

# Visit St. Lucie County

January – March 2017 Visitor Tracking Report

Phillip Downs, Ph.D.  
Joseph St. Germain, Ph.D.  
Rachael Anglin  
Downs & St. Germain Research



# Study Objectives

---

- Profile travel parties to St. Lucie County
- Assess motivation for visiting St. Lucie County
- Determine likelihood of returning
- Define mode of transportation
- Capture rating of St. Lucie County
- Calculate daily expenditures & expenditures by category
- Investigate trip planning information
- Assess use of Visit St. Lucie Mobile App
- Create a demographic profile of visitors

# Methodology

- Visitor Tracking Study
  - Internet survey & in-person interviews in public areas & at events around St. Lucie County
  - Sample size – 1,085 completed interviews
- Target individuals
  - 2<sup>nd</sup> quarter visitors to St. Lucie County
- Data Collection: January 2017 – March 2017

# Executive Summary



# Tourism Snapshot: Jan-Mar 2017

Visitor Statistics	Jan – Mar 2017
Visitors	<b>325,709</b>
Direct Expenditures <sup>1</sup>	<b>\$181,686,600</b>
Total Economic Impact <sup>2</sup>	<b>\$274,346,800</b>

<sup>1</sup>Includes spending for: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

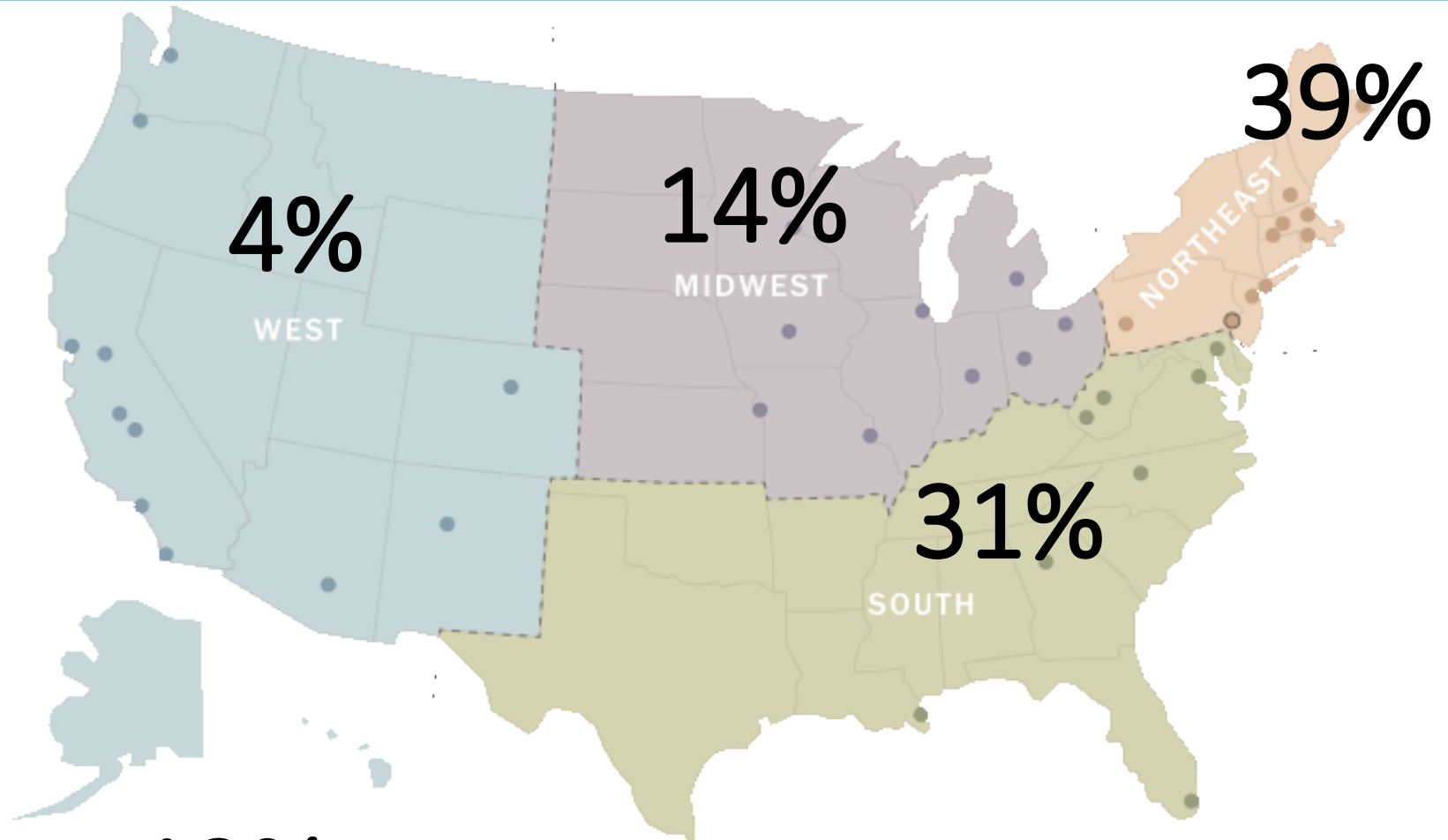
<sup>2</sup>A multiplier of 1.51 was used based on data from other destinations. The final multiplier for St. Lucie County will be calculated after 12 months of data collection.

Hotel Lodging Statistics	Jan – Mar 2017
Occupancy <sup>3</sup>	<b>76.7%</b>
Room Rates <sup>3</sup>	<b>\$121.20</b>
RevPAR <sup>3</sup>	<b>\$92.96</b>
Room Nights <sup>3</sup>	<b>333,484</b>
TDT Collections	<b>\$1,454,871</b>

<sup>3</sup>From STR Report



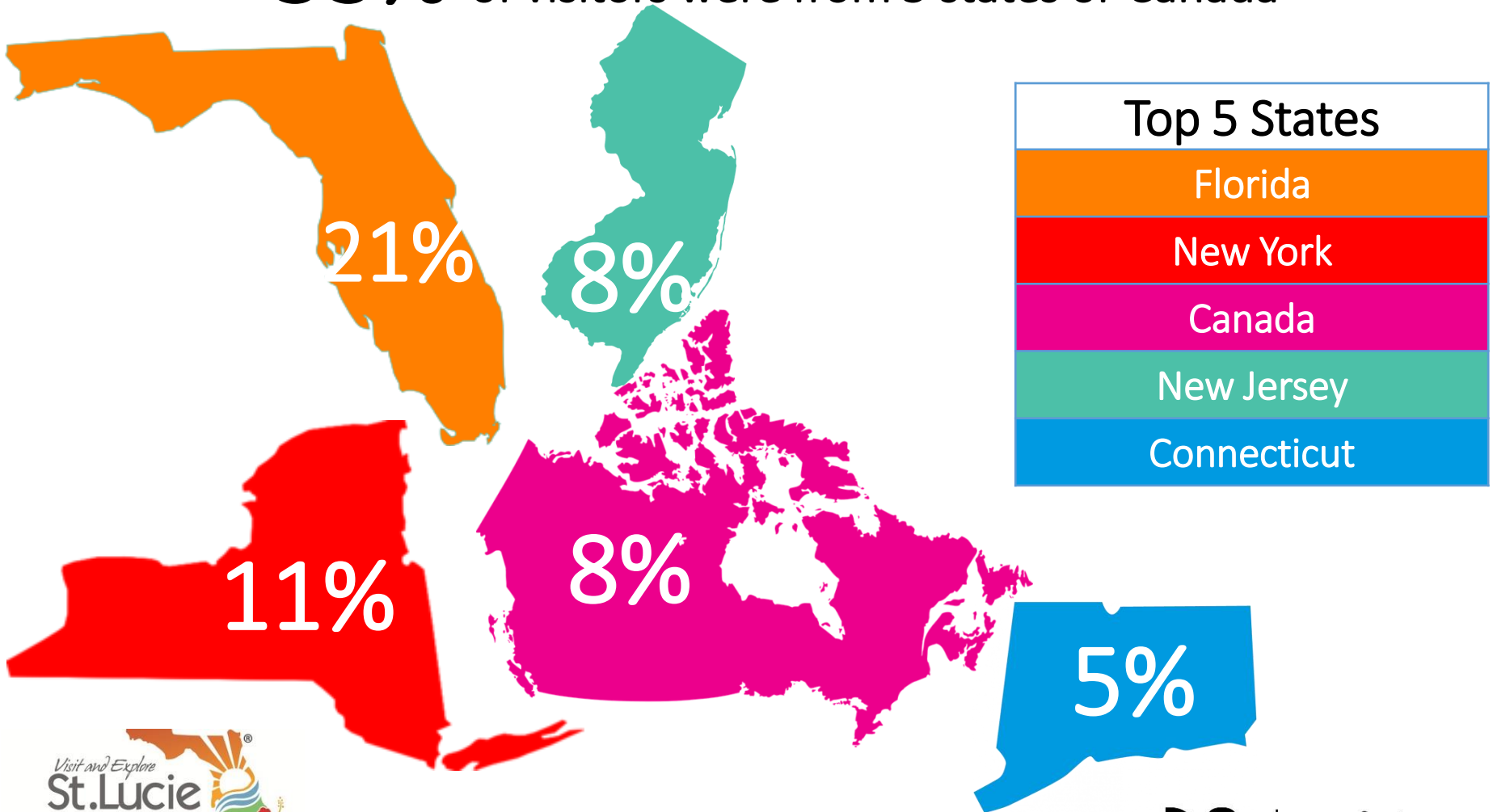
# Origin of Visitors



**12%** of visitors were from areas outside the U.S.

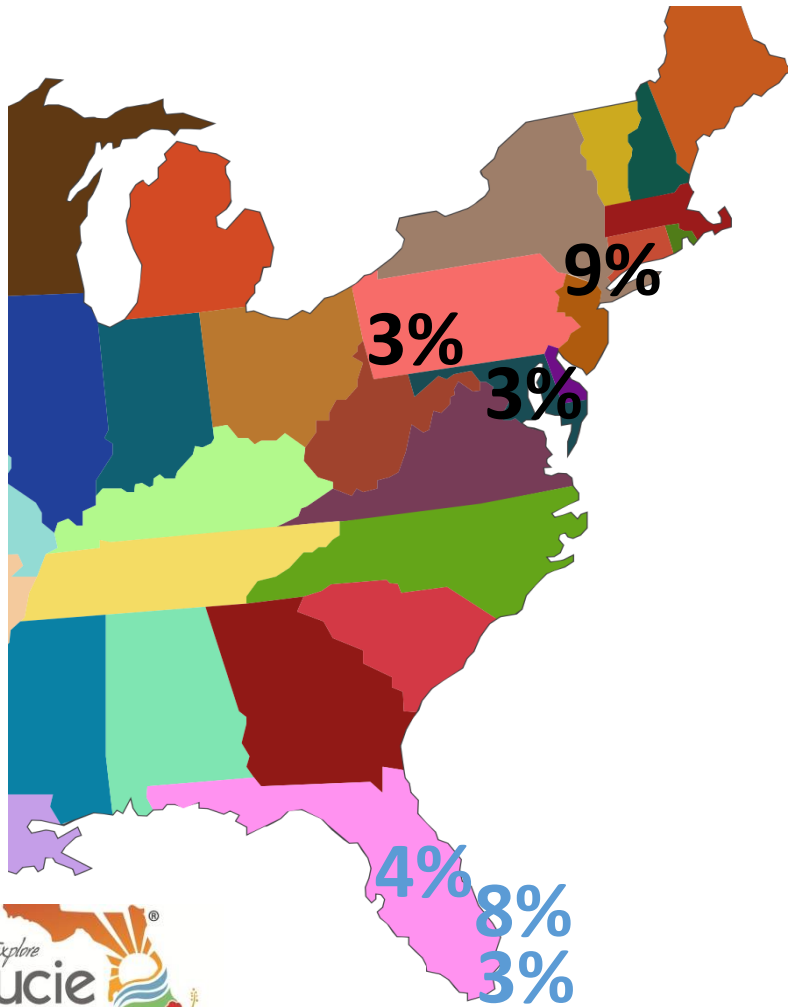
# Origin of Visitors

**53%** of visitors were from 5 states or Canada



# Origin of Visitors

**3 in 10** visitors were from 6 U.S. markets



Top 6 Markets
New York City
Surrounding counties
Orlando
Miami-Ft. Lauderdale
Washington DC-Baltimore
Pittsburgh

# Visitors' Accommodations

46%

Paid Accommodations



21%

Friends & Relatives



33%

Day Trippers



# Visitors' Paid Accommodations

46% Hotel/motel



24% Personal house/condo



20% Rental house/condominium

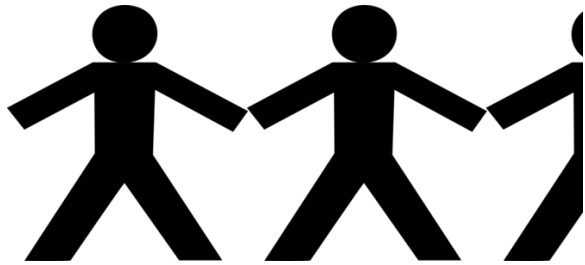


9% RV park/campground/cabin



# Travel Parties

The typical visitor traveled in a party composed of **2.8** people



**2 in 5** visitors traveled as a couple to St. Lucie County



**28%** traveled with at least one person under the age of 20 in their travel party



**1 in 7** visitors traveled by themselves to St. Lucie County



# Transportation

65% of visitors drove to  
St. Lucie County

24% of all visitors flew in via Palm  
Beach International Airport



# Length of Stay

- Visitors spent 6.9<sup>1</sup> nights in St. Lucie County



<sup>1</sup>When including visitors who stayed longer than 1 month, average nights stayed is 37.3 nights.

