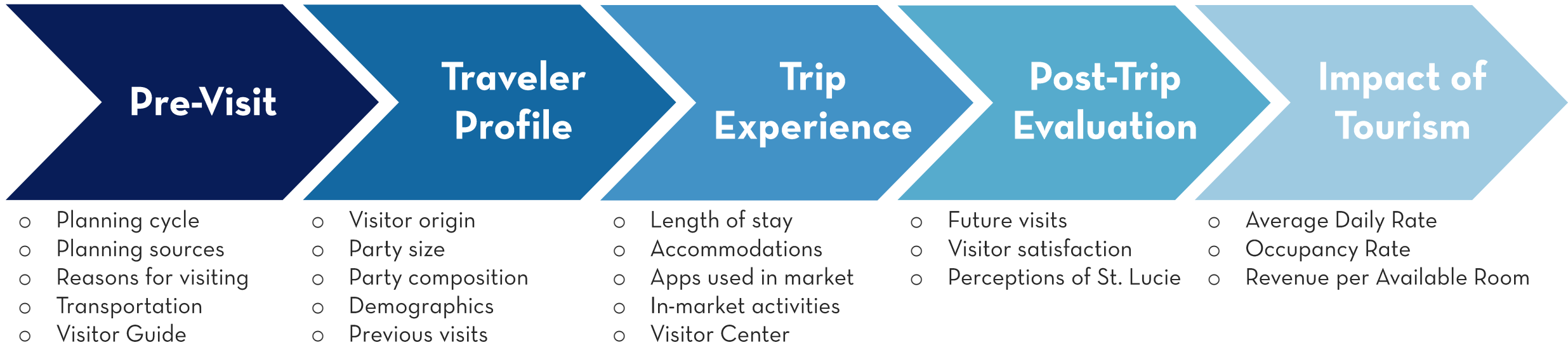


VISIT ST. LUCIE

Visitor Tracking & Economic
Impact Annual Report



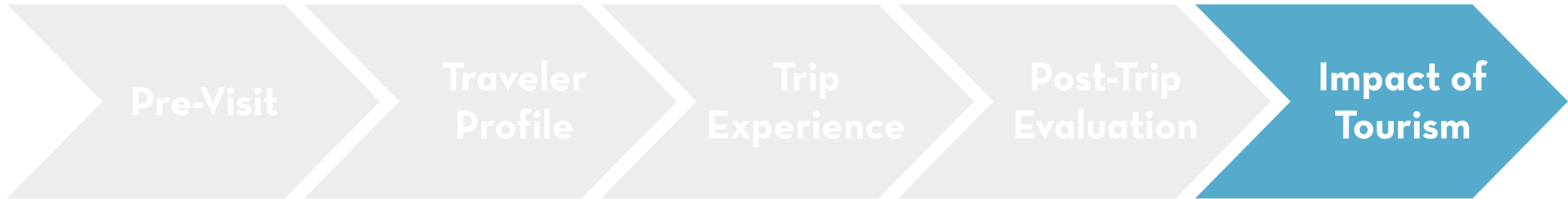
STUDY OBJECTIVES: VISITOR JOURNEY



EXECUTIVE SUMMARY



VISITOR JOURNEY: IMPACT OF TOURISM



Tourism Matters To St. Lucie County



Visitor spending in 2023 generated a total economic impact of

\$1,083,780,800

in St. Lucie County

Direct Spending

Visitors who traveled to St. Lucie
County in 2023 spent

\$703,753,800

in St. Lucie County on
accommodations, restaurants,
groceries, transportation, attractions,
entertainment, and shopping



St. Lucie County attracted

1,012,800

visitors in 2023



Tourism Development Tax

Taxes paid on rooms reserved by visitors to St. Lucie County in 2023 resulted in

\$6,393,400

in TDT collected*

*December data not yet available, so December TDT was estimated.



Room Nights

St. Lucie County visitors
generated

1,130,300

room nights in paid
accommodations in 2023



Lodging Statistics

Occupancy

64.1%

Room Rates

\$122.31

RevPAR

\$79.28



Tourism in St. Lucie County
supported

8,520

local jobs in FY2023, generating

\$287,231,300

in wages and salaries



Visitors Support Jobs

An additional St. Lucie County job is supported by

119

visitors



Visitors in FY2023
generated a net tax
benefit of
\$9,070,600
To St. Lucie County
government

*St. Lucie County government tax revenue generated by visitors
minus the cost to St. Lucie County government for servicing visitors



Household Savings

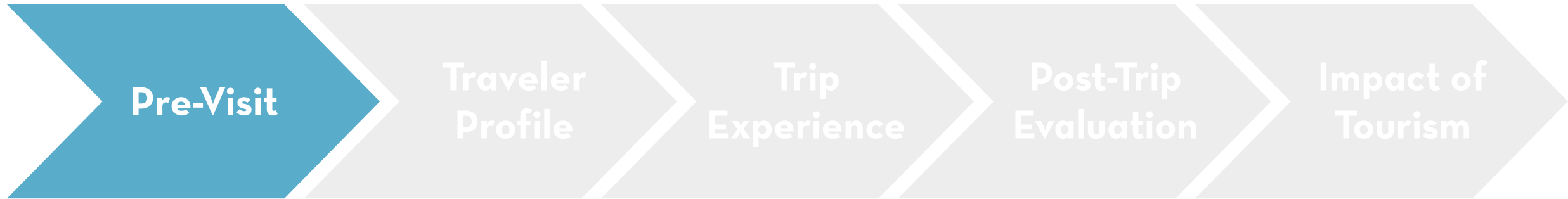
Visitors to St. Lucie County save local residents

\$406

Per household in taxes every year

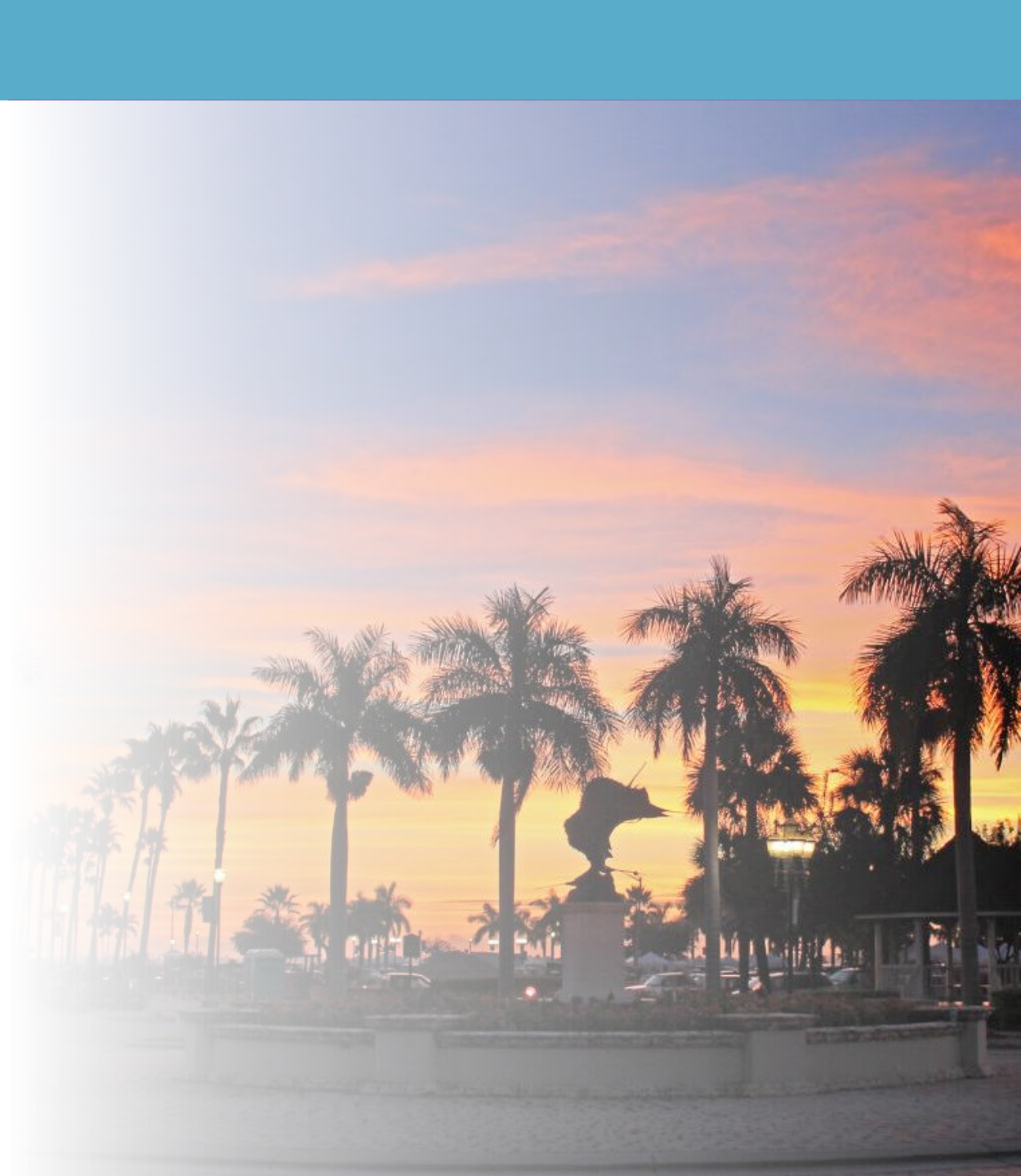


VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » **Over 1 in 4** visitors planned their visit to St. Lucie County **1 to 3 months** in advance of their trip
- » **Over 2 in 5** visitors planned their visit to St. Lucie County **3 or more months** in advance



