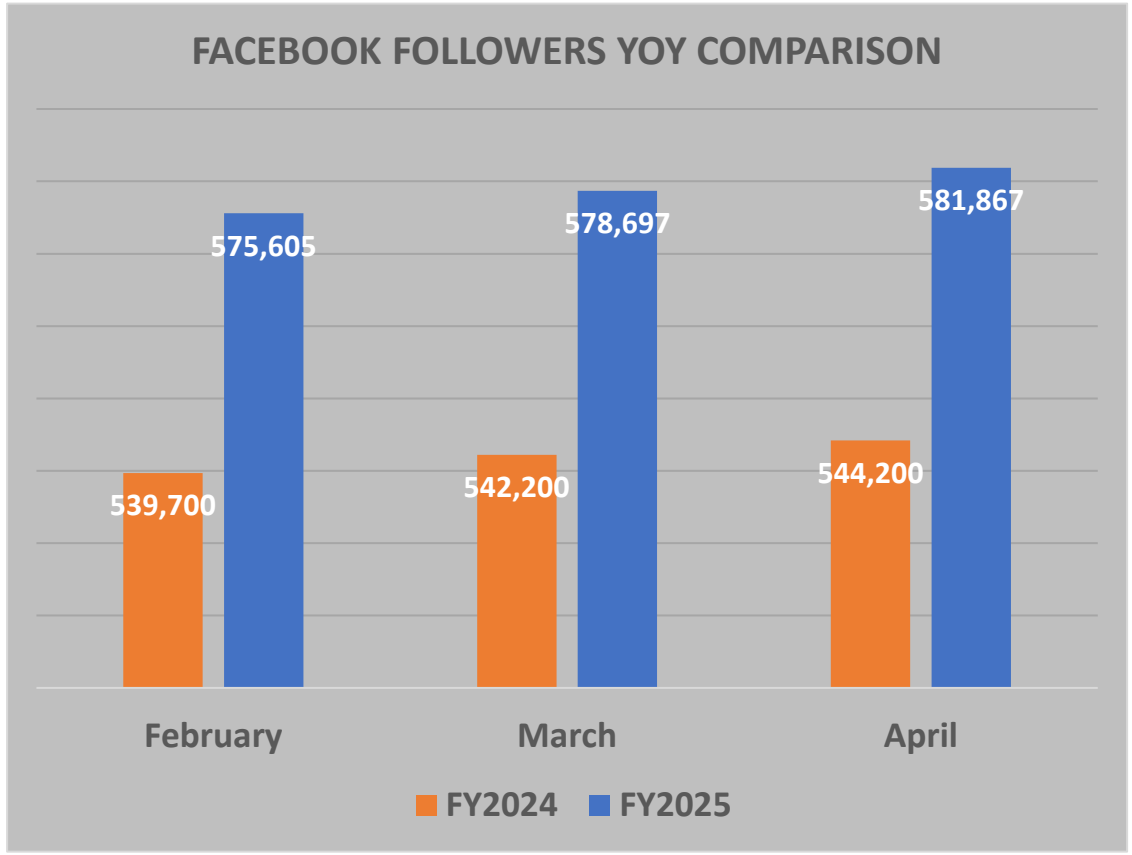


Jacksonville Airport VIC Visitation - April 2025

- **Jacksonville Airport VIC St. Aug & PV** **928**
- **Jacksonville Airport VIC Airport Information** **8,354**
- **Jacksonville Airport VIC Phone Calls** **6**
- **Jacksonville Airport VIC Visitor In-Person 2025** **9,640**