# Visitation

➤ 3 in 10 were first time visitors



# Visitor Satisfaction

- Visitors gave St. Lucie County a 9.0<sup>1</sup> as a place to vacation
- 92% of visitors will return to St. Lucie County



<sup>1</sup>10=Excellent; 1=Poor.

# Top Reasons for Visiting

Relax & unwind



Beach



Art galleries, museums



Friends or family



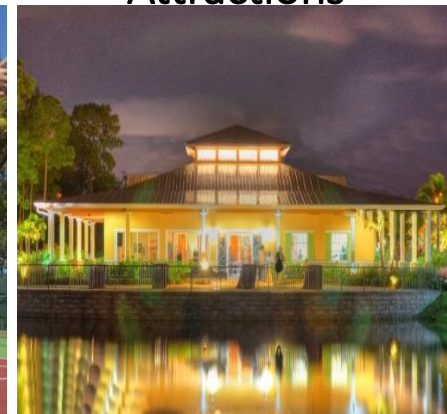
Sporting event



Family vacation



Attractions



# Top Activities During Visit

Relax & unwind



Beach



Friends or family



Art galleries, museums, cultural events



Sporting event



Attractions



Restaurants



Family vacation



# Visitor Spending

- Visitors spent **\$297** a day
- Visitors spent **\$2,049** on their trip



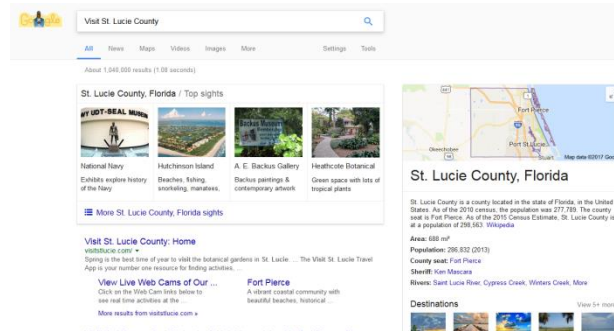
# Trip Planning

- 46% of visitors planned their trip a month or less in advance
- Top trip planning sources:

Friends



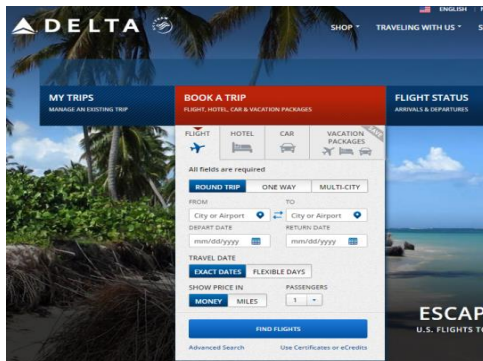
Google, Bing, etc.



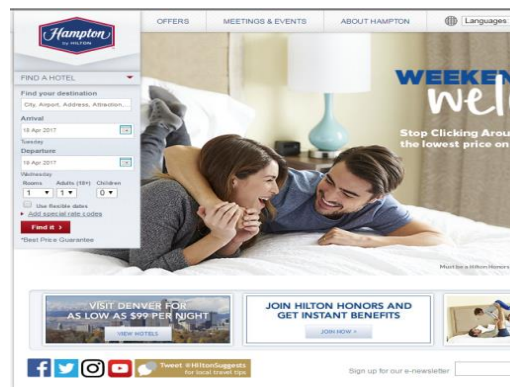
Trip planning apps



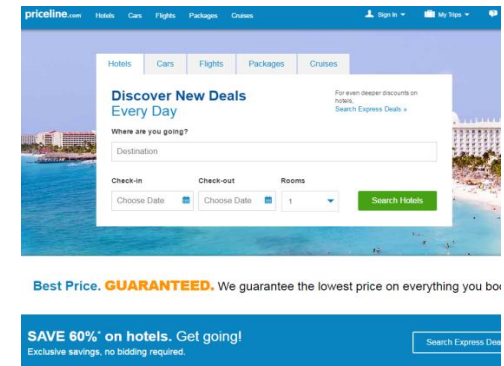
Airline website



Hotel website



Travel website



# Other Destinations

- 14% of visitors considered other destinations in place or in addition to St. Lucie County when planning their trip, including the following:

## Jensen Beach



## West Palm Beach



## Vero Beach



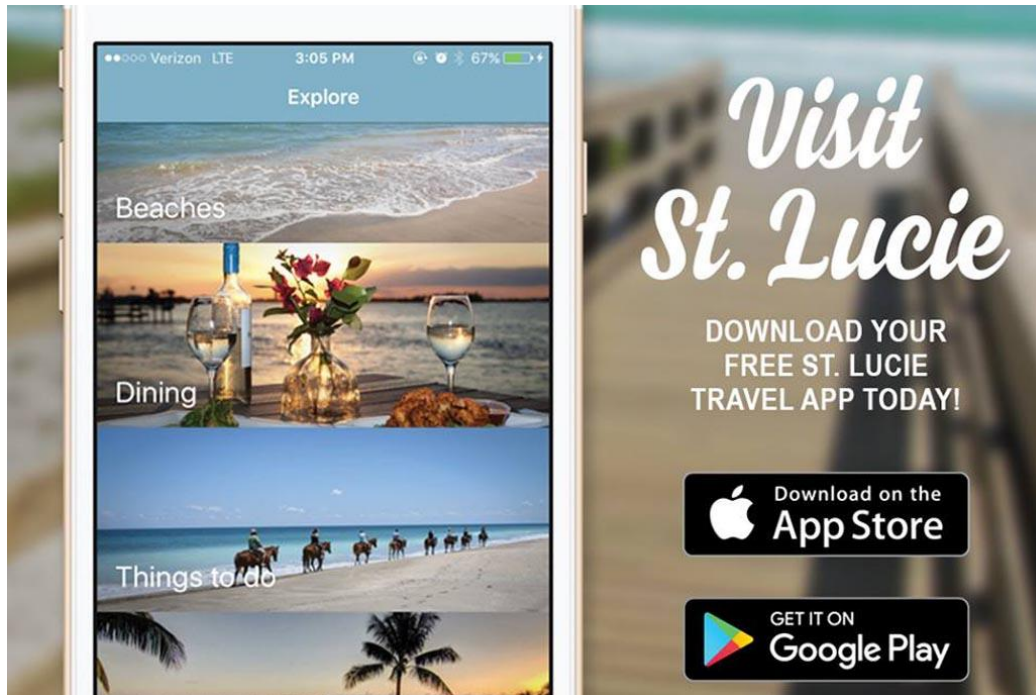
# Additional Upscale Hotels

- 32% of visitors would visit more often if there were additional upscale hotels on the beach.
- 60% of visitors agree that adding upscale hotels on the beach would make St. Lucie County a more attractive destination to visit.



# Advertising & Promotions

- **11%** of visitors had seen, read or heard advertising or promotions about the St. Lucie County area
- **16%** of visitors who had seen, read or heard advertising or promotions about the area recalled Visit St. Lucie County as the sponsor
- **4%** of visitors used the Visit St. Lucie mobile app



# Perceptions of St. Lucie County



## Nice place to visit

- “An excellent city to spend quality time with someone special.”



## Relaxing, laid back, tranquil

- “St. Lucie County is a place you can go for relaxation. Not too fast paced or too slow, just enough for someone just wanting to unwind.”



## Beautiful

- “Absolutely beautiful with great parking and super clean beaches.”

# Demographics

## ➤ The typical St. Lucie County Visitor:

- Is 57 years old
- Has a household income of \$78,500
- Is Caucasian (86%)
- Is female (52%)



# Quarterly Comparisons



# Quarterly Comparisons

	Oct-Dec 2016	Jan-Mar 2017
Visitors	278,055	325,709
Direct expenditures	\$105,544,200	\$181,686,600
Total economic impact	\$159,371,700	\$274,346,800
Occupancy	59.8%	76.7%
Room rates	\$84.28	\$121.20
RevPAR	\$50.40	\$92.96
Room nights	265,782	333,484
TDT collections	\$759,075	\$1,454,871

# Quarterly Comparisons

Top Origin States	Oct-Dec 2016	Jan-Mar 2017
Florida	43%	21%
New York	3%	11%
Canada	6%	8%
New Jersey	5%	8%
Georgia	4%	3%
Connecticut	4%	5%

Top Origin Markets	Oct-Dec 2016	Jan-Mar 2017
Surrounding Counties	25%	8%
Miami-Ft. Lauderdale	6%	3%
New York City	5%	9%
Orlando	3%	4%
Atlanta	3%	2%
Washington DC-Baltimore	3%	3%
Pittsburgh	1%	3%



# Quarterly Comparisons

	Oct-Dec 2016	Jan-Mar 2017
Paid accommodations	42%	46%
VFRS	27%	21%
Day trippers	31%	33%
Travel party size	2.9	2.8
Traveled as a couple	37%	43%
Traveled as a family	34%	35%
Drove	72%	65%

# Quarterly Comparisons

	Oct-Dec 2016	Jan-Mar 2017
Will return to St. Lucie County	94%	92%
Rating for overall experience	8.6	9.0
Length of stay	6.6	6.9
Length of stay including long-term visitors	23.8	37.3
Visitor spending per day	\$254	\$297
Visitor spending per trip	\$1,678	\$2,049
1 <sup>st</sup> time visitors	23%	30%
10+ visits to St. Lucie	20%	4%

# Quarterly Comparisons

	Oct-Dec 2016	Jan-Mar 2017
Used Visit St. Lucie County mobile app	7%	4%
Considered other destinations	18%	14%
Recalled advertising or promotions	18%	11%
Median age	54	57
Median household income	\$62,500	\$78,500
Caucasian	87%	86%
Female	43%	52%