TOP TRIP PLANNING SOURCES*



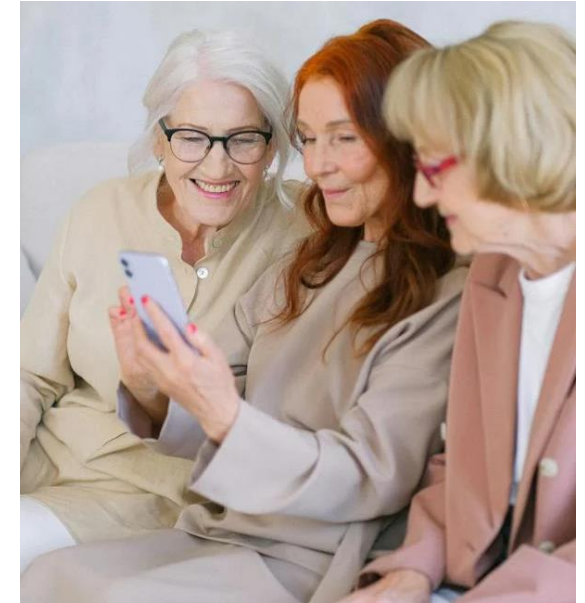
49%
Talking to
friends/family



24%
Search sites
(Google, etc.)



14%
Hotel websites/apps



13%
Personal social media

*Multiple responses permitted.

ADVERTISING EXPOSURE

- » **2 in 5** visitors recalled advertising about St. Lucie County prior to their trip
- » The top sources of recalled advertising were **online ads** (15%) and **social media posts** (12%)
- » **29%** of all visitors were influenced by advertising
- » The top advertising sponsors recalled were **Visit St. Lucie** (25%), **Visit Florida** (25%), and **attractions** (14%)



OTHER DESTINATIONS CONSIDERED

- » **63%** of visitors said St. Lucie County was the **only** destination they considered
- » **Stuart** (11%) and **Jensen Beach** (11%) are the most popular*

*These data reflect all visitors.



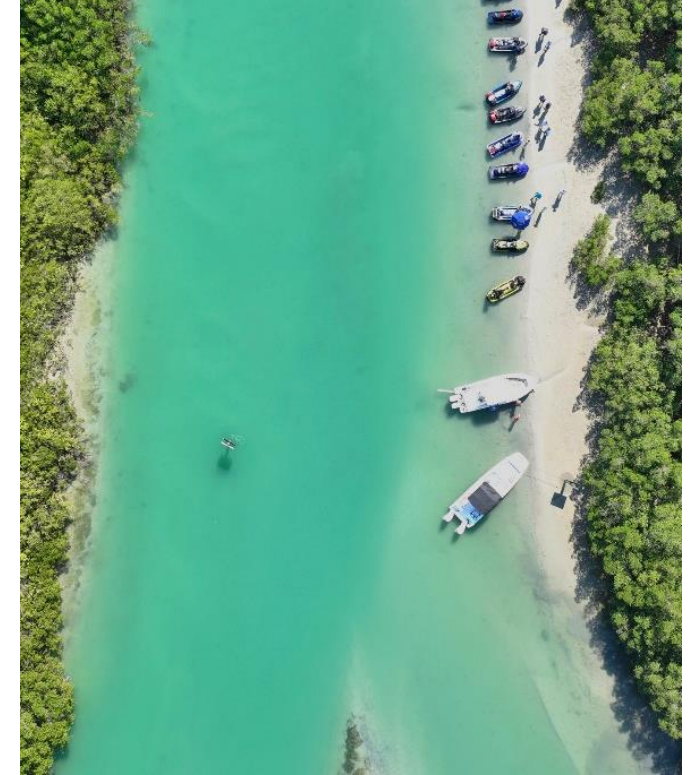
TOP REASONS FOR VISITING



42%
Visit friends/ family



42%
Relax/unwind



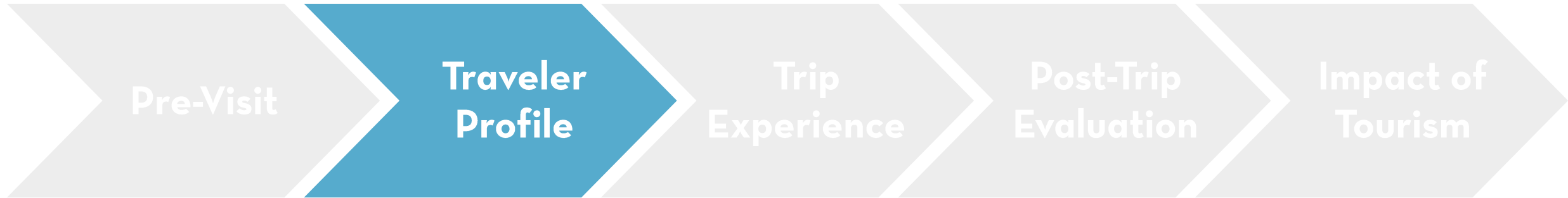
37%
Beach

TRANSPORTATION

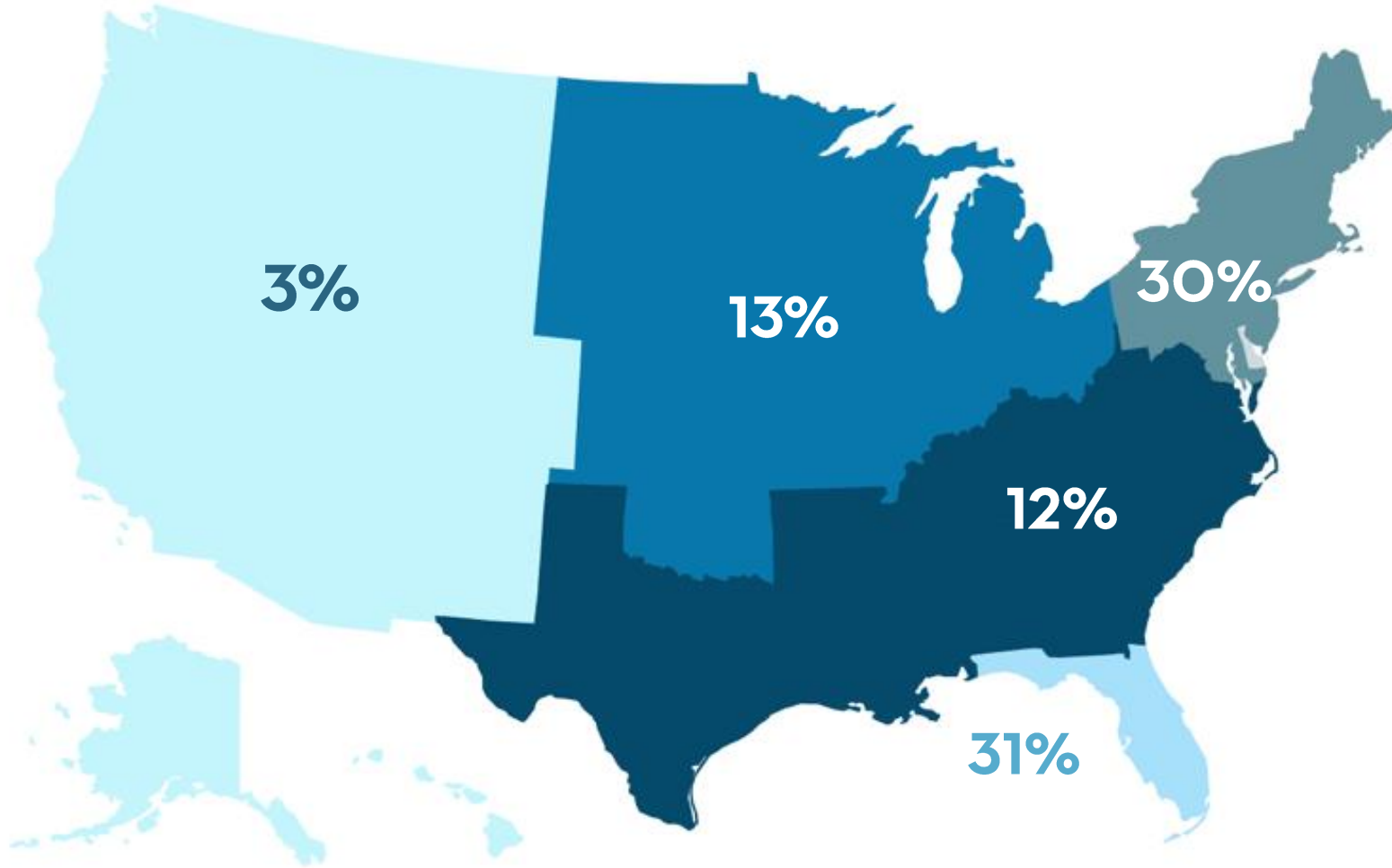
- » **Over 2 in 3** visitors drove to St. Lucie County
- » **Palm Beach International Airport** remains the most popular, with **18% of all visitors** flew in to visit St. Lucie County



