

ST. JOHNS COUNTY
TOURIST DEVELOPMENT COUNCIL MEETING
NOVEMBER 17, 2025, 1:30 PM
COUNTY AUDITORIUM

1. CALL TO ORDER – Irving Kass, Vice Chair
2. PLEDGE OF ALLEGIANCE
3. ROLL CALL
4. APPROVAL OF AGENDA (**Action Required**)
5. APPROVAL OF MINUTES (**Action Required**)
 - Regular Meeting Minutes – October 20, 2025 (Pages 2 - 5)
 - Public Comment
6. PUBLIC COMMENT – 3 minutes, not related to agenda items
7. SIGNATURE SEASONS FRAMEWORK INITIATIVE DISCUSSION – Irving Kass (Pages 6 - 11)
8. ACH GRANT PROGRAM FY2027 (**Action Required**) (Pages 12 - 22)
 - Public comment
9. VISITOR PROFILE QUARTERLY REPORT (Pages 23 - 93)
10. FY25 DESTINATION MARKETING EXPENDITURE UPDATE (Page 94)
11. MONTHLY REPORTS PROVIDED IN PACKETS (Pages 95 - 121)
12. MEMBER COMMENTS
13. NEXT MEETING DATE - TBD
14. ADJOURN

TDC Regular Meeting – November 17, 2025

Agenda Item 5 – Approval of Minutes (Action Required)

- Regular Meeting – October 20, 2025
- Public Comment



Minutes of Meeting
Tourist Development Council
St. Johns County, Florida
County Administration Building
500 San Sebastian View
St. Augustine, Florida 32084
October 20, 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
Clay Murphy, BCC Representative
Nancy Sikes-Kline, Mayor, City of St. Augustine Representative
Charles Cox, District 3

Absent: Michael Wicks, District 4
Michael Gordon, District 4
Dylan Rumrell, Mayor, St. Augustine Beach City Commission, Seat 2

Staff Present: Jesse Dunn, Deputy County Administrator
Lex Taylor, Deputy County Attorney
Artricia Allen, Deputy Clerk

Dunn announced that Commissioners Clay Murphy would replace Joseph, as the BCC representative for at least two Tourist Development Council meetings.

2. PLEDGE OF ALLEGIANCE

Blevins led the Pledge of Allegiance.

3. ROLL CALL

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

4. APPROVAL OF AGENDA

Motion by Cox, seconded by Phillips, carried 6/0, with Gordon, Wicks and Rumrell absent, to approve the Agenda, as submitted.

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

5. APPROVAL OF MINUTES

Motion by Murphy, seconded by Blevins, carried 6/0, with Gordon, Rumrell, and Wicks absent, to approve the minutes for the August 18, 2025, meeting, as submitted.

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

6. PUBLIC COMMENT

There was none.

7. SPORTS TOURISM GRANT APPROVALS

Bobby McFarland, Sports Tourism Development Specialist, presented the details of the recommended grants.

Discussion ensued on the International Open Billiards Tournament.

Motion by Cox, seconded by Blevins, carried 6/0, with Gordon, Rumrell, and Wicks absent, to recommend to the Board of County Commissioners to approve Phase 1 - Sports Tourism Grants for Fiscal Year 2026.

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

8. MONTHLY REPORTS PROVIDED IN PACKETS

Dunn highlighted the Tourist Development Tax for Fiscal Year 2025, noting a reduction compared to Fiscal Year 2023/2024. He also spoke about the planning for Fiscal Year 2026, noting a flat appropriation.

Susan Phillips, President and Chief Executive Officer of the St. Augustine, Ponte Vedra, and the Beaches Visitors Convention Bureau, provided an update on the Nights of Lights, encouraged the Council to download the app, shared the advertisement "Know Before You Go" campaign, stated that this year's event was not drive-thru; however encouraged everyone to park, take a shuttle, and walk around.

Discussion ensued regarding the app, guest training on new protocols and procedures for Nights of Lights, a comparison of advertising dollars to previous years, and a request to adjust the font on the bar graphs.

Jeff Potts, Executive Director of St. Johns County Cultural Council, provided updates on Arts, Culture, and Heritage Grants, Art in public spaces, the Black Heritage Trail, a third-place award for a tourism guide publication, and on ongoing partnerships and grant contracts.

9. MEMBER COMMENTS

Murphy commented about serving on the Tourist Development Council.

Sikes-Kline welcomed Murphy to the Tourist Development Council meeting and announced that the Mayor was responsible for selecting special guests for the Light-Up Night. She shared that the Minorcan Experience and Minorcan Cultural Society were invited to participate. She also noted that arrangements were made to provide employee parking at the Flagler College garage during December and January.

Kass spoke about the reduction of the \$4.5 million advertising budget and requested a review to restore the full amount. Dunn stated a report would be provided at the next Tourist Development Council meeting.

NEXT MEETING DATE

The next meeting was scheduled for November 17, 2025.

10. ADJOURN

With no further business to come before the Council, the meeting adjourned at 2:04 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

TDC Regular Meeting – November 17, 2025

Agenda Item 7 – Signature Seasons Framework Concept Discussion – Irving Kass

November 17, 2025 TDC Meeting

Agenda Item 7 - Countywide Signature Seasons Initiative

Prepared by Irving J. Kass –November 6, 2025

Purpose & Mission

This initiative proposes the development of five significant, branded event periods throughout the year. Each Signature Season will be carefully curated to elevate St. Johns County's identity, strengthen its destination brand, and deliver a consistent, world-class guest experience.

The mission of this Signature Season Initiative is to explore the best ways to support, coordinate, and elevate essential aspects of event development, incubation, planning, production, financing, and marketing. Through community input and collaboration with existing organizations, the initiative will identify how to enhance existing events and create new programming that meets the highest standards of quality, safety, and visitor experience.

This work will be guided by broad community participation and close collaboration with the Visitors and Convention Bureau, the Cultural Council, St. Johns County Cultural Events, Inc., and tourism leadership. This approach ensures that communications, promotions, and programming reflect and strengthen a unified destination brand.

By focusing on Signature Seasons and building strong, inclusive partnerships, St. Johns County will continue to position itself as a leader in world-class destination experiences.

Collaborative Framework & Alignment

During this development phase, the Signature Season Initiative will rely on input and feedback from the community and key partners, including:

- St. Johns County Cultural Events, Inc.
- Visitors and Convention Bureau (VCB)
- Cultural Council of St. Johns County
- Local event organizers and nonprofit partners
- County, City and Beach Administrations
- Tourist Development Council
- Community Leaders

The purpose of this phase is not to alter or affect any existing county agreements, contracts, or governance structures. Instead, it is to ensure that Signature Seasons are developed in a manner that supports, enhances, and aligns with current agreements and operations.

No changes will be proposed without comprehensive consultation and input from affected parties. The initiative will work collaboratively to ensure that messaging, branding, logistics, and programming support the county's broader destination strategy.

Event Period Development & Tourism Stabilization

Each of the Signature Seasons is envisioned to span approximately 70 days, producing sustained opportunities for residents and visitors to enjoy curated programming. This structure is designed to stabilize tourism by spreading demand throughout the year and reducing reliance on peak periods.

There are hundreds of events currently take place countywide. As the initiative advances, existing events will be evaluated for potential alignment within each Signature Season, with the goal of amplifying visibility, strengthening marketing, and enhancing overall consistency.

This process will be fully collaborative and will not alter how current partners plan or operate their events. Instead, the goal is to position events within a unified marketing and branding framework that benefits all stakeholders.

Signature Seasons (Draft Concepts)

American Legacy & Heritage (Mid-January – March)

St. Johns County will come alive with history, culture, music, and community. By weaving together the MLK Celebration, the Fort Mose Jazz & Blues Series, African American and Women History Months, we create a powerful season of programming that honors the diverse stories shaping our county. Linking these commemorations under one umbrella elevates their visibility, deepens public engagement, and celebrates the legacy of our heritage.

Love of the Arts (April – June)

St. Johns County is home to extraordinary artists, musicians, and creatives, along with a cultural history that deserves to be celebrated. This season will highlight our vibrant arts scene, galleries, performances, festivals, and heritage events, while honoring the traditions that shaped our community. By designing programs that welcome and inspire younger audiences, we will cultivate the next generation of art lovers and ensure that our creative legacy thrives well into the future.

Living the Outdoors (July – August)

From the Guana River to the Bartram Trail, St. Johns County offers unmatched natural beauty and opportunities for exploration. This season will celebrate our outdoor treasures through eco-tourism, nature festivals, recreation events, and educational programs. By highlighting the landscapes that make our region special, we connect residents and visitors more deeply to the environment while promoting conservation and outdoor adventure.

Sing Out Loud & Hispanic/Latino Heritage Celebration (September – Mid November)

Expand from a concentrated two-week festival into a full ten-week season, positioning music as a cornerstone of St. Johns County's brand. Add Hispanic/Latino Heritage with vibrant celebrations of the roots, rhythms, and flavors that shape our identity. From the journeys of Ponce de León to the global influence of Jennifer Lopez, this season spans history, music, and cuisine. Anchored by Hispanic Heritage Month (September 15), Founders Day (September 6), and culinary experiences like Flavors of St. Augustine, creating a multi-layered celebration of sound, culture, and cuisine.

Nights of Lights (Mid-November – Mid-January)

Nights of Lights is already one of our most beloved traditions. By maintaining its current momentum while thoughtfully planning for long-term growth and sustainability, we ensure it continues to enchant both residents and visitors. This balanced approach protects its charm while opening the door to new opportunities for cultural and economic impact.

Leadership, Participation & Input Process

During the development phase, a designated facilitator will coordinate meetings, gather community input, and guide the planning process. Responsibilities will include:

- Conducting listening sessions with community stakeholders
- Facilitating joint meetings with VCB, Cultural Council, and Cultural Events, Inc.
- Developing draft management models for review
- Ensuring that all work respects and preserves current county agreements
- Building consensus on the most effective long-term management approach

- Creating an interim board
-

Qualifications for the Facilitator

- Significant world class event experience, including planning and logistics
 - Ability to work across multiple organizations, respecting existing governance
 - Strategic vision for destination development and branded events
 - Economic impact focus, with emphasis on local business and workforce participation
 - Strong communication and collaboration skills
 - Understanding of destination branding and message coordination
-

Opportunity & Responsibility

Through this collaborative, exploratory process, St. Johns County has a unique opportunity to:

- Create year-round economic and employment opportunities
 - Identify a unified approach to event branding and promotion
 - Strengthen the county's identity through five distinct Signature Seasons
 - Develop a management model that enhances operations without modifying or interfering with existing agreements
 - Build stronger connections between residents, visitors, and the cultural and natural assets of the county
-

Next Steps & Immediate Priorities

- Launch a structured community engagement process to gather input and refine the long-term vision for the Signature Seasons initiative.
- Determine the most effective management approach for the initiative without altering any existing county agreements.
- Develop a comprehensive seasonal branding framework to be integrated into the County's Marketing Plan, with full implementation targeted for the 2027 plan cycle.
- Align messaging and communication efforts across partners including the VCB, Cultural Council, Cultural Events, Inc., and event organizers, while maintaining current operational structures.
- Update the 2027 grant program guidelines to encourage alignment with Signature Seasons for funding requests above a defined threshold.

- Prepare a 2027 zero-based budget for Signature Seasons implementation to be presented alongside the seasonal marketing strategy for TDC review

TDC Regular Meeting – November 17, 2025

Agenda Item 8 – FY27 Arts, Culture and Heritage Grant Guidelines (**Action Required**)

Review and/or Approval of the Arts, Culture & Heritage Grant Guidelines for Fiscal year 2027 (October 1, 2026 – September 30, 2027).



St. Johns County Tourist Development Council

Arts, Culture and Heritage Grant Guidelines

DRAFT

For programs and activities occurring between October 1, 2026 and September 30, 2027

Visit www.StJohnsCulture.Com for application deadlines and mandatory workshop dates.

St. Johns Cultural Council
184 San Marco Avenue
St. Augustine, Florida
www.stjohnsculture.com

PURPOSE AND OVERVIEW

To support and enhance St. Johns County as a culturally interesting and vibrant destination, the St. Johns County Board of County Commissioners has allocated a portion of the Tourist Development Tax to aid in the operations and promotion of arts, cultural, and heritage activities that have - as a main purpose - the attraction of visitors as evidenced by promotion to tourists. A portion of these funds support an Arts, Culture and Heritage Grant program administered by the St. Johns County Cultural Council and supervised by the St. Johns County Tourist Development Council. Funding recommendations for Arts, Culture and Heritage Grants must be approved by the Board of County Commissioners.

TDC Arts, Culture and Heritage Grants are available for either Marketing Support or Marketing and Program support. To also receive program support, proposed programs in the application need to be new or significantly improved existing programs or events.

Applications will be scored by an evaluation team that will present its funding recommendations to the Tourist Development Council for review and to the Board of County Commissioners for final approval. Evaluation team meetings are open to the public. Notice of such meetings will be provided in advance.

The total estimated award amount for the Fiscal Year 2027 Arts, Culture and Heritage Grant Program will be determined as part of the County's annual budget process.

Organizations that wish to apply for funding must complete an application, before the published deadline, with all requested information, through the online [Grant Portal](#) (linked).

The deadline for FY2027 applications is 5 p.m. on **May 31, 2026**.

Questions regarding any portion of the application or application process must be submitted in writing via email to grants@historiccoastculture.com. The deadline for submitting questions is ten (10) calendar days before the application deadline. All questions will be answered and posted to StJohnsCulture.com.

The funding process is not over until the final award decisions are made by the St. Johns County Board of County Commissioners. To ensure fair consideration for all applicants, communication regarding this funding process to or with any County department, employee, elected official or any other person involved in evaluation of or consideration of the applications, until the County Commission has formalized its funding decision, is prohibited. The County's representative may initiate communication with an applicant to obtain necessary information.

The intent of the ACH Grant Program is to accept and fund applications which, in the County's judgment, best serve the interests of the County and its residents and support a vibrant cultural atmosphere that is attractive to visitors. St. Johns County reserves the right to accept or reject any application in whole or in part and to waive technicalities.

Responses to this grant and related documents and communications become public records subject to the provisions of Chapter 119, Florida Statutes, the Florida Public Records Law.

ELIGIBILITY

BASIC ELIGIBILITY

All applications must meet the following basic eligibility criteria at the time of application:

- All grant funded activities must occur within St. Johns County.
- The proposed annual programs or event must be arts, culture or heritage related and have a primary purpose of attracting visitors to St. Johns County, as evidenced by the promotion of the program or event to tourists.
- Applicants, including for-profit businesses and private institutions of higher education, must be qualified to do business in Florida as evidenced by their Active Status with the Florida Division of Corporations. Municipalities are also eligible to apply.
- Have a marketing plan that includes out-of-area marketing, defined as follows:
Advertising, promotion, publicity and sales activities that take place and are directly targeted to Tourists, which are defined as persons and groups residing outside the following counties: St. Johns, Flagler, Putnam, Clay, Duval, and Nassau. Media that reaches audiences of both Tourists and those within St. Johns, Flagler, Putnam, Clay, Duval, and Nassau Counties is allowable to the extent that the advertising reaches out-of-area. For this, grantees will need to provide a broadcast area, distribution, designated market area, analytics, or other data showing the market reach of the advertiser. The allowable reimbursement amount will be based on a percentage of the documented out of area reach. For example, if you purchase a \$1,000 ad with a print publication that has a distribution that is 20% out-of-area, you can request a \$200 reimbursement for that expense.

SPECIFIC ELIGIBILITY

In addition to meeting basic eligibility above, applicants need to meet additional criteria depending on the type of applicant, the type of funding they are applying for, and the nature of programs or events for which funds are being requested.

Type of Applicant

There are year-round applicants and applicants that apply for single events or event series. Applicants must meet the following criteria to apply as a year-round applicant:

- Be a 501(c)3 non-profit arts, culture or heritage organization with headquarters in St. Johns County and a primary mission of producing arts, culture or heritage programs for public audiences.
- Manage a facility or facilities that are open to the public at least 180 days per year. This may include museums, theaters, and historic sites.

Type of Funding

This grant program has two funding options:

1. Out-of-Area Marketing Support: This funding is for existing events or year-round programs that are not proposing any changes or improvements to existing programs or events. 100% of this grant funding is for out-of-area marketing, as defined above. All applicants that meet the basic eligibility requirements may apply for out-of-area marketing support.
2. **Program and Marketing Support**: This funding is for applicants that are planning **new or significantly improved programs or events**. Below are specific eligibility requirements for different arts, culture and heritage events and programs.
 - Year-round, non-performing arts, culture and heritage organizations must request funding for a **new** program, exhibition, or cultural event that has not been presented in St. Johns County in the previous two years, or for significant and measurable improvements to current programs, exhibitions and cultural events.
 - Retail art markets must be scheduled for two or more consecutive days, include greater than 50% vendors unique to your market in St. Johns County (i.e. do not regularly have booths at other markets in the County or have not participated in a market within the market area in the last 90 days), and 75% or more of the vendors must be artisans selling work they created.*
 - Year-round Performing Arts organizations and single special events (not including music festivals) must have 75% of shows, performances, or theatrical productions that not have been performed in St. Johns County in the previous two years or within the market area for the past 90 days. Performances and shows that feature students that have paid to be in the performance must have at least 15% of the performers be paid professional performing artists, or a single paid professional performing artist or group that has a verifiable national or international following that has not performed in St. Johns County in the previous two years or within the market area for the past 90 days.*
 - Music Festivals must include at least one headliner who has a verifiable regional or national following that has not performed in St. Johns County in the previous two years or within the market area for the past 90 days.*
 - Culinary Festivals that have received TDC grant funding in the previous three years must include both local culinary artists and culinary artists with a verifiable regional (4 or more states) following for tastings and cooking demonstrations who have not provided those options in St. Johns County in the previous two years or within the market area for the past 90 days.*

* This will be verified by SJCC staff through attendance at the grant supported activity and/or through reimbursement documentation prior to approval for reimbursement. If this requirement is not met, expenses will not be reimbursed.

ADDITIONAL REQUIREMENTS

- Marketing plans and budgets for Program and Marketing Support must include at least 25% of total grant expenses for out-of-area marketing as defined above (i.e. outside of St. Johns, Flagler, Putnam, Clay, Duval, and Nassau Counties).

- Marketing plans and budgets for Out-of-Area Marketing Support requests must include 100% of grant funds for paid advertising that targets counties beyond those adjacent to St. Johns County.
- All grantees must include the St. Johns Cultural Council and St. Johns County Tourist Development Council logos and/or the statement “funded in part by the St. Johns County Tourist Development Council” on all event or program related websites and promotional materials, with a link to www.historiccoastculture.com whenever possible.

GRANT AWARD AND FUNDING LEVELS

Year-round annual expenses are based on the organization’s most recently completed Form 990. Event expenses are provided on the grant budget form and must be verified through the organization’s annual financial statements.

OUT-OF-AREA MARKETING SUPPORT

30% of the annual year-round program or event expenses, but no more than \$30,000.

PROGRAM AND MARKETING SUPPORT

Year-round annual expenses or event expenses over \$167,000: *maximum request equal to 30% of operating expenses or \$75,000, whichever is less.*

Year-round annual expenses or event expenses between \$100,000 and \$167,000: *maximum request equal to 50% of operating expenses or \$50,000, whichever is less.*

Year-round annual expenses of up to \$100,000*: *maximum request equal to 50% of operating expenses or \$50,000, whichever is less.*

**Nonprofits may include volunteer hours and in-kind contributions in calculation of operating revenue, up to \$100,000.*

GRANT BUDGET AND MATCH REQUIREMENTS

The TDC Arts, Culture and Heritage grant requires a minimum 1:1 match, which is documented by your event or organization financial statements submitted with your application and reimbursement request(s). ***The grant budget form only needs to show revenue and expenses that you are using to show the required match.***

REIMBURSEMENT

This grant is a reimbursement grant. Proof of compliance with marketing requirements as specified in the interim reimbursement request and final report documents (e.g. proof of payment and tear sheets), a log of all grant funded expenses by type as outlined in the grant application budget (e.g. contracted services, performers, etc.) which includes proof of payment for individual expenses \$5,000 and over, and a year-to-date financial statement, must accompany all requests for funds. Organizations with annual programs or multiple events may request reimbursement, with proper documentation, one time in each calendar quarter, and **MUST** submit at least one interim reimbursement request by April 30 of the grant year. Requests for reimbursement for annual events must be requested within 60 days after conclusion of the event, and all requests must be received by October 10, 2026.

All grantee reports and reimbursement requests are subject to audit; if selected for audit, grantee will provide copies of receipts and proof of payment for all expenses included in the report(s). Failure to provide appropriate records will result in repayment of the grant funds and grantee will be ineligible to apply for future TDC grants.

NONALLOWABLE EXPENSES

The following expenditures are NOT reimbursable by grant funds:

- Salaries, benefits, travel or expenses of personnel not directly related to the creation of programs, events or attractions that are open to the public with a focus on the attraction of visitors
- Payment of rent, mortgage, or utilities
- Real property or capital improvements, including but not limited to new construction, renovation restoration, installation or replacement of fixtures and tangible personal property, with the exception of expenditures that are directly related to construction of a proposed exhibition. Please contact grants@historiccoastculture.com with questions related to allowable capital expenditures.
- Interest or reduction of deficits or loans, fines, penalties or cost of litigation
- Expenses incurred or obligated prior to or after the funding period
- Events which are restricted to private or exclusive participation, including member-only events
- Advertising, printing or other expenses that omit the required logos and support statement
- Benefits, projects and fundraisers that benefit organizations or individuals other than the contracted applicant
- Prize money, scholarships, awards, plaques, certificates, or contributions
- Political or religious events
- Food or beverage
- Any expenditure not authorized by the St Johns County Code of ordinances

CRITERIA AND SCORING

SECTION 1. ATTENDANCE (25 TOTAL POINTS)

- a. Attendance Ratio Score (see calculation below) (15 points)
- b. Detailed explanation of how attendance estimates were determined and documentation of attendance over the previous two years with description of how attendance is tracked and verified based on ticket sales, research, surveys, etc. Previously held events and programs must include attendance numbers from the previously completed event. **Include specific information about attendance by out-of-area visitors, including estimated room nights generated** (10 points)

Attendance Ratio Score

A significant percentage of the score for each grant application will be based on the Attendance Ratio. The Attendance Ratio is calculated by dividing the funding request by estimated event or program attendance. Points awarded per ratio score are as follows:

Ratio Score	Points
9.9 and below	15
10 – 14.9	10
15 and higher	5

Example: An event requesting \$40,000 in funding for attendance of 2,000 would have a Ratio Score of 20 and would receive 5 points.

SECTION 2: CULTURAL SIGNIFICANCE, QUALITY AND COMMUNITY SUPPORT (35 TOTAL POINTS)

1. Provide a history of your organization and its contribution to the cultural development of St. Johns County (5 points)
2. Describe your program or event and address the following (30 points):

Program Details

If you are requesting a grant for a special event, provide dates and times. If you are an organization that provides an annual calendar of programs applying for Marketing Support Only, provide the number of days and hours you are open to the public or presenting performances with a description of permanent exhibitions, special events and performances supported by this grant. If you are an organization that provides an annual calendar of programs applying for Program and Marketing Support, be specific about how this grant is funding new or significantly improved exhibitions, programs, performances or events.

Artistic Excellence

The significance of the culture/heritage or quality of the artists/performers and other key individuals, creative process, works of art, museum collections, organizations, education providers, artistic partners, and services involved in the project and their relevance to the audience or communities of St. Johns County. You must provide a percentage of paid versus nonpaid performers.

Artistic Merit

- The value and appropriateness of the project to the organization's mission, artistic/cultural/historical field, artists, audience, community, and constituency.
- The ability to carry out the project based on such factors as the appropriateness of the budget, clarity of the project activities, resources involved, and the qualifications of the project's personnel and partnerships.
- Clearly defined goals and proposed outcomes and an appropriate plan to determine if those goals and outcomes are met. This includes, where relevant, measures to assess audience enjoyment and engagement.
- Evidence of direct compensation to artists or program providers that bring visitors to St. Johns County. See eligibility requirements for specific information about participation of paid artists and performers.

Relationship to St. Johns County

How your program or event directly relates to St. Johns County's unique arts, culture, and heritage and how the artists, performers, or exhibitions presented will attract audiences from outside the area. The program or event should be something that St. Johns County wants to showcase, and that people will travel a long way to attend.

3. Community support, grants, collaborations and in-kind contributions: help us understand the level of support your program receives from the community by providing information about grants, volunteer support, collaboration with other organizations, and in-kind contributions.

SECTION 3: MARKETING PLAN (30 TOTAL POINTS)

1. Describe your marketing plan including out-of-area marketing and address the following (10 points):
 - How your event or program will be promoted to tourists.
 - How this grant will allow you to expand your audience.Note: Marketing plan must include listing events and programs on historiccoastculture.com.
2. Provide a detailed description with a budget breakdown of how 25% of requested grant funding will be spent to attract tourists.
3. Provide supporting documents such as examples of past print or digital advertising, social media posts and analytics, radio or television spots, etc. to illustrate the quality of your marketing efforts.
4. Documented Collaborations (up to 10 points)
 - Events - Lodging listed on webpage: 2 points for listing and linking at least one hotel/accommodation.
 - Formal package agreements with other venues/events or accommodations. Examples include: historic sites and museums creating a joint ticketing/tour package or weekend event; weekend packages that include lodging, dinner, and a theater show; special events with packages to visit other locations in St. Johns County after the event; formal agreements with accommodations for lodging discounts to attendees or visitors.
 - Applicants may receive up to 10 points total for this section. ***With an accommodation link***, an applicant can get up to 8 points for formal package agreements.

SECTION 4: FINANCIAL INFORMATION (10 TOTAL POINTS)

Financial information will be reviewed for accuracy and reasonableness and evidence of organizational sustainability.

Required Financial Information

- A complete copy of the organization's most recently filed U.S. tax return. For nonprofit organizations with revenues below \$50,000 - a statement of revenues and expenses for the most recently completed fiscal year, signed by Board Chair / President or Executive Director.
- The first page of the IRS Form 990 for the previous two years.
- A detailed budget for the program, special event or activity focused on attracting tourists, signed by Board Chair / President or Executive Director, using the budget form provided with the application.
- In the case of for-profit organizations and organizations whose primary organizational purpose or mission is not to attract audience members, funding request amounts must be based on the project budget rather than the organizational budget.

- Municipalities and institutions of higher learning must submit a detailed project / event budget for their special events or activities, signed by an appropriate staff member. Funding request amounts shall be based on the project / event budget.

FAILURE TO PROVIDE A COMPLETE COPY OF THE MOST RECENTLY FILED TAX RETURNS, financial statements and detailed event budgets will disqualify the application.

SECTION 5: OPTIONAL POINTS FOR EXCEPTIONAL FREE AND FIRST-TIME EVENTS (5 AND 10 TOTAL POINTS, RESPECTIVELY)

Because a new event will not have previous attendance data or examples of past marketing efforts available, nor data on attendance, reviewers may award up to ten additional points for first-time events that provide exceptional value to visitors.

Because measuring attendance for free events is generally more difficult than paid events, reviewers may award up to five additional points to first-time and free events that provide exceptional value to visitors. ***Total points for the application may not exceed 100.***

SECTION 6: MANDATORY DEDUCTION FOR EVENTS OCCURRING IN PEAK PERIODS (5 POINT DEDUCTION)

Special events or a series of events with greater than 50% of dates occurring during a peak visitor period (as defined by TDC staff) will receive an automatic 5-point deduction. This deduction does not apply to nonprofit organizations offering year-round programs.