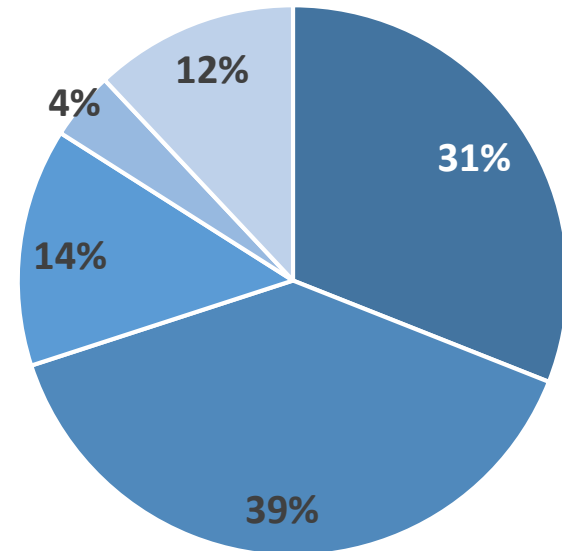
# Detailed Findings



# Origin of Visitors

U.S. Market	% of Visitors
New York City	9%
Surrounding Counties	8%
Orlando	4%
Miami-Ft. Lauderdale	3%
Washington DC-Baltimore	3%
Pittsburgh	3%
Atlanta	2%
Detroit	2%
Philadelphia	2%
Chicago	2%
Dallas-Ft. Worth	1%
Columbus	1%
Boston	1%
Denver	1%
Nashville	1%
Louisville	1%
Greensboro	1%

45% of St. Lucie County visitors live in 17 markets



- Southeast
- Northeast
- Midwest
- West
- International

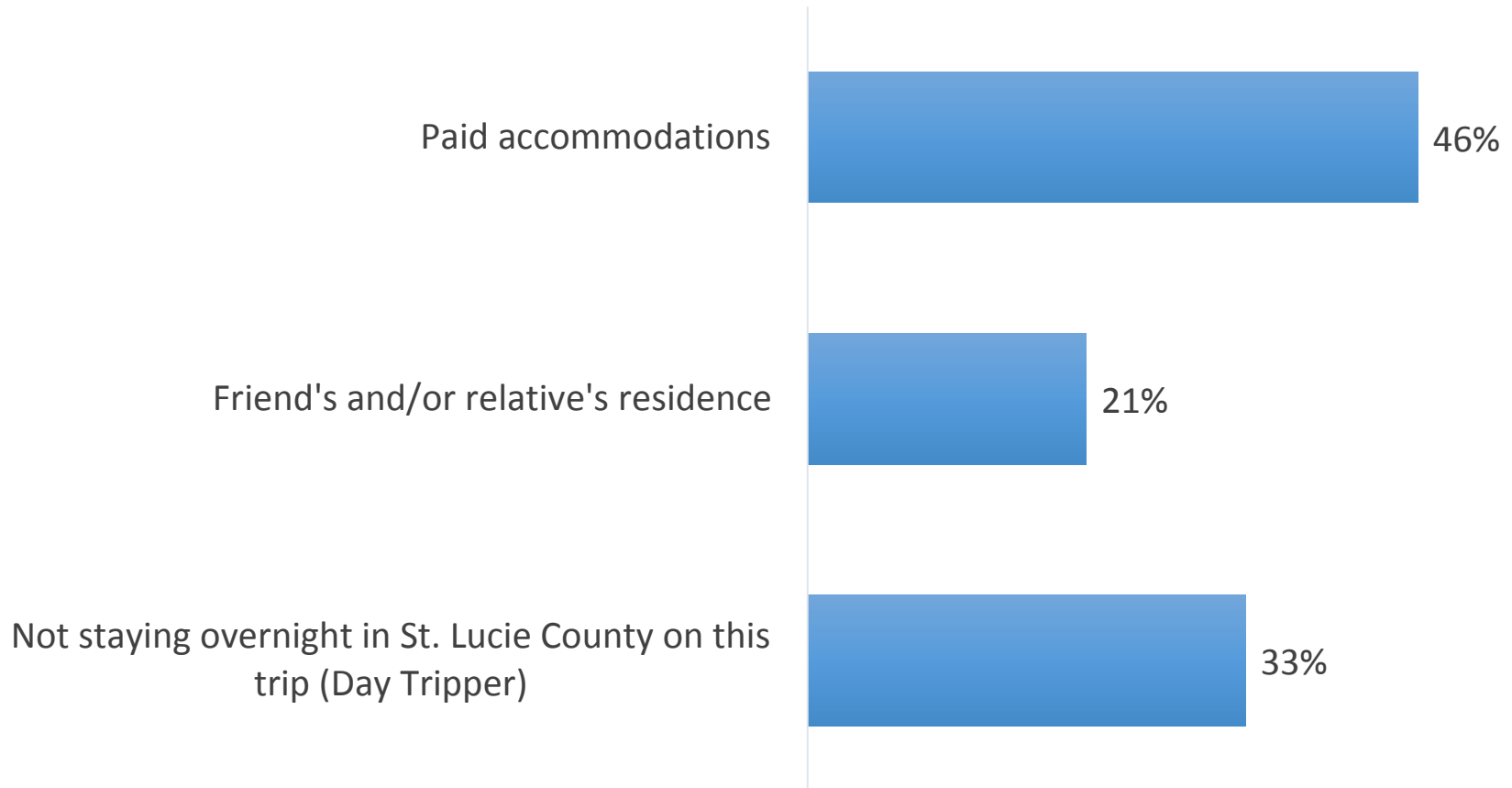


# Origin of Visitors

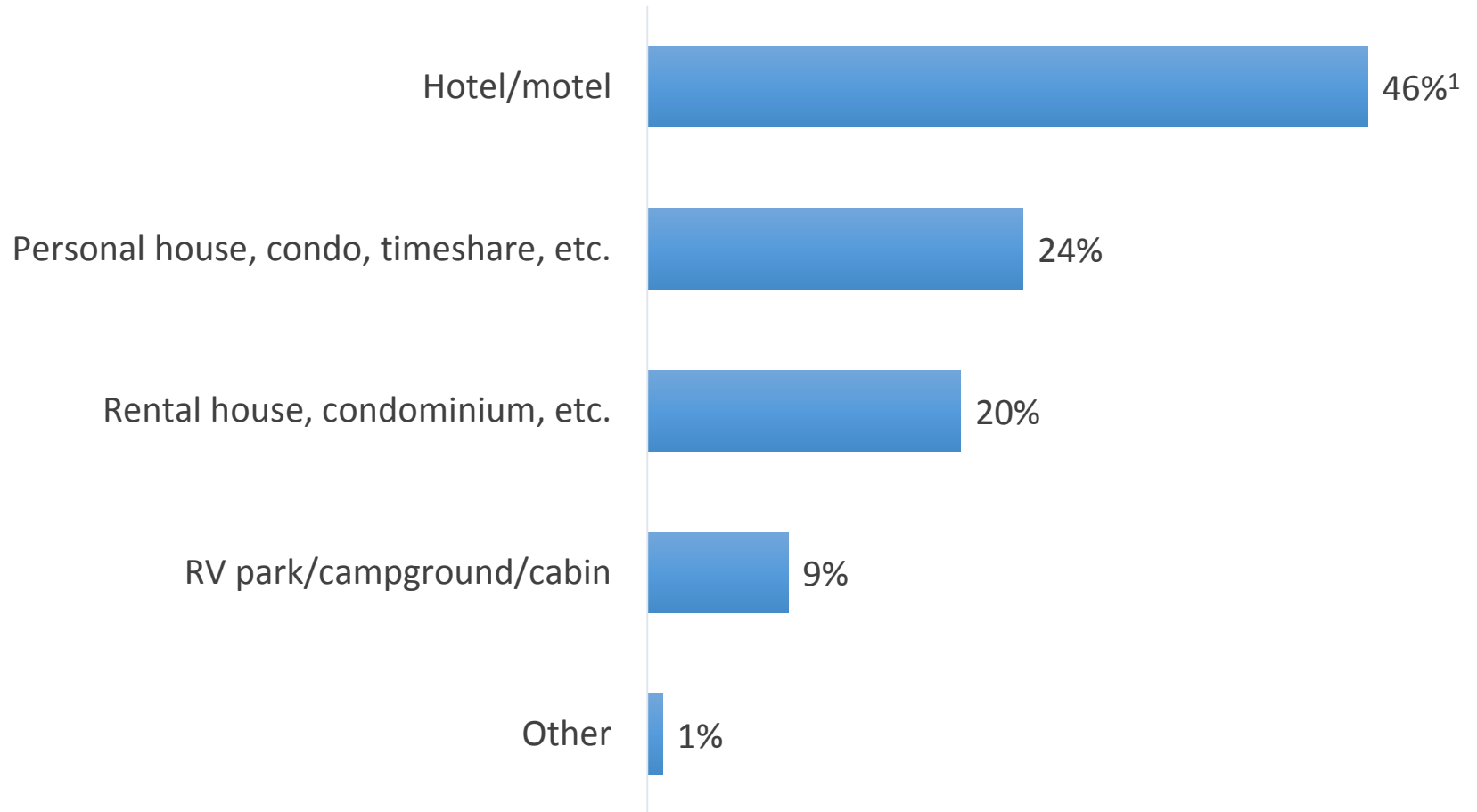
**66%** of St. Lucie County visitors live in **8** states or Canada

Florida	<b>21%</b>
New York	<b>11%</b>
Canada	<b>8%</b>
New Jersey	<b>8%</b>
Connecticut	<b>5%</b>
Massachusetts	<b>4%</b>
Michigan	<b>3%</b>
Virginia	<b>3%</b>
Georgia	<b>3%</b>

# Visitors' Accommodations



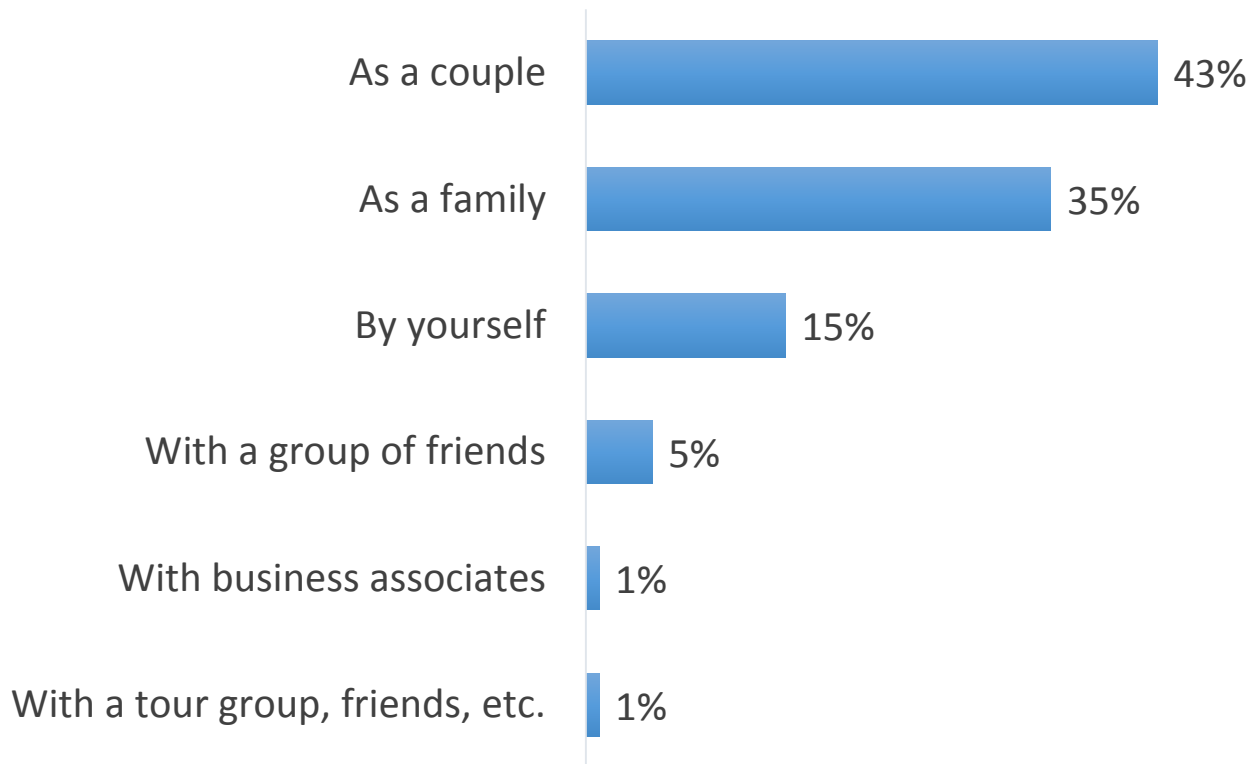
# Visitors' Paid Accommodations



<sup>1</sup>Only asked to visitors staying in paid accommodations.