VISITOR JOURNEY: TRAVELER PROFILE



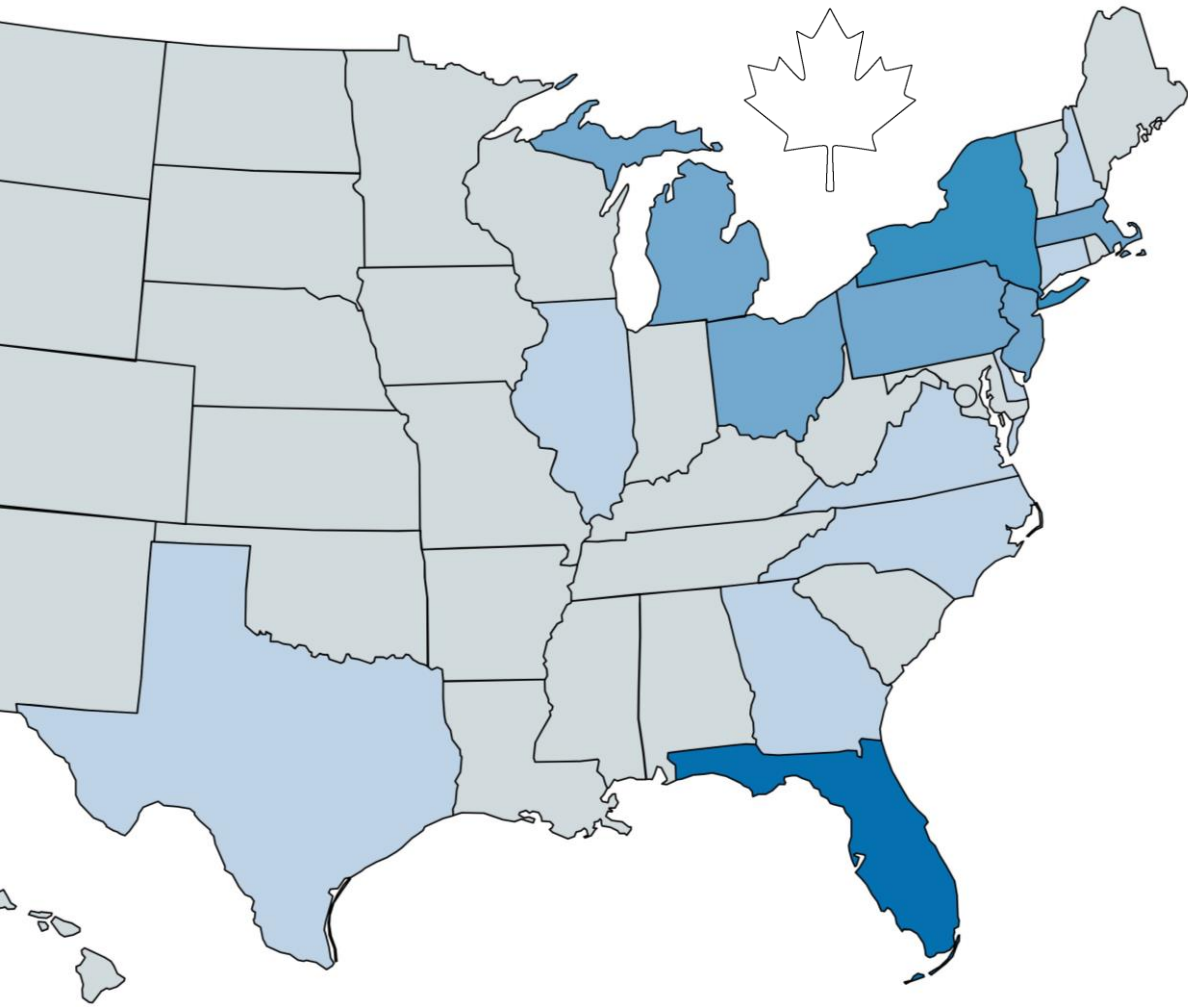
REGIONS OF ORIGIN



International
11%

Region (International)	Percent
Canada	6%
Europe	2%
South America	1%
Caribbean	1%
Other	1%
Total	11%

TOP STATES OF ORIGIN



81%

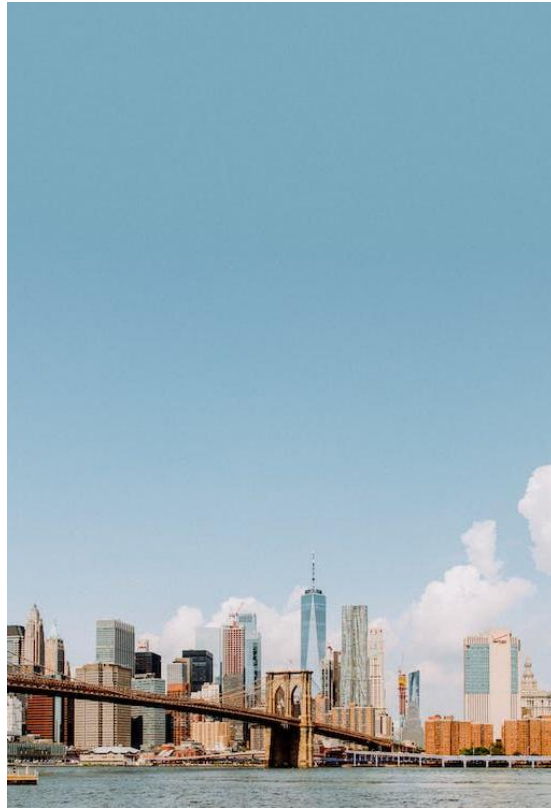
of visitors to St. Lucie County were from 15 U.S. states and Canada.

- 31 % Florida
- 6 % Canada
- 10 % New York
- 5 % New Jersey
- 4 % Pennsylvania
- 3 % Michigan
- 3 % Ohio
- 3 % Massachusetts
- 2 % Georgia
- 2 % Connecticut
- 2 % Delaware
- 2 % Illinois
- 2 % New Hampshire
- 2 % North Carolina
- 2 % Virginia
- 2 % Texas

TOP MARKETS OF ORIGIN



17%
West Palm Beach



11%
New York City¹



5%
Orlando-Daytona-
Melbourne



5%
Philadelphia²

¹Metro area includes counties in New Jersey, Pennsylvania, and Connecticut.

²Philadelphia DMA includes parts of New Jersey and much of Delaware.

TRAVEL PARTIES

Visitors to St. Lucie County traveled in parties of **2.9** people



25% traveled with at least one person under the age of 20



VISITOR PROFILE



57 years old



Earned **\$87,100** per year



Male¹ **(53%)**

¹ Percent who agreed to be interviewed.

VISITS TO ST. LUCIE COUNTY

- » **15%** were first-time visitors
- » **22%** of visitors had visited more than 10 times



VISITOR JOURNEY: TRIP EXPERIENCE



OVERNIGHT VISITORS

- » Over **3 in 4** visitors stayed overnight in St. Lucie County
- » Typical visitors stayed **5.8*** nights in St. Lucie County

*Long-term visitors' number of nights capped at 30.
This data includes visitors staying in paid accommodations,
unpaid accommodations, and day trippers



TOP ACCOMMODATIONS



36% Hotel/motel



26% Friends and Relatives



20% Rental house/condo

TOP VISITOR ACTIVITIES*



48%

Relax/unwind



44%

Visit friends/family



42%

Beach



37%

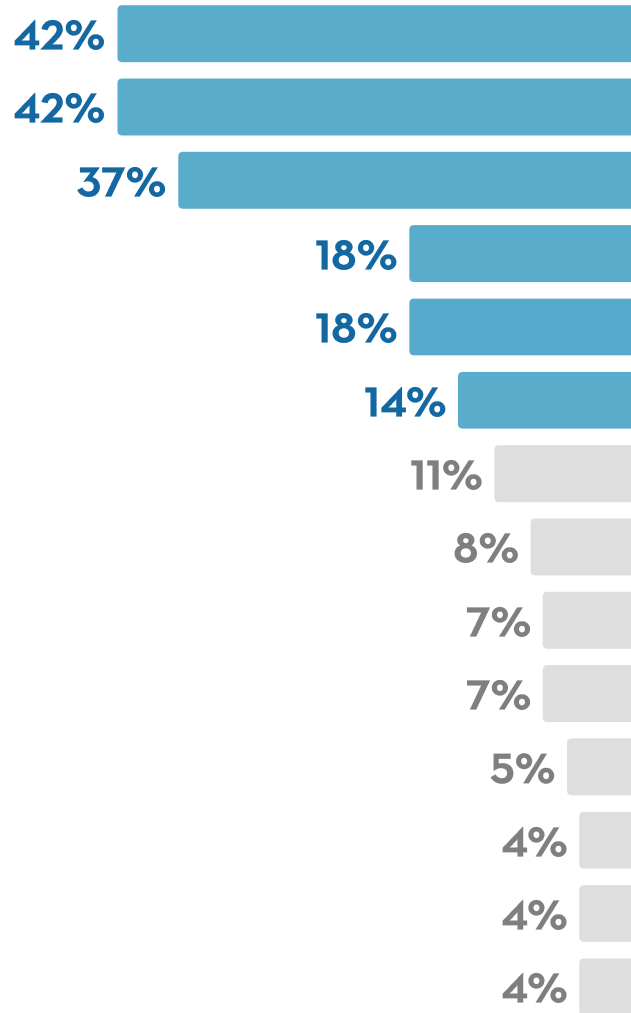
Restaurants

*Multiple responses permitted.