SCORING AND AWARD RATIOS

<u>Description of Total Score</u>	<u>Score</u>	<u>Funding</u>
Exemplary demonstration of the public value of arts, culture & heritage. Extremely likely to generate a large number of overnight stays. Merits investment of St. Johns County funding.	93-100	up to 100%
Strongly demonstrates public value of arts, culture and heritage. Very likely to generate overnight stays. Merits investment of St. Johns County funding.	87-92	up to 90%
Demonstrates public value of arts, culture and heritage. Likely to generate overnight stays. Merits investment of St. Johns County funding.	80-86	up to 80%
Makes an inadequate case for the public value of proposed arts, culture or heritage programs. Does not merit investment of St. Johns County funding.	below 80	No Funding

The evaluation team will present award recommendations to the Tourist Development Council for review and approval before the recommendations are submitted to the Board of County Commissioners for final approval. It may be necessary to apply a ratio to the amount each applicant qualifies for. The ratio will be determined by dividing the total funds available by the total eligible amount of all the applicants.

For example: 30 organizations are eligible for funding totaling \$1,200,000, but only \$600,000 in funding is available. Available funding will be divided by eligibility ($600,000 / 1,200,000$) to arrive at a ratio of .50. The actual funding amount will be 50% of the eligible funding amount, so an applicant who is eligible for \$20,000 in funding based on the scoring methodology will receive 50% of that amount, or \$10,000.

APPLICATION INSTRUCTIONS

All applicants must attend a grant workshop and complete and provide by the posted deadline:

1. Online Grant Application
2. Up to 5 supporting documents, which may include examples of marketing materials and analytics; event programs; program reviews; photographs and video of past programs/events, or any other material that illustrates the quality of organizational programs
3. Proof of organizational status from the Florida Department of State
4. Proof of 501(c)3 Tax Exempt Status (e.g. IRS determination letter) when applicable.
5. Required financial information

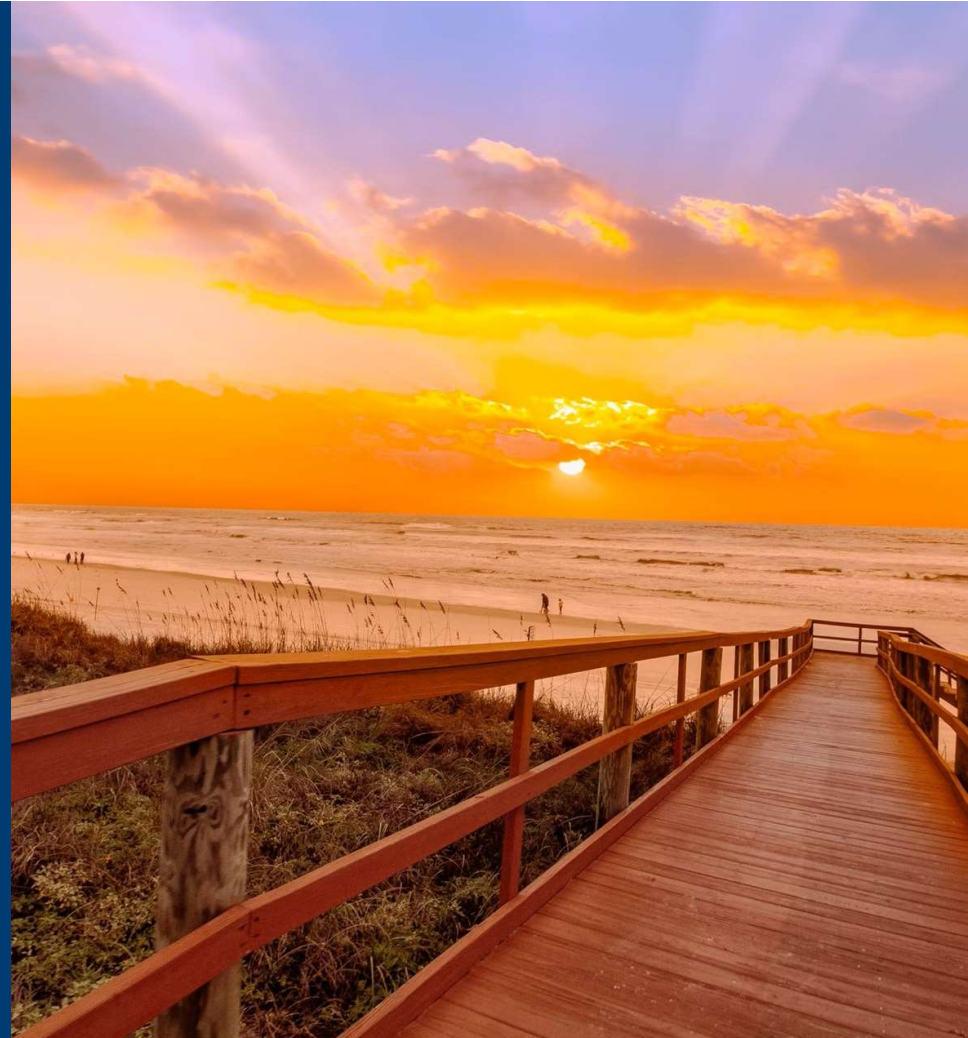
TDC Regular Meeting – November 17, 2025

Agenda Item 9 – 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 July and September 2025.

ST. JOHNS COUNTY

Visitor Tracking and Beach Study
July to September 2025



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PONTE VEDRA
FLORIDA'S HISTORIC COAST®

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19	<u>Visitor Profile Detailed Findings</u>	52	<u>Beach Visitor Detailed Findings</u>
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METHODOLOGY

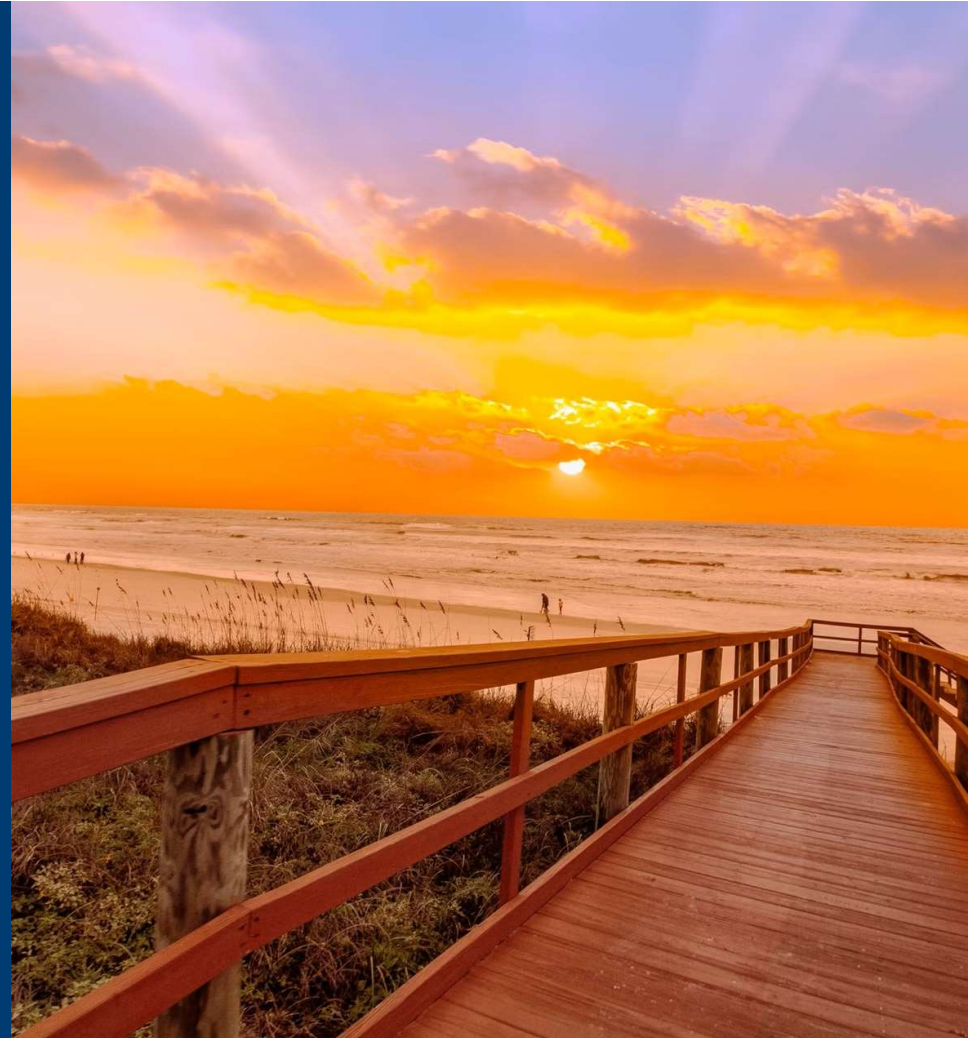


Interviews were completed in person and online with **811** visitors between July 1 and September 30, 2025.

Surveying locations included:

- Butler Beach
- Crescent 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
- Sing Out Loud Festival
- Vilano Beach

EXECUTIVE ECONOMIC IMPACT SUMMARY



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KEY PERFORMANCE INDICATORS

JULY TO SEPTEMBER 2025



736,800

**TOTAL
VISITORS**



539,560

**ROOM
NIGHTS**



\$344,521,600

**DIRECT
SPENDING**



\$5,186,270

**TOURISM
DEVELOPMENT TAX¹**

¹ Source: St. Johns County Tourism Development Council.
September TDT is estimated.



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LODGING METRICS

JULY TO SEPTEMBER 2025

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

COMBINED



51.9%

Occupancy



\$186.79

Average Daily
Rate



\$96.95

Revenue Per
Available Room

HOTELS¹



54.6%

Occupancy



\$151.95

Average Daily
Rate



\$82.96

Revenue Per
Available Room

VACATION RENTALS²



46.5%

Occupancy



\$249.17

Average Daily
Rate



\$115.86

Revenue Per
Available Room

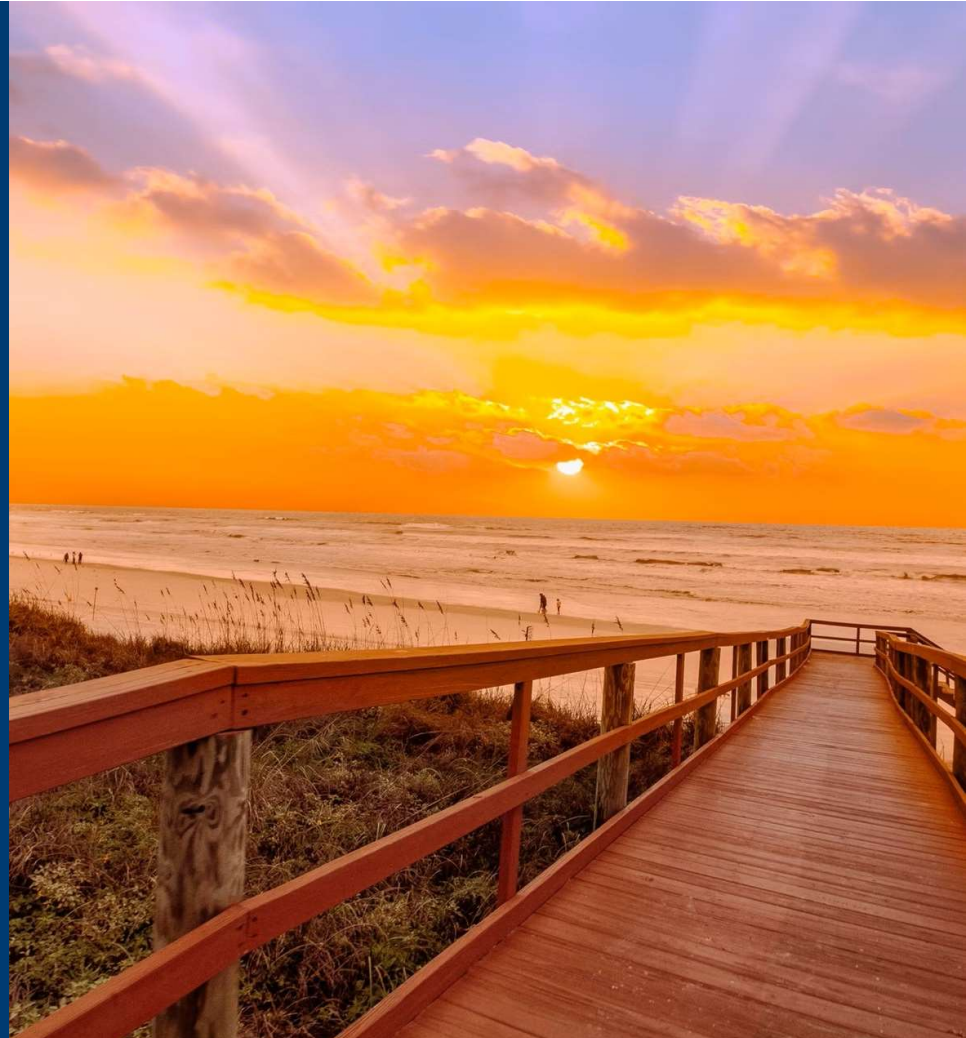


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¹ Source: Smith Travel Research.

² Source: Key Data.

EXECUTIVE VISITOR PROFILE SUMMARY



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VISITOR PROFILE

JULY TO SEPTEMBER 2025



80%
Drove

\$1,542
Total Travel Party Spend

38%
First-time Visitor

48%
Traveled with Children¹

3.5
Travel Party Size²

3.7
Length of Stay²

¹Children are defined as people under 18 years old.

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



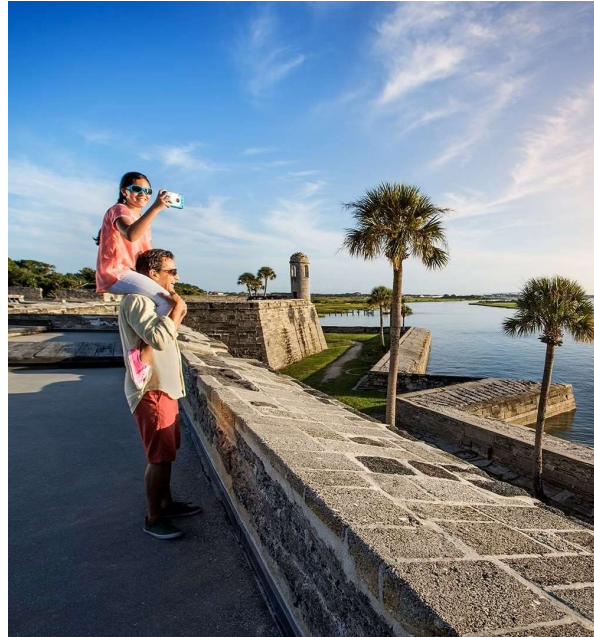
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VISITOR TYPE¹

JULY TO SEPTEMBER 2025



Paid accommodations²
66%



Day trippers
17%



Nonpaid accommodations³
17%

¹See Appendix II for data comparisons by visitor type.

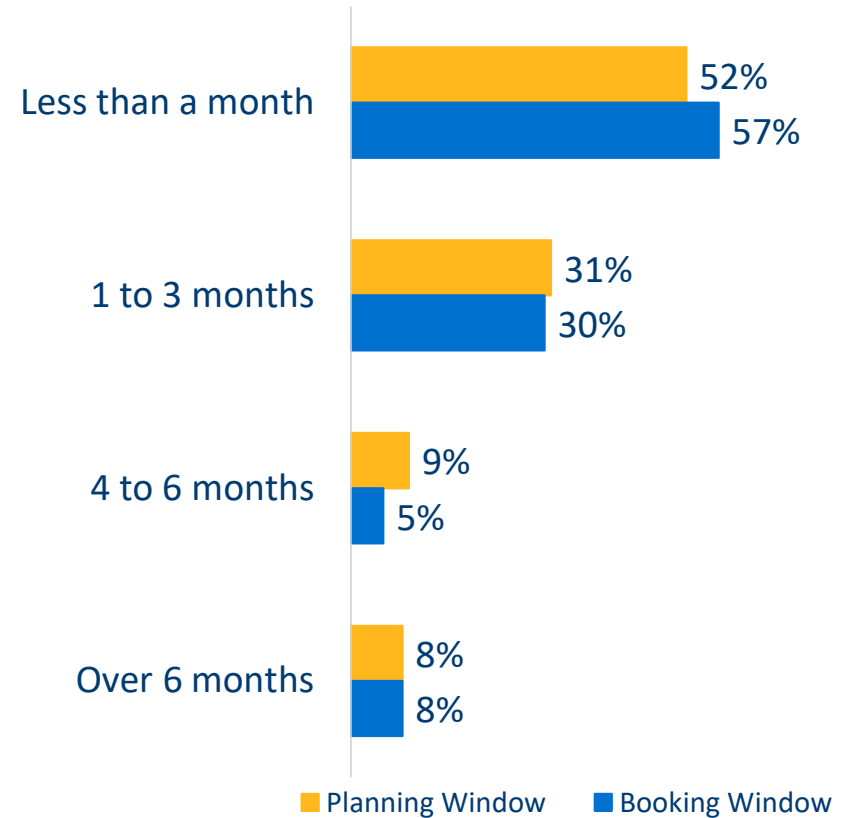
²Visitors staying in a hotel/motel/resort, vacation rental, RV park/campground, and bed & breakfast.

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

TRIP PLANNING & BOOKING CYCLE: OVERNIGHT VISITORS

JULY TO SEPTEMBER 2025

Overnight visitors¹ **planned** their trip **28 days** in advance and **booked** their trip **25 days** in advance.



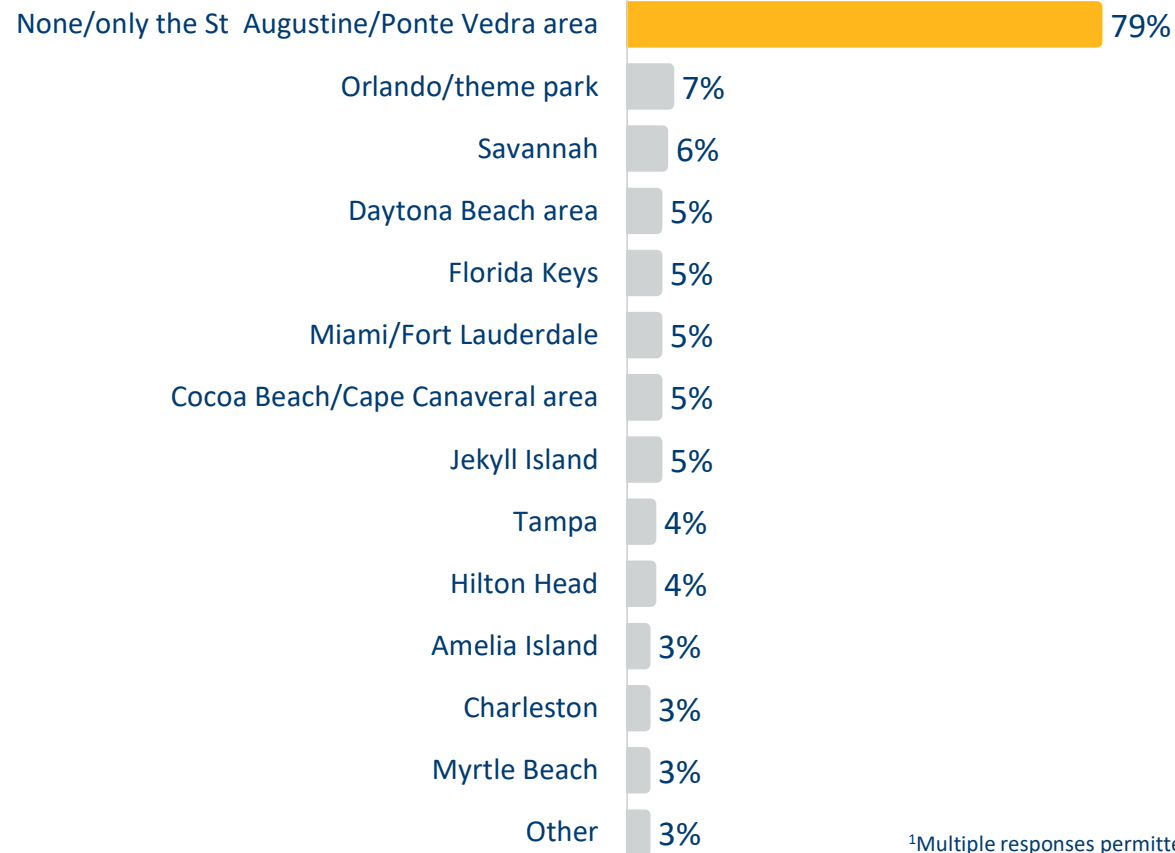
¹Excludes day trippers.

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IL1 TRIP PLANNING DESTINATIONS¹

JULY TO SEPTEMBER 2025

Nearly 4 in 5 visitors only considered the St. Augustine/Ponte Vedra area when planning their trip.



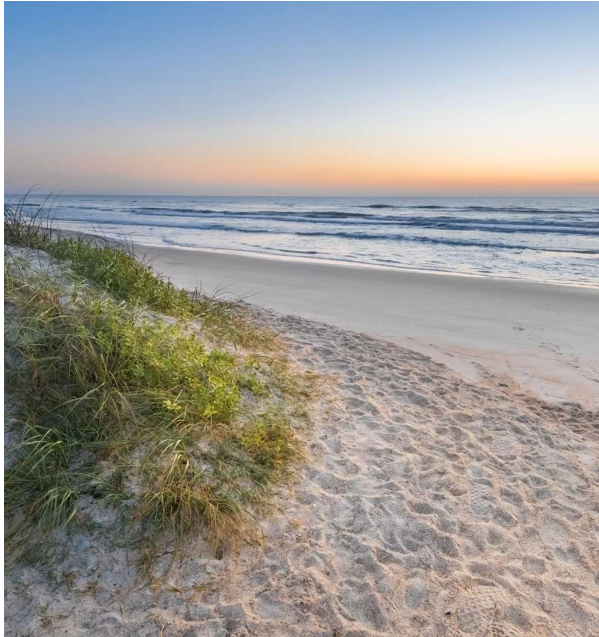
¹Multiple responses permitted.



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MAIN REASONS FOR VISITING

JULY TO SEPTEMBER 2025



Beach vacation/leisure trip
54%



Visit historical sites
25%



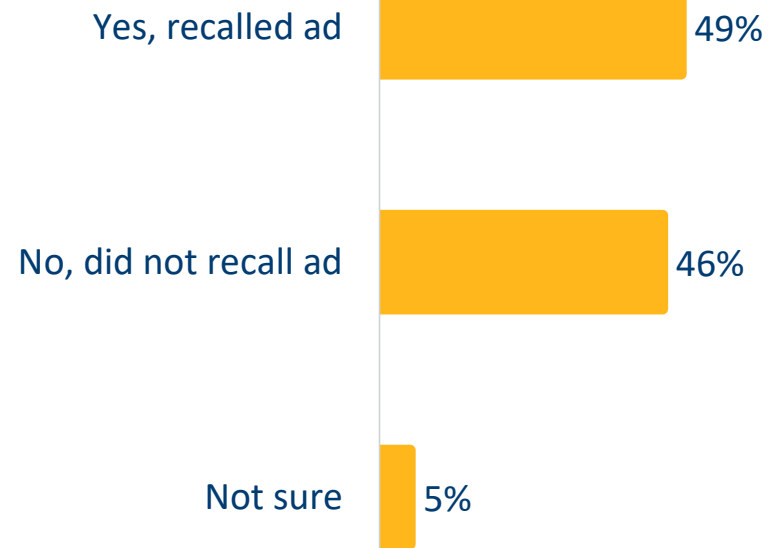
Visit friends/relatives
21%

ADVERTISING RECALL

JULY TO SEPTEMBER 2025

Nearly half of visitors **recalled advertising** about the St. Augustine/Ponte Vedra area.

This information **influenced 43% of all visitors** to visit the St. Augustine/Ponte Vedra area.

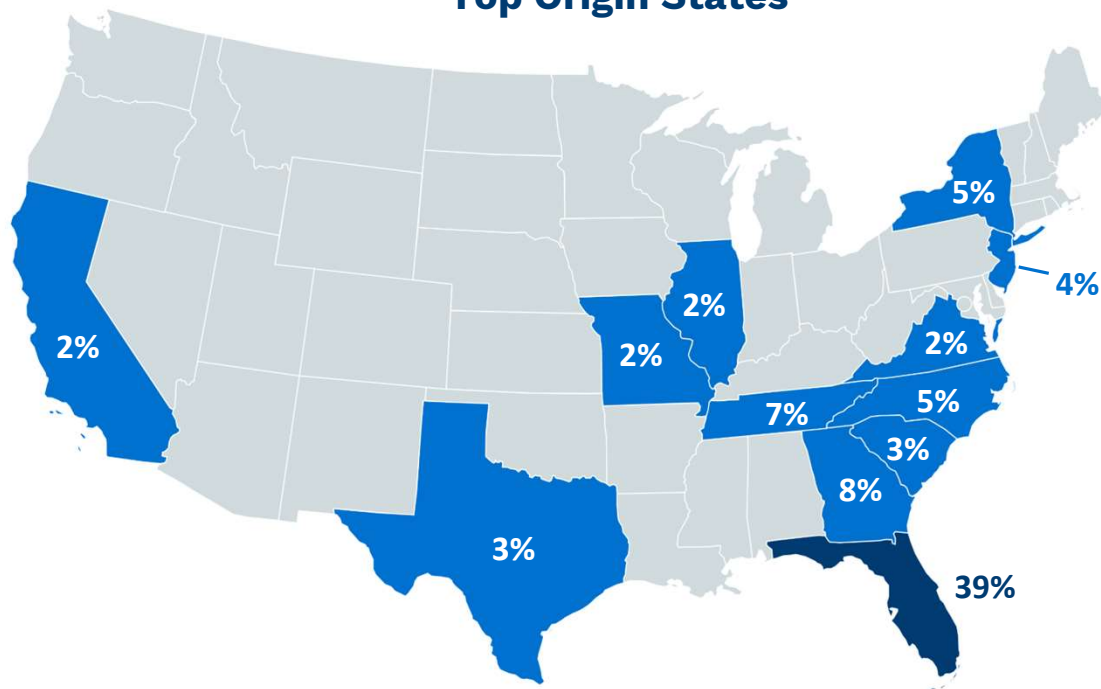


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VISITOR ORIGIN

JULY TO SEPTEMBER 2025

Top Origin States



Top Origin Markets	Jul-Sep 2025
Jacksonville	13%
Orlando – Daytona Beach – Melbourne	11%
New York ¹	9%
Miami – Fort Lauderdale	5%
Tampa – St. Petersburg	4%
Atlanta	4%
Top International Markets	Jul-Sep 2025
United Kingdom	2%
Canada	1%
Germany	1%
Brazil	1%

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



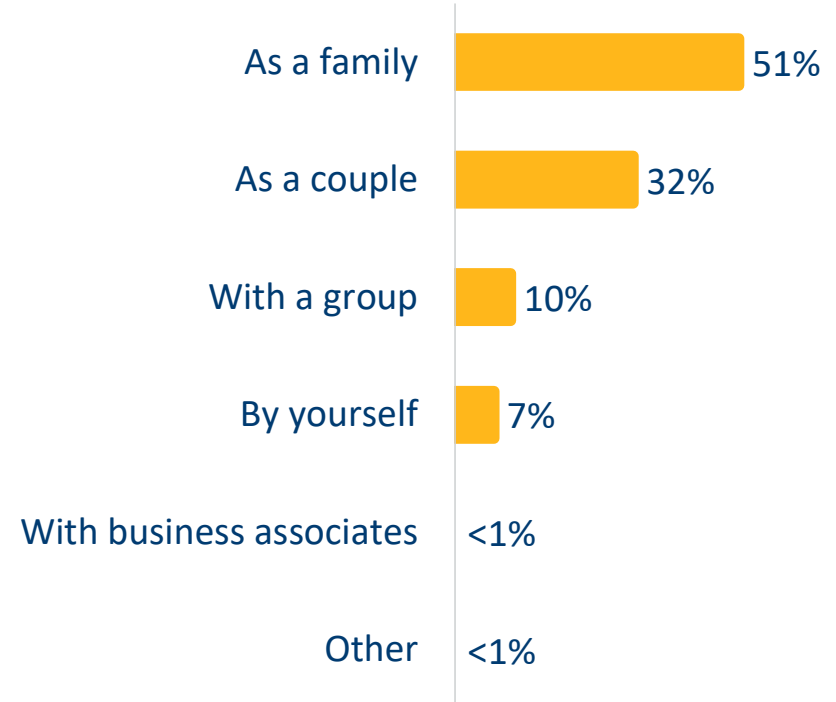
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TRAVEL PARTIES

JULY TO SEPTEMBER 2025

Over 4 in 5 visitors traveled as a **family** or a **couple**.