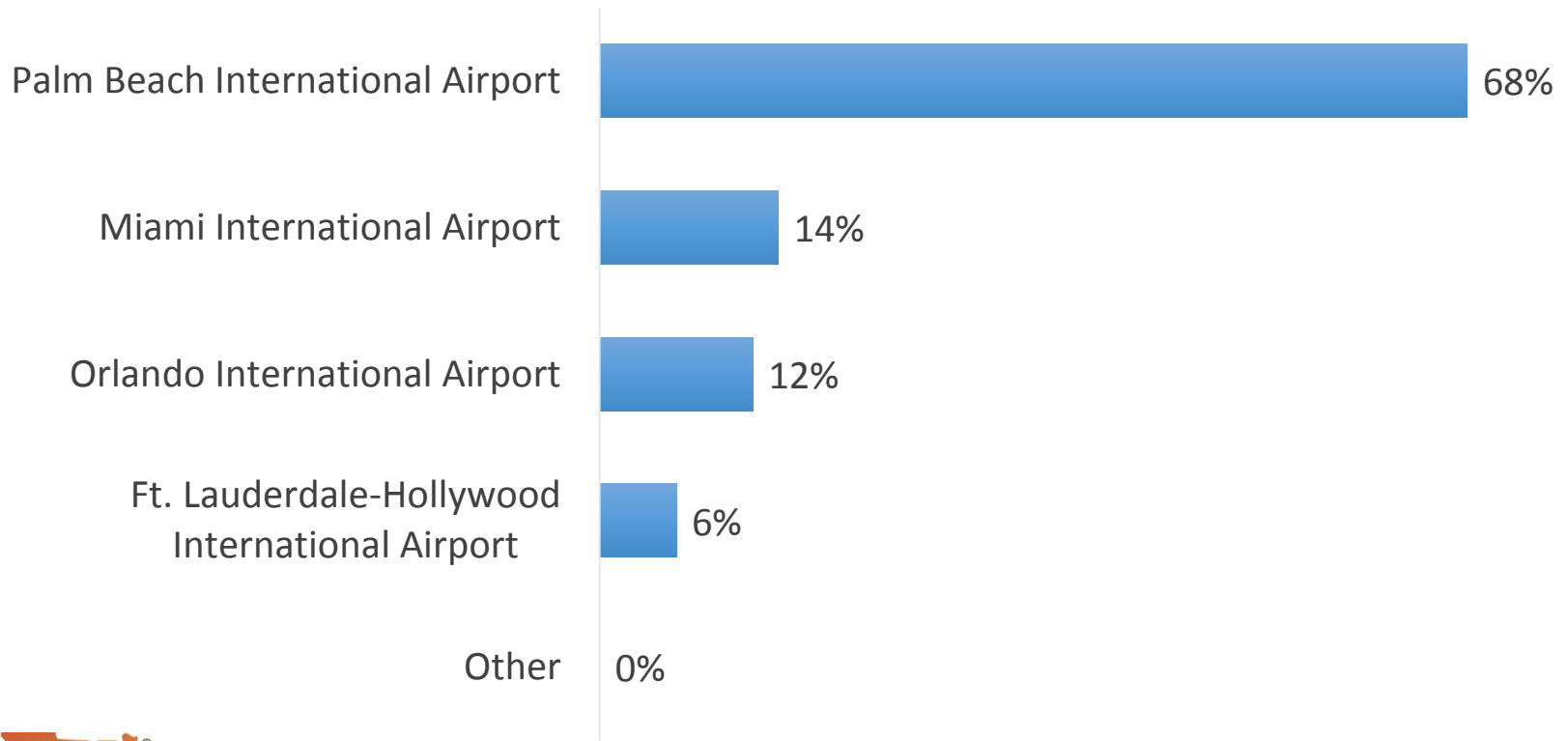
# Travel Parties

- The typical visitor traveled in a party composed of **2.8** people
- **28%** traveled with at least one person under the age of 20 in their travel party
- **78%** of visitors traveled as a **couple** or a **family**



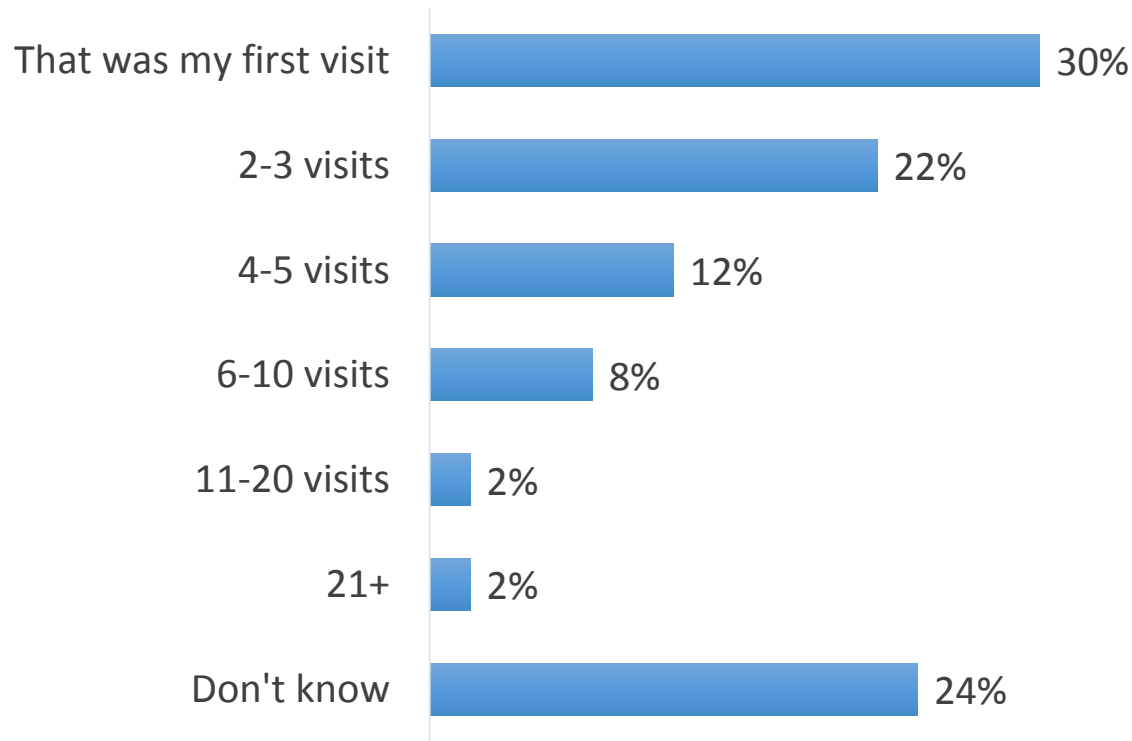
# Typical St. Lucie County Visitor

- **Drove** to St. Lucie County (**65%**)
- **35%** who flew used the following airports:



# Typical St. Lucie County Visitor

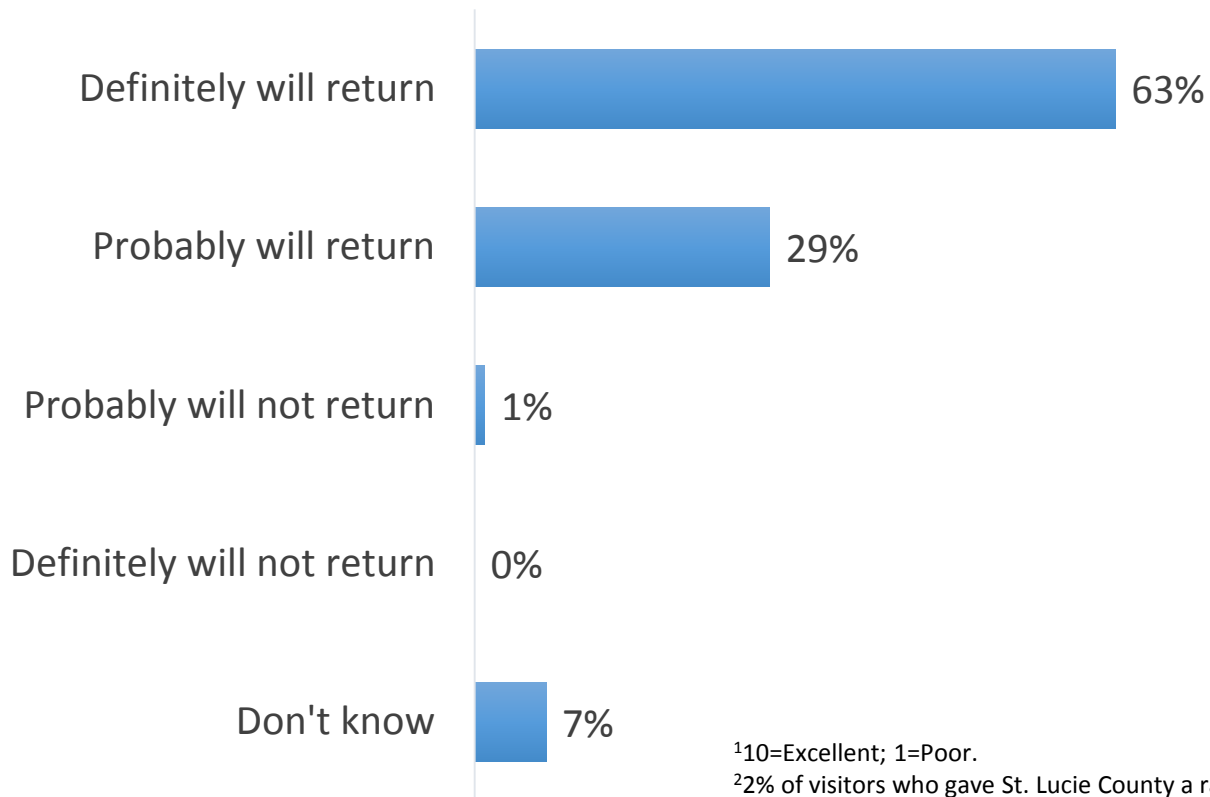
- Spent **6.9** nights in St. Lucie County
  - When including long term visitors<sup>1</sup>, average nights stayed is **37.3**
- **30%** were first time visitors
- **4%** had visited more than 10 times



<sup>1</sup>People who stayed longer than 1 month.