VISITOR ACTIVITIES VS. REASONS FOR VISITING



Reasons for Visiting*



Visit friends/family

Relax/unwind

Beach

Look for a place to relocate

Restaurants

Attractions

Golf/tennis/pickleball, etc.

Business/conference/meeting

Nature/environment/bird watching

Attend/participate in sporting events

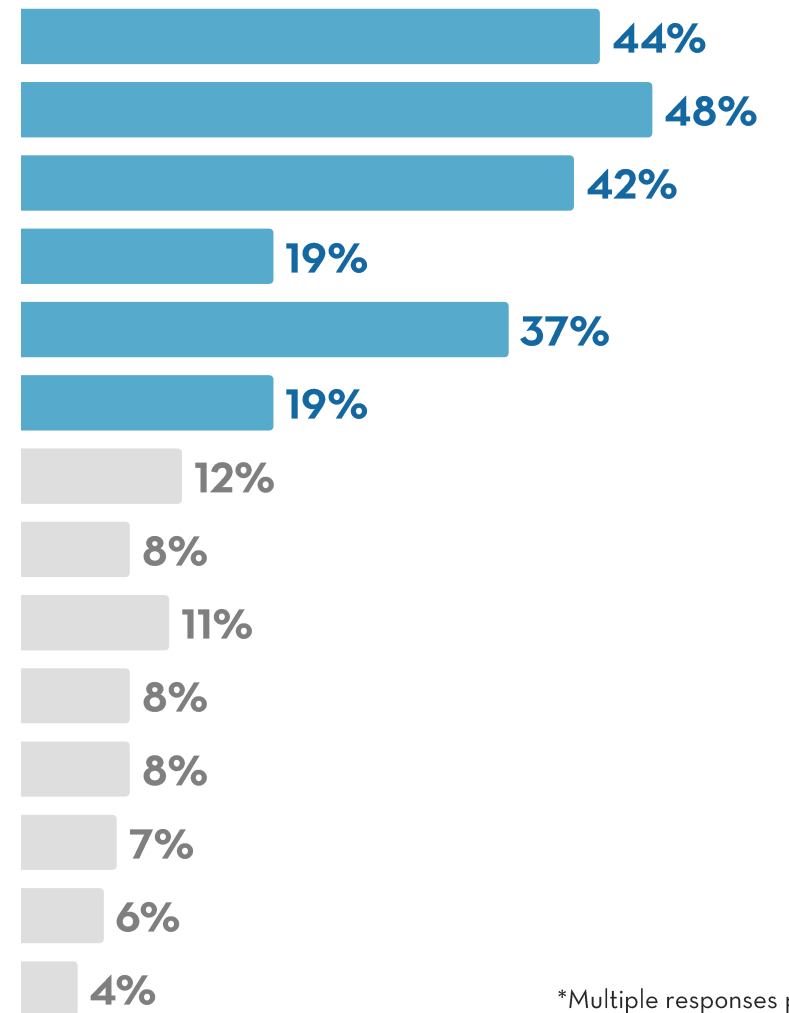
Art galleries, museums, cultural events

Water sports

Fishing/hunting/etc.

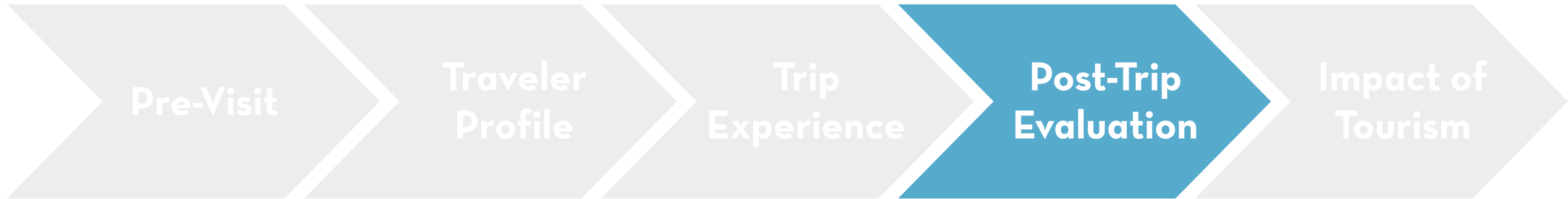
Special occasion

Visitor Activities*



*Multiple responses permitted.

VISITOR JOURNEY: POST-TRIP EVALUATION



VISITOR SATISFACTION

Visitors gave St. Lucie County an **8.3*** rating as a place to visit or vacation



96% of visitors will return to St. Lucie County for a future visit or vacation (**78%** will definitely return)



*On a 10-point scale where 10 means "excellent" and 1 means "poor".

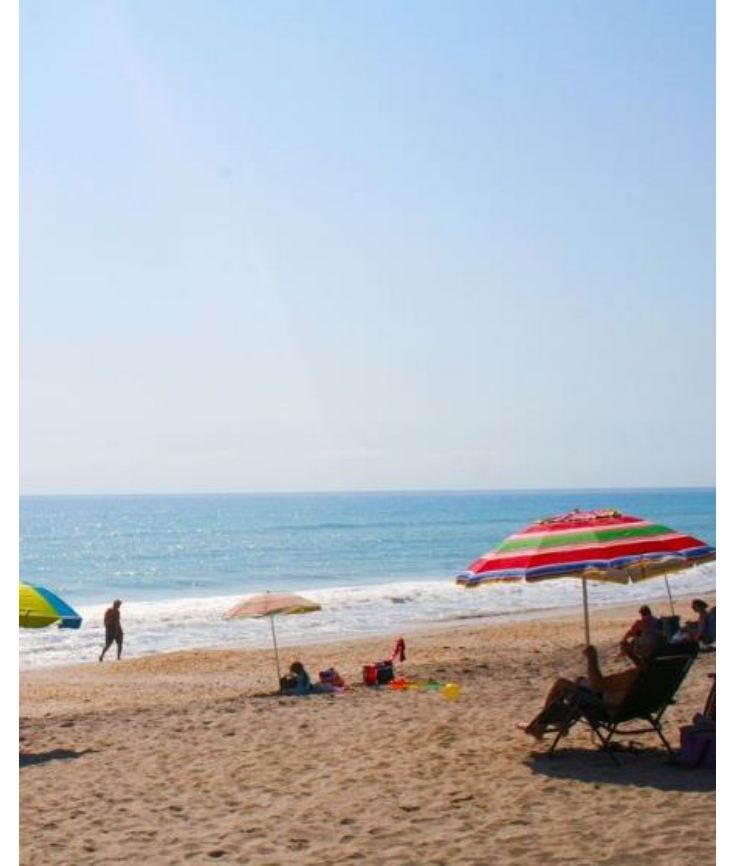
VISITOR PERCEPTIONS IN A FEW WORDS



“Beautiful, well-kept, welcoming.”



“Developing, potential, and friendly.”

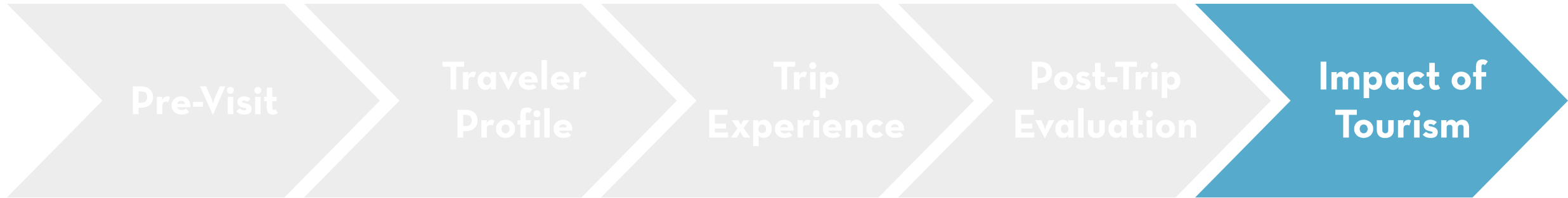


“Family, friend, warm weather.”