Nearly half of travel parties **included children** under 18 years old.



NEW & RETURNING VISITORS¹

JULY TO SEPTEMBER 2025

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

This was my first time 38%

2-3 28%

4-5 17%

6-10 7%

11+ 10%

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

TOP VISITOR ACTIVITIES¹

JULY TO SEPTEMBER 2025



Dining out
74%



Beach
70%



Visit Downtown St. Augustine
69%



Visit historical sites
55%



Shopping
46%

¹Multiple responses permitted.



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VISITOR PROFILE INSIGHTS

JULY TO SEPTEMBER 2025

COMPARED TO PREVIOUS QUARTERS...



Visitors have significantly **shorter trip planning and booking windows**.



The top reasons for visiting remain the same - visitors come to the area for the **beach**, for the **history**, and to **visit friends/relatives**.



The number of visitors traveling from the **New York market**¹ **nearly doubled**.



While most visitors are repeat travelers, there was an **increase in first time visitors**.



More visitors **only considered the St. Augustine/Ponte Vedra area** when planning their trip.



More visitors **recalled advertising** about the St. Augustine/Ponte Vedra and in turn were **influenced to visit the area**.



There was an increase in the number of visitors who **traveled as a family and with children** – explaining the **increase in travel party size**.



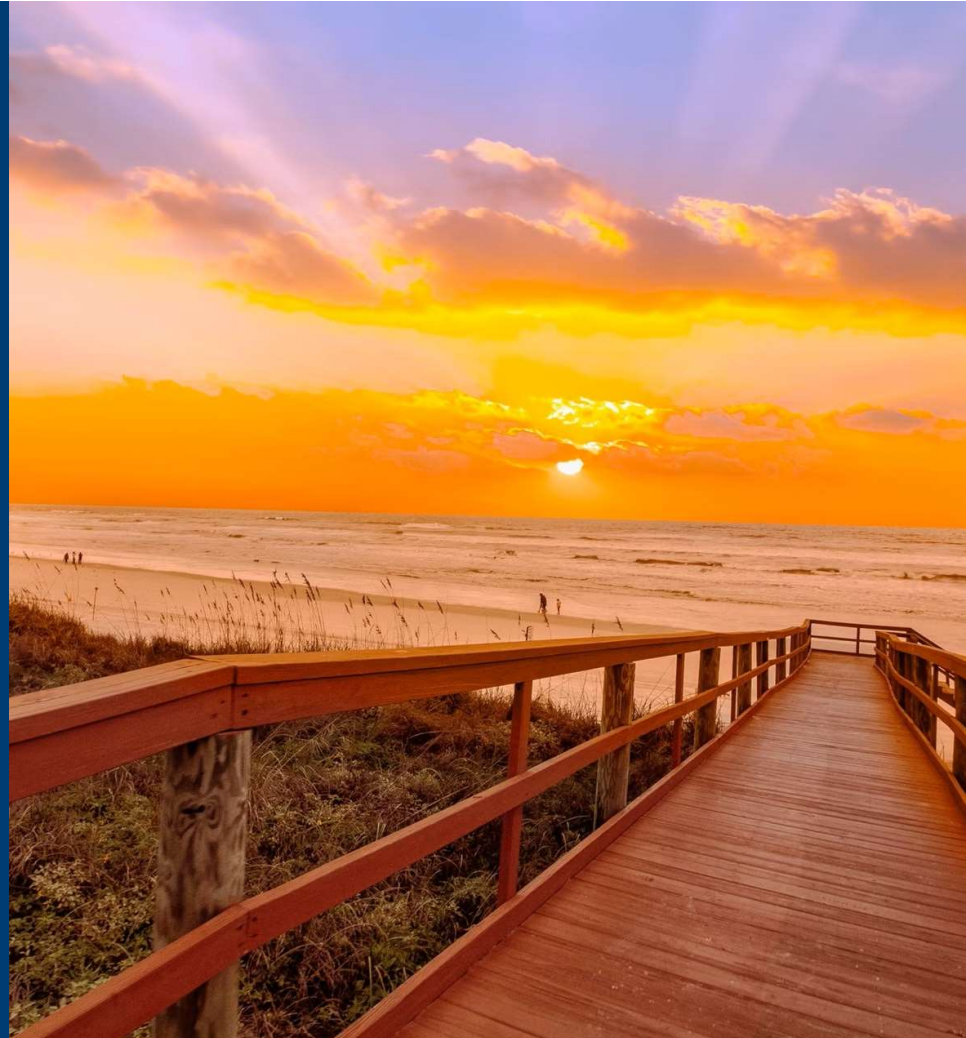
There was an increase in visitors staying in **paid accommodations**, specifically vacation rentals (Airbnb, Vrbo, etc.), and a **decrease in day trippers**.

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



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VISITOR PROFILE DETAILED FINDINGS



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STUDY OBJECTIVES: VISITOR JOURNEY

PRE-VISIT

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

TRAVEL PARTY PROFILE

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

TRIP EXPERIENCE

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

POST TRIP EVALUATION

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

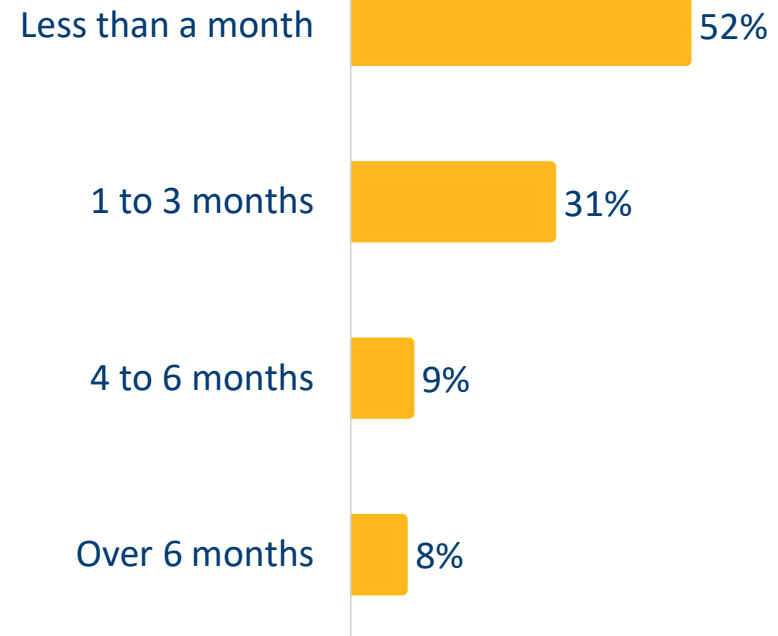
VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE: OVERNIGHT VISITORS¹

JULY TO SEPTEMBER 2025

- **Overnight visitors** to the St. Augustine/Ponte Vedra area have short trip **planning** windows, as **over 4 in 5** 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 6 overnight visitors** planned their trip **at least 4 months in advance**
- The typical **overnight visitor** planned their trip **28 days (about 1 month)** in advance



¹Excludes day trippers.

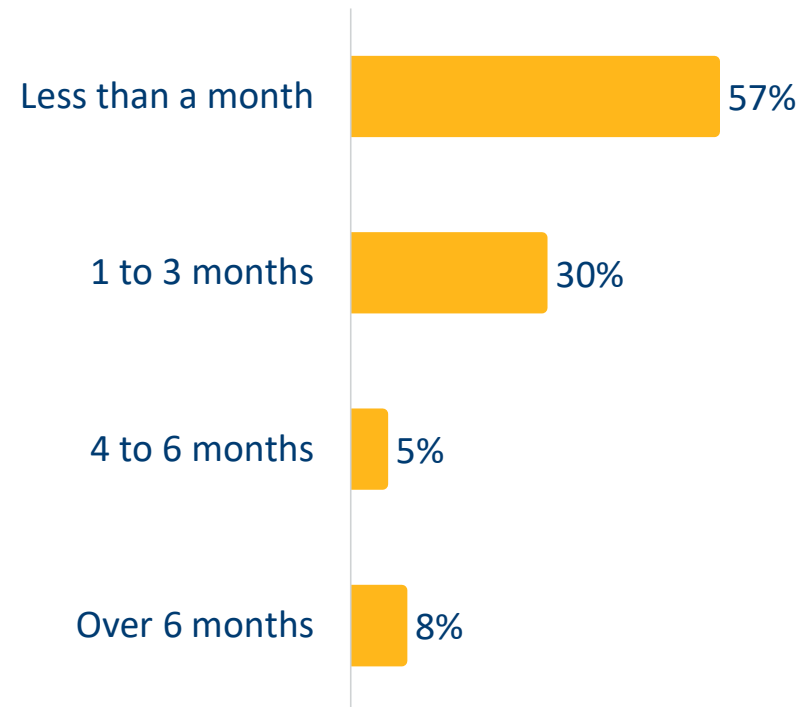


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TRIP BOOKING CYCLE: OVERNIGHT VISITORS¹

JULY TO SEPTEMBER 2025

- **Overnight visitors** to the St. Augustine/Ponte Vedra area have short **booking** windows, as **nearly 9 in 10** overnight visitors booked their trip to the St. Augustine/Ponte Vedra area **3 months or less in advance**
- On the other hand, **1 in 8 overnight visitors** booked their trip **at least 4 months in advance**
- The typical **overnight visitor** booked their trip **25 days (a little less than one month)** in advance



¹Excludes day trippers.

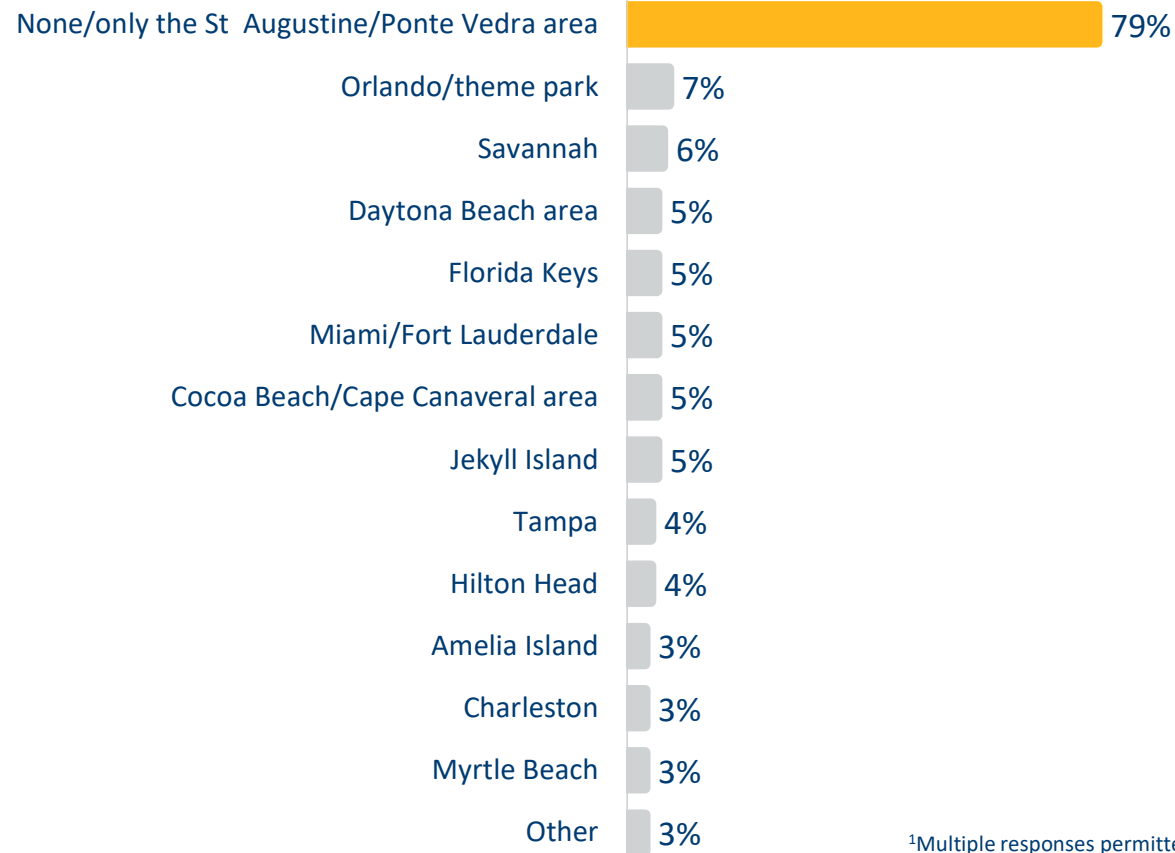


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IL1 TRIP PLANNING DESTINATIONS¹

JULY TO SEPTEMBER 2025

- Nearly 4 in 5 visitors only considered the St. Augustine/Ponte Vedra area when planning their trip



¹Multiple responses permitted.



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ONLINE TRIP PLANNING SOURCES¹

JULY TO SEPTEMBER 2025

- **Nearly half** of visitors used **mapping websites (Google maps, etc.)** as an online planning source for their trip to the St. Augustine/Ponte Vedra area
- **Around 2 in 5** visitors planned their trip via **destination websites*** and **vacation rental companies (Airbnb, Vrbo, etc.)**
- **Around 1 in 3** visitors used **video streaming services (YouTube, Hulu, etc.)** and **hotel websites/apps** to plan their trip



¹Multiple responses permitted.

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

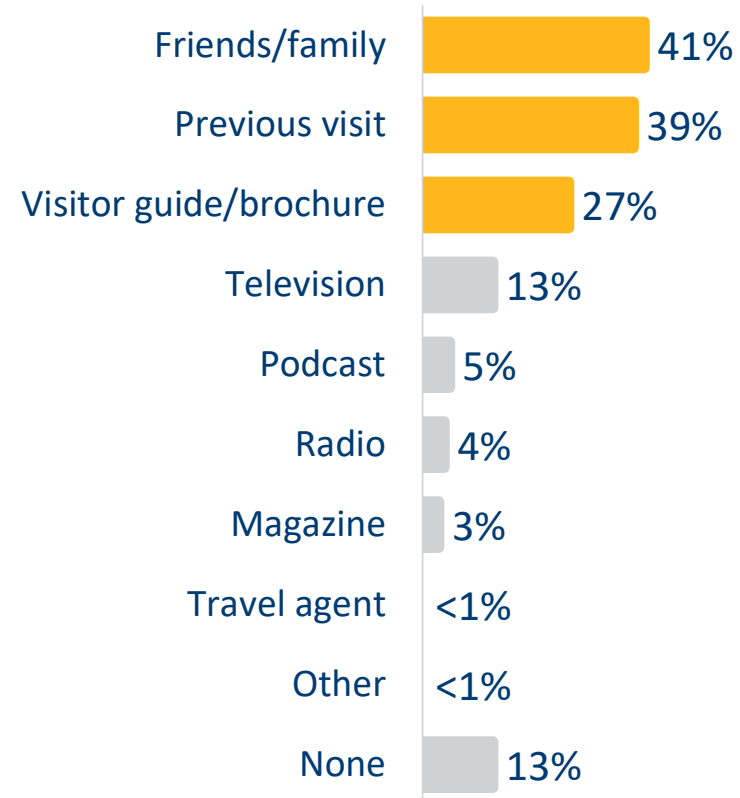


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IL1 OTHER TRIP PLANNING SOURCES¹

JULY TO SEPTEMBER 2025

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



¹Multiple responses permitted.

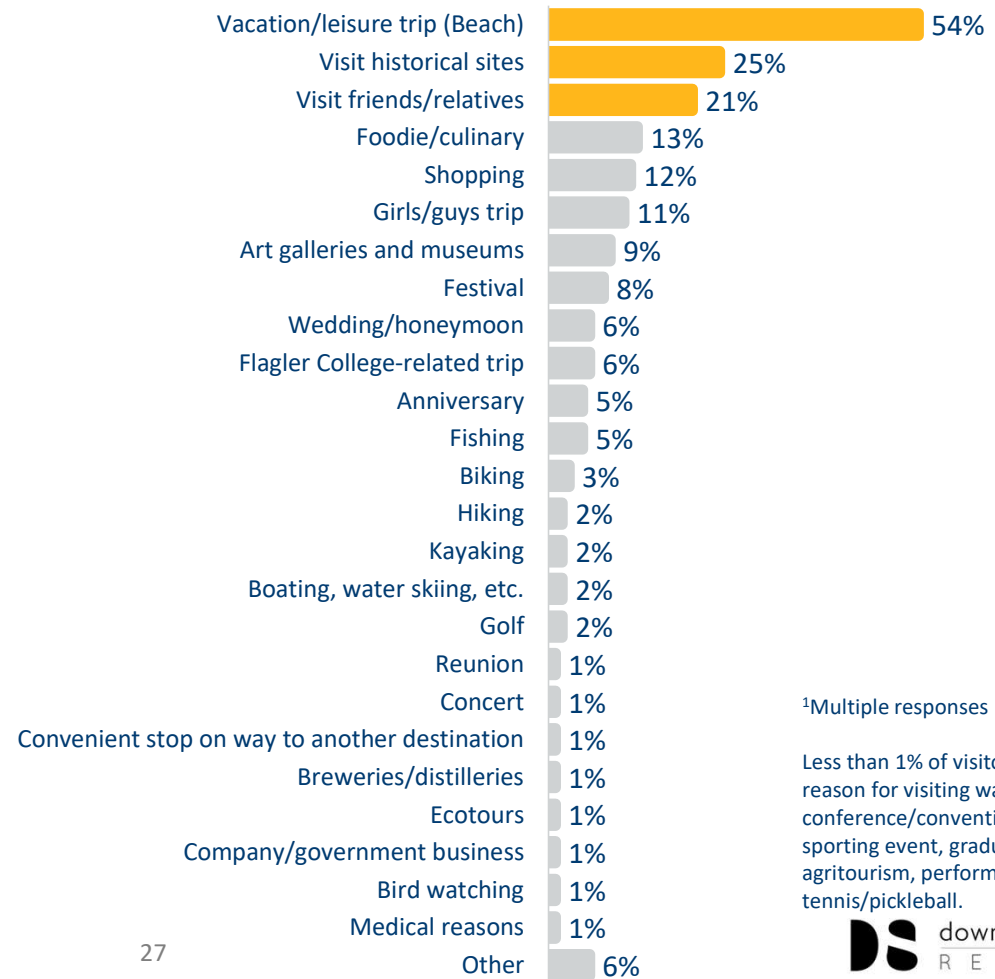


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REASONS FOR VISITING¹

JULY TO SEPTEMBER 2025

- **Over half** of visitors visited the St. Augustine/Ponte Vedra area for a **beach vacation**
- **1 in 4** visitors came to **visit historical sites**
- **Over 1 in 5** visitors came to **visit friends/relatives**



¹Multiple responses permitted.

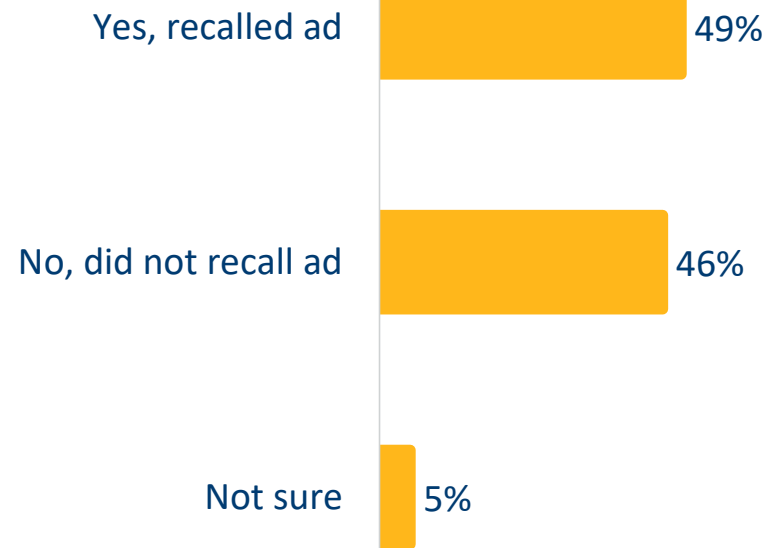
Less than 1% of visitors stated their reason for visiting was the following: conference/convention/trade show, sporting event, graduation, agritourism, performing arts and tennis/pickleball.

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ADVERTISING RECALL

JULY TO SEPTEMBER 2025

- **Nearly half** of visitors **recalled advertising** about the St. Augustine/Ponte Vedra area
- This information **influenced 43% of all visitors** to visit the St. Augustine/Ponte Vedra area



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ADVERTISING RECALL¹

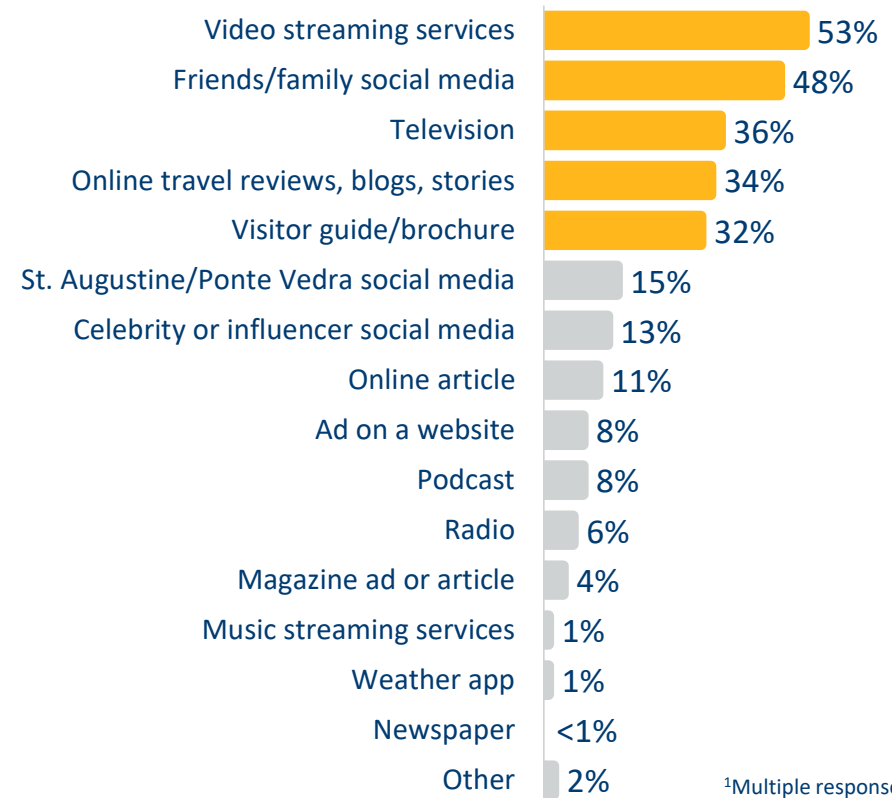
JULY TO SEPTEMBER 2025

Of the **49%** of visitors who **recalled advertising** about the St. Augustine/Ponte Vedra area:

- **Around half** noticed it on a **video streaming service (YouTube, Hulu, etc.)** and **friends/family social media**
- **Around 1 in 3** noticed it on **television, online travel reviews/blogs/stories, and visitor guides/brochures**

This information influenced **43% of all visitors to visit** the St. Augustine/Ponte Vedra area

Base: **49%** of visitors who recalled advertising



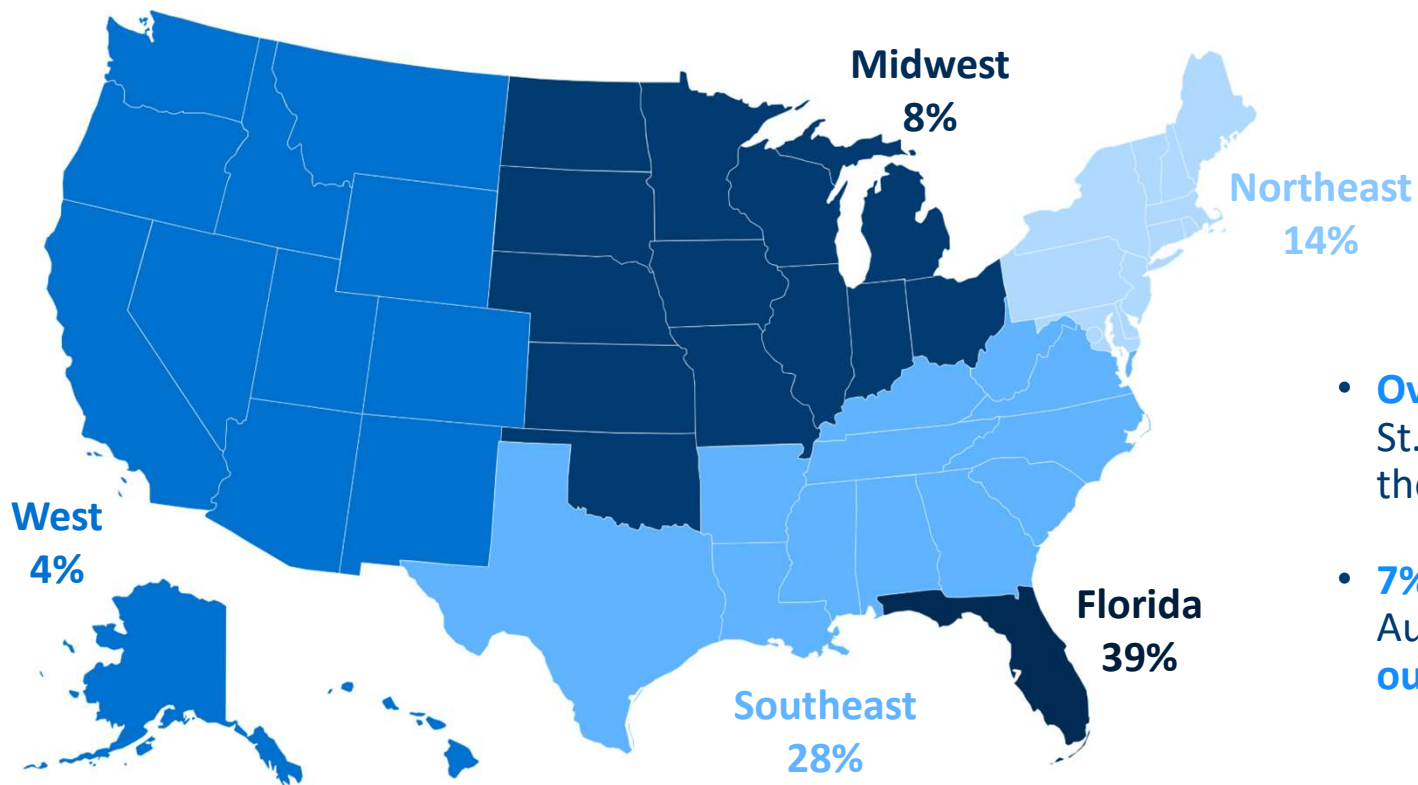
¹Multiple responses permitted.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN

JULY TO SEPTEMBER 2025



- **Over 2 in 3** 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 (2%), Canada (1%), Germany(1%), and Brazil(1%).