# Visitor Satisfaction

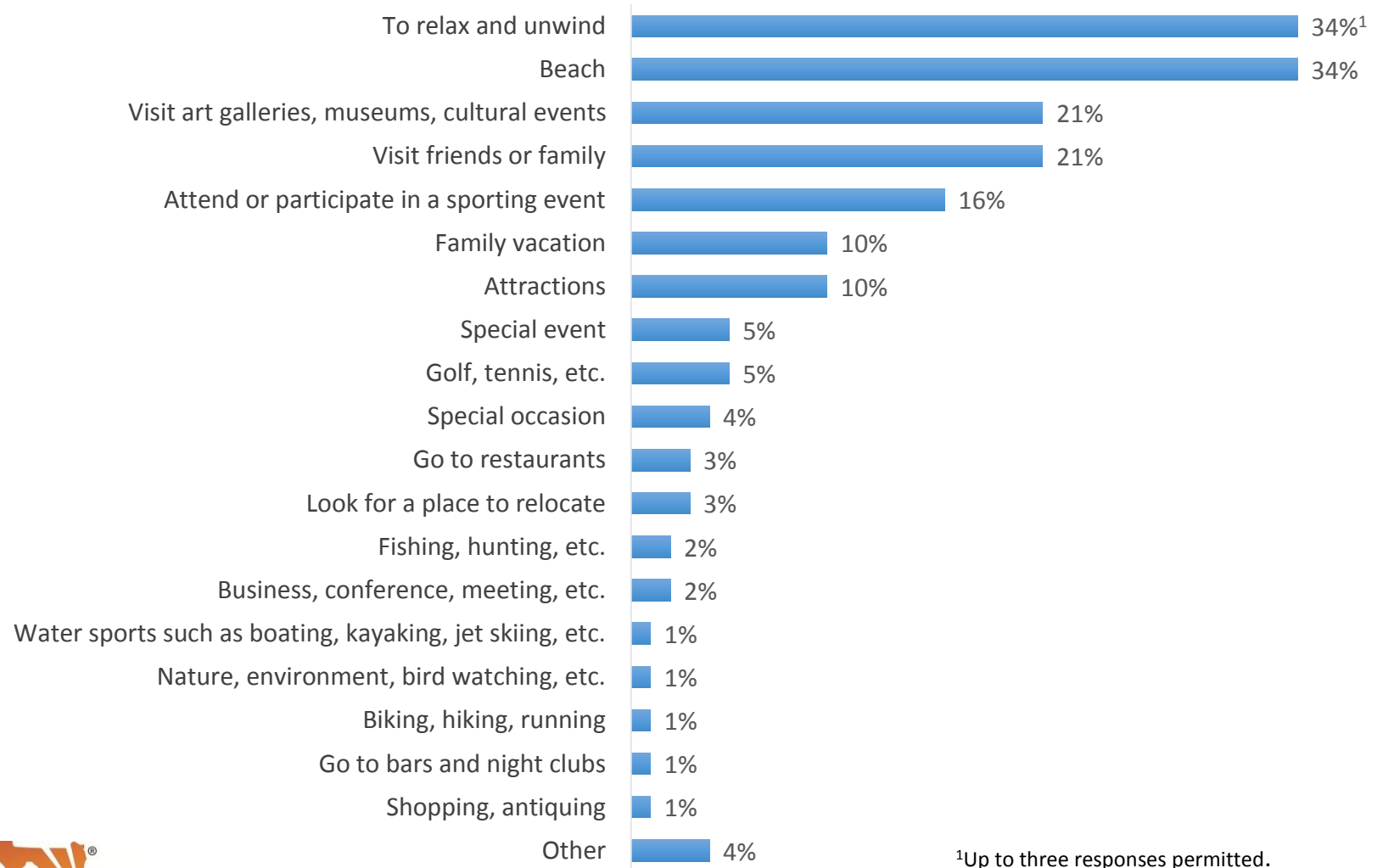
- Visitors gave St. Lucie County a rating of **9.0**<sup>1</sup> as a place to vacation<sup>2</sup>
- **92%** will return to St. Lucie County



<sup>1</sup>10=Excellent; 1=Poor.

<sup>2</sup>2% of visitors who gave St. Lucie County a rating of 6 or below gave the following suggestions for improvement: 1. Full service resort on the beach; 2. More to do during the day; 3. More to do at night.

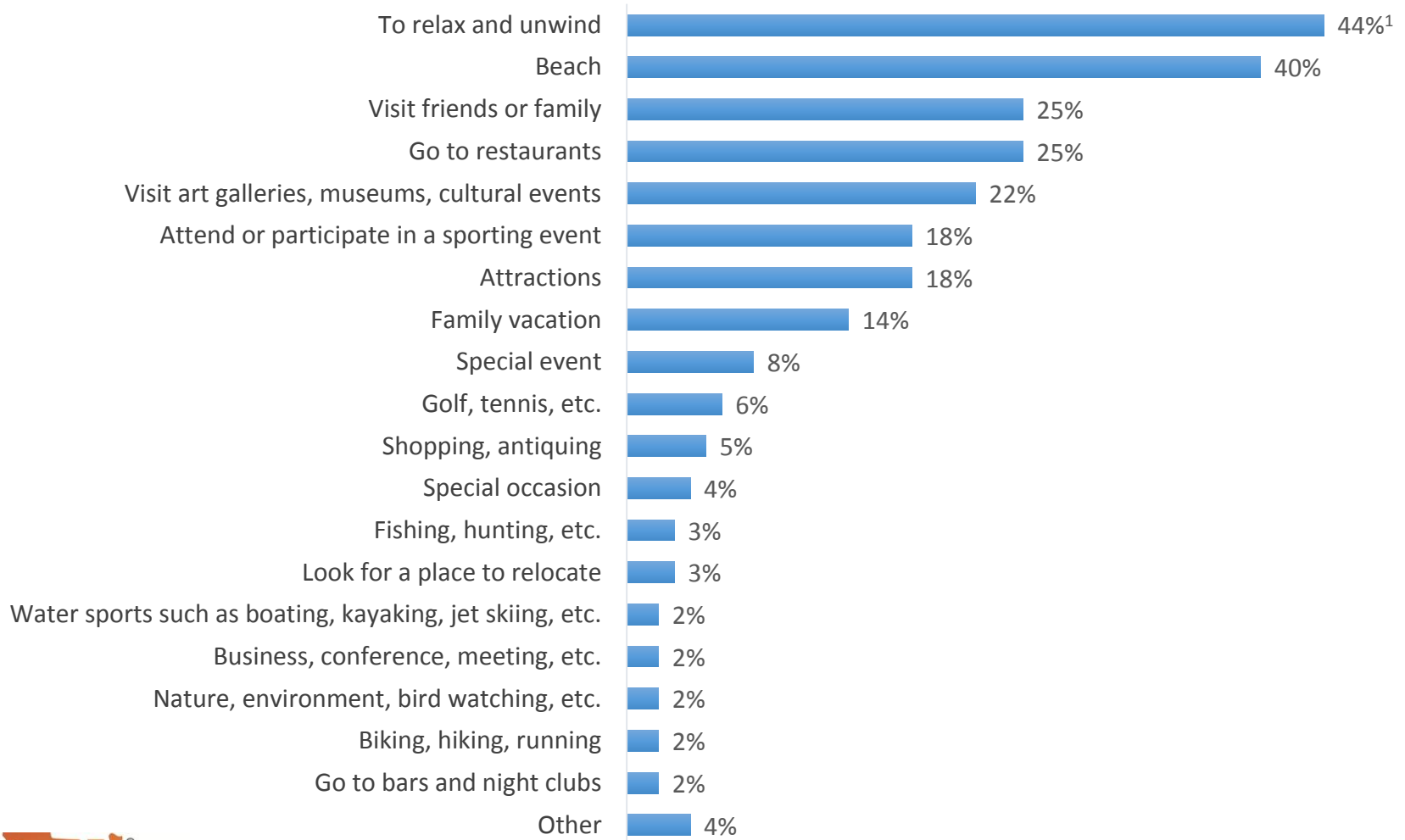
# Reasons for Visiting



<sup>1</sup>Up to three responses permitted.



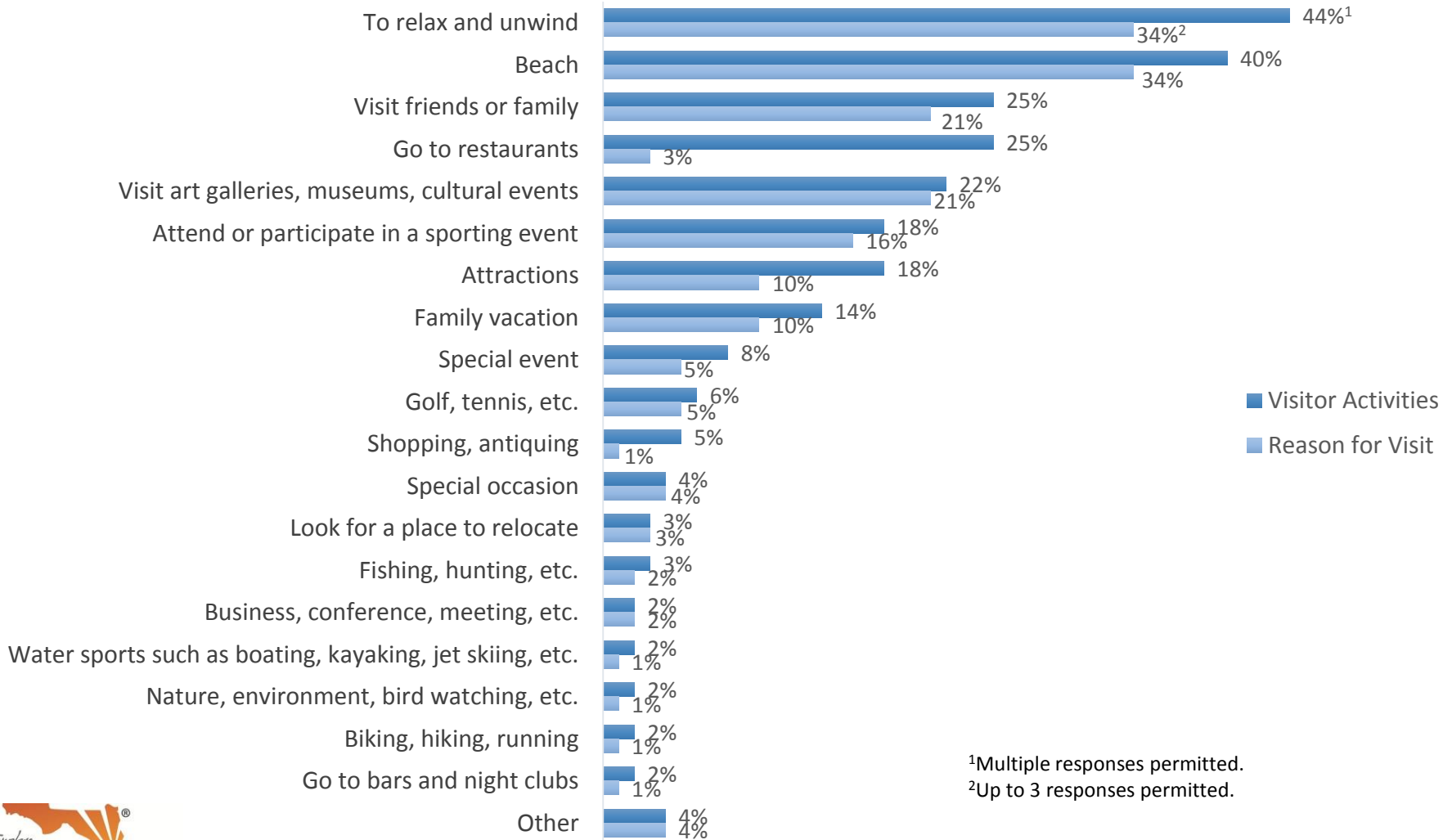
# Visitor Activities



<sup>1</sup>Multiple responses permitted.



# Visitor Activities vs. Reason for Visit



<sup>1</sup>Multiple responses permitted.

<sup>2</sup>Up to 3 responses permitted.