DETAILED FINDINGS



VISITOR JOURNEY: IMPACT OF TOURISM

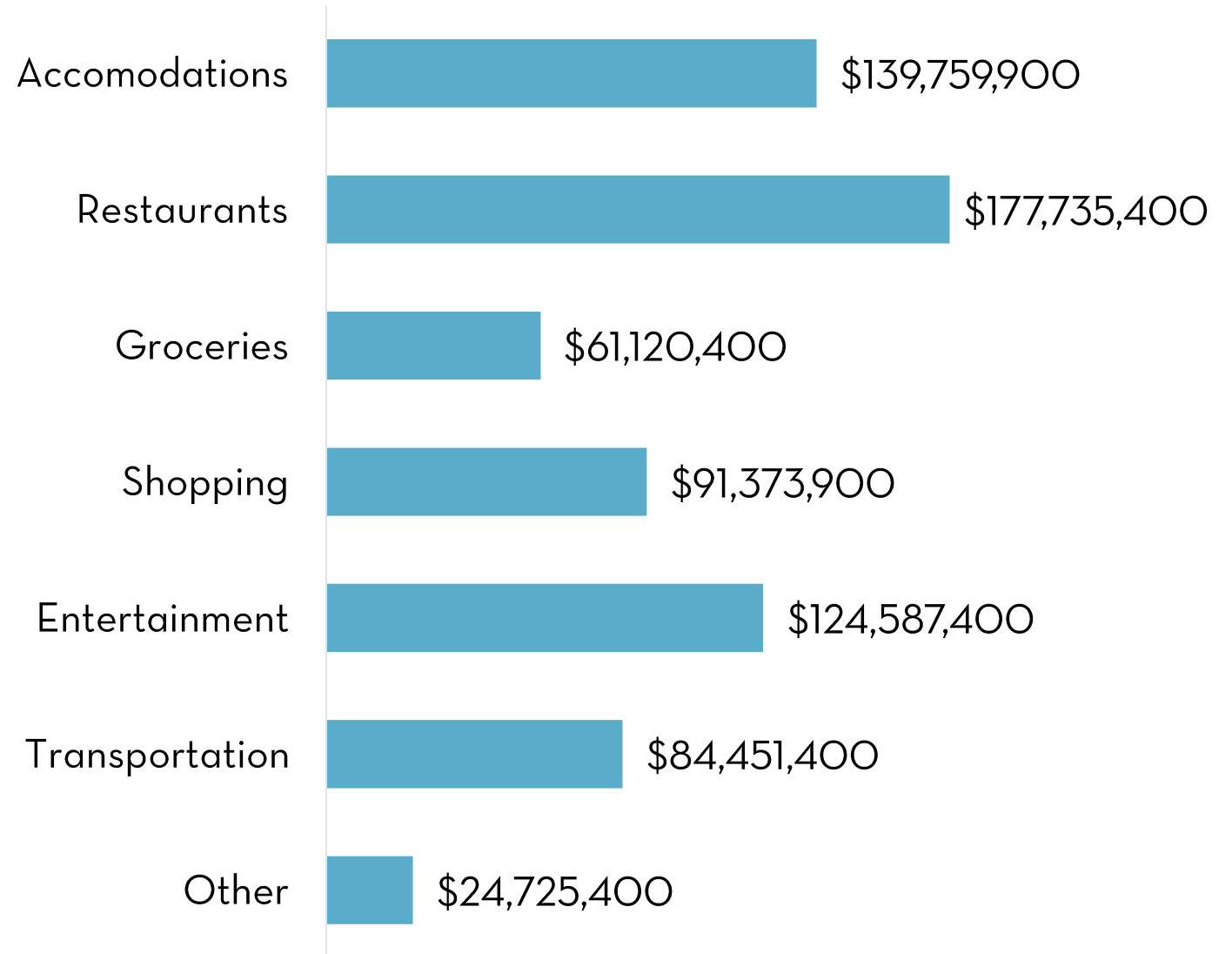


KEY PERFORMANCE INDICATORS

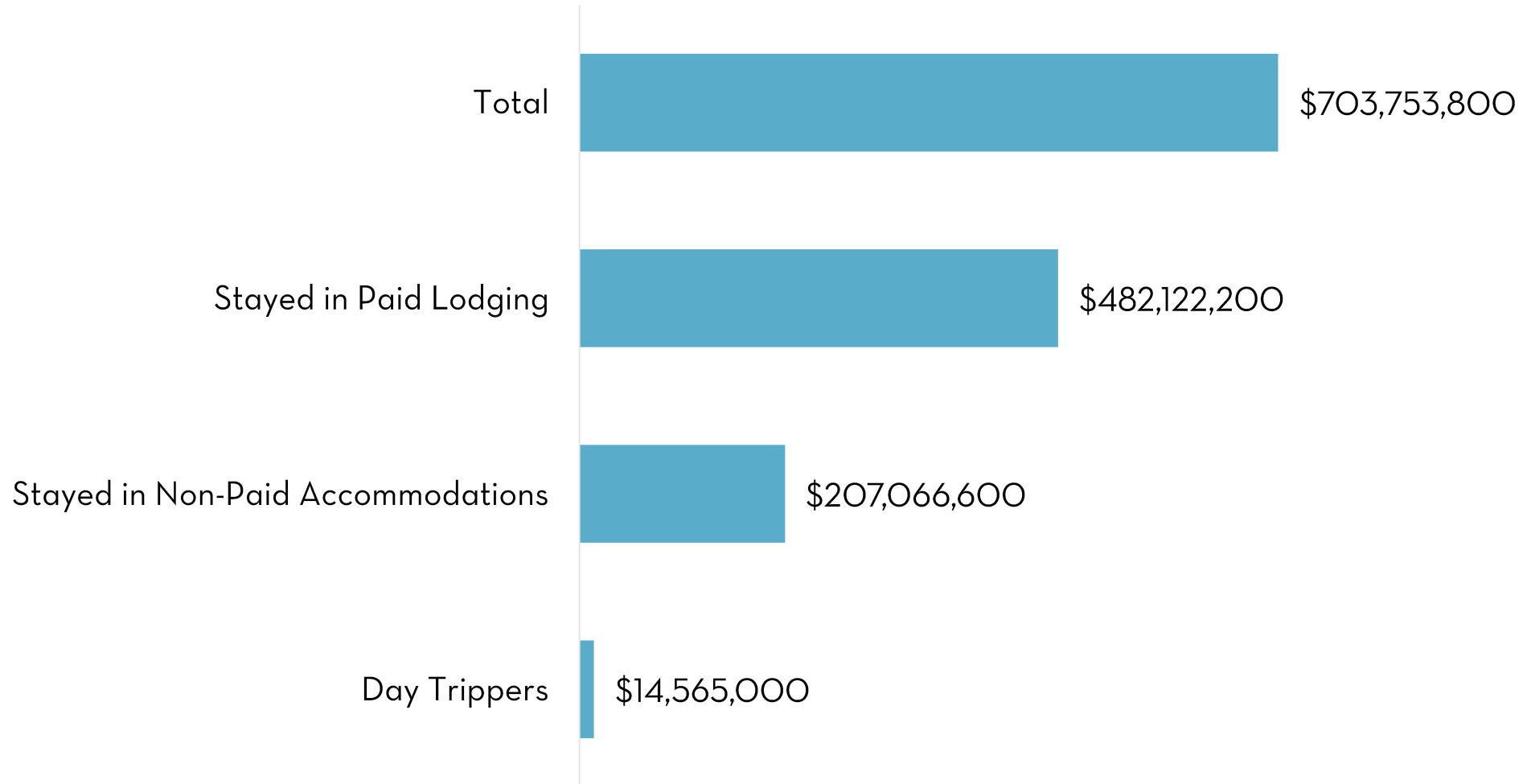
	2017	2023	% Change
Total Economic Impact	\$692,798,700	\$1,083,780,800	+56.4%
Direct Spending	\$453,408,600	\$703,753,800	+55.2%
Room Nights Generated	979,508	1,130,300	+15.4%
Average Daily Rate	\$94.81	\$122.31	+29.0%
Occupancy	66.6%	64.1%	-3.7%
Revenue per Available Room	\$64.05	\$79.28	+23.8%

Visitor Spending by Category

- St. Lucie County visitors spent **\$703,753,800** in St. Lucie County in 2023
- Restaurants accounted for 25% of visitor spending and accommodations accounted for 20%