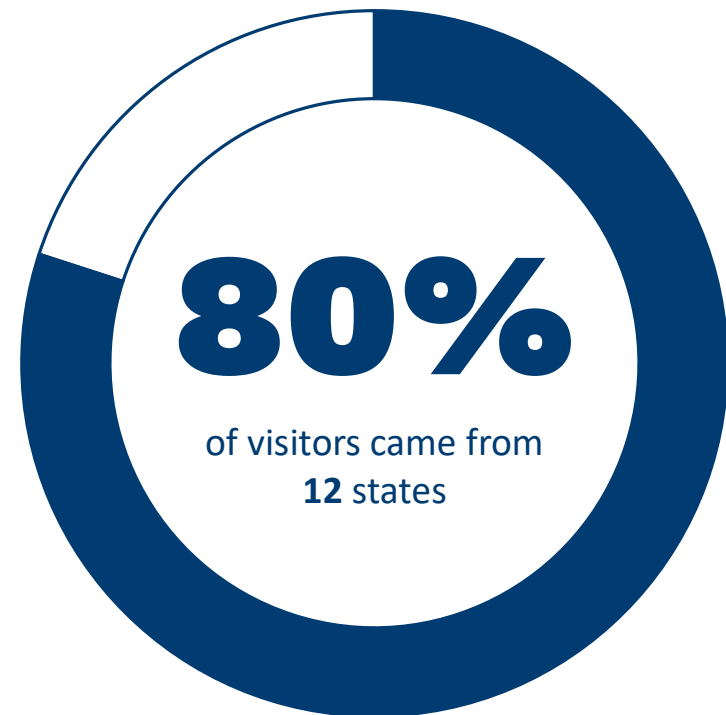


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TOP ORIGIN STATES

JULY TO SEPTEMBER 2025

State of Origin	Jul-Sept 2025
Florida	39%
Georgia	8%
Tennessee	5%
North Carolina	5% IL1
New York	5%
New Jersey	4%
South Carolina	3%
Texas	3%
Missouri	2%
California	2%
Virginia	2%
Illinois	2%

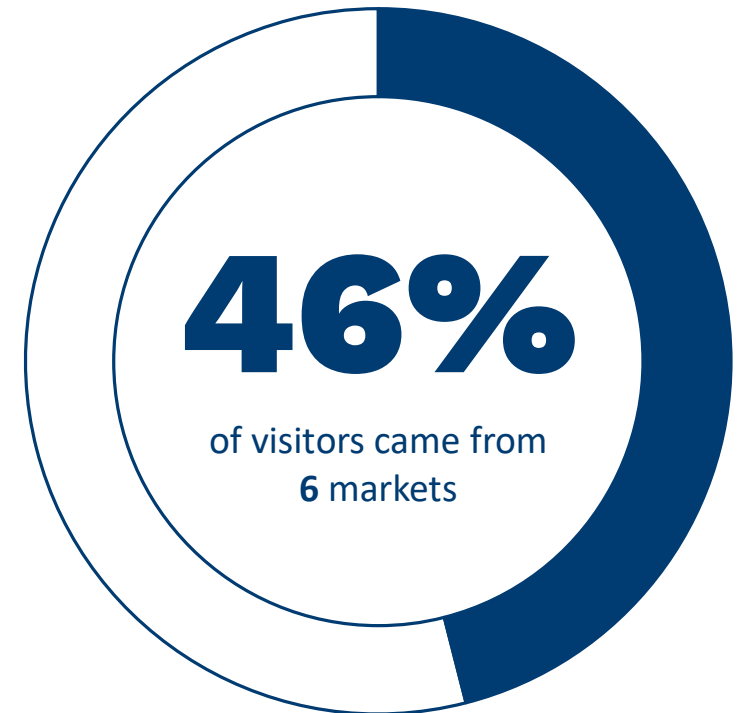


TOP ORIGIN MARKETS

JULY TO SEPTEMBER 2025

Markets	Jul-Sept 2025
Jacksonville	13%
Orlando – Daytona Beach – Melbourne	11%
New York ¹	9%
Miami – Fort Lauderdale	5%
Tampa – St. Petersburg	4%
Atlanta	4%

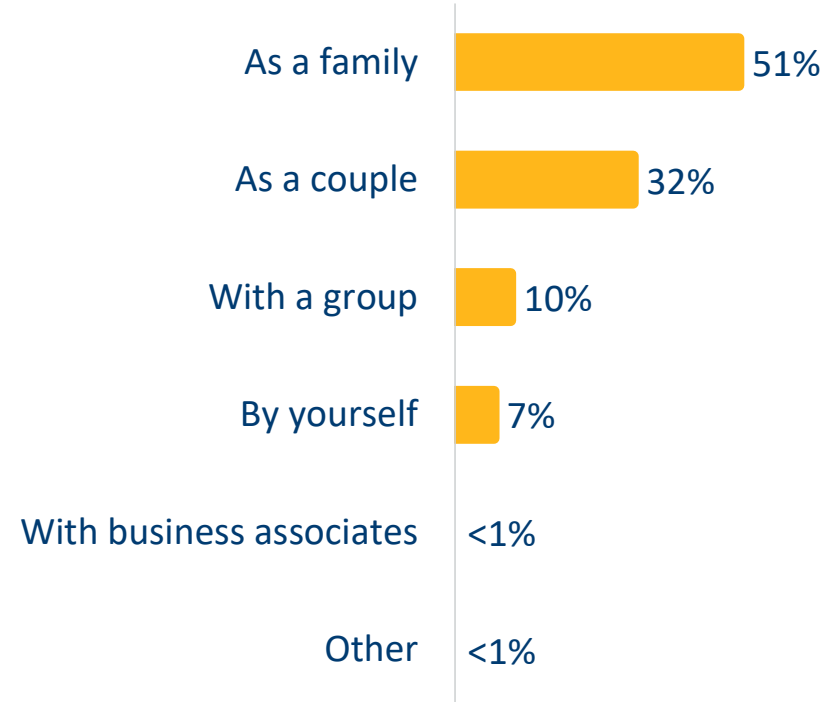
¹New York market includes some areas in Connecticut, New Jersey, and Pennsylvania.



TRAVEL PARTIES

JULY TO SEPTEMBER 2025

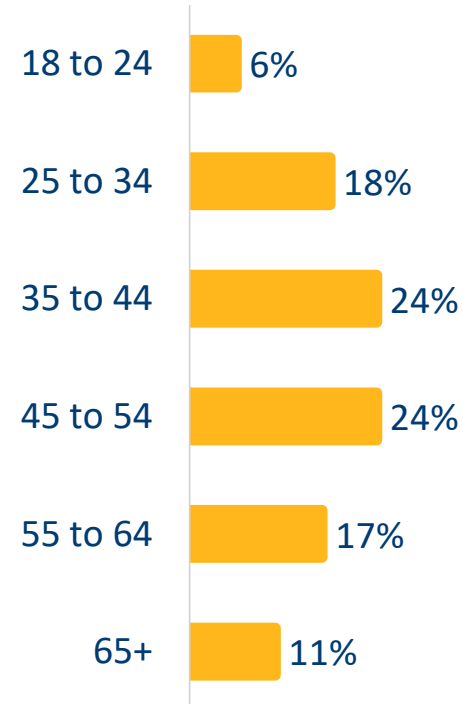
- **Over 4 in 5** visitors traveled as a **family** or a **couple**
- **Nearly half** of travel parties **included children** under 18 years old
- For all visitors, the typical travel party size was **3.5**



AGE

JULY TO SEPTEMBER 2025

- The **median age** of visitors to the St. Augustine/Ponte Vedra area was **46**¹



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

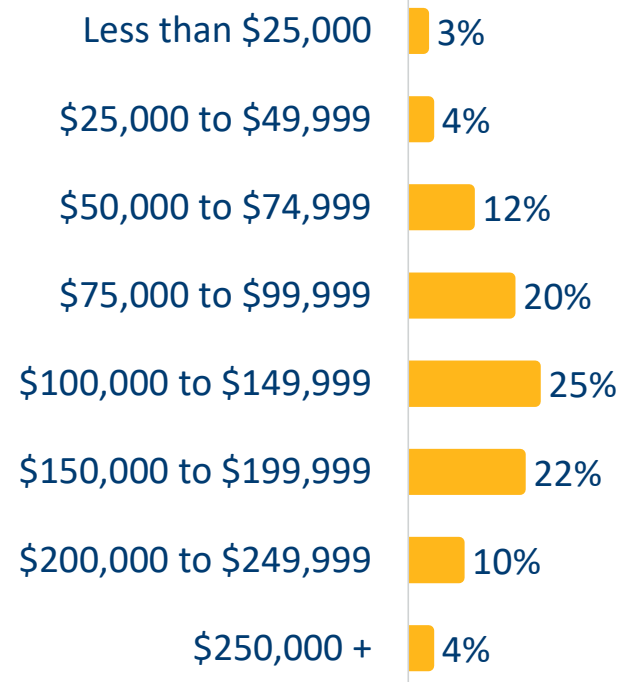


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HOUSEHOLD INCOME

JULY TO SEPTEMBER 2025

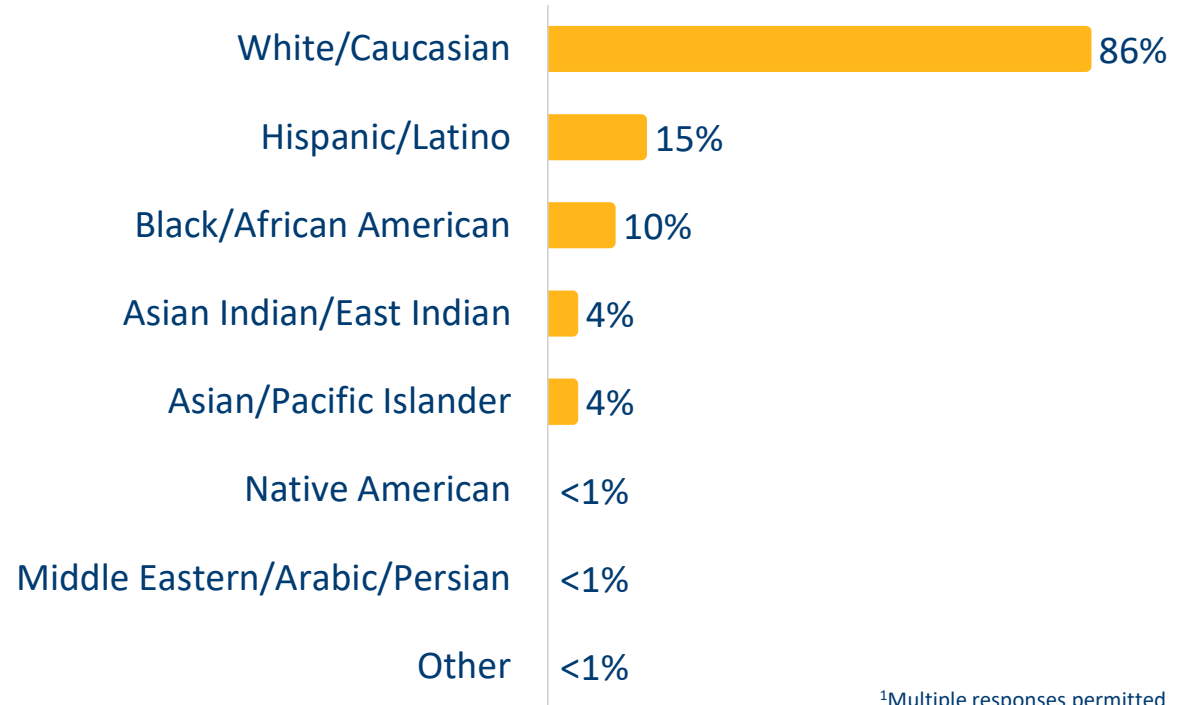
- Visitors to the St. Augustine/Ponte Vedra area had a **median household income of \$122,000** per year
- **61%** of visitors had household incomes over **\$100,000**



RACE/ETHNICITY¹

JULY TO SEPTEMBER 2025

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



¹Multiple responses permitted

²Race/ethnicity of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

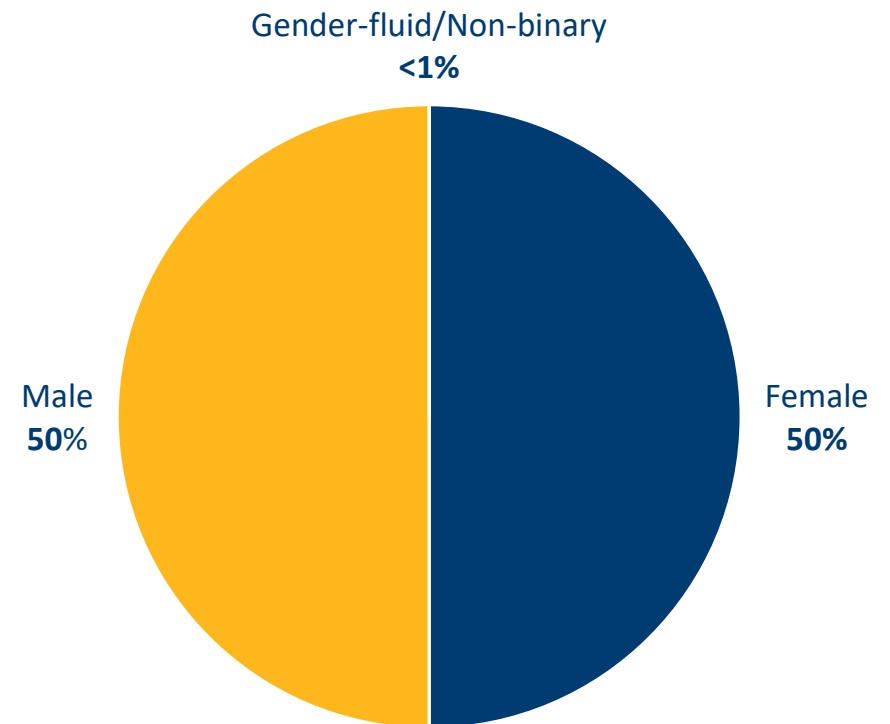


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GENDER¹

JULY TO SEPTEMBER 2025

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



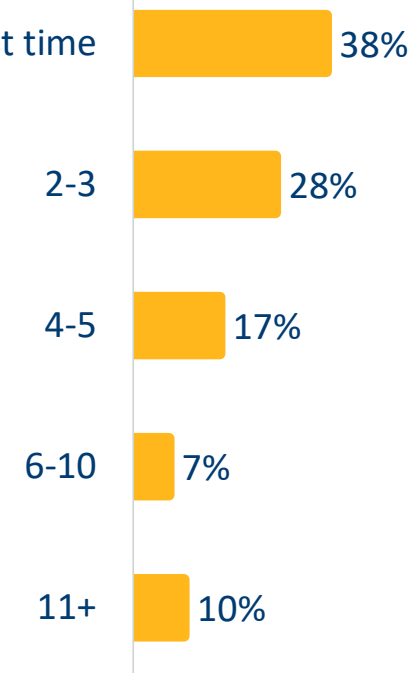
¹Gender of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

NEW & RETURNING VISITORS¹

JULY TO SEPTEMBER 2025

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

This was my first time



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

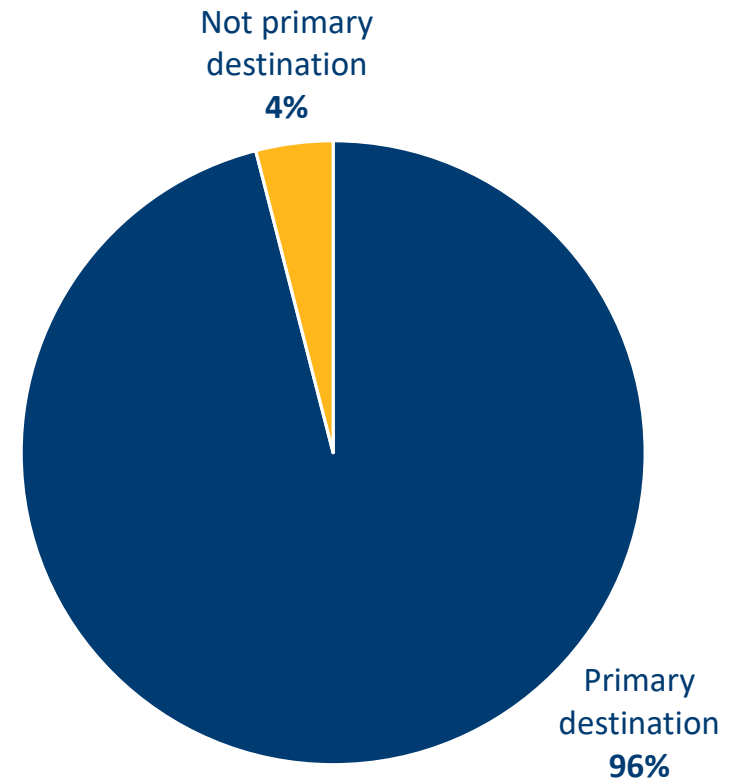


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PRIMARY TRIP DESTINATION

JULY TO SEPTEMBER 2025

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



¹Coded open-ended responses; multiple responses permitted.



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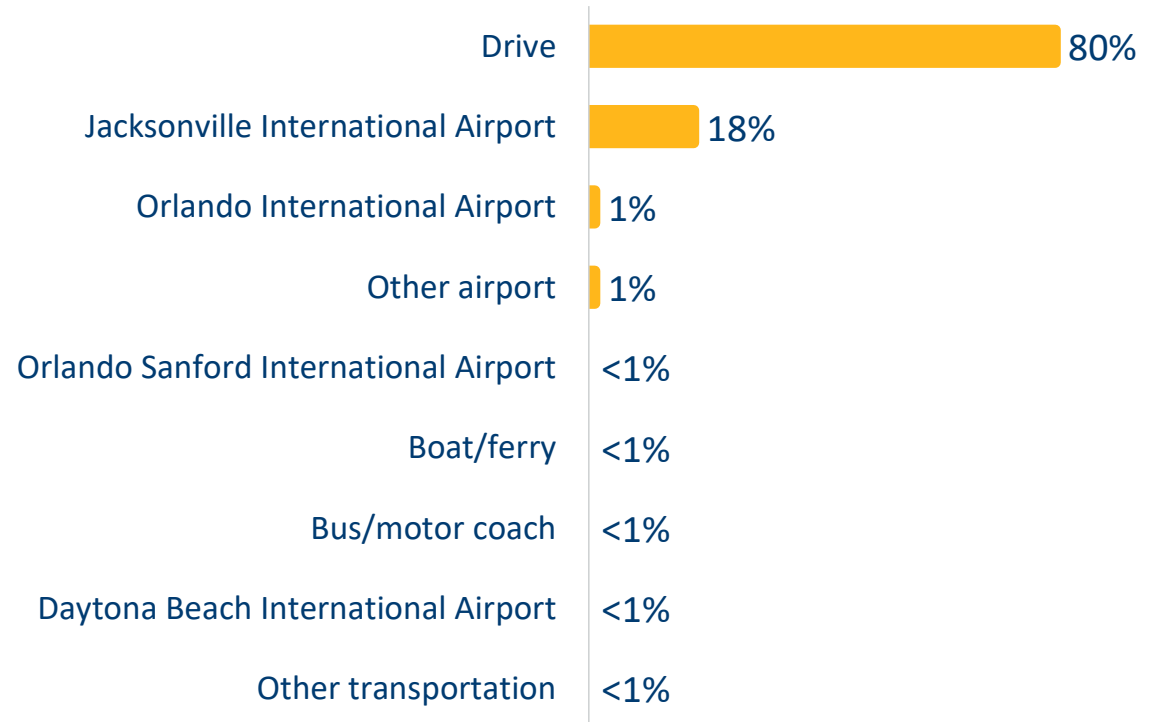
VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

JULY TO SEPTEMBER 2025

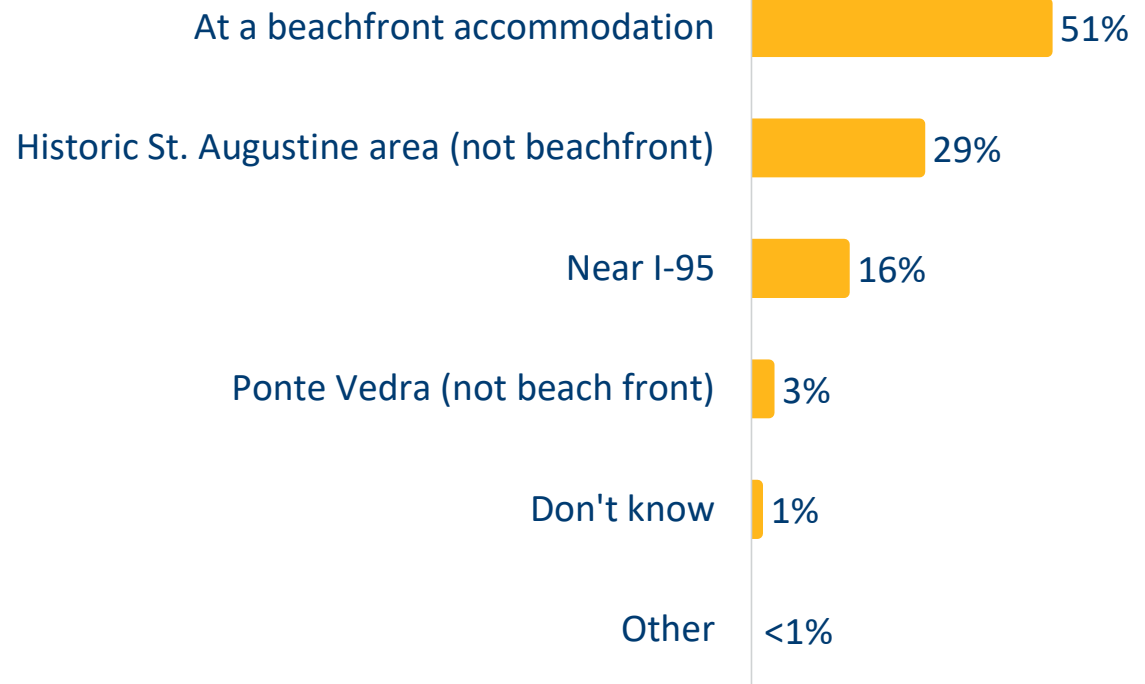
- **4 in 5** visitors **drove** to the St. Augustine/Ponte Vedra area
- Of the **20%** of visitors who **flew** to the St. Augustine/Ponte Vedra area, **9 in 10** used **Jacksonville International Airport**



ACCOMMODATION LOCATION

JULY TO SEPTEMBER 2025

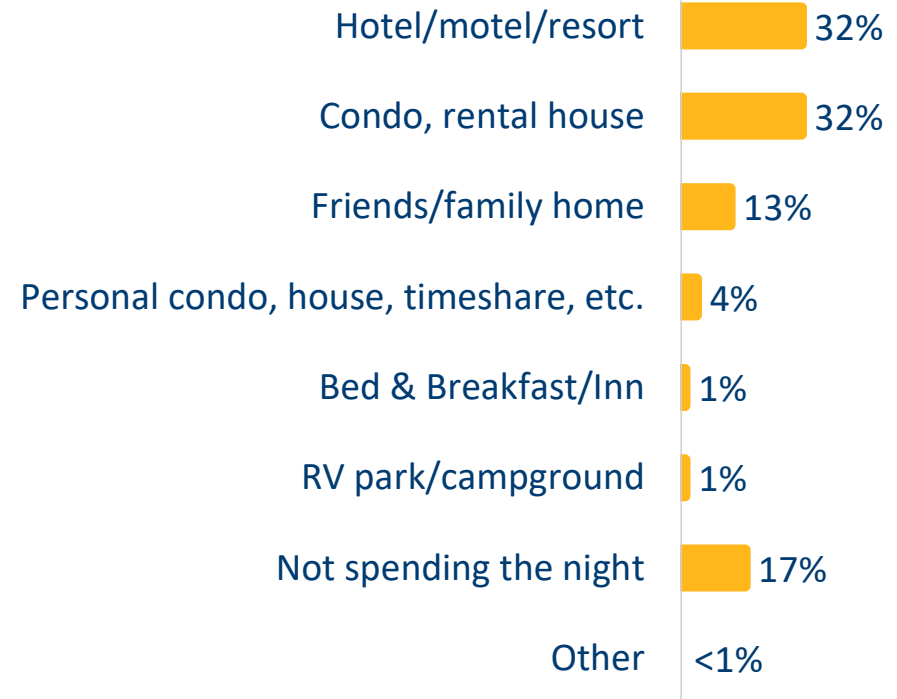
- **Over half** of overnight visitors stayed at a **beachfront accommodation** in the St. Augustine/Ponte Vedra area
- **Over 1 in 4** overnight visitors stayed in the **Historic St. Augustine area**



ACCOMMODATION TYPE

JULY TO SEPTEMBER 2025

- **2 in 3** of visitors stayed overnight in **paid accommodations**¹ in the St. Augustine/Ponte Vedra area
- The average **length of stay** across **all visitors**² was **3.7 nights**
- Visitors staying in **paid accommodations** stayed an average of **3.9 nights**



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

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

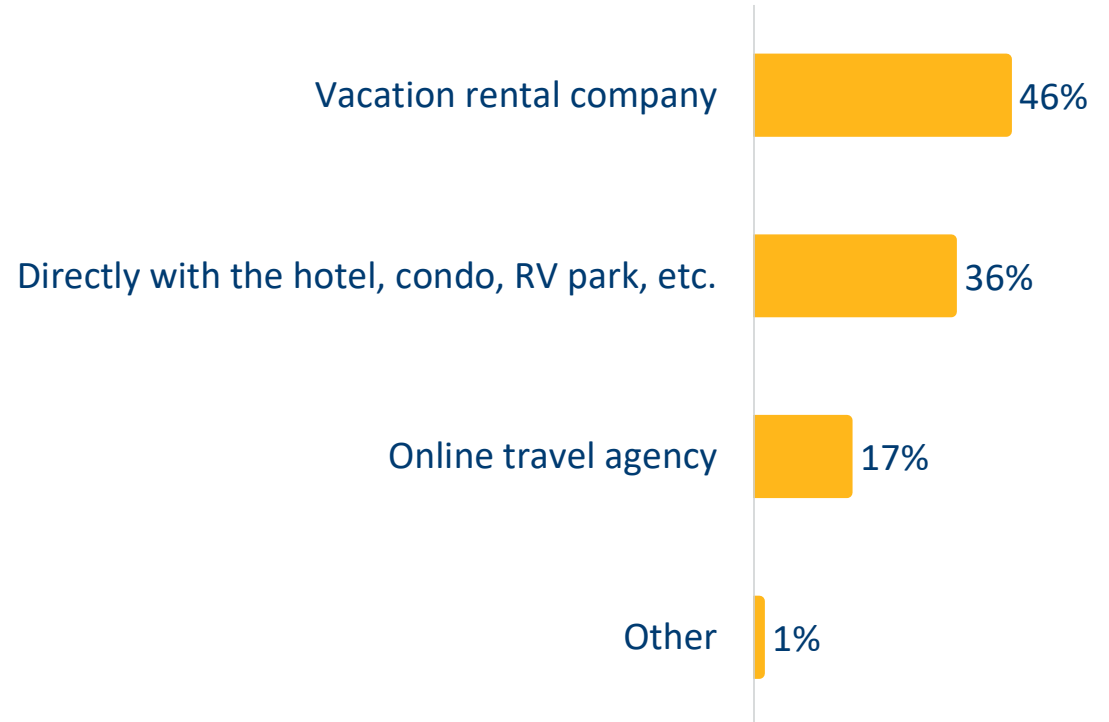


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ACCOMMODATION BOOKING

JULY TO SEPTEMBER 2025

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

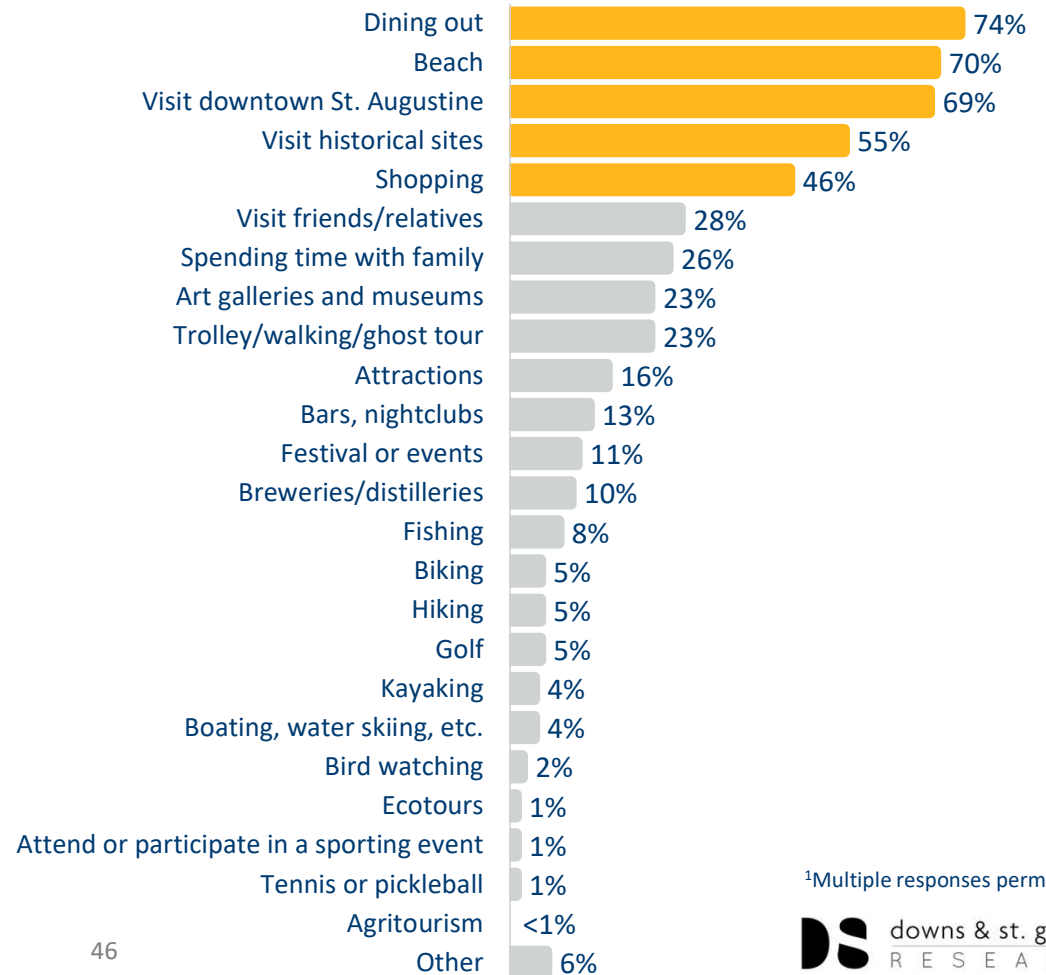


VISITOR ACTIVITIES¹

JULY TO SEPTEMBER 2025

- Top activities enjoyed by visitors this quarter include:

- Dining out at restaurants
- Visiting the beach
- Visiting downtown St. Augustine
- Visiting historical sites
- Shopping



¹Multiple responses permitted.