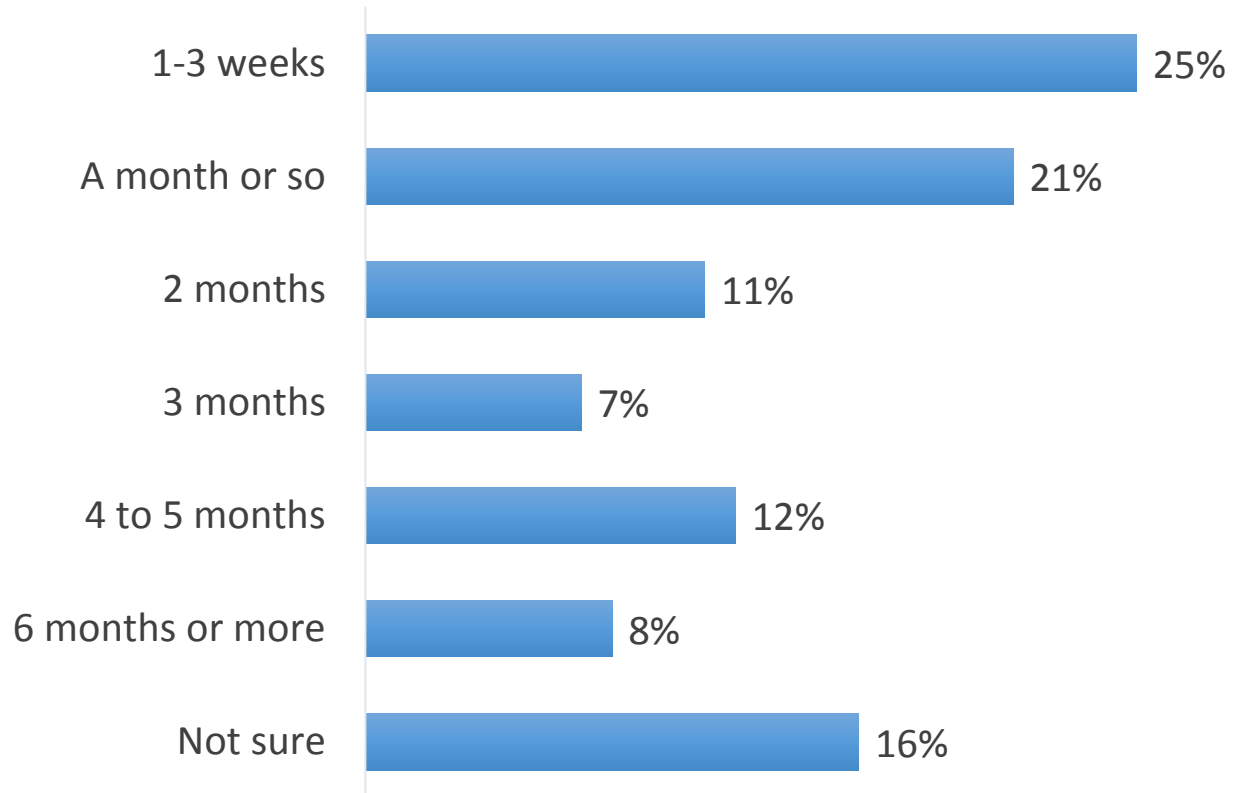
# Visitor Spending

- Visitors spent **\$297** a day
- Visitors spent **\$2,049** on their trip

Expense Categories	Spend per Day	Spend per Trip
Accommodations	\$89	\$614
Restaurants	\$67	\$462
Groceries	\$21	\$145
Shopping	\$31	\$214
Entertainment	\$63	\$435
Transportation	\$25	\$172
Other	\$1	\$7
<b>Total</b>	<b>\$297</b>	<b>\$2,049</b>

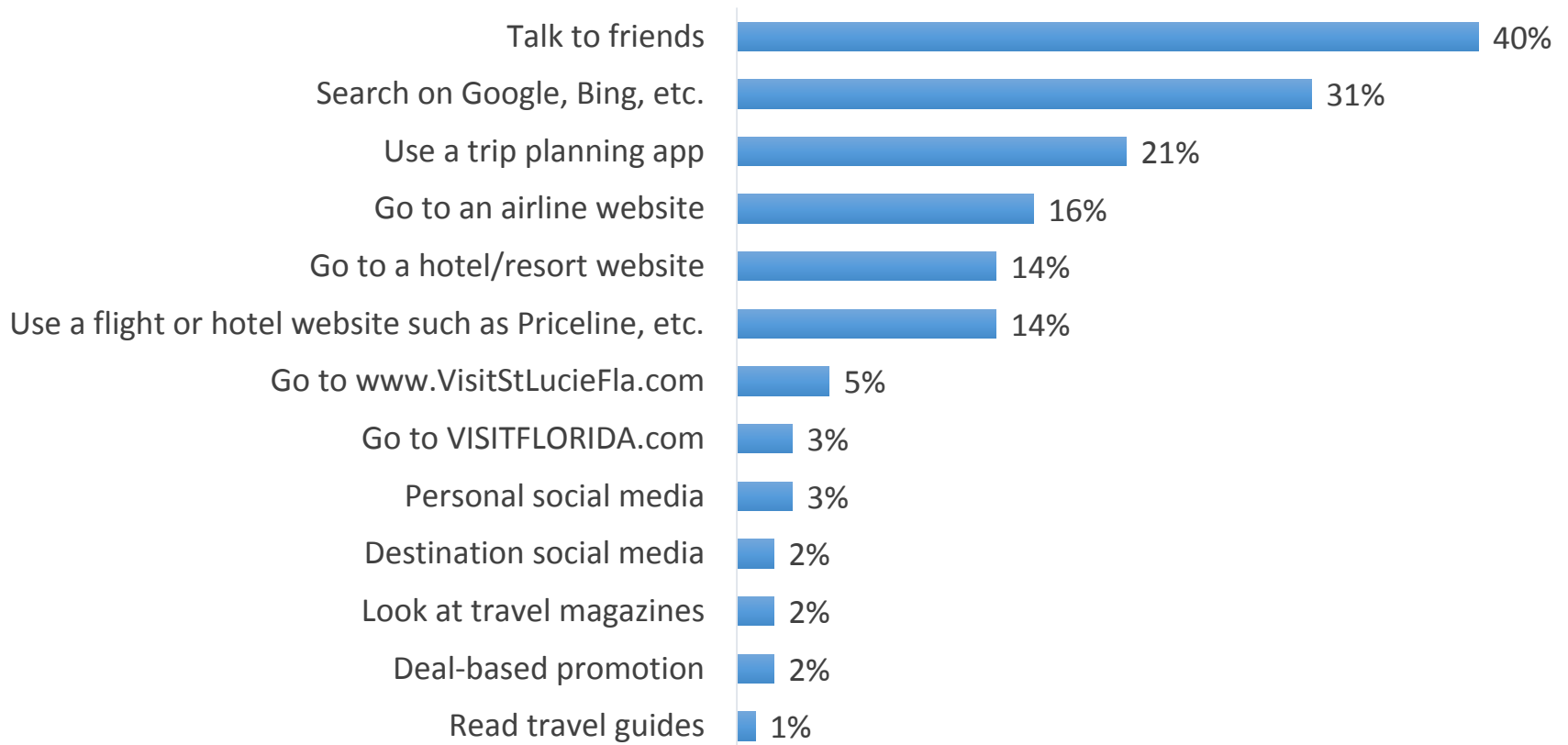
# Trip Planning Cycle

- **1 in 4** visitors planned their trip only 1-3 weeks in advance



# Trip Planning Sources

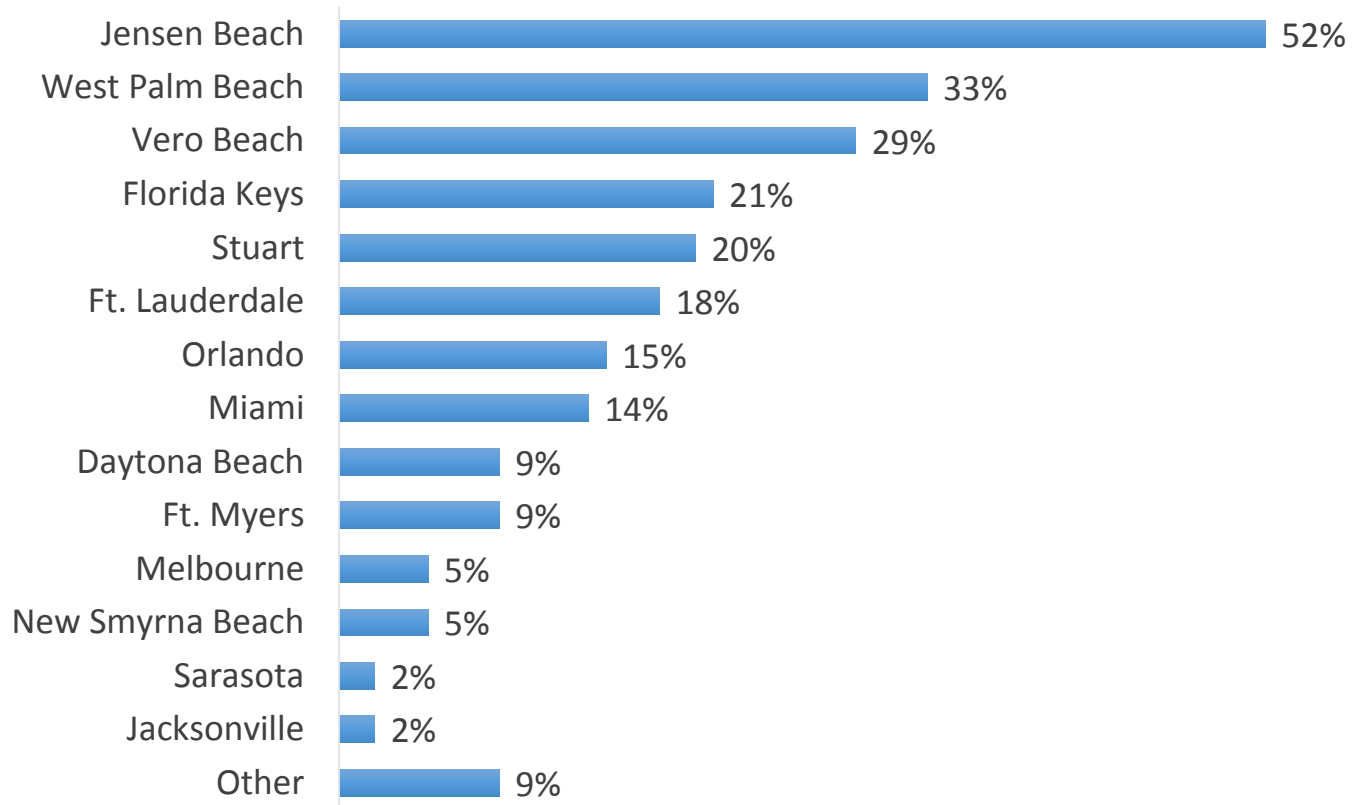
- **4%** of visitors accessed the Visit St. Lucie mobile app
- Visitors used the following sources to plan their trips<sup>1</sup>:



<sup>1</sup>Multiple responses permitted.

# Other Destinations

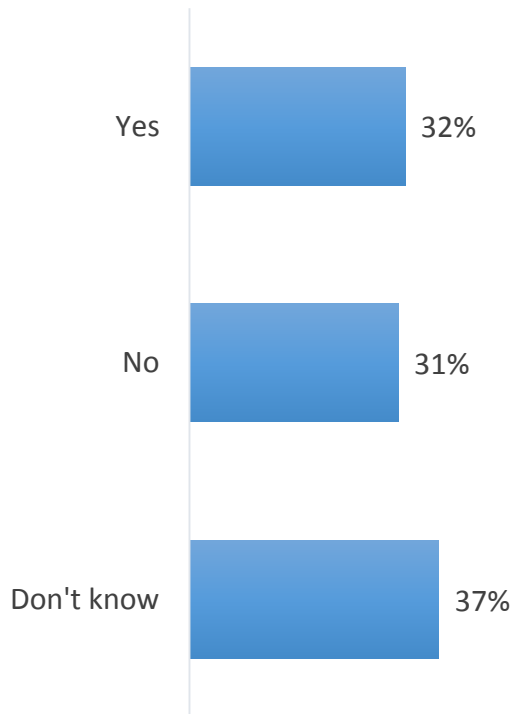
- **14%** of visitors considered one or more of the following destinations in place or in addition to St. Lucie County when planning their trip<sup>1</sup>:



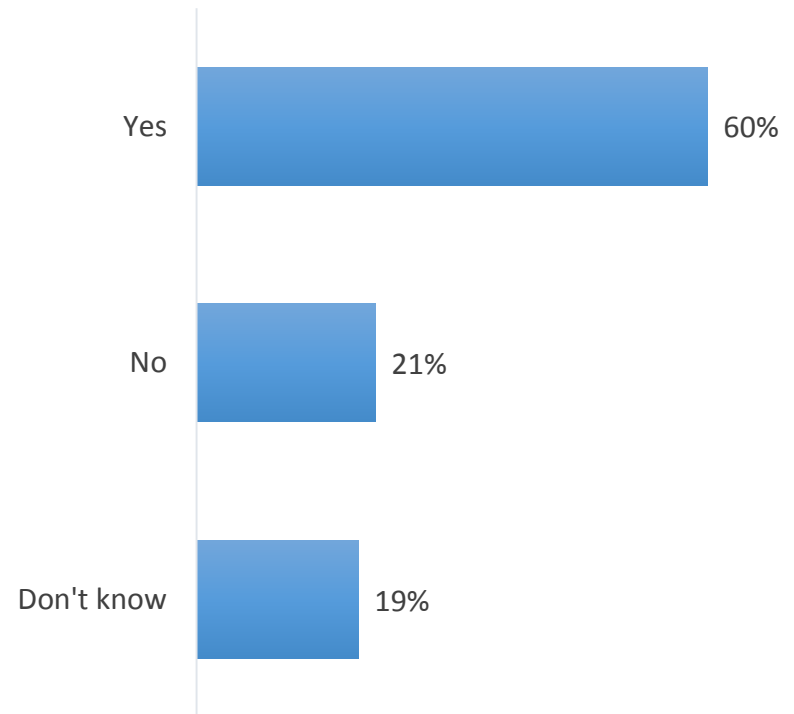
<sup>1</sup>Multiple responses permitted.