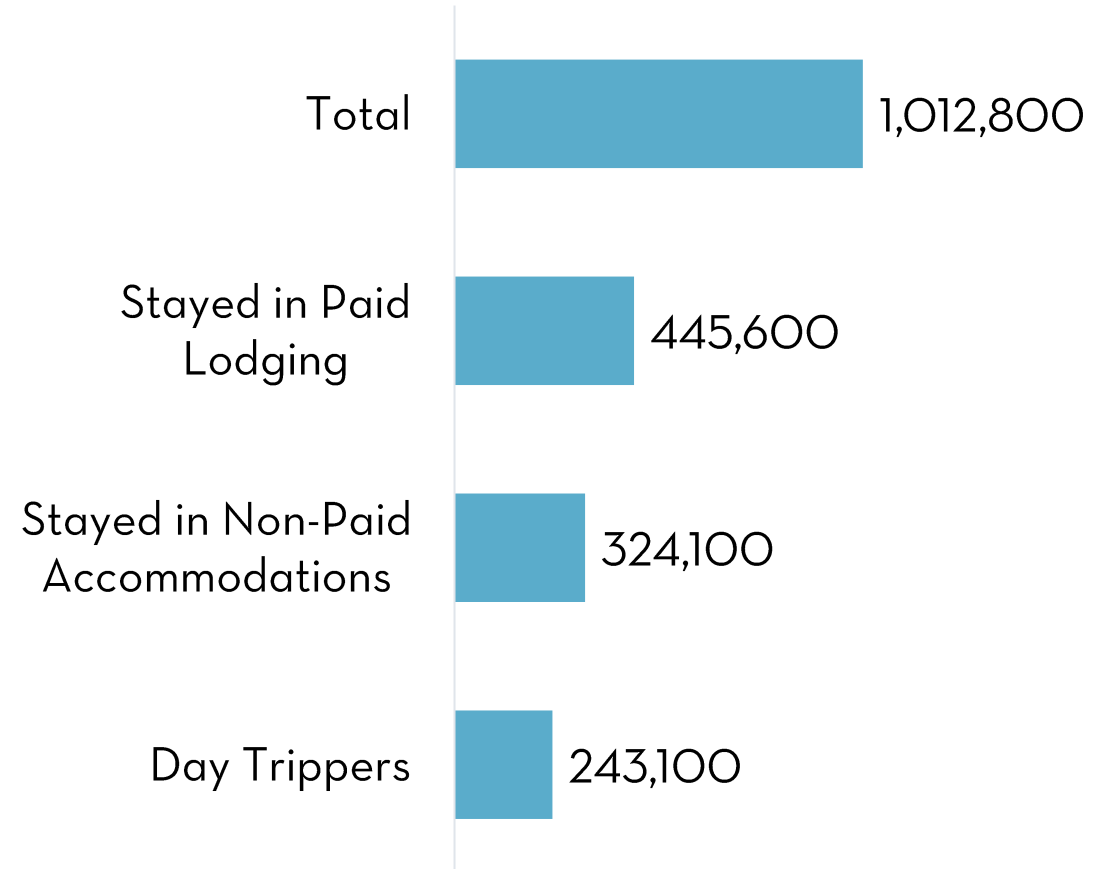


Direct Spending by Traveler Type

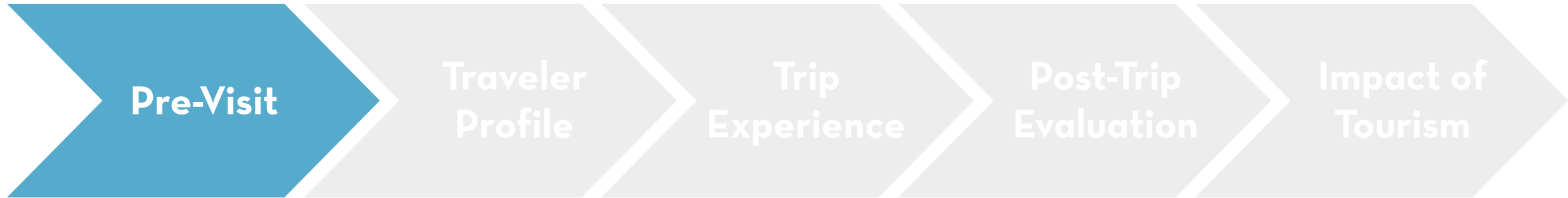


Traveler Type

- » St. Lucie County attracted **1,012,800** visitors to St. Lucie County in FY2023
- » **44%** of visitors stayed in paid lodging

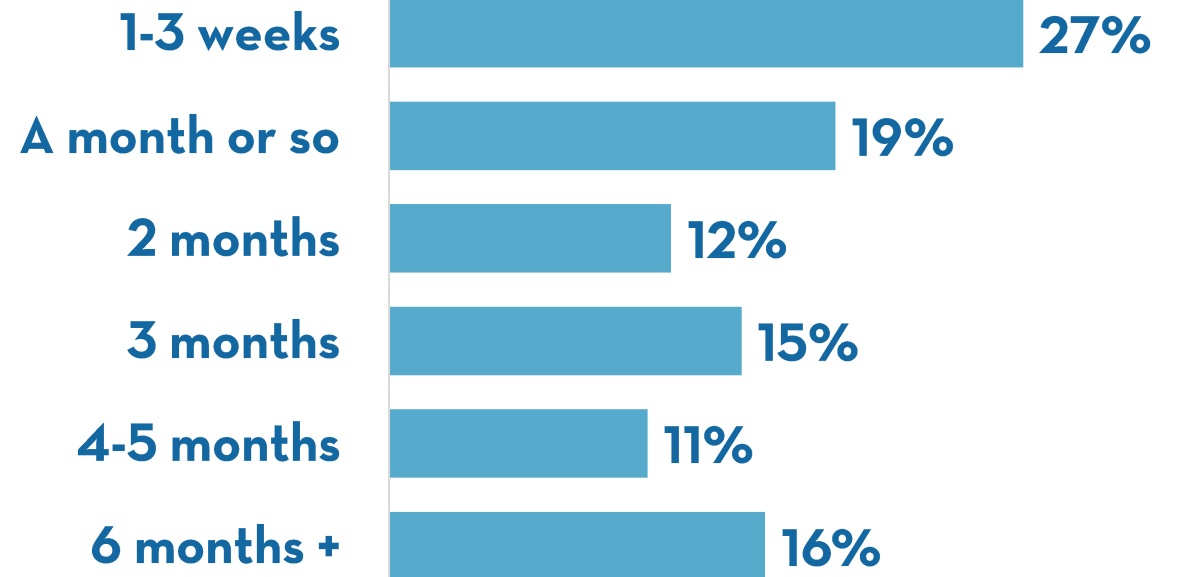


VISITOR JOURNEY: PRE-VISIT



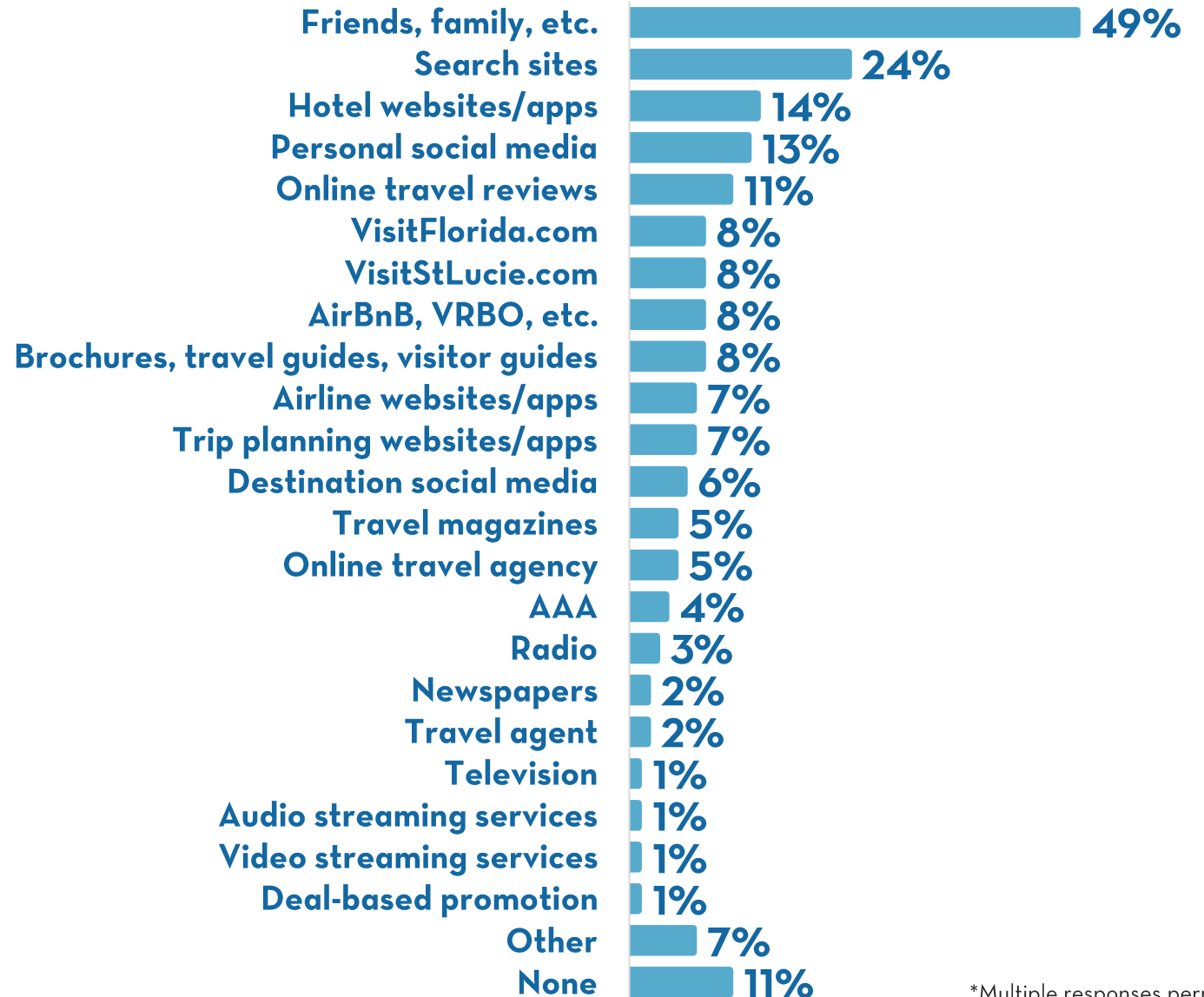
TRIP PLANNING CYCLE

- **Over 1 in 4** visitors planned their visit to St. Lucie County 1 to 3 weeks in advance of their trip
- **Over 2 in 5** visitors planned their trip 3 or more months in advance