Social Media

Social Media
April 2025

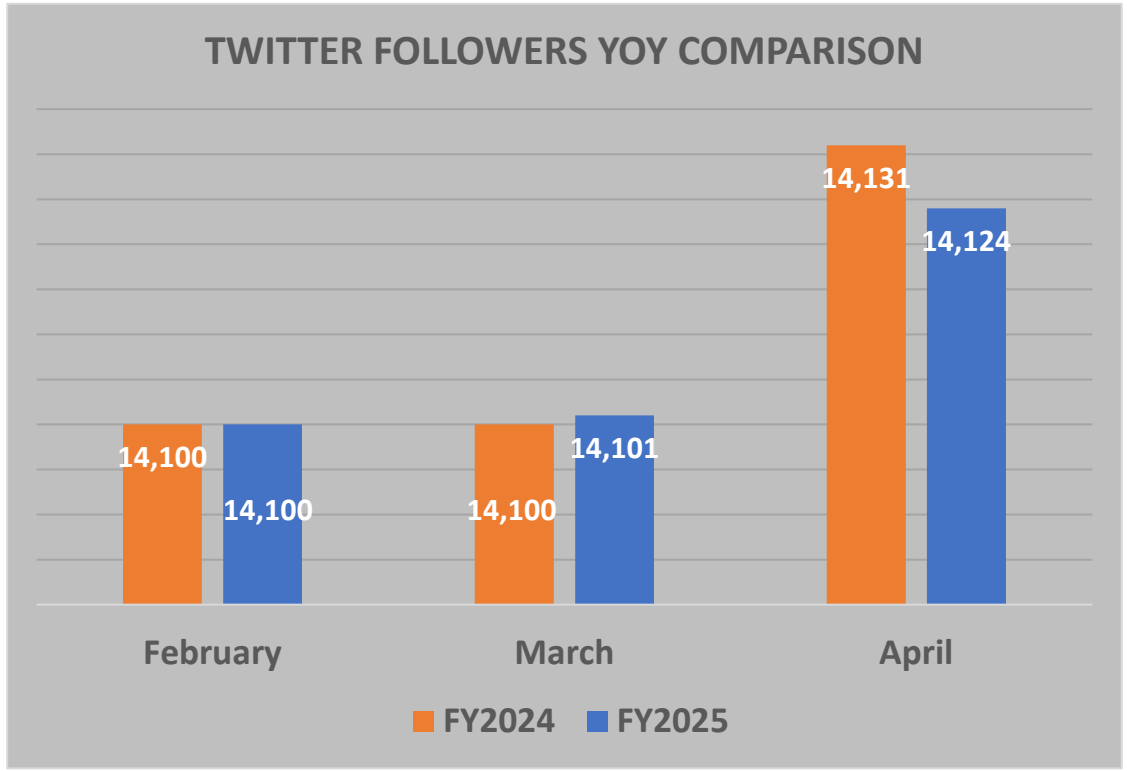


Facebook Followers April 2025

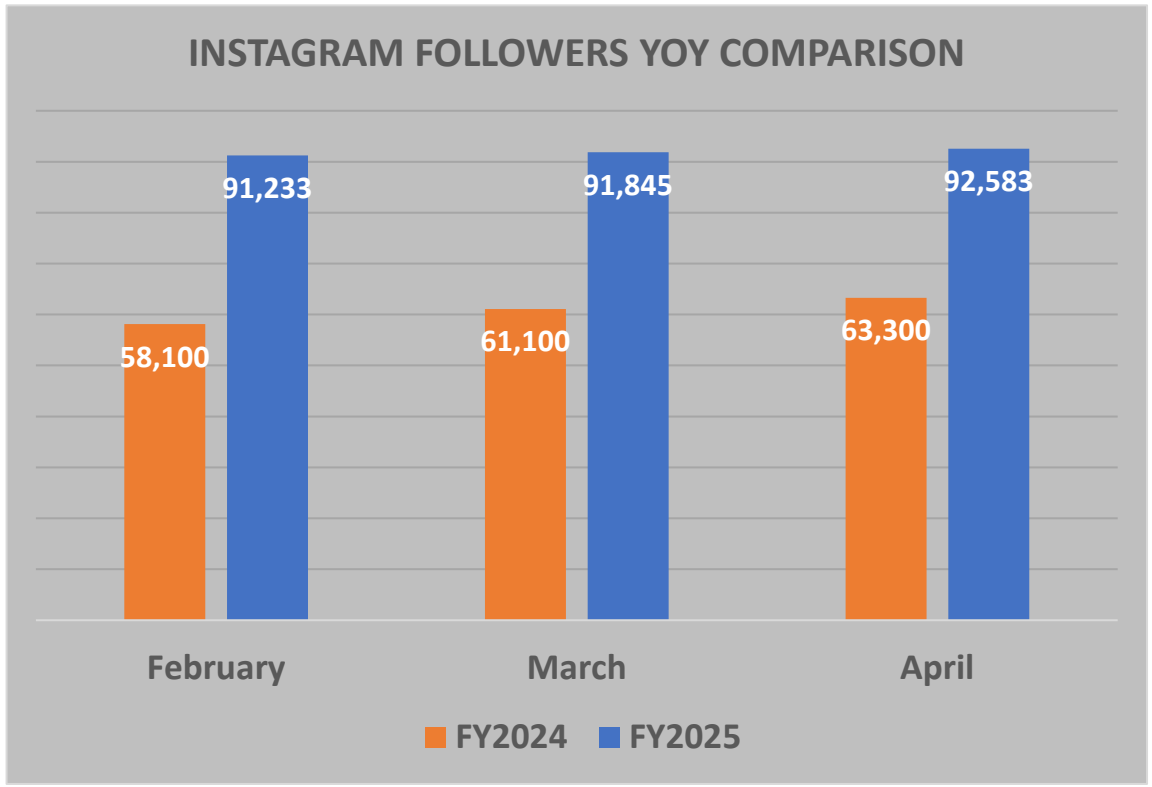
- **Facebook Followers increased** in April 2025 **+6.92% YOY**