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RESEARCH

IL1 TRAVEL PARTY SPENDING¹

JULY TO SEPTEMBER 2025

	Daily Travel Party Spend	Total Travel Party Spend
Accommodations	\$124	\$456
Restaurants	\$110	\$404
Groceries	\$19	\$69
Shopping	\$45	\$166
Entertainment	\$88	\$325
Transportation	\$23	\$86
Other	\$10	\$36
Total	\$419	\$1,542

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



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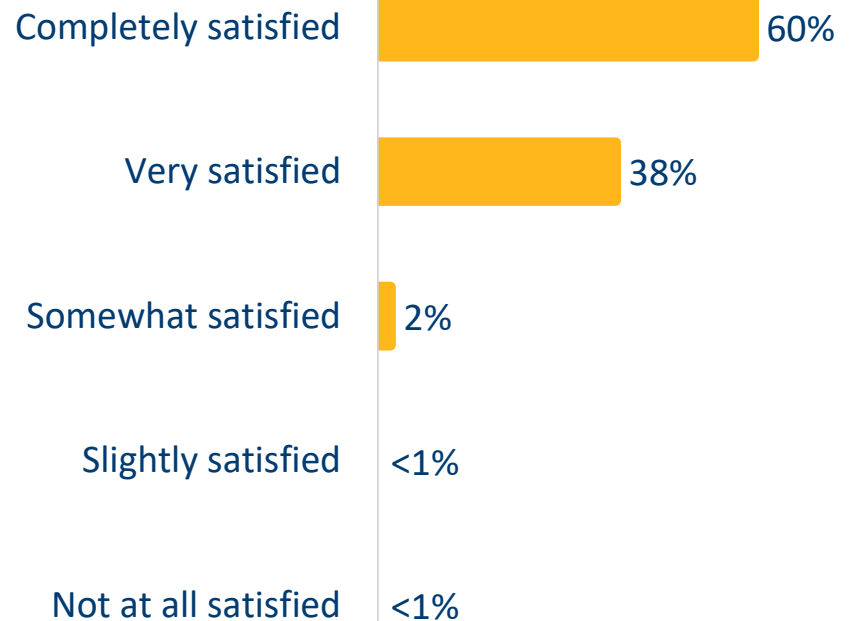
TRIP PLANNING CYCLE: POST-TRIP



VISITOR SATISFACTION

JULY TO SEPTEMBER 2025

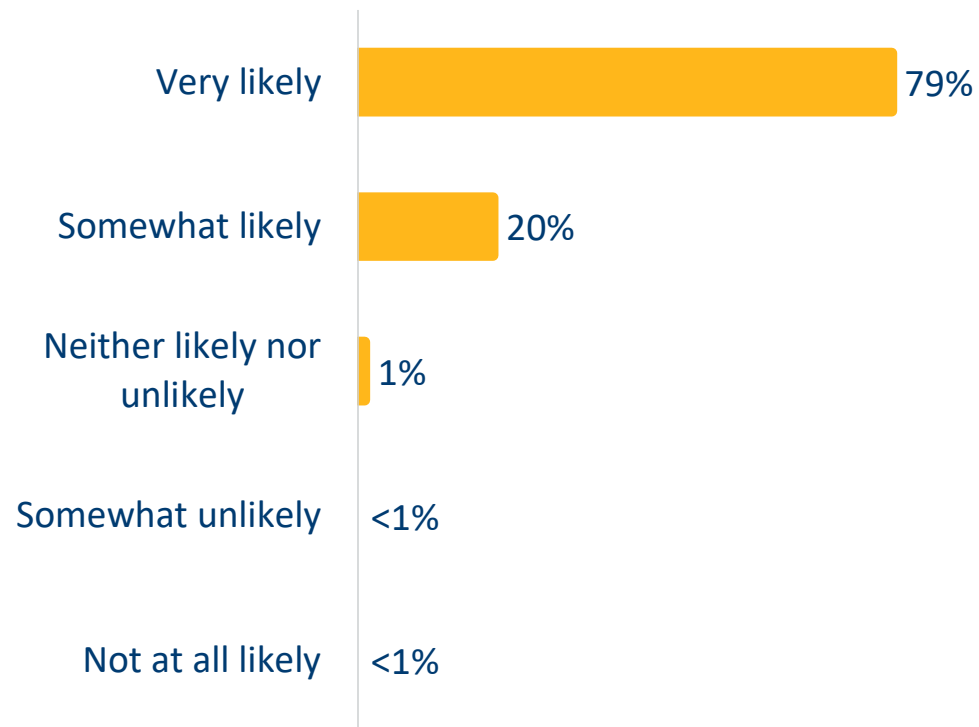
- **98%** of visitors were **satisfied** with their trip to the St. Augustine/Ponte Vedra area
- **3 in 5** were **completely satisfied** with their trip to the St. Augustine/Ponte Vedra area



RECOMMENDATION

JULY TO SEPTEMBER 2025

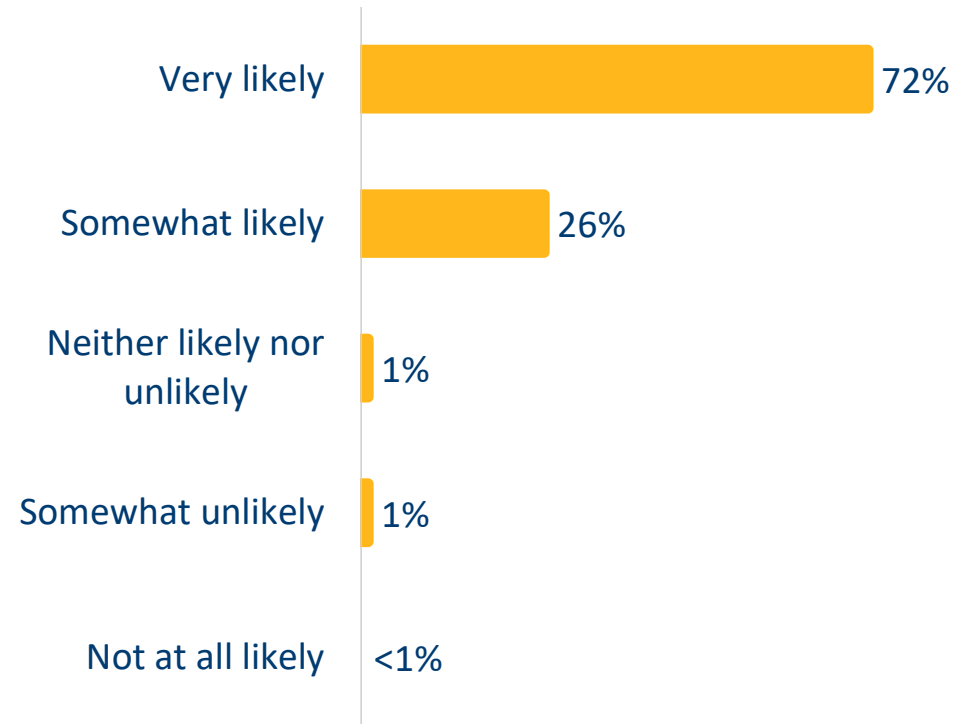
- **Nearly 4 in 5** visitors are **very likely** to recommend the St. Augustine/Ponte Vedra area to others



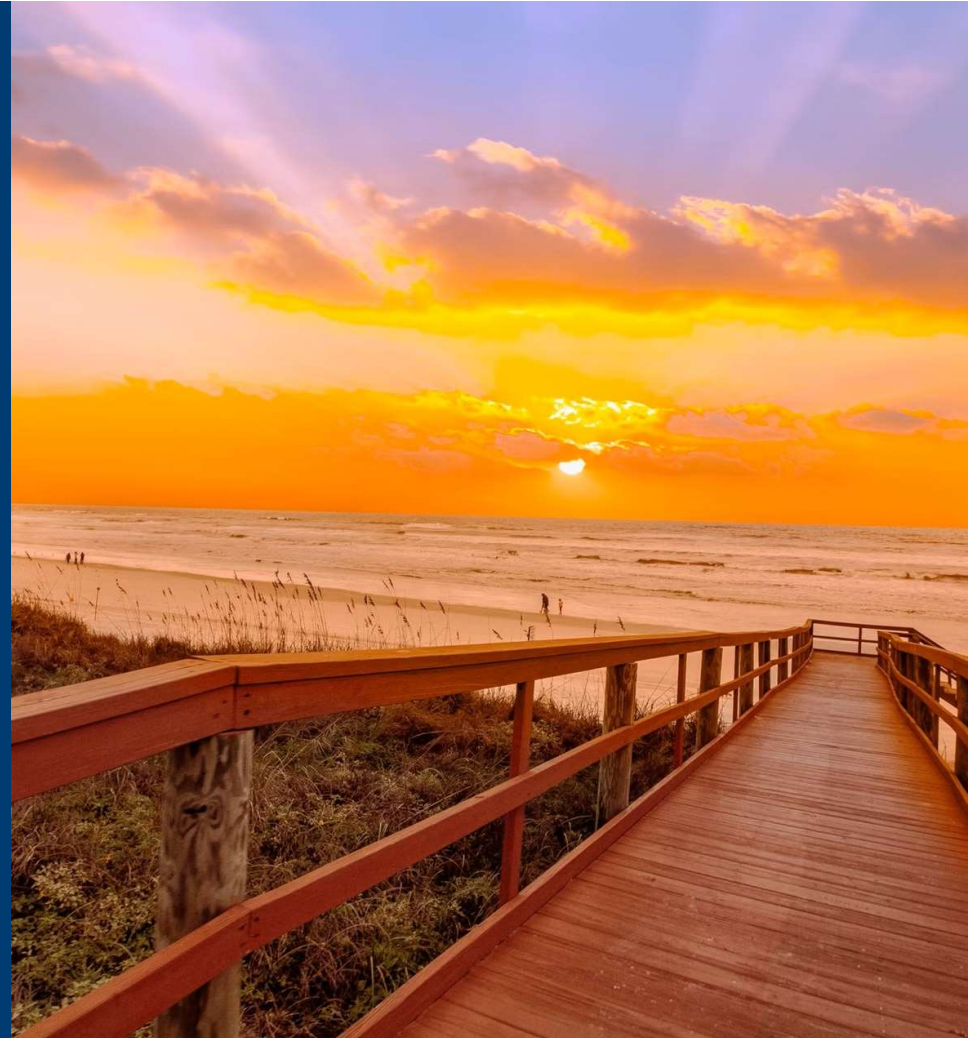
LIKELIHOOD OF RETURNING

JULY TO SEPTEMBER 2025

- **98%** 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 **2%** of visitors who said they are **unsure/unlikely to return** were asked why they were uncertain, the most common reason being they **found it to be too expensive**.



BEACH VISITOR DETAILED FINDINGS

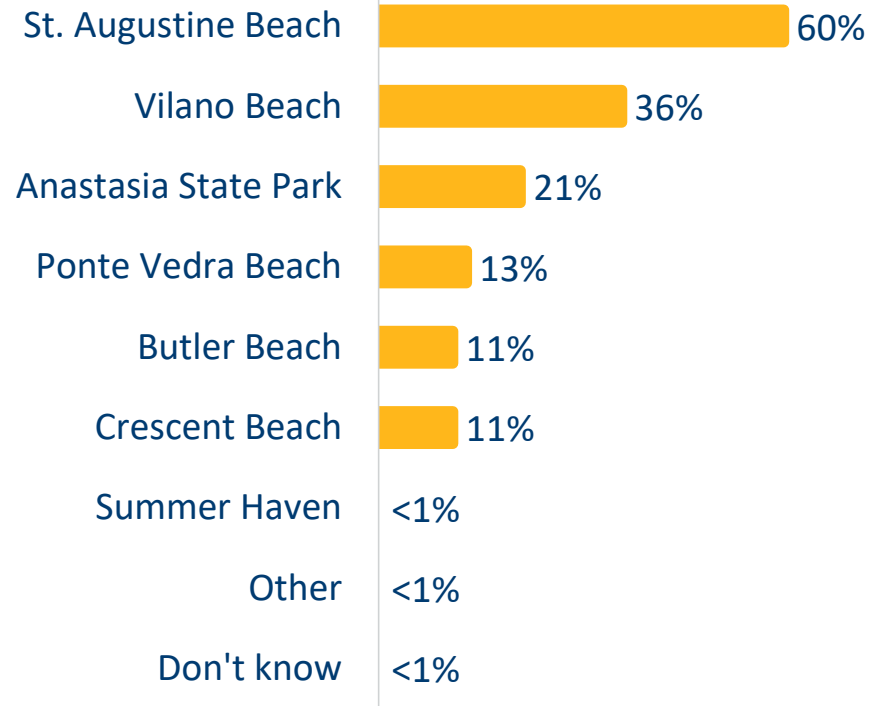


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BEACHES VISITED¹

JULY TO SEPTEMBER 2025

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



¹Multiple responses permitted.

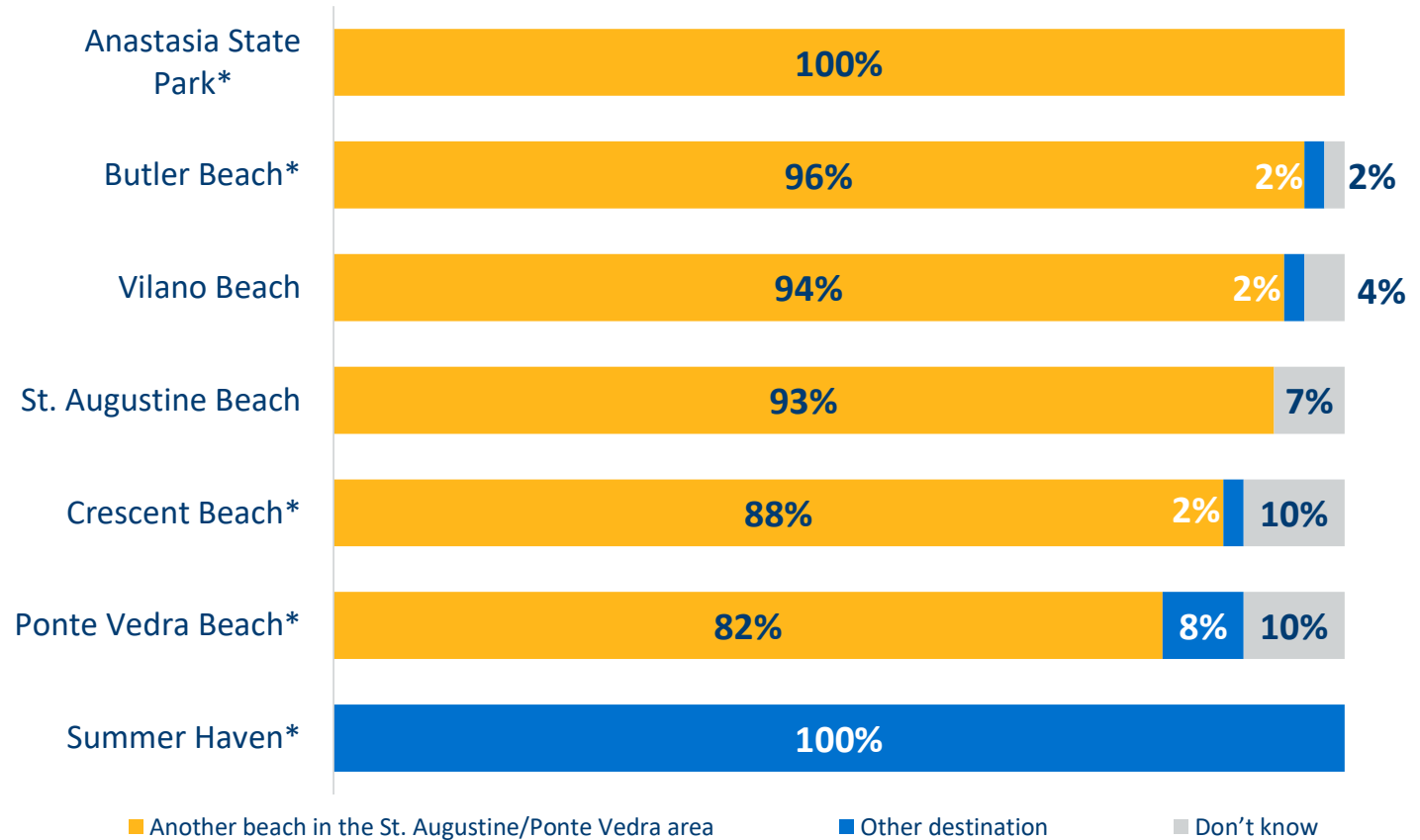


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IL1 VISITOR BEHAVIOR IF BEACHES ARE UNAVAILABLE

JULY TO SEPTEMBER 2025

- 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



Another beach in the St. Augustine/Ponte Vedra area

Other destination

Don't know

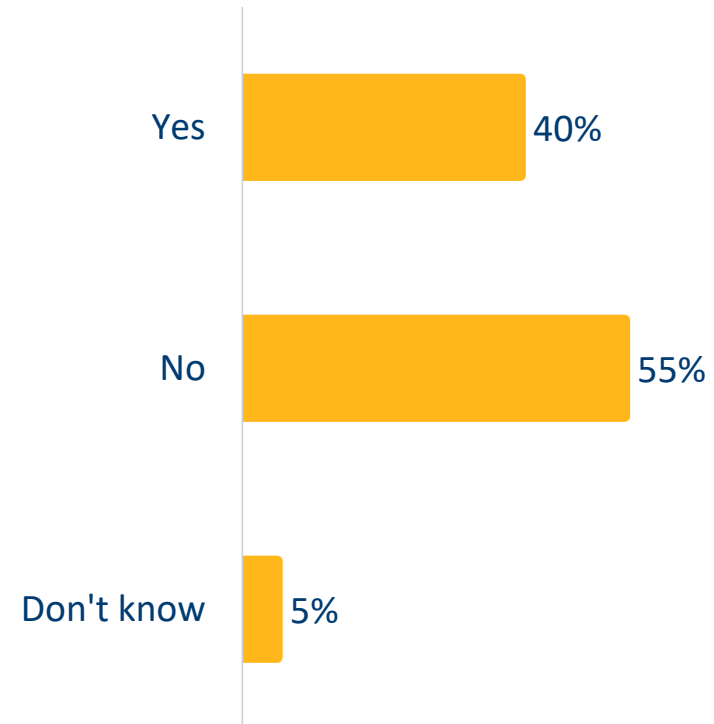


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ON-BEACH DRIVING

JULY TO SEPTEMBER 2025

- **2 in 5** visitors who visited the beach went to beach that allowed **on-beach driving**
- Of the **40%** of visitors who visited a beach that allows on-beach driving, **10%** drove on the beach
- The average experience rating for **visitors who drove on the beach** was **4.5¹**, 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 **4.8¹**, indicating most visitors had a **very good** experience



¹Visitors 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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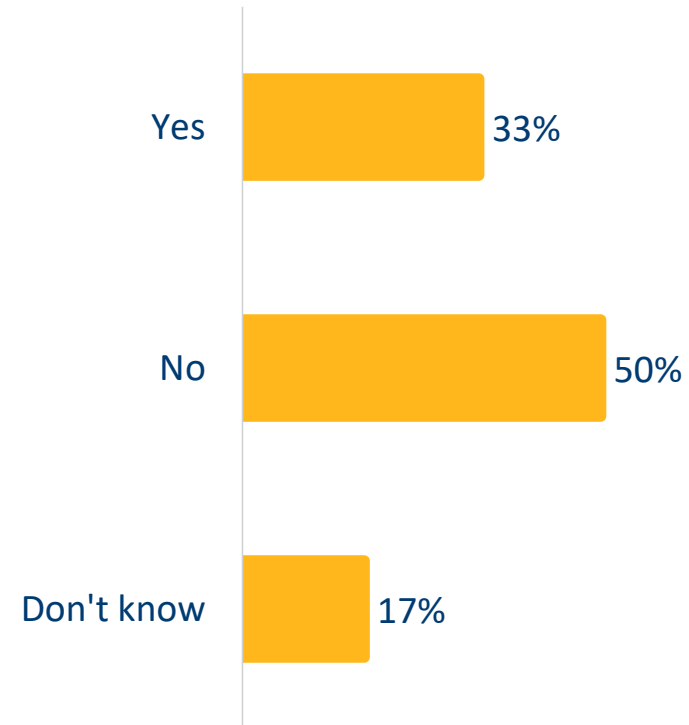
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USE OF ADA ACCESSIBLE BEACHES

JULY TO SEPTEMBER 2025

Base: **3%** of visitors who required ADA accessible beach facilities

- Of the **3%** of visitors who required ADA accessible beach facilities, **1 in 3** visitors used an **ADA accessible beach**
- The average experience rating for **visitors who used an ADA accessible beach** was **3.7¹**, indicating most visitors had a **satisfactory** experience



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

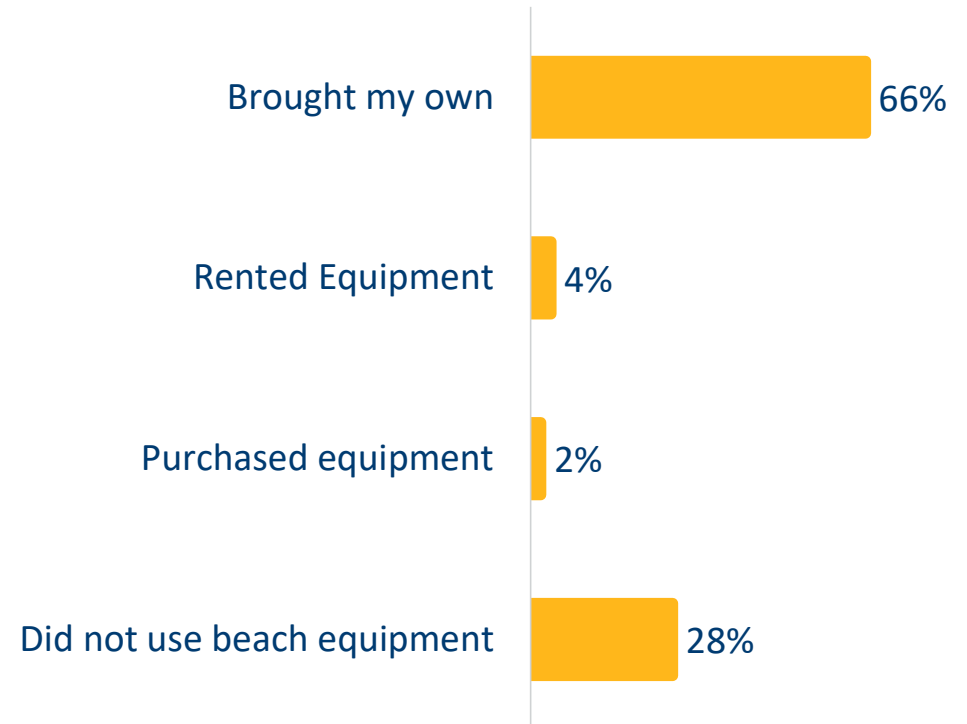


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BEACH EQUIPMENT

JULY TO SEPTEMBER 2025

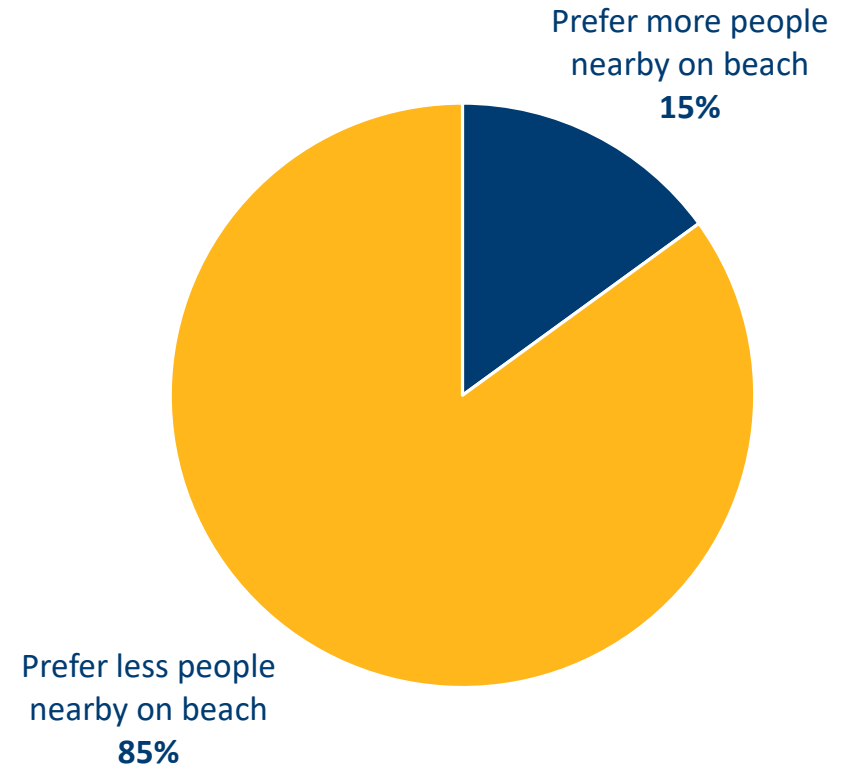
- **2 in 3** visitors who visited the beach brought their own beach equipment
- **Over 1 in 4** visitors who visited the beach did not use beach equipment