TRIP PLANNING SOURCES*

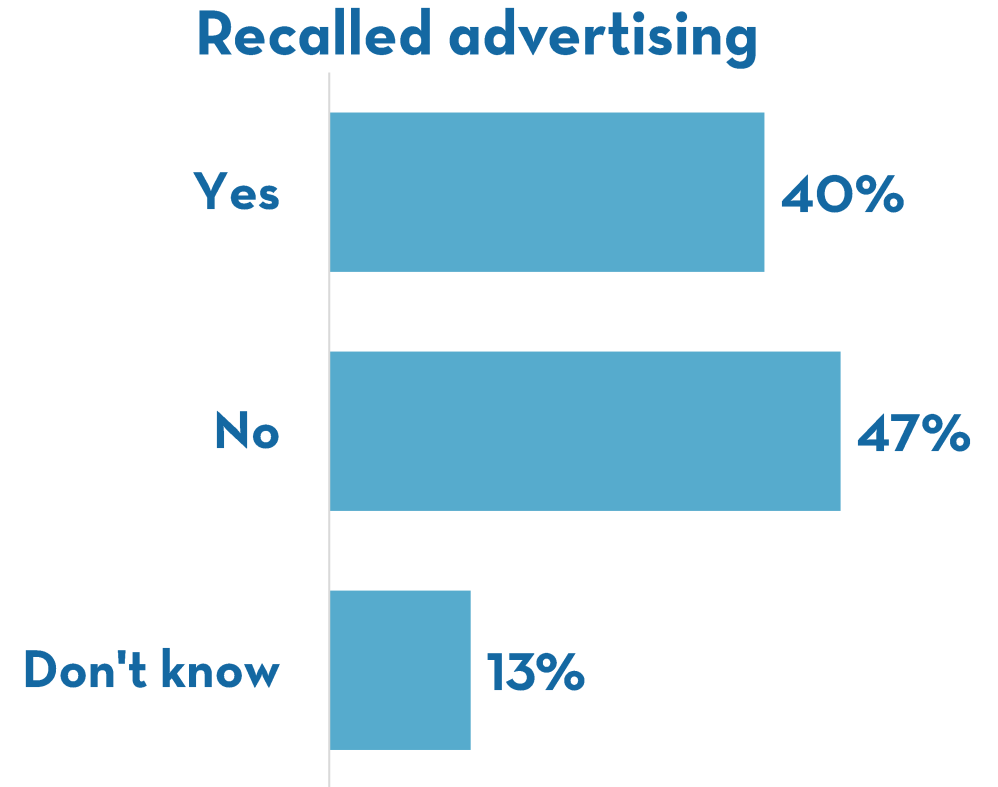
- Top 5 trip planning sources are **friends & family, search sites, hotel websites/apps, personal social media, and online travel reviews**
- Nearly **1 in 2** visitors planned their trip by talking about it with **friends and family**
- **89%** of visitors used at least one type of trip planning resources



*Multiple responses permitted.

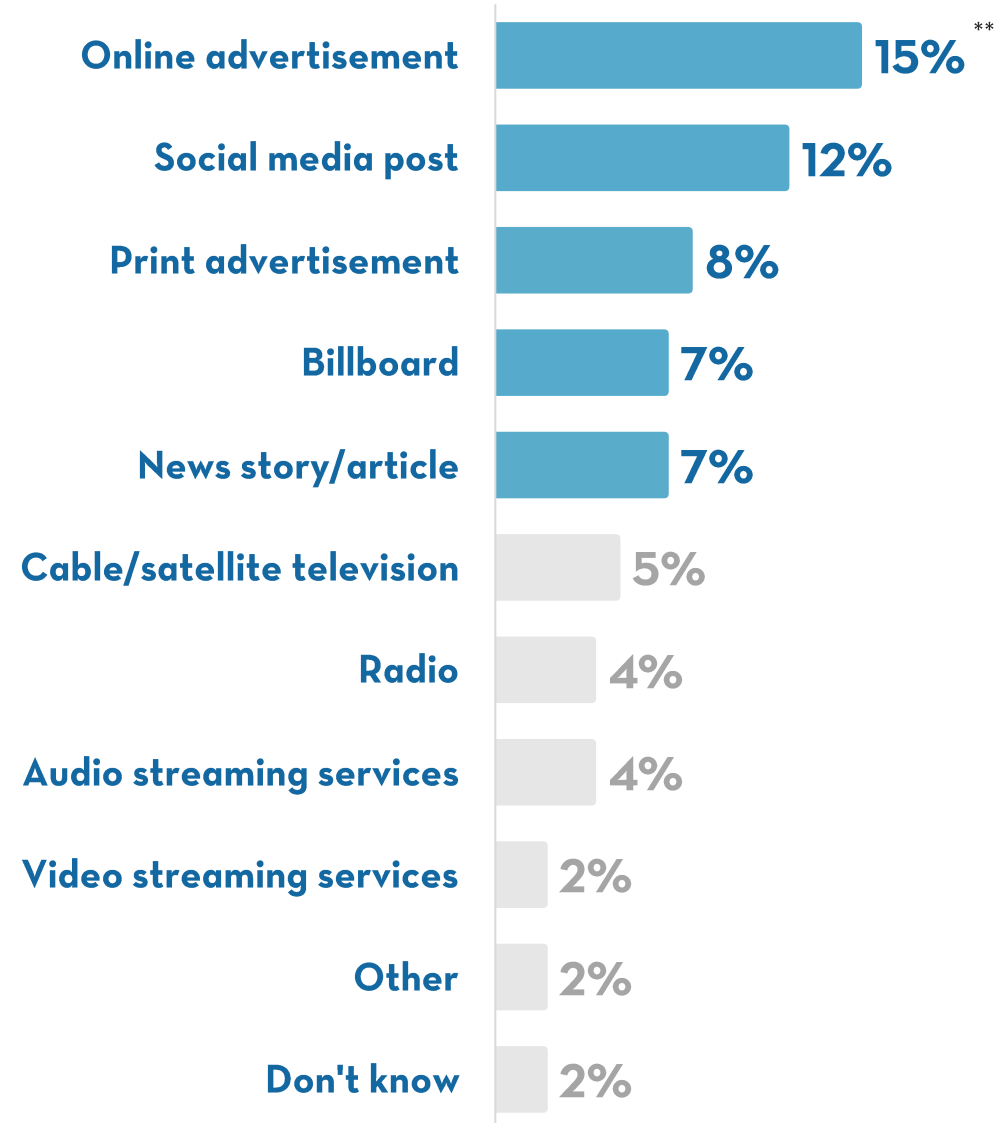
RECALLED ADVERTISING

- **2 in 5** of visitors recalled advertising about St. Lucie County before booking their trip
- **29% of all** visitors reported that it influenced their decision to visit St. Lucie County



SOURCES OF ADVERTISEMENT RECALL*

- **15%** of all visitors recalled advertising of St. Lucie County either on **online ads**
- Over **1 in 8** visitors recalled advertising on **social media posts**