# Additional Upscale Hotels

- **32%** of visitors would visit St. Lucie County more often if there were additional upscale hotels on the beach:

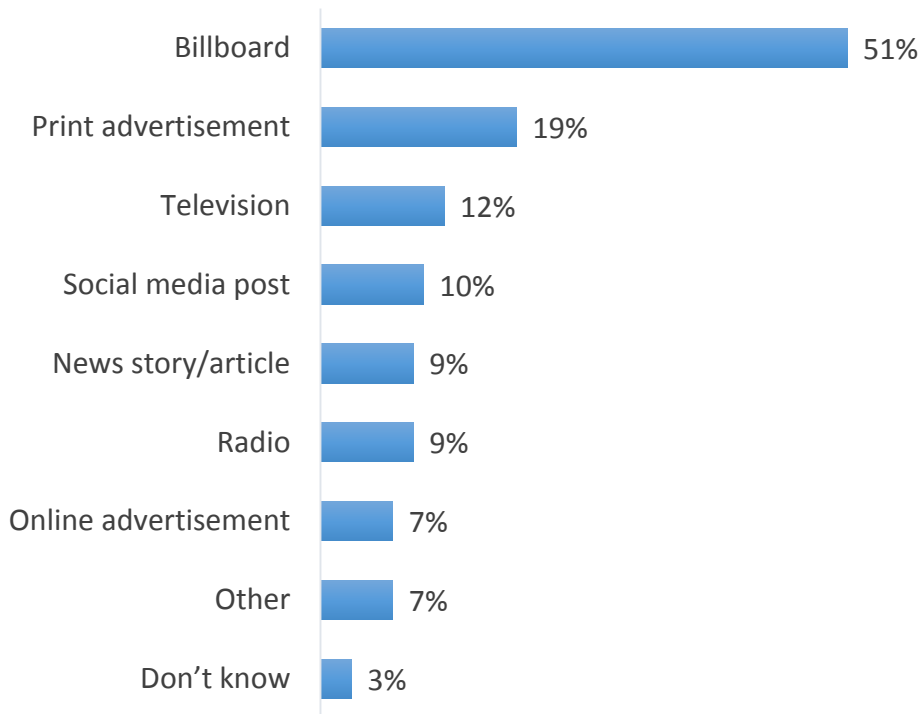


- **60%** of visitors agree that adding upscale hotels on the beach would make St. Lucie County a more attractive destination to visit vs. West Palm Beach, Jensen Beach, Vero Beach, and other similar areas:

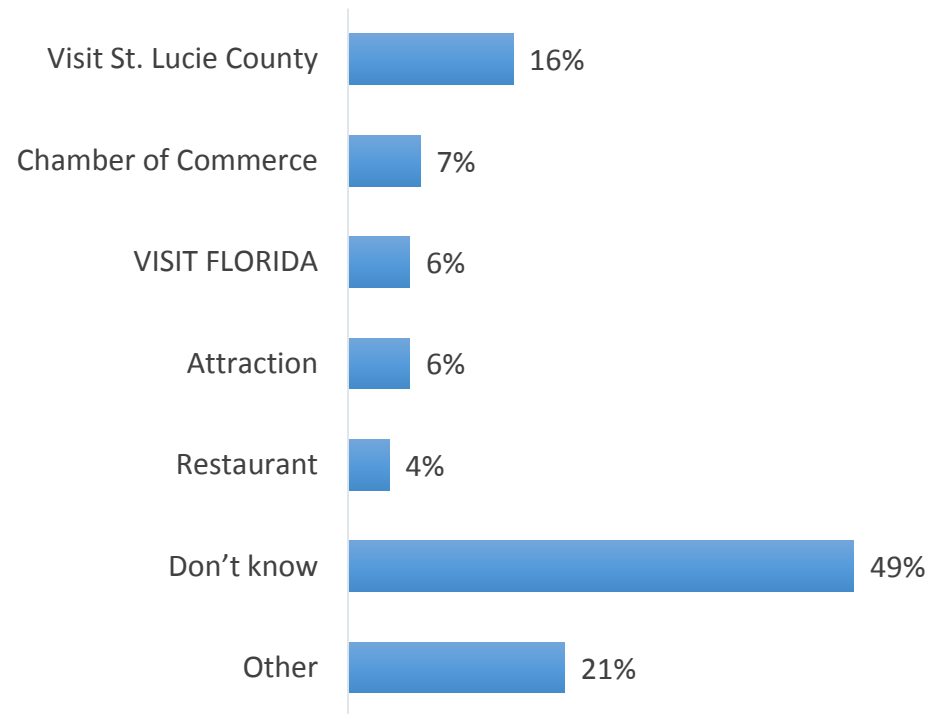


# Advertising & Promotions

- **11%** of visitors had seen, read or heard advertising or promotions about the St. Lucie County area on the following media<sup>1</sup>:



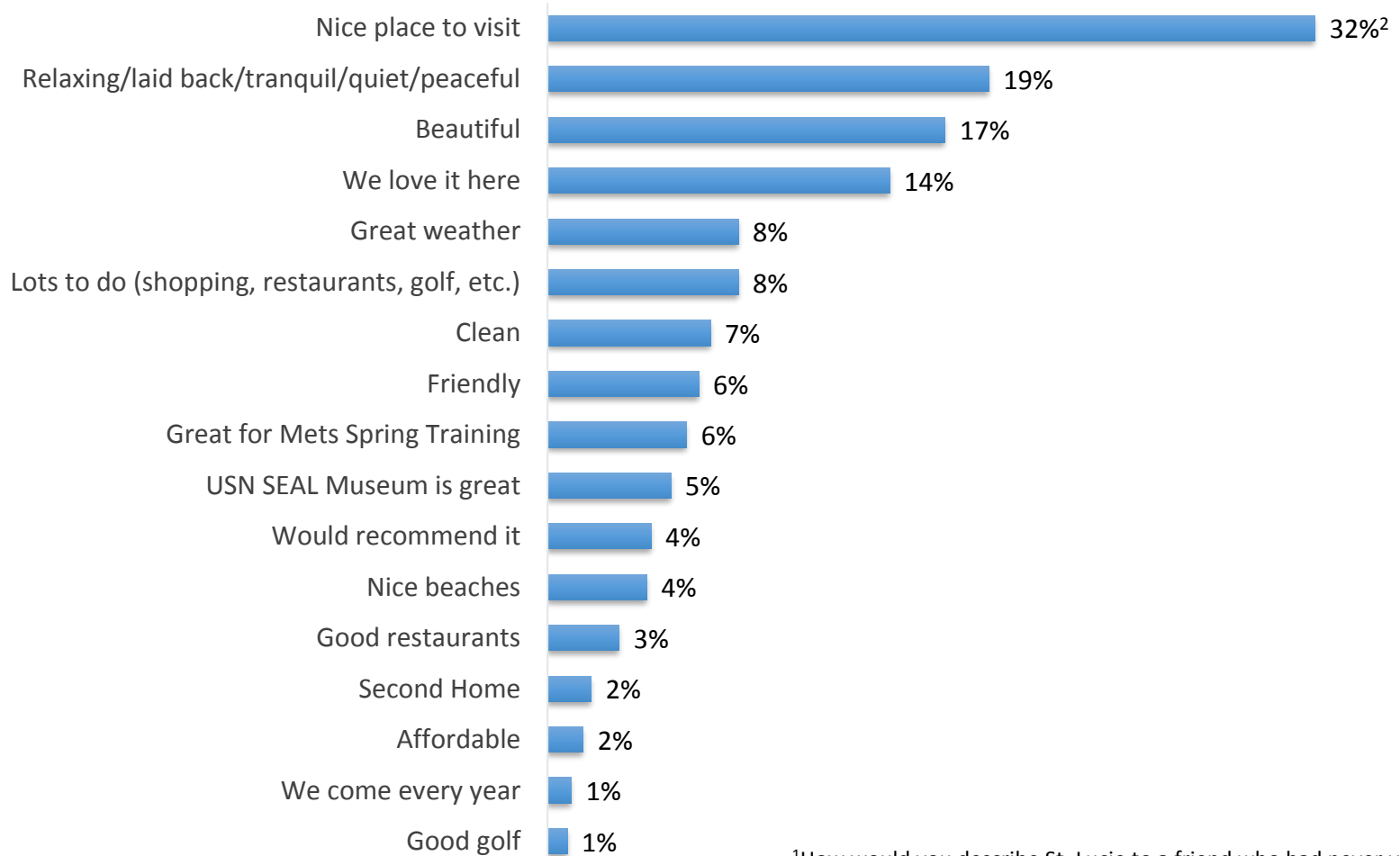
- Visitors who had seen, read or heard advertising or promotions about the St. Lucie County area recalled the following sponsors<sup>1</sup>:



<sup>1</sup>Multiple responses permitted.



# Perceptions of St. Lucie County<sup>1</sup>



<sup>1</sup>How would you describe St. Lucie to a friend who had never visited?

<sup>2</sup>Coded open-ended responses; multiple responses permitted.



# Visitor Comments

---

- From visitors who describe St. Lucie County as a **nice place to visit**:

"We're traveling through all parts of Florida. It's very nice here."

"An excellent city to spend quality time with someone special."

"Very nice. Love all the places to go here. It's a good location."

"Very lush and warm. Very nice place to visit."

"We come to visit family every year; we all think it's a great place."

# Visitor Comments

---

- From visitors who describe St. Lucie County as **relaxing**:

“Laid back gorgeous place. Museum is moving and people are great.”

“Quaint; far enough away from everything to be peaceful, but close enough if you want to do things. I like St. Lucie County without hotels on the beach; it’s my little get away from everything.”

“Very nice here; it’s much quieter than Palm Beach.”

“A quiet location, very clean and nicely kept; I like that it’s away from the large tourist crowds.”

“St. Lucie County is a place you can go for relaxation. Not too fast paced or too slow, just enough for someone just wanting to unwind.”



# Visitor Comments

---

- From visitors who describe St. Lucie County as **beautiful**:

"It's been really beautiful; we love it."

"Beautiful, quiet place with lots to do."