BEACH SPACE

JULY TO SEPTEMBER 2025

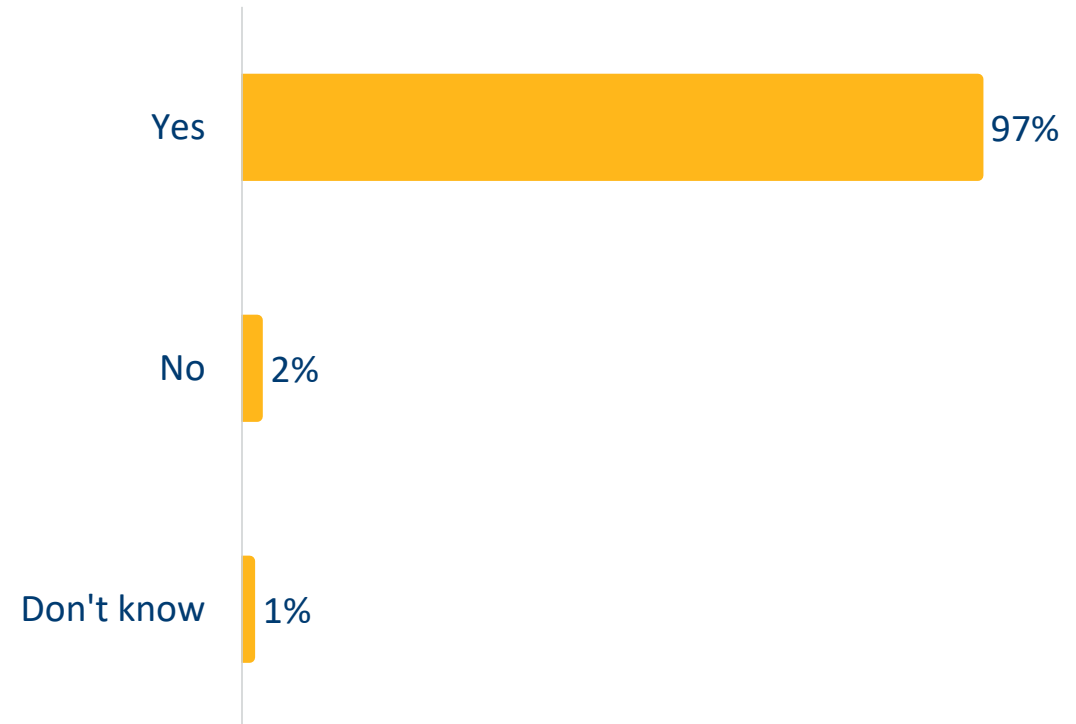
- Nearly 9 in 10 visitors prefer to have less people nearby when visiting the beach
- 98% of visitors who visited the beach felt the beach had enough space for their group and equipment



BEACH ACCESS POINTS

JULY TO SEPTEMBER 2025

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

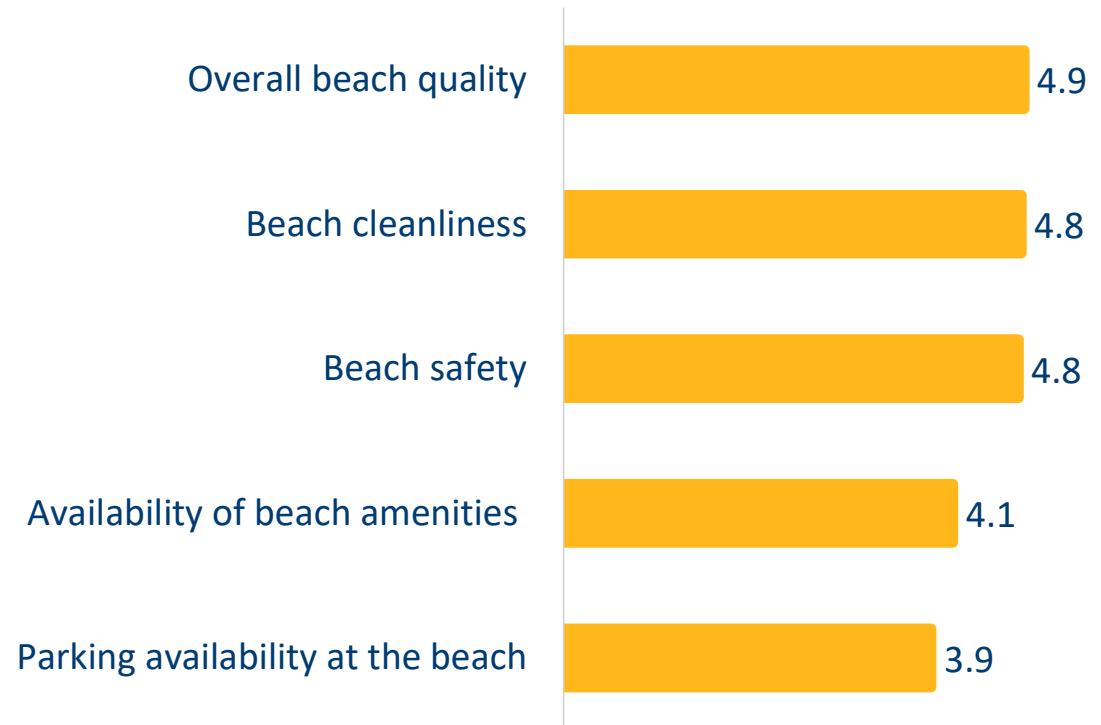


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BEACH RATINGS

JULY TO SEPTEMBER 2025

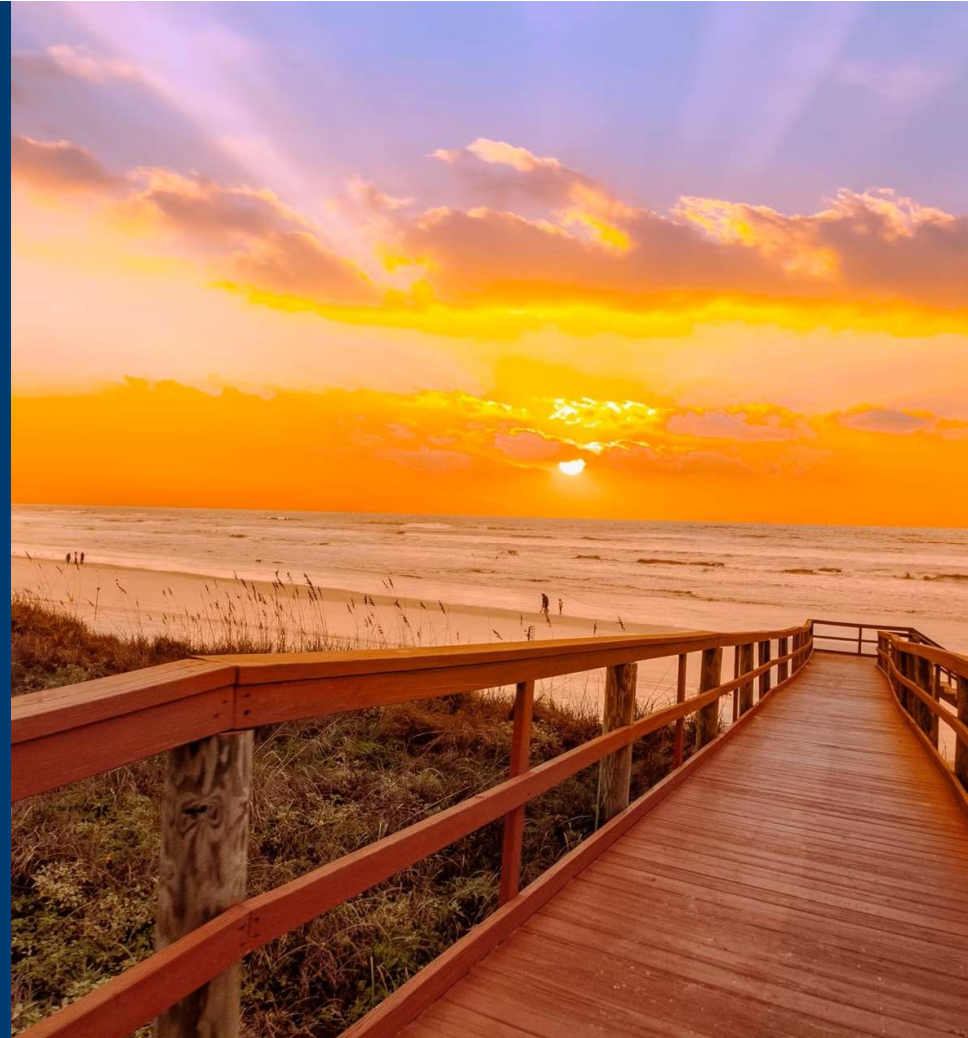
- On average, **beach cleanliness**, **safety**, and **overall quality** was rated¹ as **very good** by visitors
- On average, **availability of beach amenities** and **parking availability at the beach** was rated¹ as **good** by visitors



¹Visitors 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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APPENDIX I: DATA COMPARISON OF FIRST TIME AND REPEAT VISITORS



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TRIP PLANNING & BOOKING CYCLE: OVERNIGHT VISITORS¹

JULY TO SEPTEMBER 2025

PLANNING CYCLE	FIRST TIME VISITOR	REPEAT VISITOR
Less than 1 month	56%	50%
1 to 3 months	28%	33%
4 to 6 months	10%	9%
Over 6 months	6%	8%
Median Days	26 days prior to visit	30 days prior to visit

BOOKING CYCLE	FIRST TIME VISITOR	REPEAT VISITOR
Less than 1 month	64%	55%
1 to 3 months	20%	34%
4 to 6 months	8%	4%
Over 6 months	8%	7%
Median Days	23 days prior to visit	26 days prior to visit

¹Excludes day trippers.

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TOP TRIP PLANNING SOURCES¹

JULY TO SEPTEMBER 2025

ONLINE SOURCES	FIRST TIME VISITOR	REPEAT VISITOR
Mapping websites	56%	46%
Destination websites ²	45%	43%
Video streaming services	38%	35%
Vacation rental company	38%	40%
Review website/app	28%	29%
Hotel websites/apps	22%	39%
St. Augustine/Ponte Vedra social media	21%	22%
Online travel agency	19%	30%
Online travel reviews, blogs, stories	14%	18%
Personal social media	13%	19%
None	12%	15%

OTHER SOURCES	FIRST TIME VISITOR	REPEAT VISITOR
Friends/relatives	51%	36%
Visitor guide/brochure	29%	26%
None	17%	11%



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¹Multiple responses permitted.

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

ADVERTISING RECALL

JULY TO SEPTEMBER 2025

	FIRST TIME VISITOR	REPEAT VISITOR
Recalled advertising	40%	52%

TOP AD SOURCES ¹	FIRST TIME VISITOR ²	REPEAT VISITOR ²
Video streaming services	53%	54%
Friends/relatives	53%	47%
Television	41%	35%
Visitor guide/brochure	40%	30%
Online travel reviews, blogs, stories	30%	35%

	FIRST TIME VISITOR ³	REPEAT VISITOR ³
Ad influenced visitation	38%	45%

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

²Base: Visitors who recalled advertising

³Base: All visitors



VISITOR PROFILE

JULY TO SEPTEMBER 2025

	FIRST TIME VISITOR	REPEAT VISITOR
Travel Party Size ¹	3.2	3.7
Length of Stay ¹	3.7	3.8

	FIRST TIME VISITOR	REPEAT VISITOR
Paid accommodations	70%	66%
Nonpaid accommodations	17%	16%
Day tripper	13%	18%

	FIRST TIME VISITOR	REPEAT VISITOR
Traveled as a family	48%	55%
Traveled as a couple	36%	29%
Traveled with a group	8%	11%
Traveled by yourself	8%	4%
Traveled with business associates	<1%	<1%

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



TOP AREAS OF ORIGIN

JULY TO SEPTEMBER 2025

REGION OF ORIGIN	FIRST TIME VISITOR	REPEAT VISITOR
Southeast	29%	27%
Florida	25%	47%
Northeast	16%	13%
Midwest	10%	8%
West	8%	1%
International	13%	4%

MARKETS	FIRST TIME VISITOR	REPEAT VISITOR
New York ¹	11%	7%
Jacksonville	6%	16%
Tampa – St. Petersburg	5%	4%
Orlando – Daytona Beach - Melbourne	5%	14%
Miami – Fort Lauderdale	4%	5%
Atlanta	4%	4%

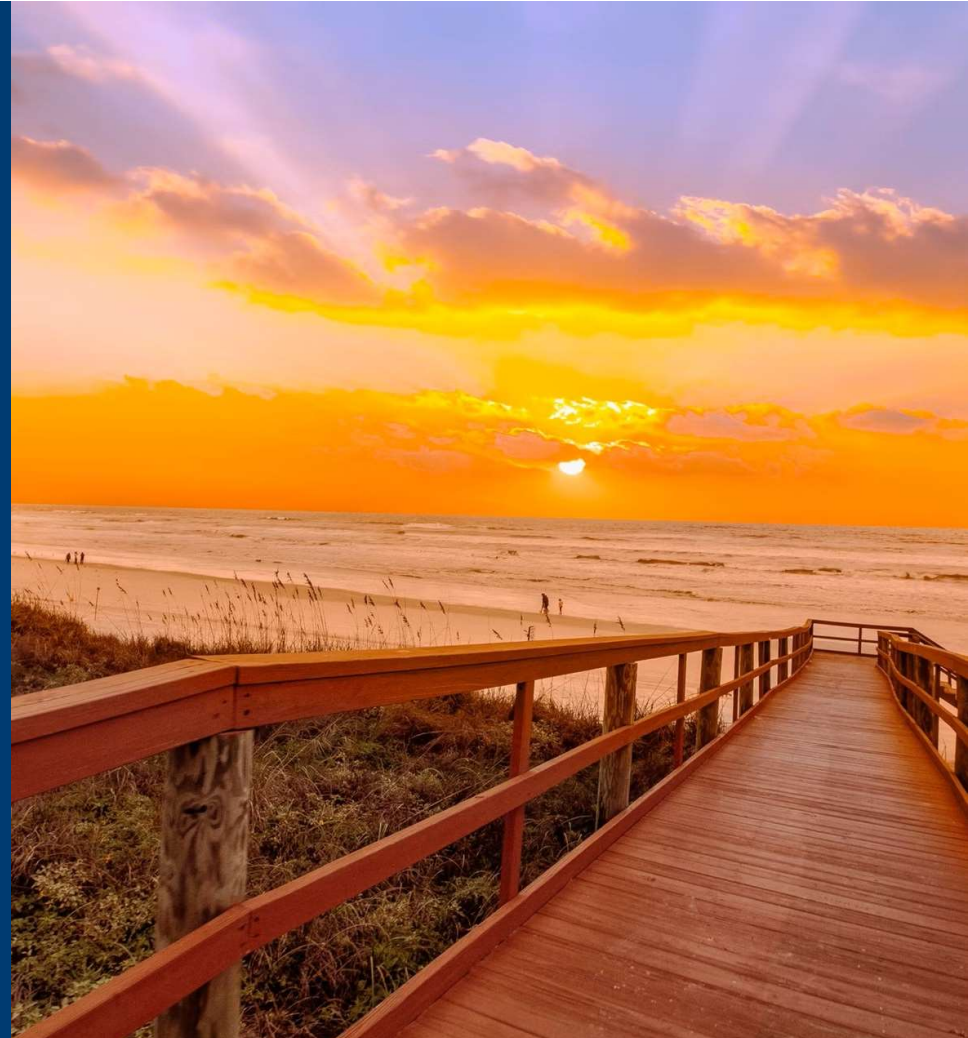
¹New York market includes some areas in Connecticut, New Jersey, and Pennsylvania.

STATE OF ORIGIN	FIRST TIME VISITOR	REPEAT VISITOR
Florida	25%	47%
New York	8%	3%
North Carolina	7%	3%
Tennessee	6%	4%
Georgia	5%	9%
California	4%	<1%
South Carolina	4%	3%
New Jersey	3%	4%
Texas	3%	3%
Missouri	3%	2%



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APPENDIX II: DATA COMPARISON BY VISITOR TYPE



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VISITOR PROFILE

JULY TO SEPTEMBER 2025

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Travel Party Size	3.6	3.5	3.2
Length of Stay	3.9	5.5	-

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
First Time Visitor	39%	40%	29%
Repeat Visitor	61%	60%	71%

	PAID ACCOMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Traveled as a family	52%	57%	42%
Traveled as a couple	34% KT1	21%	33%
Traveled with a group	10%	7%	15%
Traveled by yourself	4%	14%	8%
Traveled with business associates	<1%	1%	1%

TOP VISITOR ACTIVITIES¹

JULY TO SEPTEMBER 2025

	PAID ACCOMMODATIONS	NONPAID ACCOMODATIONS	DAY TRIPPER
Dining out	82%	72%	46%
Visit Downtown St. Augustine	79%	65%	35%
Beach	72%	67%	63%
Visit historical sites	66%	47%	20%
Shopping	52%	45%	21%
Art galleries and museums	29%	22%	4%
Visit friends/relatives	28%	40%	11%
Trolley/walking/ghost tour	27%	21%	10%
Spending time with family	27%	37%	11%
Attractions	18%	16%	6%
Bars/nightclubs	17%	7%	5%
Festival or events	14%	11%	2%
Breweries/distilleries	13%	8%	1%

¹Multiple responses permitted.

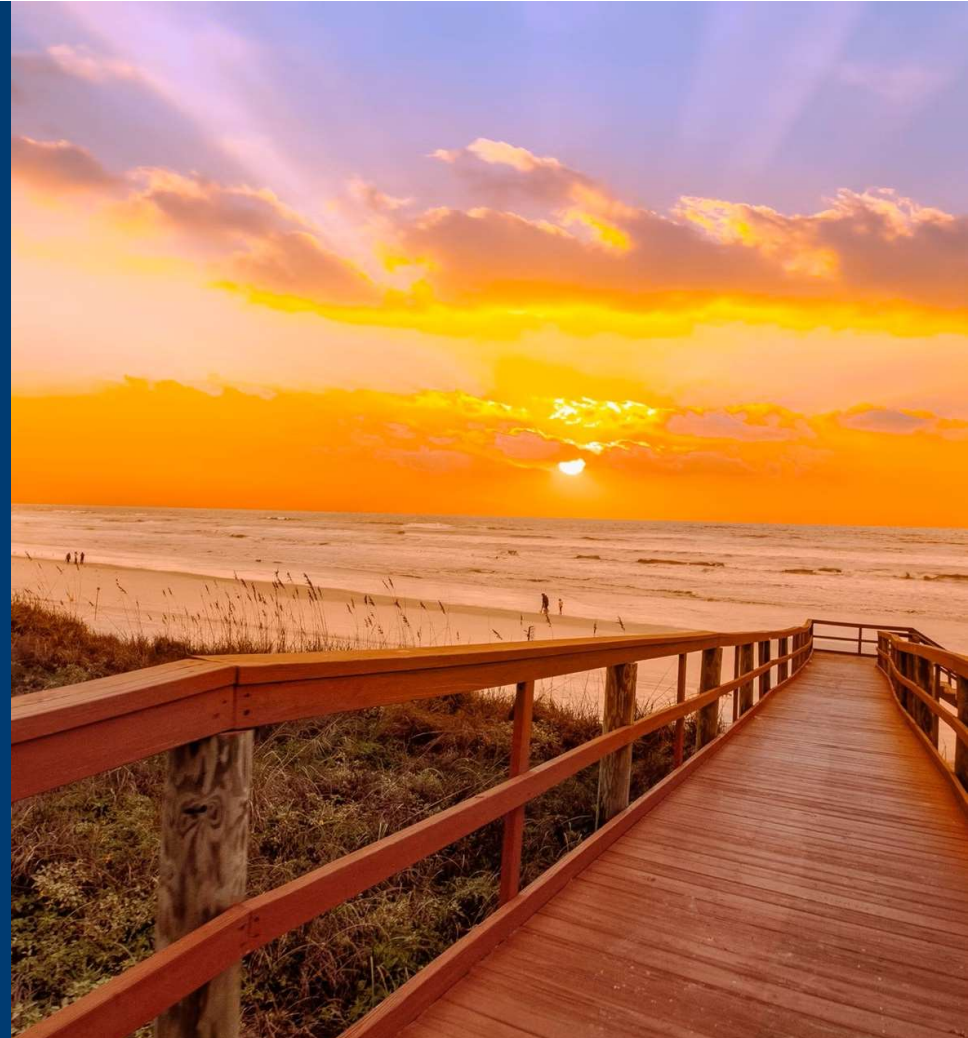


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ST. JOHNS COUNTY

Visitor Tracking and Beach Study July to September 2025

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



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TDC Regular Meeting – November 17, 2025

Agenda Item 10 – FY25 Destination Marketing (Cat 1) Expenditure Update/Recap

At the Chairman's request during the October meeting, this item is being brought before the Board for reference and discussion.

TDC Regular Meeting – November 17, 2025

Monthly Reports

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

FY2025 MONTHLY LOTDT DASHBOARD

Occupancy Month	Net to TDC	+/- PY
September	\$ 1,324,904	14.0%
FYTD	\$ 23,148,563	-0.15%
% OF BUDGET		100.0%
% OF FY		92.3%

BUDGETED \$ \$25,084,566

September 25 Collection Accounts

Description	Count
RV/MH Park or Campground	26
Hotel or Motel	90
Condo / COOP	2384
Apartment / House / Mobile Home	2368
Bed & Breakfast	34
Other	7
Total	4909

Collection by Municipality

City of St. Augustine	\$332,301
Ponte Vedra Beach	\$217,778
City of St. Augustine Beach	\$180,456

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%	\$45,832,407.89	2.8%	\$42,367,335.90	0.8%
EXEMPT RECEIPTS	-\$2,541,163.98	92.3%	-\$1,328,630.80	14.2%	-\$1,216,631.49	-13.2%	-\$1,366,125.70	36.0%
TAXABLE RECEIPTS	\$38,178,358.40	-6.6%	\$56,314,978.20	-5.2%	\$44,615,776.40	3.3%	\$41,001,210.20	-0.1%
TOTAL TAX COLLECTED	\$1,908,917.92	-6.6%	\$2,815,748.91	-5.2%	\$2,230,788.82	3.3%	\$2,050,060.51	-0.1%
ADJUSTMENTS								
TOTAL TAX DUE	\$1,908,917.92	-6.6%	\$2,815,748.91	-5.2%	\$2,230,788.82	3.3%	\$2,050,060.51	-0.1%
LESS COLLECTION ALLOWANCE	-\$14,216.41		-\$21,684.57		-\$17,304.41		-\$16,387.64	
PLUS PENALTY	\$12,500.79		\$9,639.18		\$34,585.66		\$17,981.33	
PLUS INTEREST	\$302.88		\$579.14		\$957.88		\$452.32	
TOTAL AMOUNT REMITTED	\$1,907,505.18	-6.3%	\$2,804,282.66	-5.3%	\$2,249,027.95	4.5%	\$2,052,106.52	0.3%
LESS TAX COLLECTOR & CLERK	\$(38,150.10)	-6.3%	\$(56,085.65)	-5.3%	\$(44,980.56)	4.5%	\$(41,042.13)	0.3%
NET TO TDC	\$1,869,355.08	-6.3%	\$2,748,197.01	-5.3%	\$2,204,047.39	4.5%	\$2,011,064.39	0.3%

	JUNE	% PY	JULY	% PY	AUG	% PY	SEP	% PY	YTD
GROSS RECEIPTS	\$46,021,728.95	-5.5%	\$46,690,308.27	-8.8%	\$32,122,651.59	2.4%	\$27,907,495.84	9.5%	\$488,054,650.21
EXEMPT RECEIPTS	-\$1,158,104.35	-57.7%	-\$946,918.27	-43.3%	-\$991,204.79	-30.0%	\$(1,057,862.64)	-39.2%	-\$15,736,801.21
TAXABLE RECEIPTS	\$44,863,624.60	-2.4%	\$45,743,390.00	-7.6%	\$31,131,446.80	3.9%	\$26,849,633.20	13.1%	\$472,317,849.00
TOTAL TAX COLLECTED	\$2,243,181.23	-2.4%	\$2,287,169.50	-7.6%	\$1,556,572.34	3.9%	\$1,342,481.66	13.1%	\$23,615,892.45
ADJUSTMENTS									
TOTAL TAX DUE	\$2,243,181.23	-2.4%	\$2,287,169.50	-7.6%	\$1,556,572.34	3.9%	\$1,342,481.66	13.1%	\$23,615,892.45
LESS COLLECTION ALLOWANCE	-\$21,324.22		-\$22,731.79		-\$15,648.31		\$(10,944.62)		
PLUS PENALTY	\$19,042.02		\$8,135.49		\$9,840.68		\$20,123.82		
PLUS INTEREST	\$605.94		\$442.33		\$429.01		\$281.71		
TOTAL AMOUNT REMITTED	\$2,241,504.97	-2.3%	\$2,273,015.53	-7.7%	\$1,551,193.72	3.6%	\$1,351,942.57	14.0%	\$23,620,982.68
LESS TAX COLLECTOR & CLERK	\$(44,830.10)	-2.3%	\$(45,460.32)	-7.7%	\$(31,023.87)	3.6%	\$(27,038.86)	14.0%	-\$472,419.67
NET TO TDC	\$2,196,674.87	-2.3%	\$2,227,555.21	-7.7%	\$1,520,169.85	3.6%	\$1,324,903.71	14.0%	\$23,148,563.01