Twitter Followers April 2025

- **Twitter Followers** decreased -0.05% in **April 2025 FLAT YOY**



Social Media
April 2025

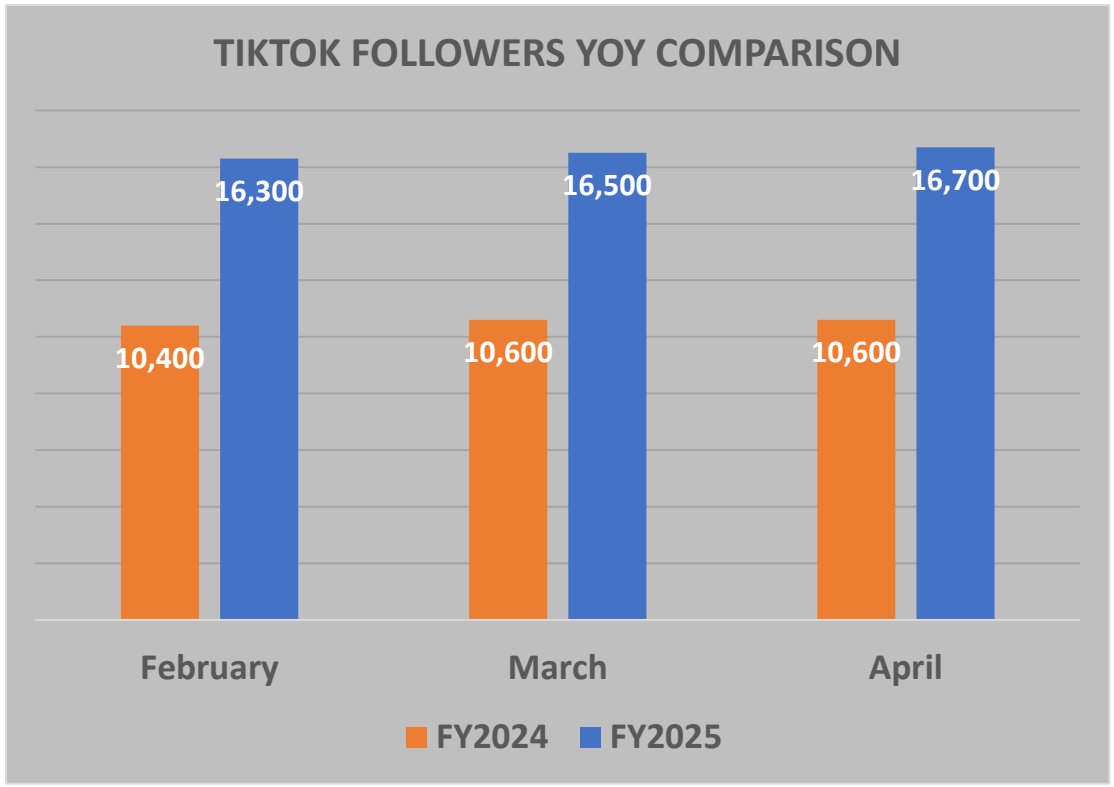


Instagram Followers April 2025

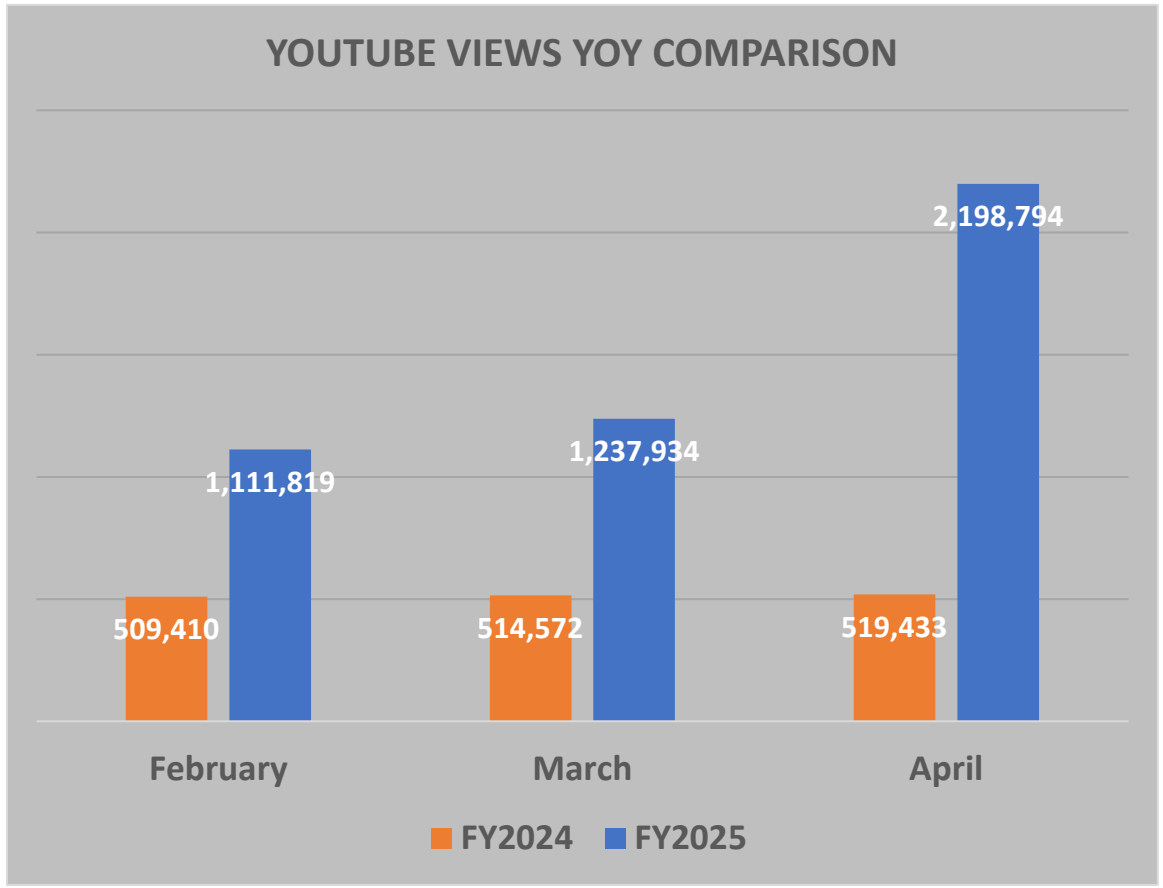
- **Instagram** increased in **April 2025 +43.3% YOY**