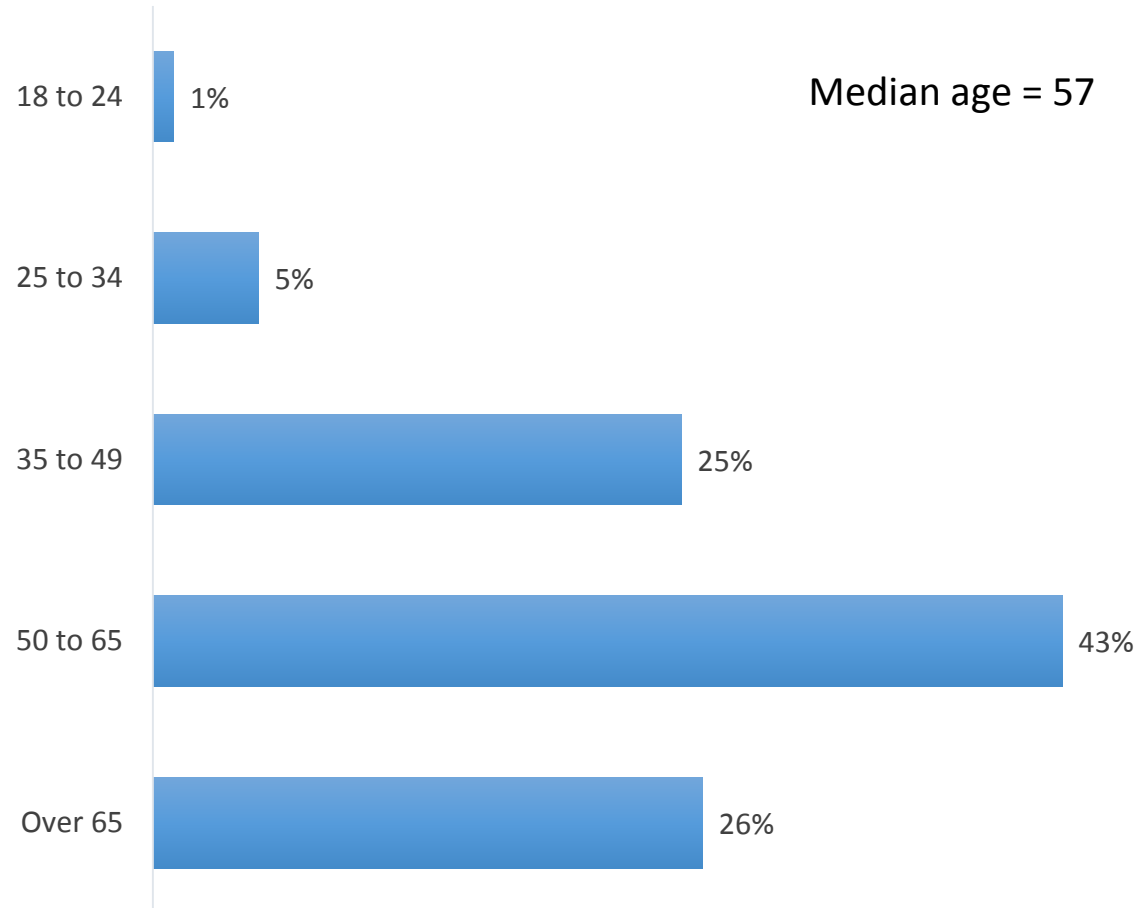
"Fabulous scenery with really nice people and good restaurants."

"Absolutely beautiful with great parking and super clean beaches."

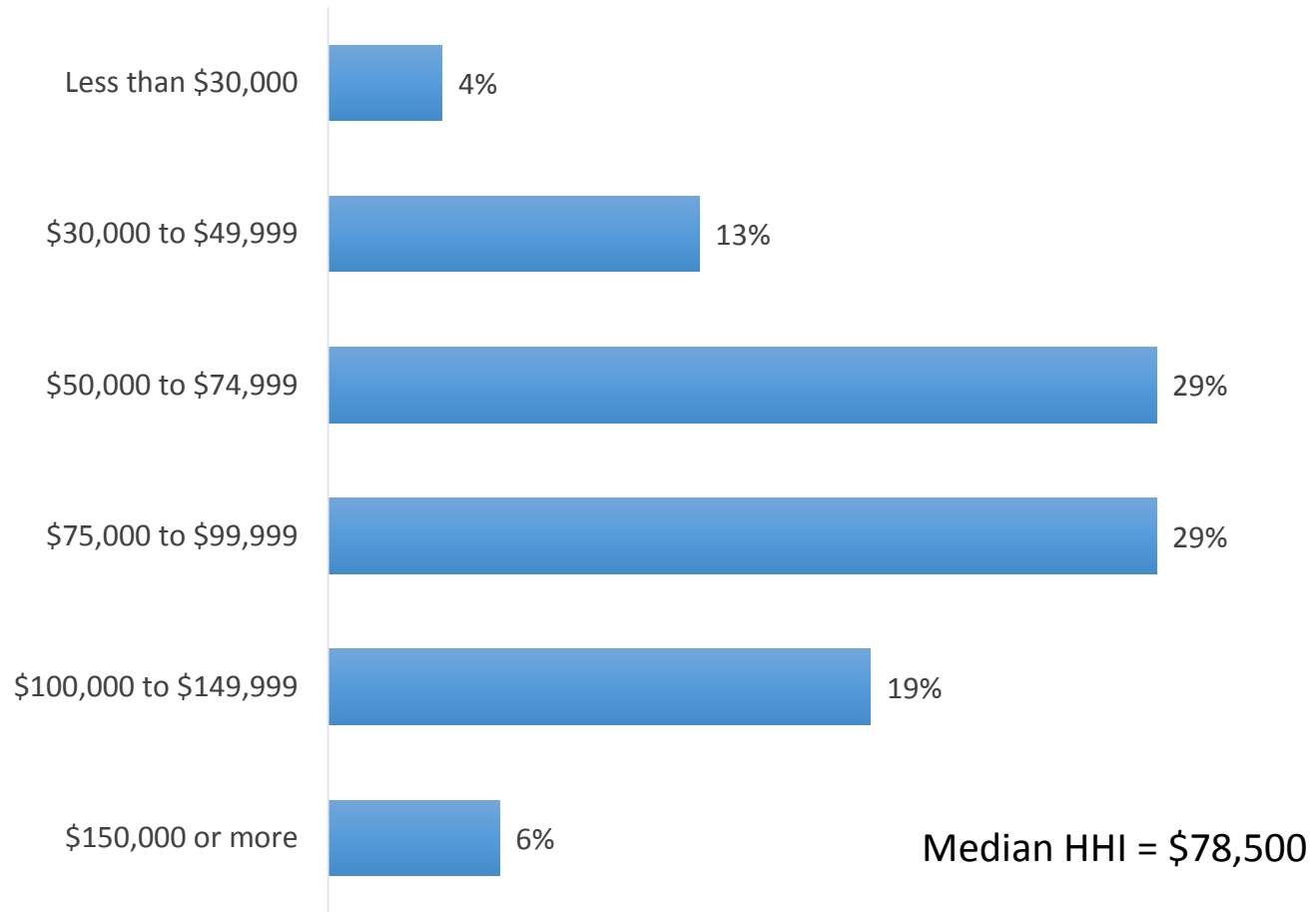
"Picturesque town with lots of activities for the family."

"Beautiful place, safest place in the world."

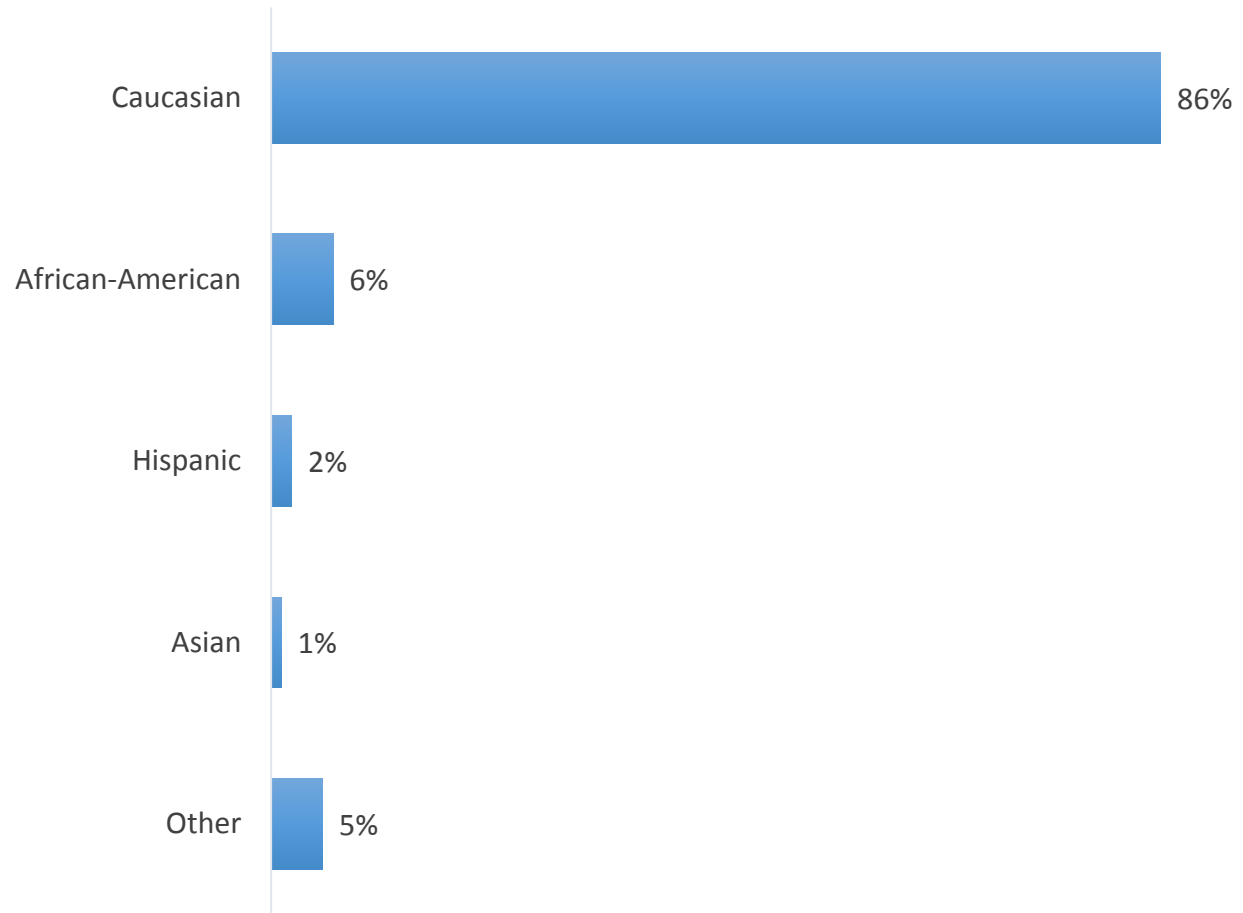
# Age



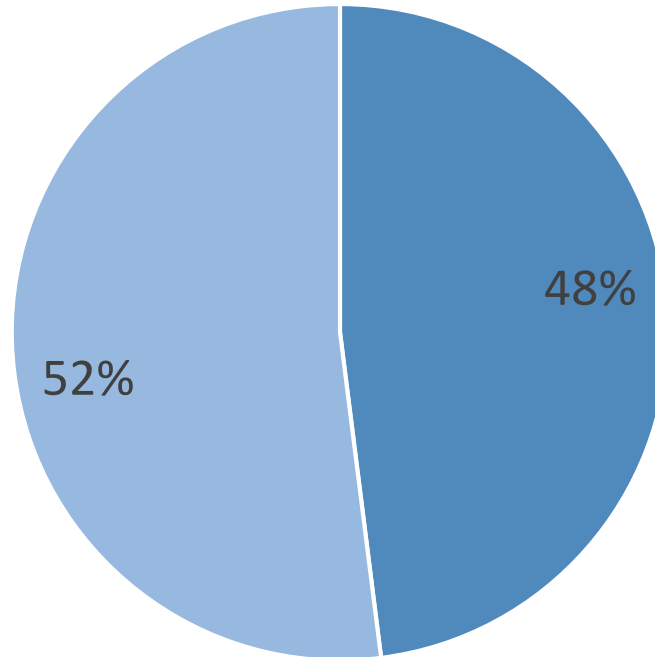
# Household Income in 2016



# Race/Ethnicity



# Gender



■ Male ■ Female

# Visit St. Lucie County

## Jan – Mar 2017 Visitor Tracking Report

---

Charlotte Bireley –Director of Tourism & Marketing  
St. Lucie County  
772-462-1539, BireleyC@stlucieco.org

Joseph St. Germain, Ph.D., President, joseph@dsg-research.com  
Phillip Downs, Ph.D., Senior Partner, pd@dsg-research.com  
Rachael Anglin, Project Director, rachael@dsg-research.com  
Downs & St. Germain Research  
850-906-3111: www.dsg-research.com