Budgeted \$25,084,566
 % of Budget 100.0%
 % of FY 92.3%

TOURIST DEVELOPMENT TAX REMITTED BY ACCOMMODATION TYPE

	H/M	% Total	PV+-	Condo	% Total	Apts	% Total	Camp	% Total	B&B	% Total	TOTAL
FY16	\$ 6,594,709	65.4%		\$ 2,285,121	22.7%	\$ 442,211	4.4%	\$ 248,222	2.5%	\$ 509,817	5.1%	\$ 10,080,080
FY17	\$ 6,846,879	67.7%		\$ 2,069,871	20.5%	\$ 476,571	4.7%	\$ 234,769	2.3%	\$ 478,419	4.7%	\$ 10,106,509
FY18	\$ 7,656,436	66.5%		\$ 2,319,501	20.1%	\$ 725,073	6.3%	\$ 277,970	2.4%	\$ 536,878	4.7%	\$ 11,515,859
FY19	\$ 7,832,455	64.8%		\$ 2,123,177	17.6%	\$ 1,196,387	9.9%	\$ 392,187	3.2%	\$ 543,632	4.5%	\$ 12,087,837
FY20	\$ 5,693,306	59.1%		\$ 1,860,647	19.3%	\$ 1,241,335	12.9%	\$ 411,802	4.3%	\$ 419,570	4.4%	\$ 9,626,661
FY21	\$ 8,464,994	57.7%		\$ 2,881,686	19.6%	\$ 2,204,745	15.0%	\$ 522,515	3.6%	\$ 605,794	4.1%	\$ 14,679,734
FY22	\$ 13,530,269	59.7%		\$ 3,985,367	17.6%	\$ 3,634,877	16.0%	\$ 724,483	3.2%	\$ 778,183	3.4%	\$ 22,653,180
FY24	\$ 13,206,489	55.8%		\$ 3,842,407	16.2%	\$ 5,188,457	21.9%	\$ 675,819	2.9%	\$ 744,325	3.1%	\$ 23,657,497

FY25 TOURIST DEVELOPMENT TAX REMITTED BY ACCOMMODATION TYPE

	H/M	% Total	PV+-	Condo	%	Apts	% Total	Camp	% Total	B&B	% Total	TOTAL
October	\$ 831,589	63.0%	-13.9%	\$ 150,640	11.4%	\$ 258,888	19.6%	\$ 33,042	2.5%	\$ 45,961	3.5%	\$ 1,320,121
November	\$ 1,118,949	65.2%	12.3%	\$ 157,385	9.2%	\$ 338,867	19.7%	\$ 38,681	2.3%	\$ 62,220	3.6%	\$ 1,716,102
December	\$ 1,423,365	62.1%	6.0%	\$ 196,801	8.6%	\$ 507,726	22.2%	\$ 67,928	3.0%	\$ 95,875	4.2%	\$ 2,291,694
January	\$ 1,070,233	57.5%	10.1%	\$ 258,708	13.9%	\$ 404,603	21.7%	\$ 65,610	3.5%	\$ 63,331	3.4%	\$ 1,862,487
February	\$ 1,089,405	57.1%	-5.5%	\$ 323,881	17.0%	\$ 357,851	18.8%	\$ 77,164	4.0%	\$ 59,205	3.1%	\$ 1,907,505
March	\$ 1,577,813	56.3%	-6.0%	\$ 466,116	16.6%	\$ 598,758	21.4%	\$ 85,563	3.1%	\$ 76,033	2.7%	\$ 2,804,283
April	\$ 1,276,570	56.8%	-0.1%	\$ 335,280	14.9%	\$ 502,471	22.3%	\$ 66,629	3.0%	\$ 68,077	3.0%	\$ 2,249,028
May	\$ 1,150,599	56.1%	-2.9%	\$ 311,375	15.2%	\$ 452,059	22.0%	\$ 80,391	3.9%	\$ 57,683	2.8%	\$ 2,052,107
june	\$ 1,007,231	44.9%	-1.6%	\$ 540,119	24.1%	\$ 588,289	26.2%	\$ 56,972	2.5%	\$ 48,894	2.2%	\$ 2,241,505
july	\$ 1,041,271	45.8%	-7.4%	\$ 563,150	24.8%	\$ 588,960	25.9%	\$ 43,663	1.9%	\$ 35,973	1.6%	\$ 2,273,016
August	\$ 783,011	50.5%	0.0%	\$ 253,231	16.3%	\$ 438,508	28.3%	\$ 34,370	2.2%	\$ 42,074	2.7%	\$ 1,551,194
SEPT	\$ 670,529	49.6%	-4.6%	\$ 163,858	12.1%	\$ 445,264	32.9%	\$ 35,365	2.6%	\$ 36,926	2.7%	\$ 1,351,943
FY25 YTD	\$ 13,040,566	55.2%	-1.3%	\$ 3,720,544	15.8%	\$ 5,482,245	23.2%	\$ 685,377	2.9%	\$ 692,251	2.9%	\$ 23,620,983

TOURIST DEVELOPMENT TAX REMITTED BY ZIP CODE, FY16 through FY24

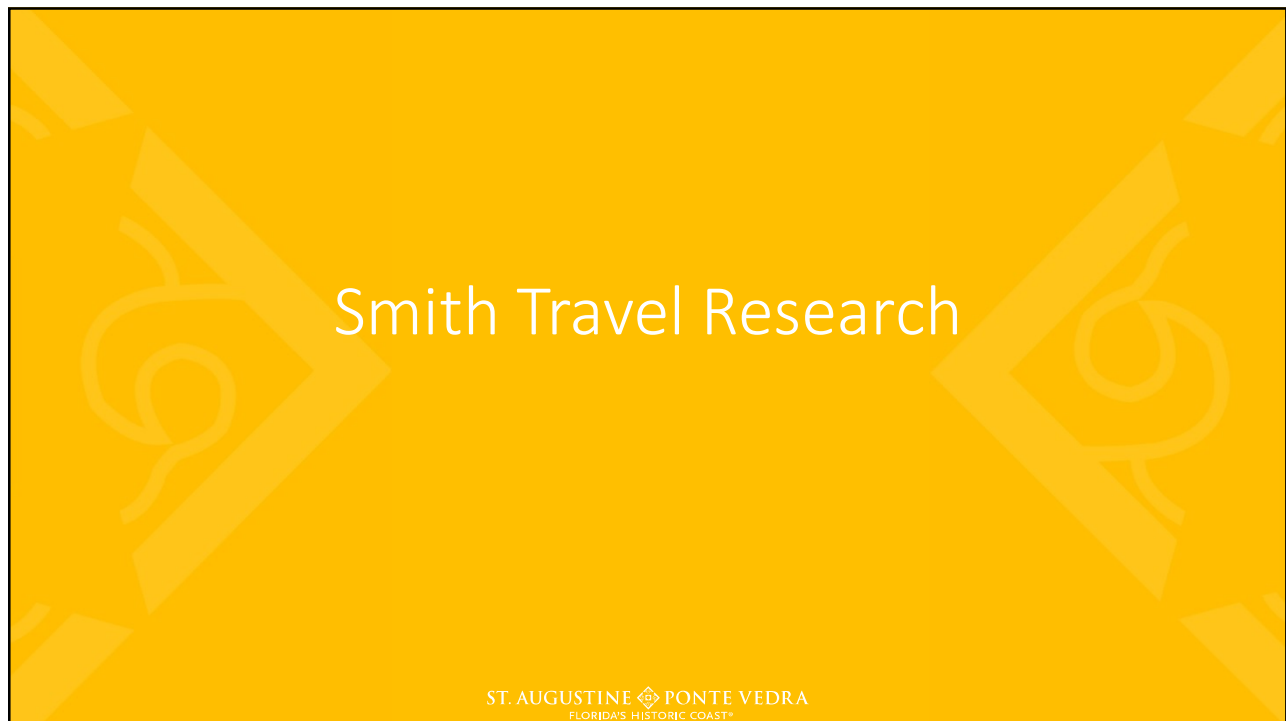
	Anastasia Island		Ponte Vedra Beach		St. Augustine/ Villano/N. Bch		Shores/South/207		WGV + west of I95		I95&SR16 + Palencia		Other		
	32080	% Total	32082	% Total	32084	% Total	32086	% Total	32092	% Total	32095	% Total	OTHER	% Total	TOTAL
FY16	\$ 3,402,894	33.8%	\$ 2,237,272	22.2%	\$ 3,399,917	33.7%	\$ 46,317	0.5%	\$ 799,659	7.9%	\$ 147,864	1.5%	\$ 46,155	0.5%	\$ 10,080,079
FY17	\$ 3,300,396	32.7%	\$ 2,207,743	21.8%	\$ 3,504,561	34.7%	\$ 63,401	0.6%	\$ 827,048	8.2%	\$ 153,758	1.5%	\$ 49,602	0.5%	\$ 10,106,509
FY18	\$ 3,714,721	32.3%	\$ 2,629,109	22.8%	\$ 4,081,024	35.4%	\$ 97,837	0.8%	\$ 854,768	7.4%	\$ 85,523	0.7%	\$ 52,876	0.5%	\$ 11,515,858
FY19	\$ 4,308,104	35.6%	\$ 2,531,345	20.9%	\$ 4,159,634	34.4%	\$ 112,932	0.9%	\$ 807,893	6.7%	\$ 112,251	0.9%	\$ 55,678	0.5%	\$ 12,087,837
FY20	\$ 3,792,503	39.4%	\$ 1,734,140	18.0%	\$ 3,297,613	34.3%	\$ 103,326	1.1%	\$ 559,523	5.8%	\$ 97,682	1.0%	\$ 41,874	0.4%	\$ 9,626,661
FY21	\$ 5,609,445	38.2%	\$ 2,685,205	18.3%	\$ 5,284,352	36.0%	\$ 160,774	1.1%	\$ 761,200	5.2%	\$ 128,333	0.9%	\$ 50,425	0.3%	\$ 14,679,734
FY22	\$ 8,274,843	36.5%	\$ 4,222,752	18.6%	\$ 8,353,846	36.9%	\$ 269,103	1.2%	\$ 1,219,794	5.4%	\$ 216,079	1.0%	\$ 96,763	0.4%	\$ 22,653,181
FY23	\$ 8,611,420	36.4%	\$ 4,539,084	19.2%	\$ 8,710,097	36.8%	\$ 352,036	1.5%	\$ 1,178,653	5.0%	\$ 177,914	0.8%	\$ 96,195	0.4%	\$ 23,665,400
FY24	\$ 8,469,241	35.8%	\$ 4,568,516	19.3%	\$ 8,911,250	37.7%	\$ 302,335	1.3%	\$ 1,125,988	4.8%	\$ 169,831	0.7%	\$ 110,338	0.5%	\$ 23,657,497

FY25 TOURIST DEVELOPMENT TAX REMITTED BY ZIP CODE

	Anastasia Island		Ponte Vedra Beach		St. Augustine/ Villano/N. Bch		Shores/South/207		WGV + west of I95		I95&SR16 + Palencia		Other		
	32080	% Total	32082	% Total	32084	% Total	32086	% Total	32092	% Total	32095	% Total	OTHER	% Total	TOTAL
OCT	\$ 388,398	29.4%	\$ 249,064	18.9%	\$ 542,601	41.1%	\$ 22,126	1.7%	\$ 87,517	6.6%	\$ 14,403	1.1%	\$ 16,013	1.2%	\$ 1,320,121
NOV	\$ 502,601	29.3%	\$ 304,702	17.8%	\$ 774,005	45.1%	\$ 12,746	0.7%	\$ 98,375	5.7%	\$ 16,880	1.0%	\$ 6,792	0.4%	\$ 1,716,102
DEC	\$ 658,288	28.7%	\$ 241,631	10.5%	\$ 1,186,923	51.8%	\$ 43,263	1.9%	\$ 120,448	5.3%	\$ 23,201	1.0%	\$ 17,941	0.8%	\$ 2,291,694
JAN	\$ 555,175	29.8%	\$ 369,761	19.9%	\$ 789,635	42.4%	\$ 33,834	1.8%	\$ 91,329	4.9%	\$ 13,512	0.7%	\$ 9,239	0.5%	\$ 1,862,487
FEB	\$ 664,841	34.9%	\$ 317,754	16.7%	\$ 762,460	40.0%	\$ 39,144	2.1%	\$ 95,973	5.0%	\$ 16,560	0.9%	\$ 10,774	0.6%	\$ 1,907,505
MAR	\$ 1,049,554	37.4%	\$ 529,032	18.9%	\$ 1,031,773	36.8%	\$ 43,050	1.5%	\$ 116,438	4.2%	\$ 22,519	0.8%	\$ 11,917	0.4%	\$ 2,804,283
APR	\$ 839,666	37.3%	\$ 436,976	19.4%	\$ 828,671	36.8%	\$ 30,043	1.3%	\$ 88,284	3.9%	\$ 15,618	0.7%	\$ 9,770	0.4%	\$ 2,249,028
May	\$ 755,288	36.8%	\$ 373,500	18.2%	\$ 756,021	36.8%	\$ 50,325	2.5%	\$ 94,712	4.6%	\$ 13,120	0.6%	\$ 9,141	0.4%	\$ 2,052,107
June	\$ 1,034,464	46.2%	\$ 348,185	15.5%	\$ 737,428	32.9%	\$ 26,497	1.2%	\$ 73,330	3.3%	\$ 11,275	0.5%	\$ 10,327	0.5%	\$ 2,241,505
July	\$ 1,069,596	47.1%	\$ 351,394	15.5%	\$ 711,436	31.3%	\$ 20,456	0.9%	\$ 97,819	4.3%	\$ 13,535	0.6%	\$ 8,779	0.4%	\$ 2,273,016
August	\$ 599,161	38.6%	\$ 291,241	18.8%	\$ 560,465	36.1%	\$ 19,441	1.3%	\$ 66,853	4.3%	\$ 8,064	0.5%	\$ 5,969	0.4%	\$ 1,551,194
SEPT	\$409,193	30.3%	\$218,351	16.2%	\$631,968	46.7%	\$22,271	1.6%	\$58,208	4.3%	\$7,439	0.6%	\$4,513	0.3%	\$ 1,351,943
Y25 YTD	\$ 8,526,224	36.1%	\$ 4,031,592	17.1%	\$ 9,313,385	39.4%	\$ 363,196	1.5%	\$ 1,089,287	4.6%	\$ 176,125	0.7%	\$ 121,174	0.5%	\$ 23,620,983



1

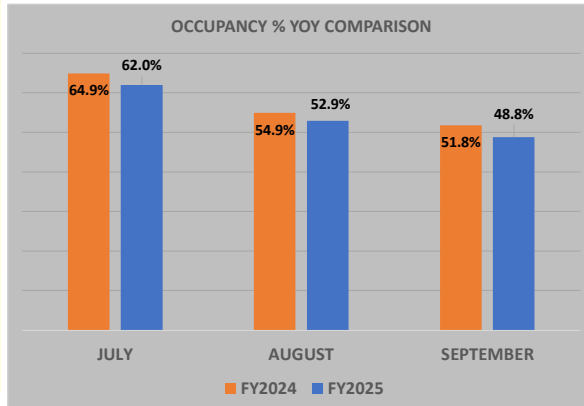


2

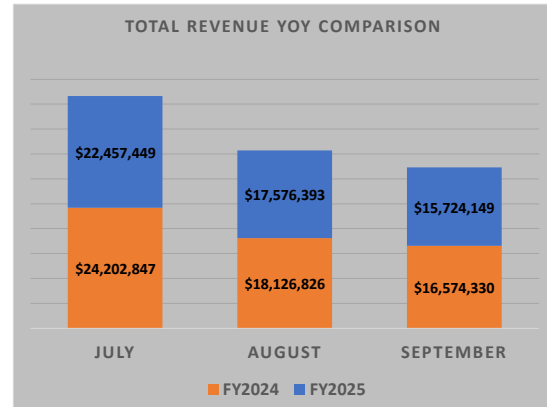
Smith Travel Research September 2025

Occupancy % September 2025

- Occupancy % declined -5.8% YOY



TOTAL REVENUE YOY COMPARISON



Total Revenue September 2025

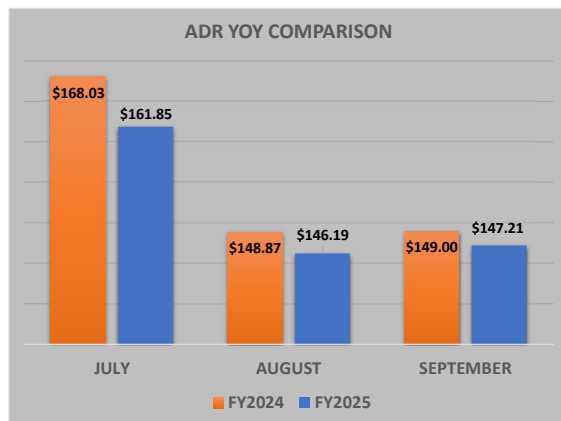
- Total Revenue declined -5.1% YOY

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Smith Travel Research September 2025

ADR YOY COMPARISON

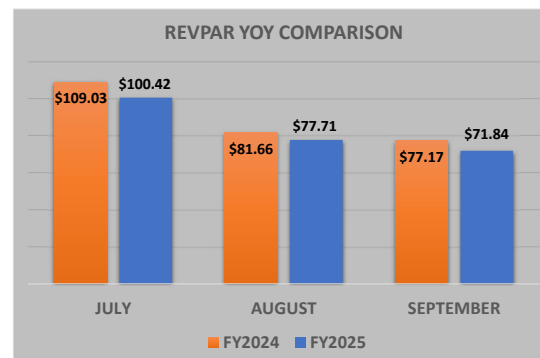


ADR September 2025

- ADR declined -1.2% YOY

RevPAR September 2025

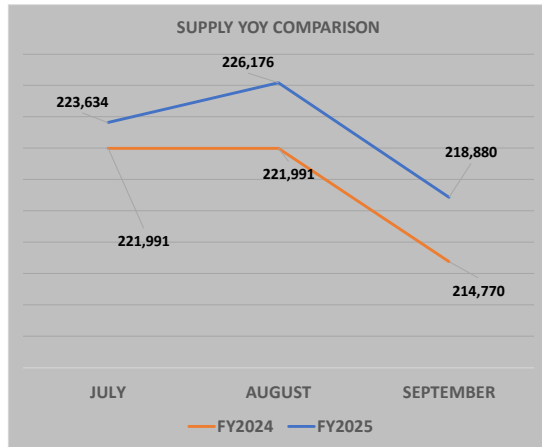
- RevPAR declined -6.9% YOY



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Smith Travel Research September 2025

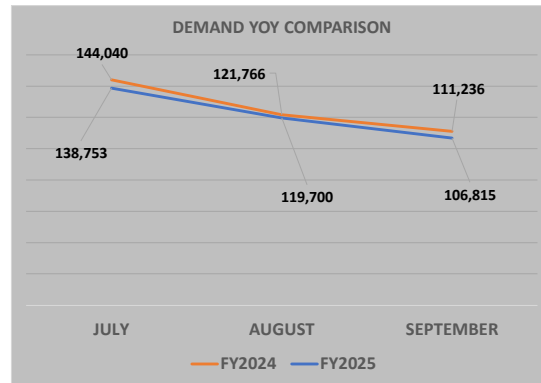


Supply September 2025

- Supply increased +1.9% YOY

Demand September 2025

- Demand declined -4.0% YOY



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September 2025 vs. September 2024 Comp Set

	Current Month September 2025 vs September 2024						
	Occ %	ADR	Percent Change from September 2024				Room Rev
	2025	2025	Occ	ADR	RevPAR	Rev	
Hillsborough County, FL	60.6	141.46	-7.6	-1.3	-8.8	-7.5	
Nassau County, FL	54.5	246.55	-6.4	2.7	-3.8	-3.9	
Pinellas County, FL	55.1	148.21	-3.5	3.4	-0.2	-4.4	
St Johns County, FL	48.8	147.21	-5.8	-1.2	-6.9	-5.1	
Charleston, SC	67.1	175.27	-1.8	0.7	-1.1	-1.7	
Jacksonville, FL	58.6	124.70	-2.8	-1.0	-3.8	-1.2	
Myrtle Beach, SC	51.7	113.24	-8.7	-4.0	-12.4	-13.9	
Orlando, FL	61.0	171.75	-4.2	-1.4	-5.6	-4.8	
Sarasota, FL	51.0	143.75	-9.7	1.8	-8.1	-9.1	
Savannah, GA	60.9	138.93	-11.3	0.4	-11.0	-7.9	
Fort Walton Beach, FL	54.4	160.99	-5.0	3.2	-2.0	0.0	
Daytona Beach, FL	40.1	112.91	-13.2	1.7	-11.7	-10.1	
Zip Code 32084+	52.0	140.40	-3.4	1.5	-1.9	-0.1	
Zip Code 32080+	50.6	132.81	-2.2	0.1	-2.1	-2.1	
Zip Code 32092+	43.6	97.80	-16.8	-2.2	-18.6	-12.3	
Ponte Vedra+	47.8	248.80	-1.1	-8.8	-9.8	-10.1	

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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

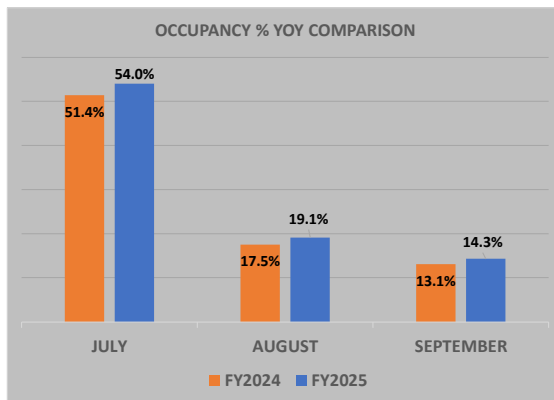
7

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

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Vacation Rental Analytics September 2025



Paid Occupancy % September 2025

- Paid Occupancy % increased **+9.2% YOY**

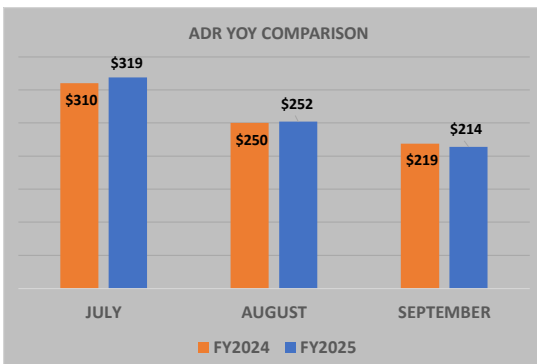
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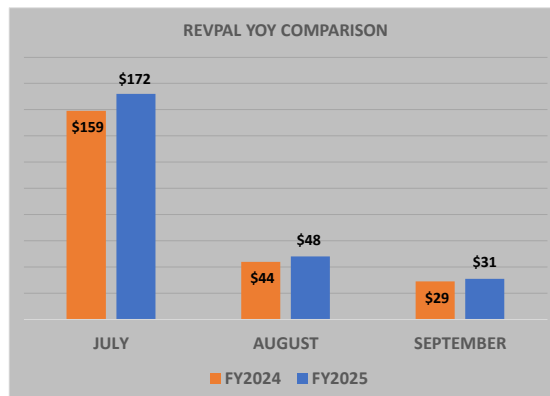
Vacation Rental Analytics September 2025

ADR September 2025

- ADR declined **-2.3% YOY**



RevPAL YOY COMPARISON



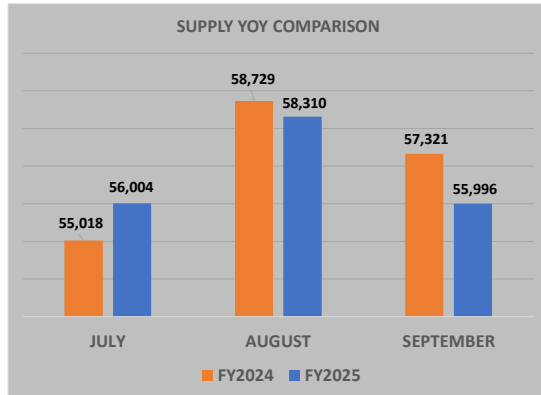
RevPAL September 2025

- RevPAL increased **+6.9% YOY**

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Vacation Rental Analytics September 2025

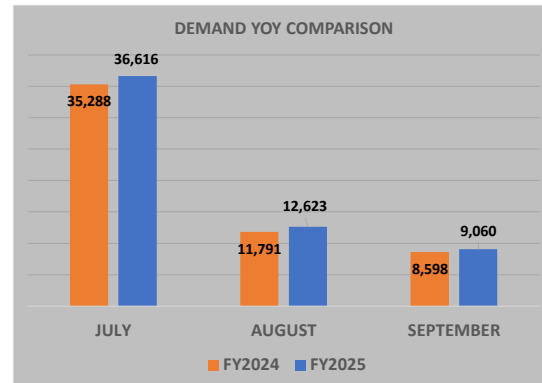


Supply September 2025

- **Supply declined -2.3% YOY**

Demand September 2025

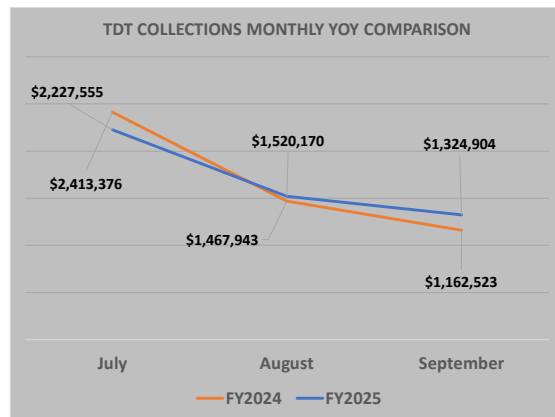
- **Demand increased +5.4% YOY**



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Tourist Development Tax Collections September 2025

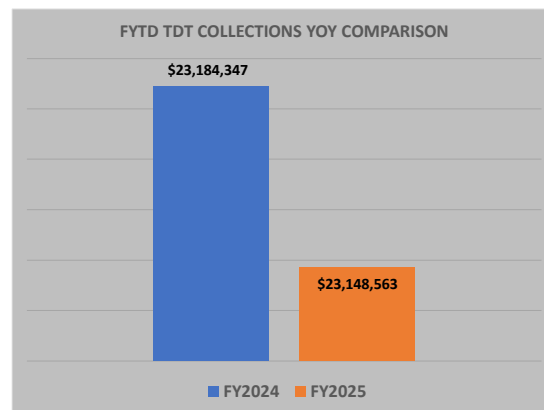


TDT Collections September 2025

- **TDT Collections increased +14.0% YOY**

FYTD TDT Collections September 2025

- **FYTD TDT Collections declined -0.2% YOY**



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Website + eCRM

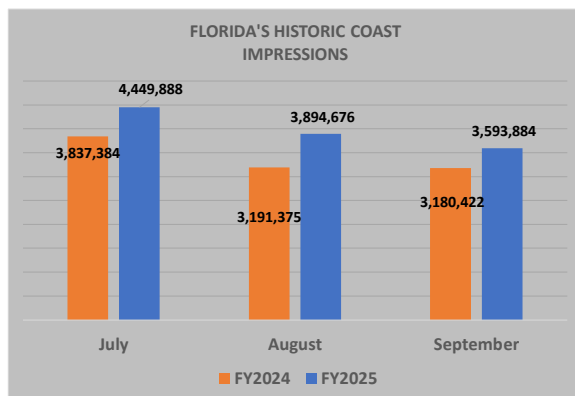
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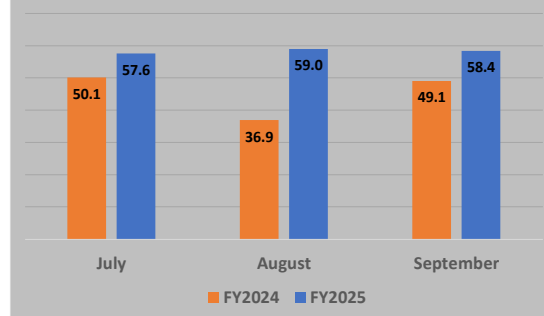
Website Report September 2025

Website Impressions September 2025

- VCB website impressions increased by +13%



ENGAGEMENT RATE YOY COMPARISON



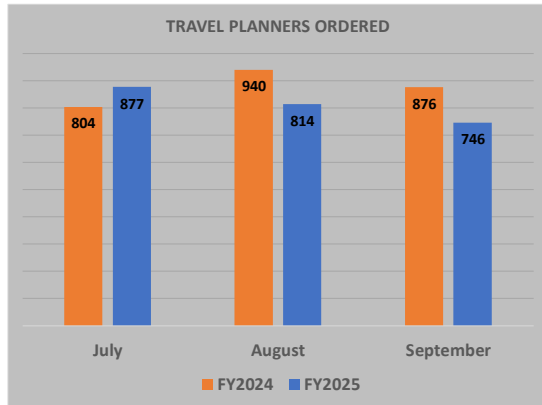
Website Engagement Rate September 2025

- Engagement Rate increased by +19% YOY

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Website Report September 2025

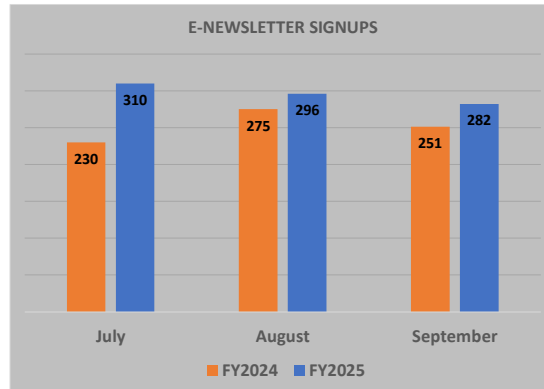


Guides Ordered September 2025

- Guides ordered declined by -14.8% YOY

eNewsletter Signups September 2025

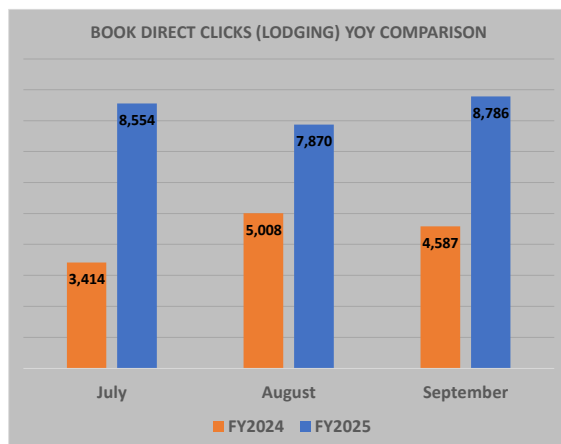
- eNewsletter signups increased +12.4% YOY



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Website Report September 2025



BookDirect Clicks September 2025

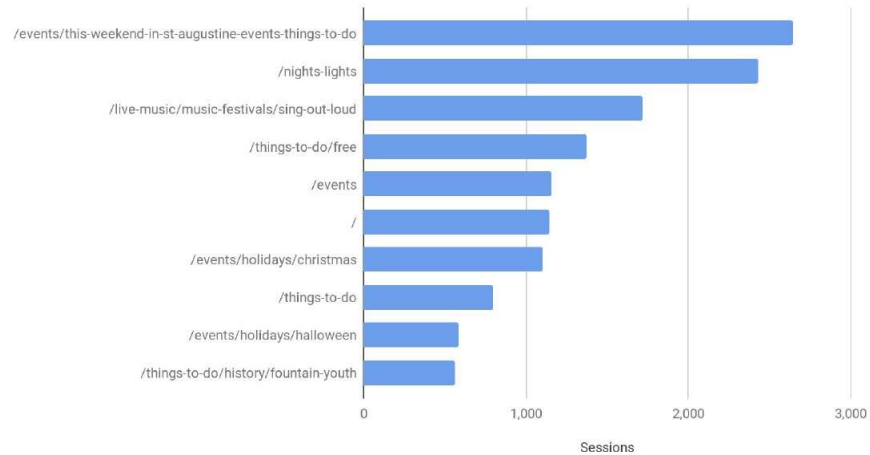
- BookDirect clicks increased by +91.5% YOY

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Top Landing Pages

Sing Out Loud increased 43% year-over-year and Halloween increased 8% year-over-year.