TikTok Followers April 2025

- **TikTok** Followers increased in April 2025 **+57.5% YOY**



Social Media
April 2025

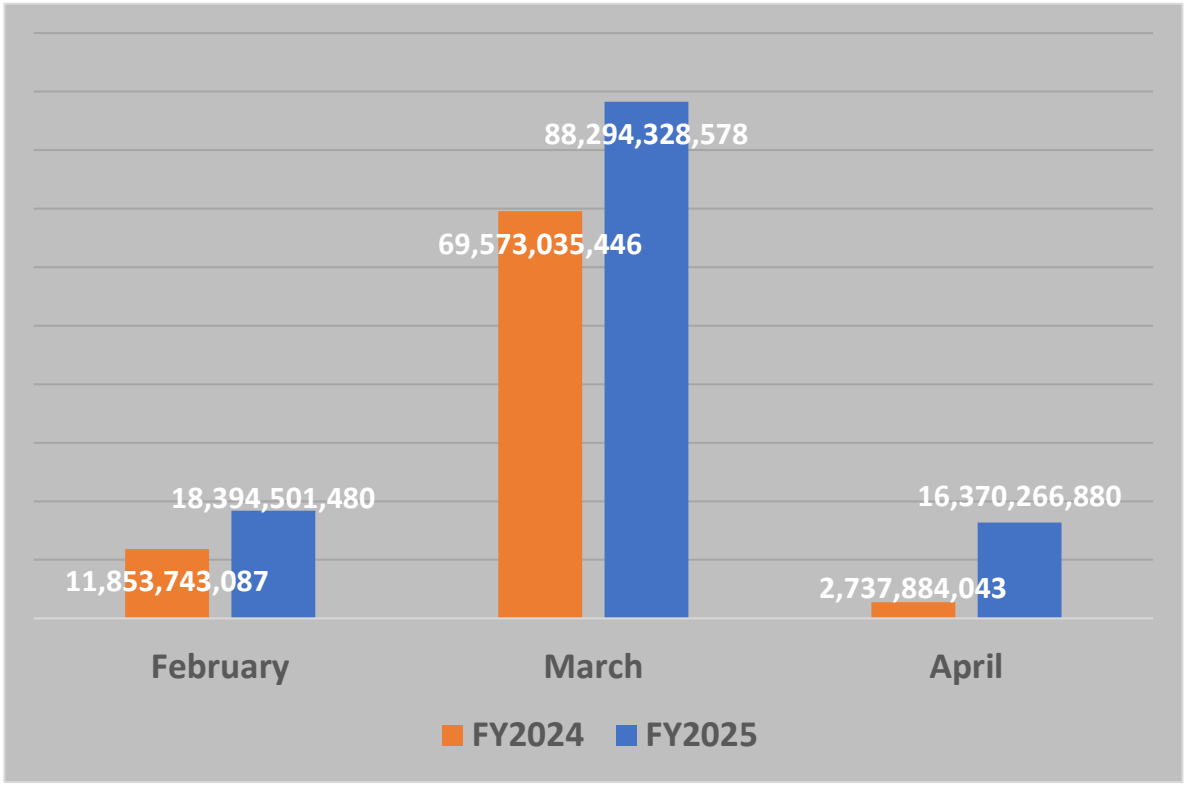


YouTube Views April 2025

- **YouTube Views** increased in **April 2025 +323.3% YOY**

Media Relations

Media Impressions – April 2025

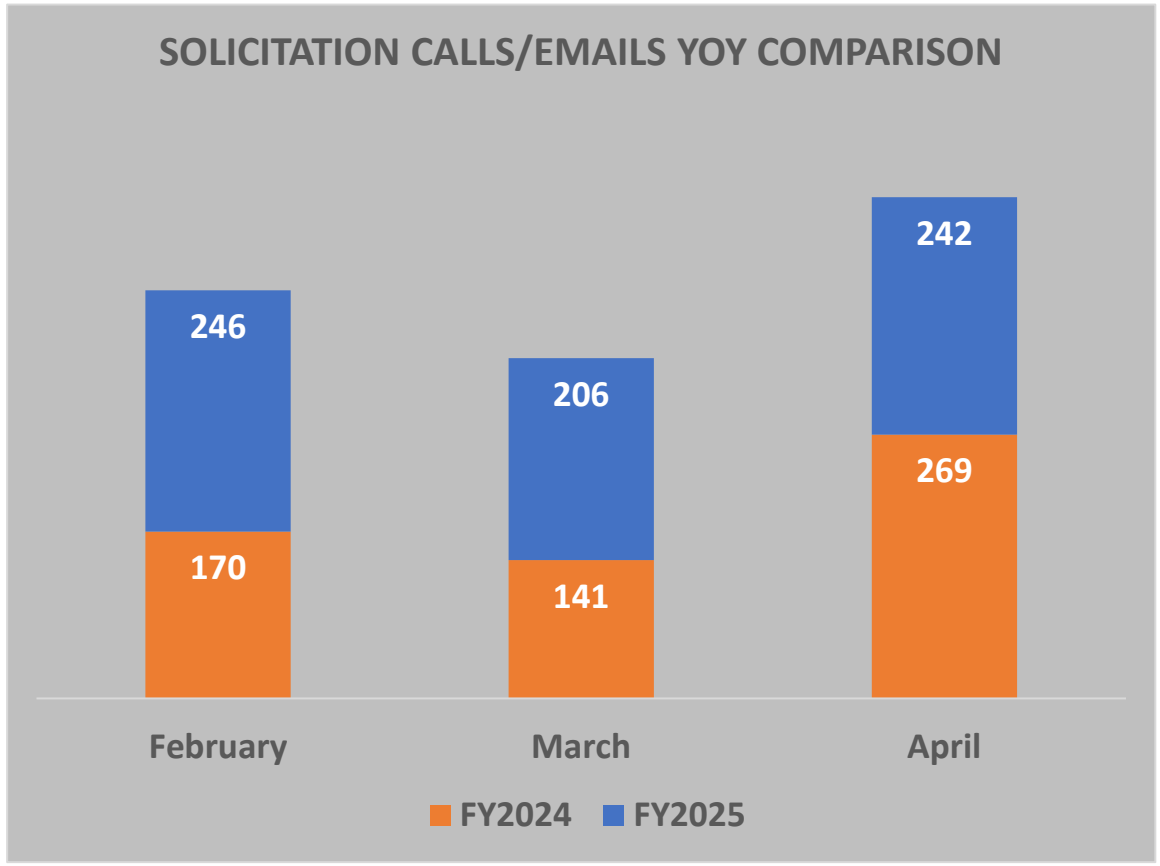


Media Impressions - April 2025

- **Media Impressions** increased **+497.9% YOY** in **April 2025**

Sales

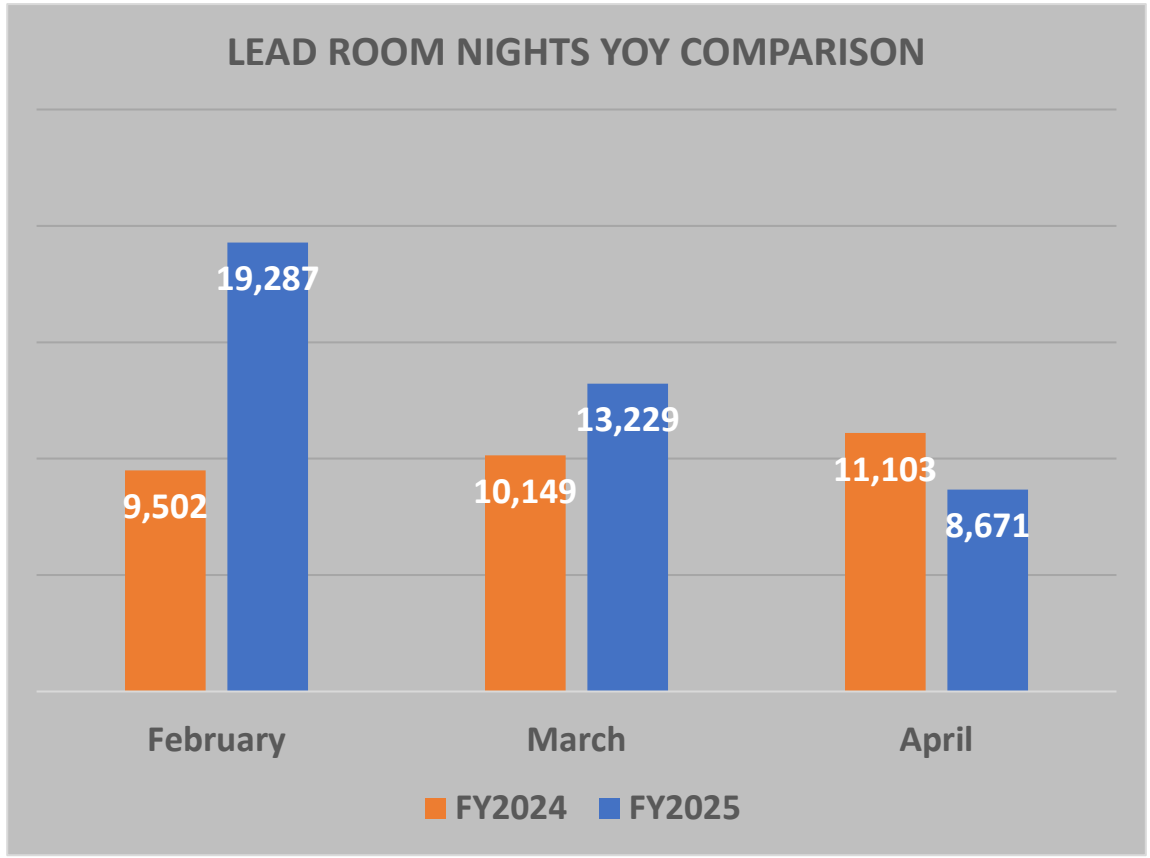
Sales Measurement Summary



Solicitations April 2025

- **Solicitations** for April 2025 decreased **-10% YOY**

Sales Report
April 2025

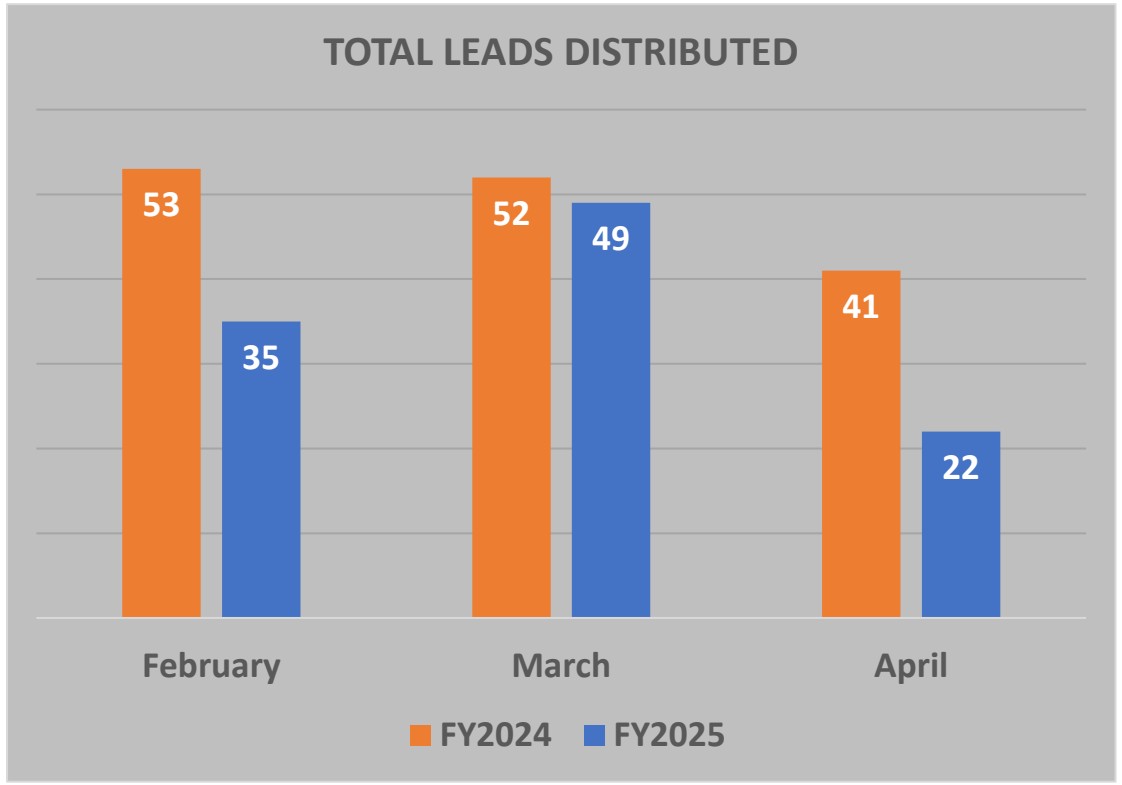


Lead Room Nights April 2025

- **April 2025 Lead Room Nights** decreased **-21.9% YOY**

Lead Distribution April 2025

- **April 2025 Lead Distribution** decreased **-46.3% YOY**



CEO’s Comments

- March 2025 Traditional Lodging Stats: Occupancy 74.2% (-0.9%), ADR $214.29 (-3.0%), RevPAR $158.91 (-3.9%), Demand (-0.5%), Revenue (-3.4%), Supply is +0.5%.
- March 2025 Vacation Rental Stats: Paid Occupancy 58.1% (-1.2%), ADR $222 (-4.3%), RevPAL $129 (-5.1%), Demand (+5.3%); Supply (+10.15%).
- March 2025 TDT Collections were down -5.3% YOY
- April 2025 Website: YOY trends with the site down -57.4% YOY and significant increase in site visitation from Austin (+1k%).
- April VIC Visitation YOY for the PVB VIC was -40%; CoSA VIC was +8.9%; Jax VIC was -18.6%; SAB VIC was +9%
- April 2025 Social Media YOY for Facebook/Meta was +6.92%, Instagram was +43.3%, TikTok was +57.5%, and YouTube was +323.3%
- April 2025 Publicity +497.9% YOY.
- April 2025 Sales team solicitations are down -10% YOY; lead room nights are down -21.9% YOY; lead distributions are down -46.34% YOY.