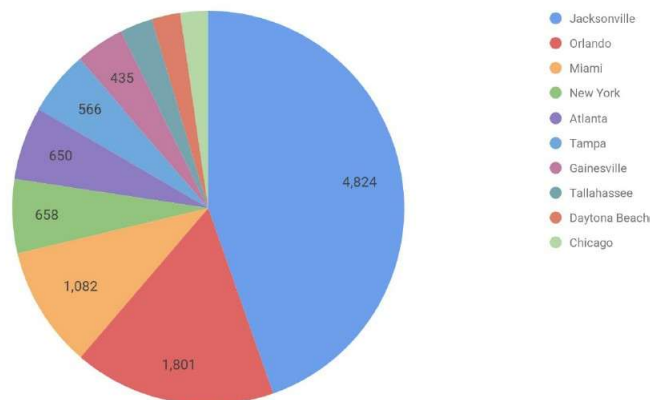


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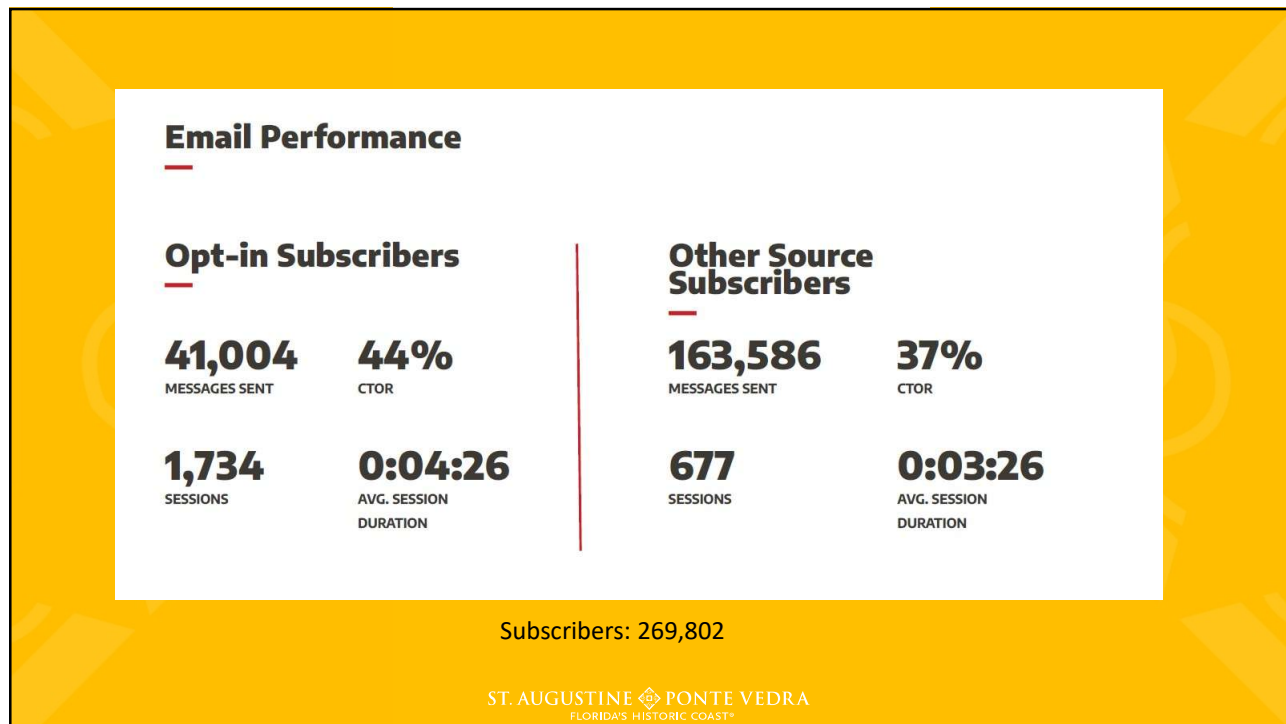
Sessions By City

Tallahassee increased 36% and Daytona Beach increased 3% year-over-year.

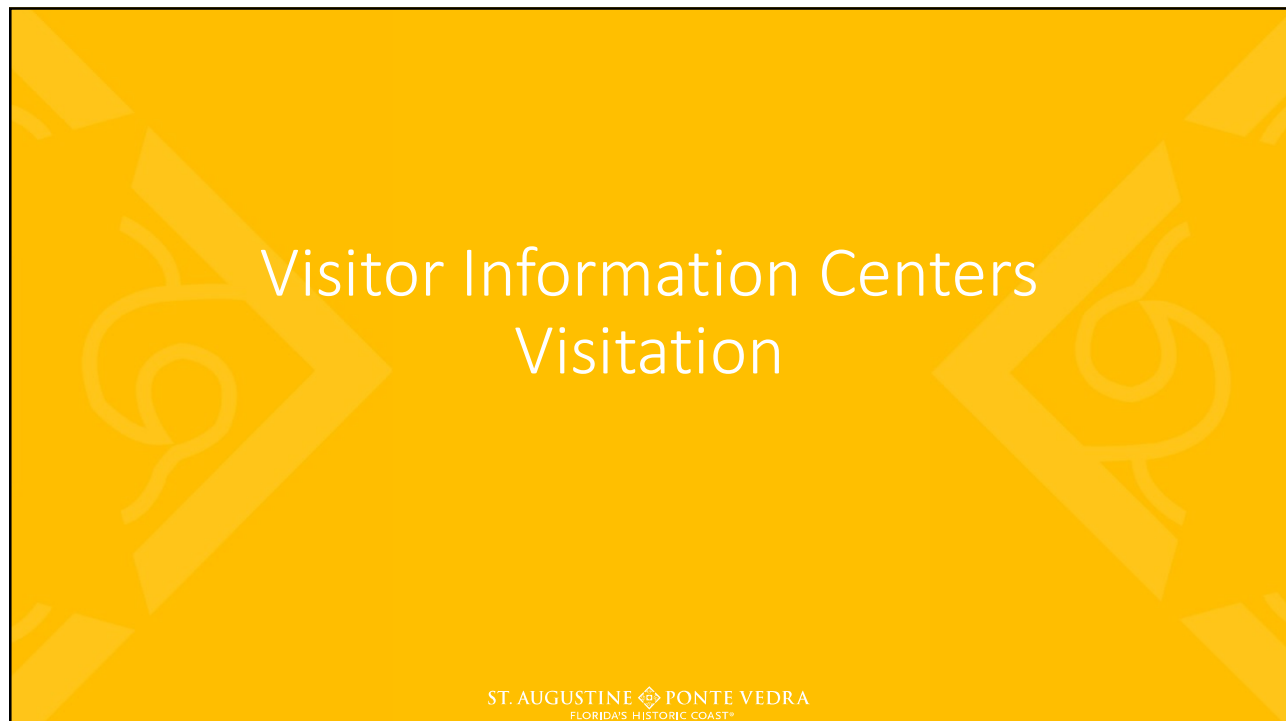


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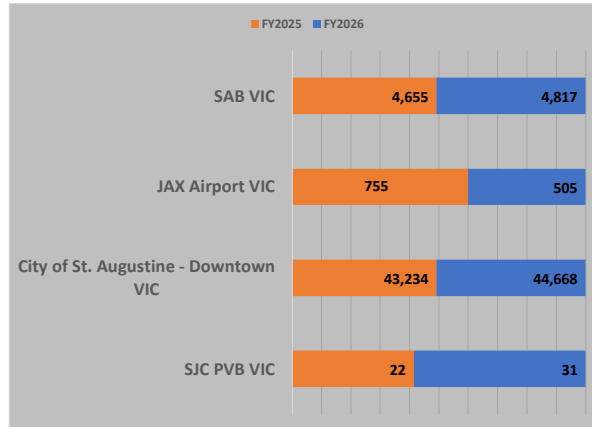


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VIC Visitation October 2025



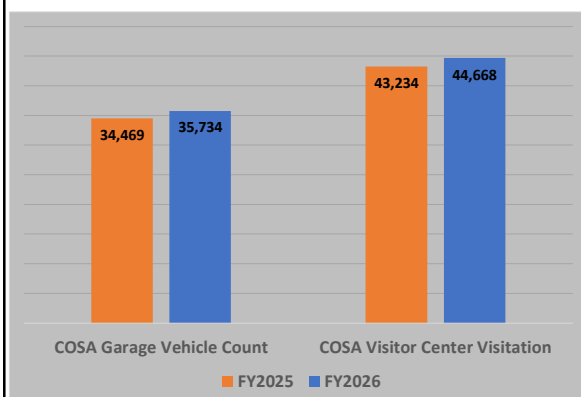
VIC Visitation - October 2025

- Visitation to the **St. Augustine Beach Visitor Information Center** increased by **+3.5%**
- Visitation to the **City of St. Augustine Downtown Visitor Information Center** increased **+3.3% YOY**
- **SJC PVB Visitor Information Center** increased by **+40.9%**
- Visitation to the **Jacksonville Airport Visitor Information Center** declined -33.1% due to construction – expected to be completed in March 2026.

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City of St Augustine Downtown VIC Visitation October 2025



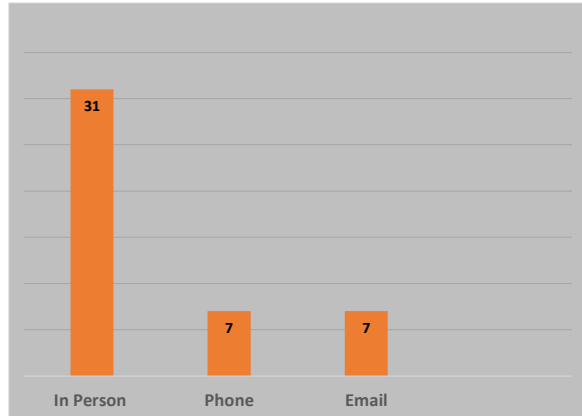
City of St Augustine Downtown VIC Visitation - October 2025

- Visitor Information Center Vehicle Count 2025 34,469
- Visitor Information Center Vehicle Count 2026 35,734
- Visitor Information Center In-Person 2025 43,234
- Visitor Information Center In-Person 2026 44,668

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Ponte Vedra VIC Visitation October 2025



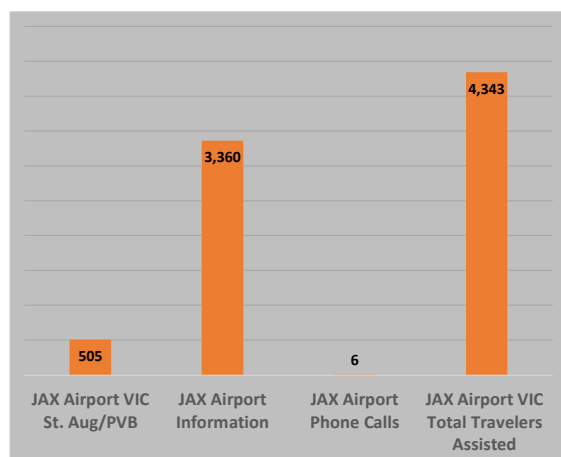
Ponte Vedra VIC Visitation October 2025

• Visitors Served In-Person	31
• # Phone Calls	7
• # Emails	7
• Mobile VIC	0

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FLORIDA'S HISTORIC COAST®

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Jacksonville Airport VIC Visitation October 2025



Jacksonville Airport VIC Visitation - October 2025

• Jacksonville Airport VIC St. Aug & PV	505
• Jacksonville Airport VIC Airport Information	3,360
• Jacksonville Airport VIC Phone Calls	6
• Jacksonville Airport VIC Visitor In-Person 2025	4,343

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FLORIDA'S HISTORIC COAST®

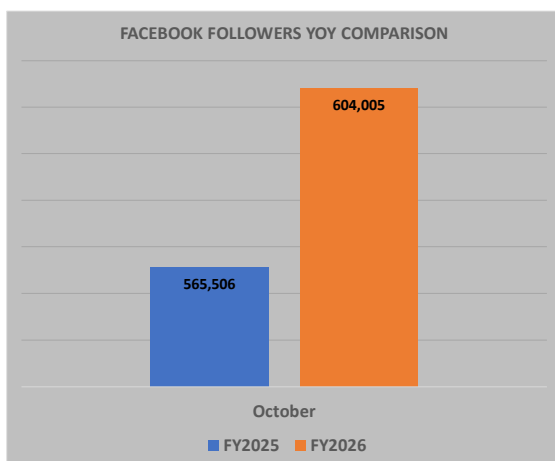
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Social Media

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FLORIDA'S HISTORIC COAST®

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Social Media October 2025



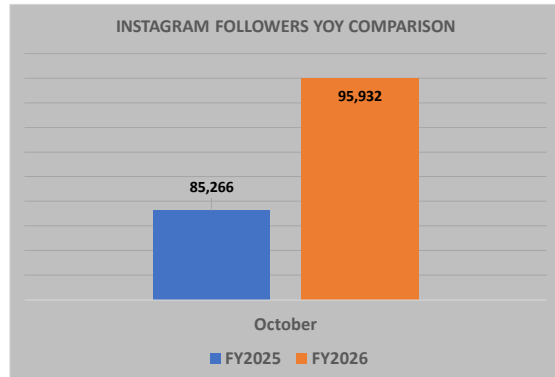
Facebook Followers October 2025

- Facebook Followers increased +6.8% YOY

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FLORIDA'S HISTORIC COAST®

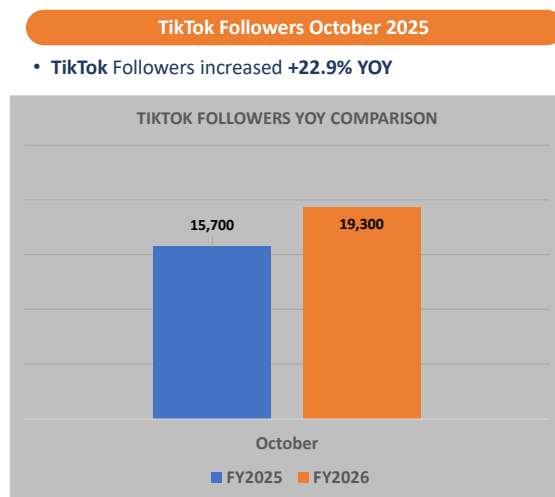
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Social Media October 2025



Instagram Followers October 2025

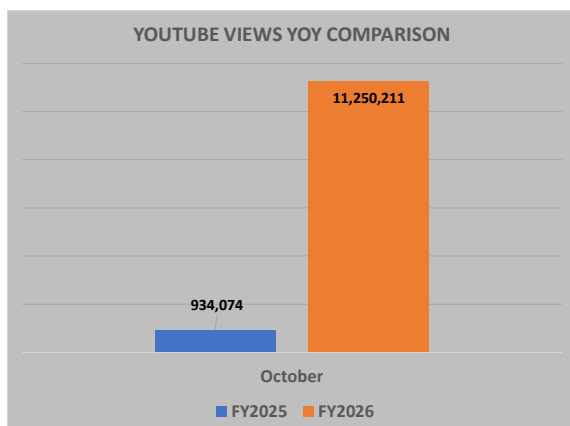
- **Instagram** increased **+12.5% YOY**



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Social Media October 2025



YouTube Views October 2025

- **YouTube Views** increased **+1104.4% YOY**

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FLORIDA'S HISTORIC COAST®

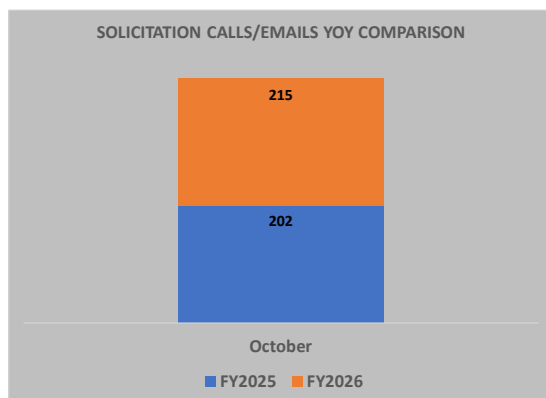
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Sales

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Sales Measurement Summary



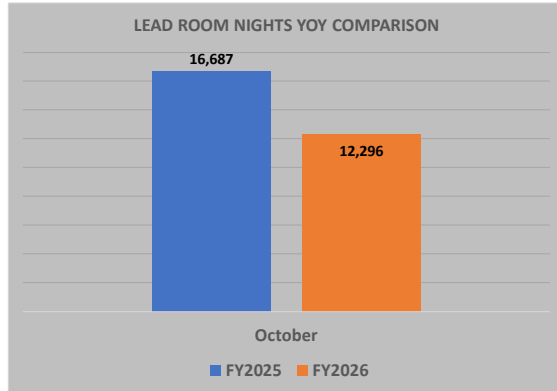
Solicitations October 2025

- Solicitations increased +2.4% YOY

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Sales Report October 2025

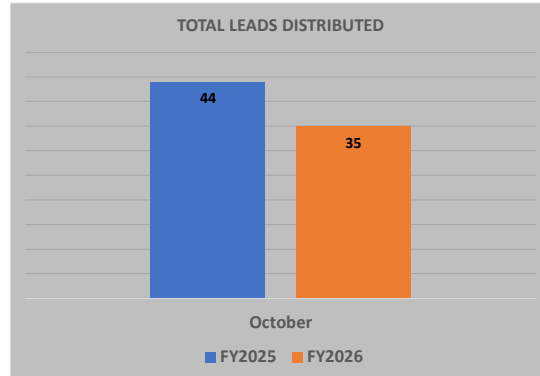


Lead Room Nights October 2025

- Lead Room Nights declined -26.3% YOY

Lead Distribution October 2025

- Lead Distribution declined -20.5% YOY



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CEO's Comments

- September 2025 Traditional Lodging Stats: Occupancy 48.4% (-5.8%), ADR \$147.21 (-1.2%), RevPAR \$71.84 (-6.9%), Demand is -4.0%, Revenue is -5.1%, Supply is +1.9%.
- September 2025 Vacation Rental Stats: Paid Occupancy 14.3% (+9.2%), ADR \$214 (-2.3%), RevPAL \$31 (+6.9%), Demand +5.4%; Supply -2.3%.
- September 2025 TDT Collections were -0.2% YOY
- October VIC Visitation YOY for the St. Augustine Beach VIC is +3.5%; CoSA VIC was +3.3%; Ponte Vedra Beach VIC was +40.9%; Jax Airport was -33.1 due to construction – expected completion in March 2026.
- October 2025 Social Media YOY for Facebook/Meta was +6.8%, Instagram was +12.5%, TikTok was +22.9%, and YouTube was +1104.4%
- October 2025 Sales team solicitations are +6.4% YOY; lead room nights are -26.3% YOY; lead distributions are -20.5% YOY.

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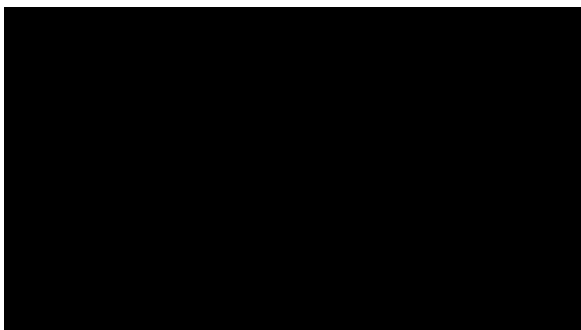
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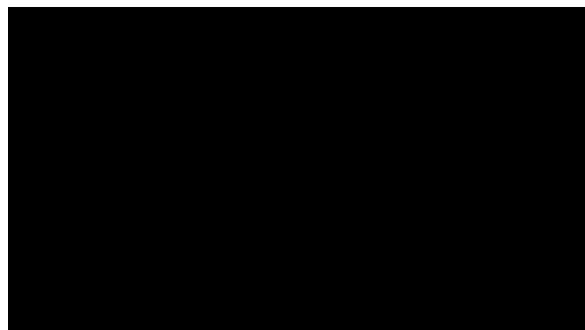
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Video (CTV/OLV/YouTube) + Paid Social Video

Nights of Lights :15



Nights of Lights :30



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Paid Social Static



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Digital Banners



Tinsley

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Nights of Lights 2025



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Nights of Lights Know Before You Go



**Nights of Lights Know Before You
Go web page
QR Code**

- Nights of Lights is a walk-through experience—not a drive-through.
- Park in one of the designated shuttle lots, ride the free shuttle, and explore downtown on foot for the best views. Using the shuttles helps you avoid parking hassles and traffic congestion.
- Please plan ahead for St. Augustine's Nights of Lights by allowing extra travel time and keeping safety a priority. With large crowds expected, patience is essential. Following safety guidelines ensures a festive and stress-free experience for everyone.

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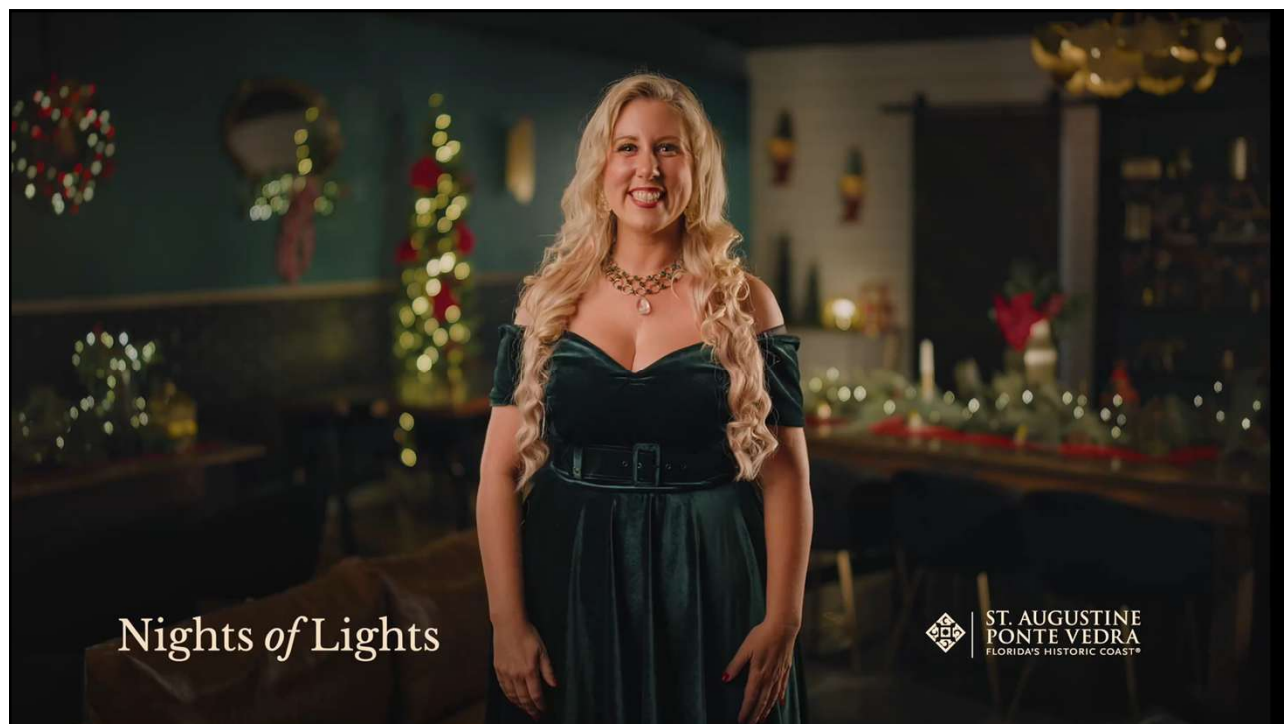
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