APRIL BOARD REPORT FY25

ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®

Tinsley



Table of Contents

1. Summary
2. Creative B2B
3. Creative B2C



Summary

- April was a transition month between PeterMayer and Tinsley Advertising.
- All activity contracted between both entities have been listed.
- Tinsley provided a Bridge Media plan for the month of April – June prioritizing Search, Paid Social, and YouTube to maintain a return to the marketplace utilizing existing PeterMayer *It's About Time* Social/YouTube creative.
- Tinsley has prepared a comprehensive May – September 2025 campaign promoting both "Save the Summer" and "Sing Out Loud" initiatives.

Tinsley

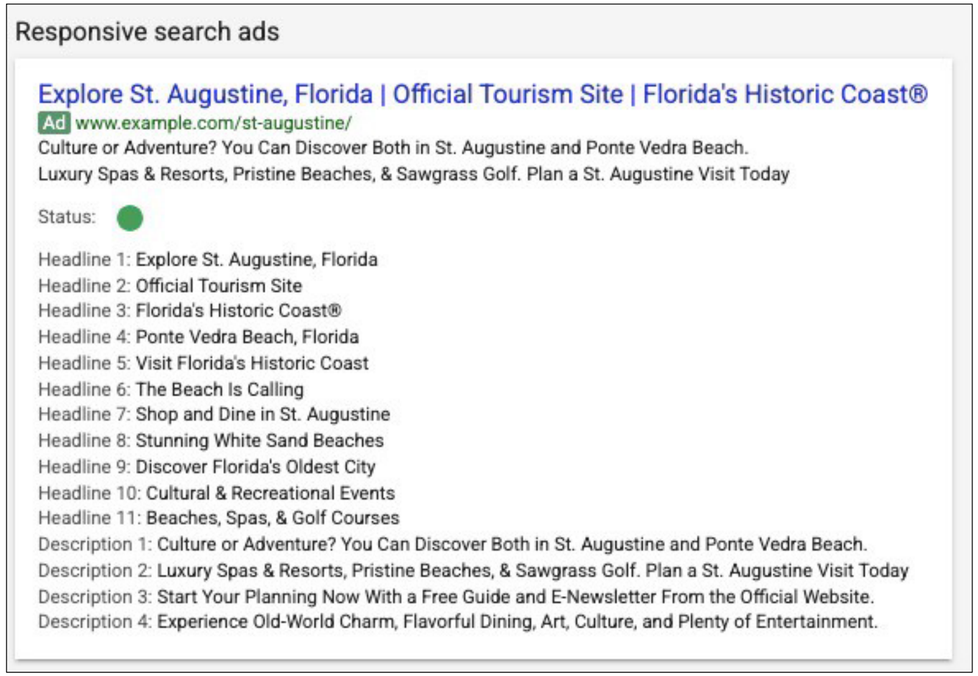
CREATIVE: B2C

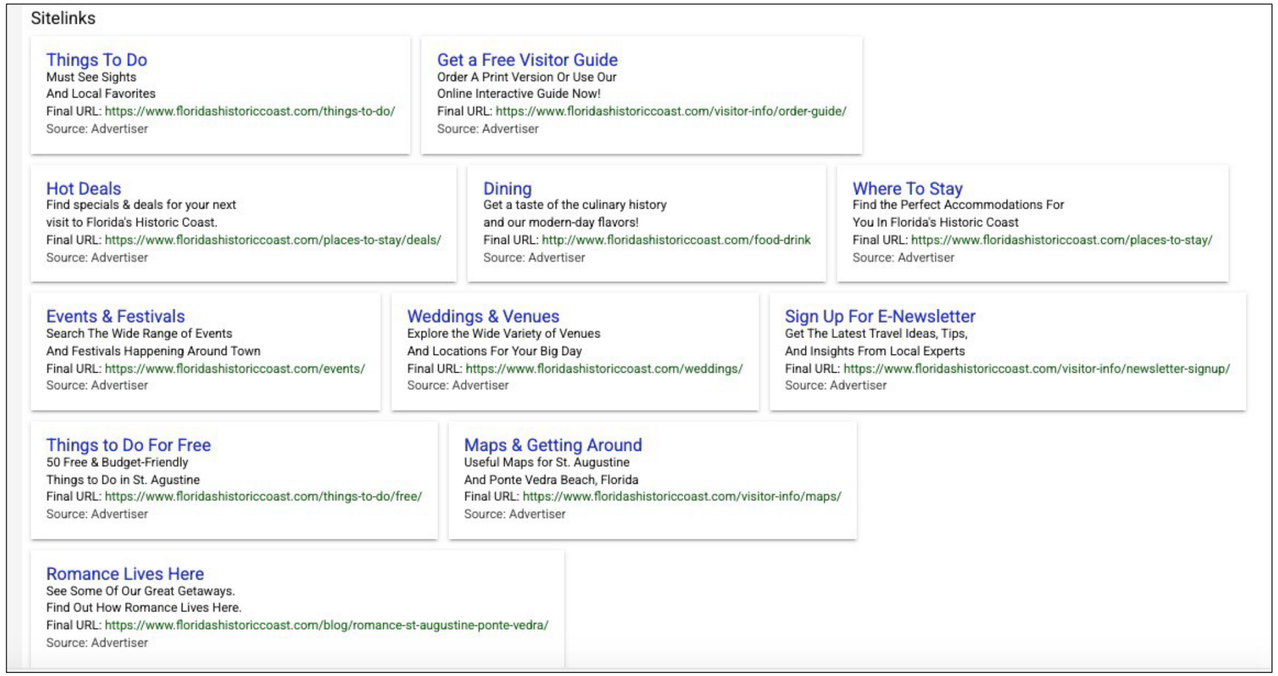


Search

Google Paid Search ran and delivered 161,700 impressions and 20,811 clicks from 4/11 – 4/30.

The campaign includes both Brand and Generic (Non-Branded) campaigns.



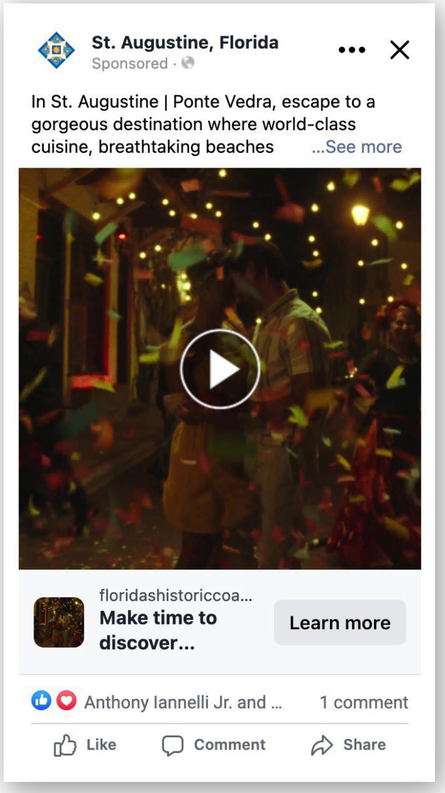


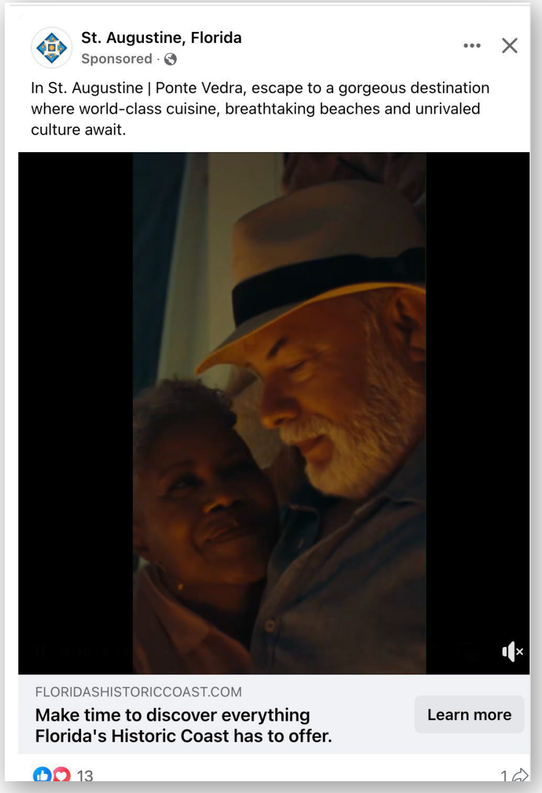
Tinsley

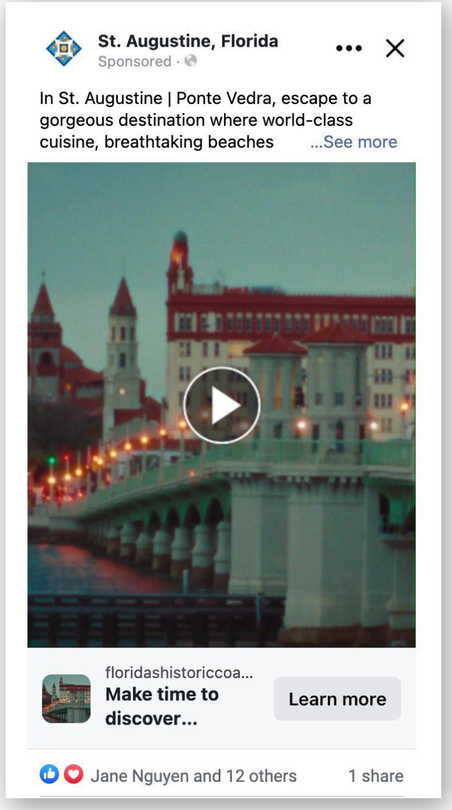
Facebook/Instagram

Facebook/Instagram delivered 411,825 impressions and 18,469 clicks from 4/18 - 4/30.

The campaign incorporates in-feed static and video units.







Tinsley

YouTube

YouTube delivered 1,257,409 impressions and 1,533 clicks from 4/18 – 4/30.



Local Palate

Details

- Co-Op Opportunity: FP4C ad adjacent to editorial or right hand read in Special FL Restaurant Section
- Southern Dining Guide / Restaurants & Bar Issue publishing in April 2025
- 142,606 circulation

Audience

- Engaged, affluent adults around the Southeast United States looking for new exciting experiences
- The average reader takes 4+ trips per year



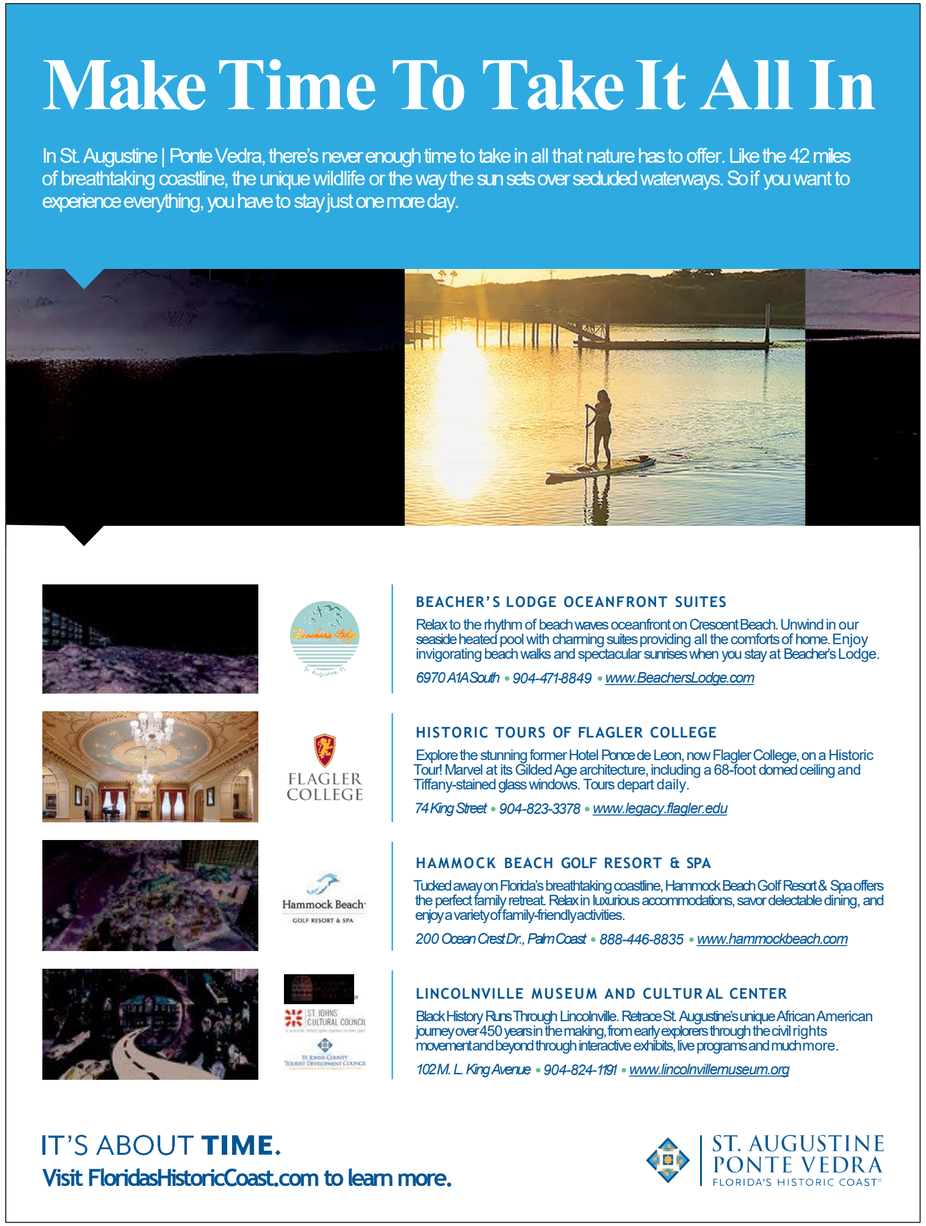
Undiscovered Florida

Details

- Co-Op Opportunity: FP4C within the Northern Region section
- 2025 Annual issue focused on nature, history/heritage, and arts/culture
- Poly-bagged in April editions of Smithsonian & Recommend Magazines
- Subscriber based with distribution at Visit Florida Welcome Centers
- 390,000 Circulation

Audience

- Lifelong learners and travel professionals
- 56% of Smithsonian readers go on 3+ night vacations to Florida



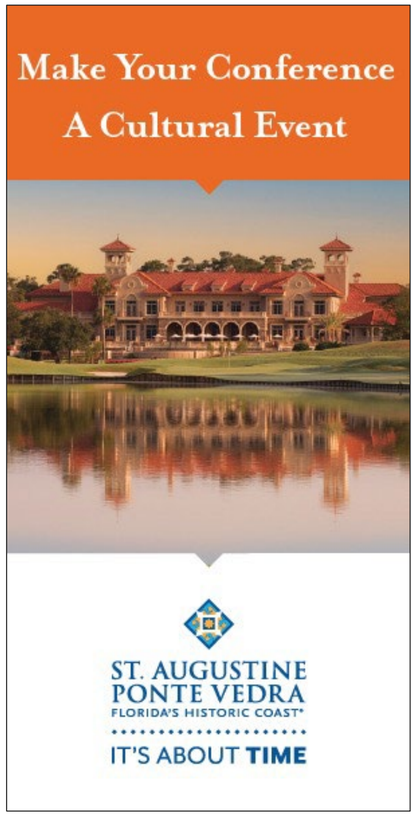
CREATIVE: B2B

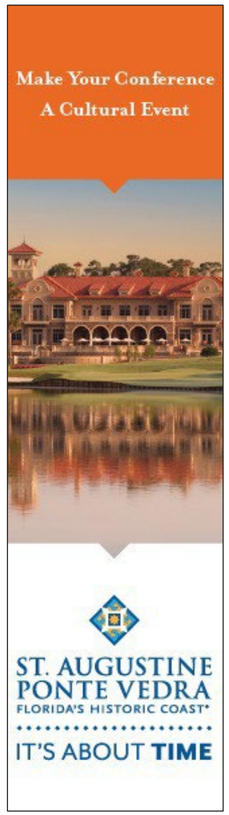


Azerion Programmatic Display

B2B Display ran and delivered 942,495 impressions and 8,580 clicks from 4/1 – 4/30.













Tinsley

Connect Meetings

Details
Event planning publication that targets event planners within the travel and tourism industry.

Audience
Far-forward positioning opposite editorial in the Spring and Fall editions.



FLORIDA

ST. AUGUSTINE | PONTE VEDRA

Ponte Vedra Inn golf

Castillo sunrise

Art gallery

St. Augustine and Ponte Vedra is a Florida meeting destination like no other with a range of accommodations and choices, from old-world boutique hotels to upscale resorts, along our immaculate 42 miles of beaches. With the nation's oldest city, visitors are immersed in the culture of more than 450 years, with a distinctively European feel.

Your attendees will enjoy unique venues, such as museums, historic sites, and popular attractions, and embrace the endless supply of fresh seafood and locally sourced produce, visit the art galleries lining Aviles Street in St. Augustine, and tee off at one of our championship golf courses.

DESTINATION FACTS

Hotel Rooms 10,000
Largest Indoor Venue Sawgrass Marriott Golf Resorts & Spa, 61,000 total sq. ft.
Largest Outdoor Venue St. Augustine Amphitheatre, 4,700-person capacity
Convention Center St. Johns County Convention Center
Convention Center Meeting Space 45,200 sq. ft.
Convention Center Meeting Rooms 17
Nearest Airport Jacksonville International Airport (JAX)

COMING SOON

- Embassy Suites St. Augustine Beach Oceanfront Resort has added 42 suites, bringing its total to 217, with 25,000 square feet of indoor and outdoor meeting space.
- Hyatt Place Vilano Beach with 120 guest rooms and 7,200 square feet of meeting space, featuring a rooftop bar and restaurant.

CONTACT

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