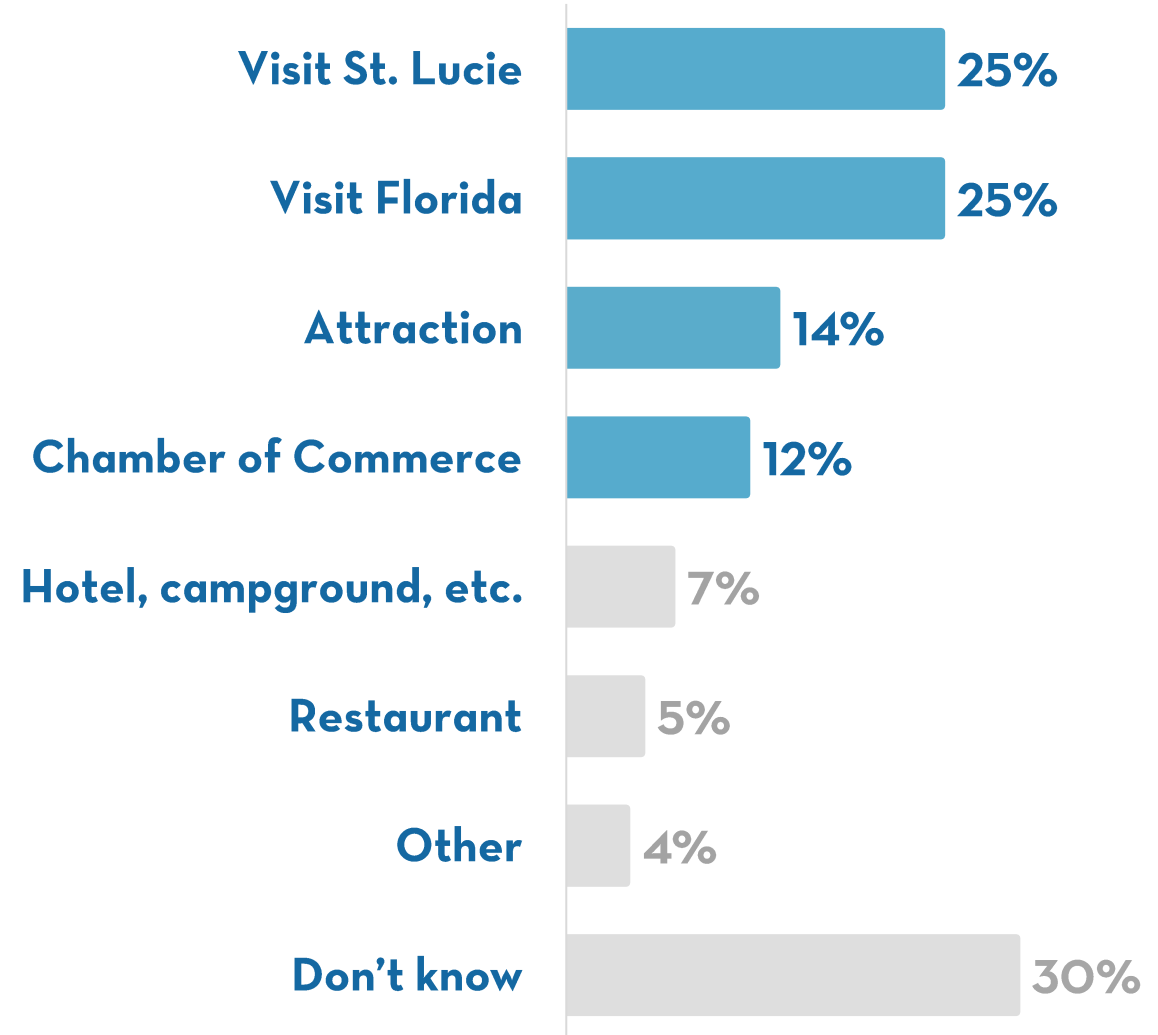


*Multiple responses permitted.

**Base: all visitors.

ADVERTISEMENT SPONSOR RECALL*

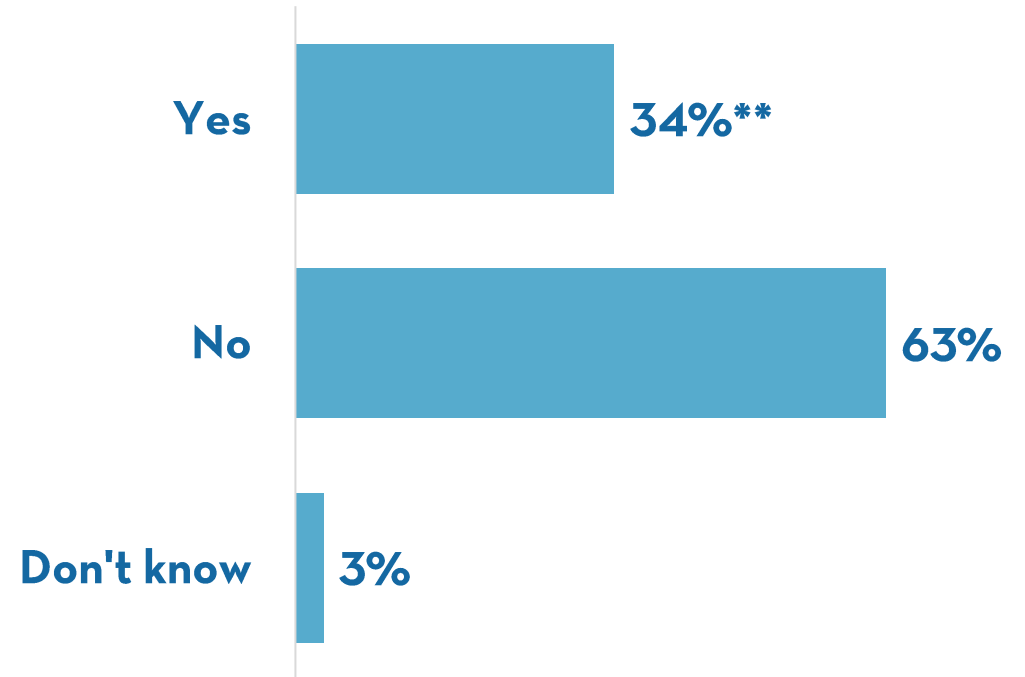
- **1 in 4** visitors to St. Lucie County recalled advertising sponsored by **Visit St. Lucie**
- **Another 1 in 4** visitors recalled advertising sponsored by **Visit Florida**



*Multiple responses permitted.

CONSIDERING DIFFERENT DESTINATIONS*

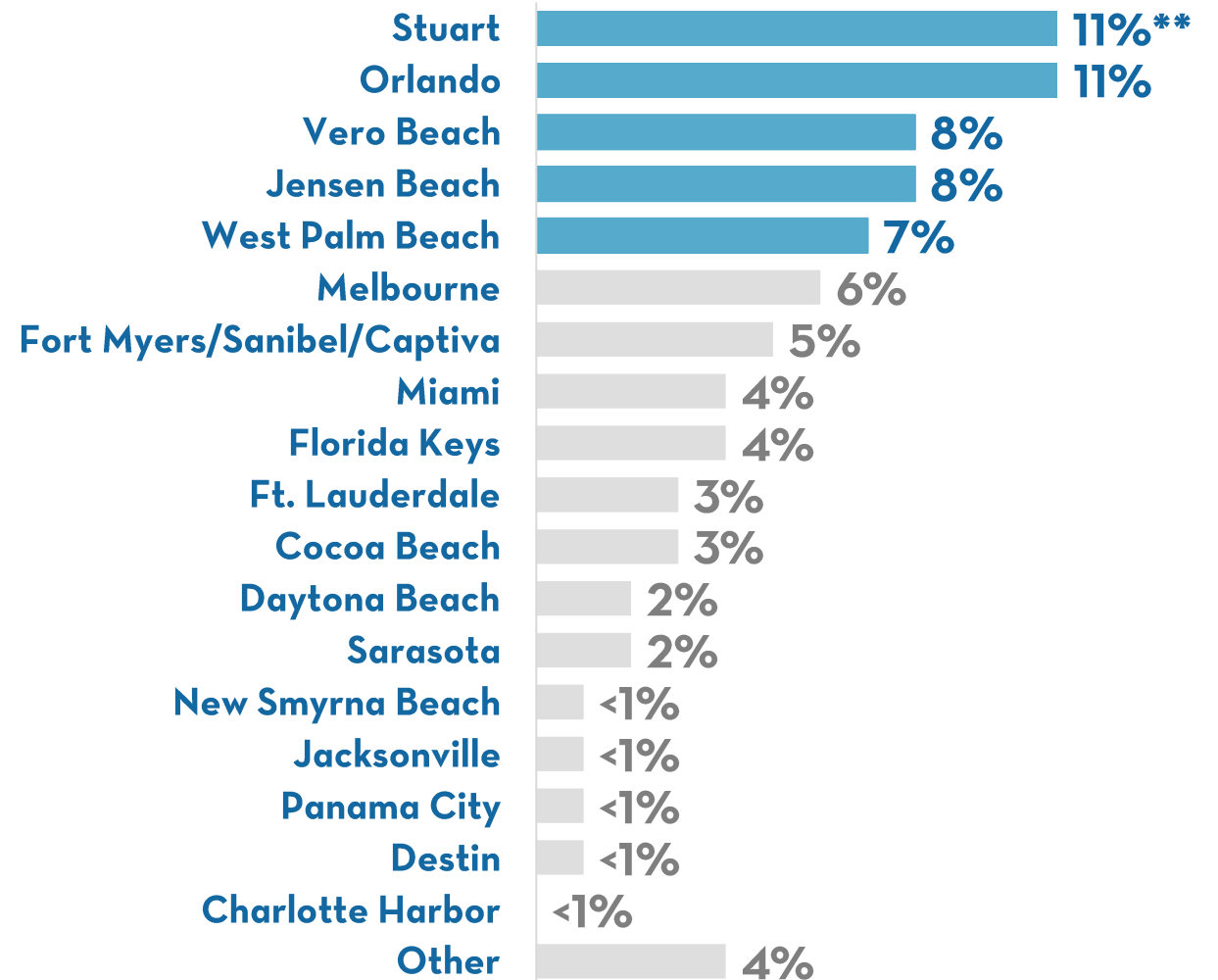
- **About 1 in 3** visitors said they considered other destinations before choosing St. Lucie County



*Multiple responses permitted.
**Represents all visitors.

OTHER DESTINATIONS CONSIDERED*

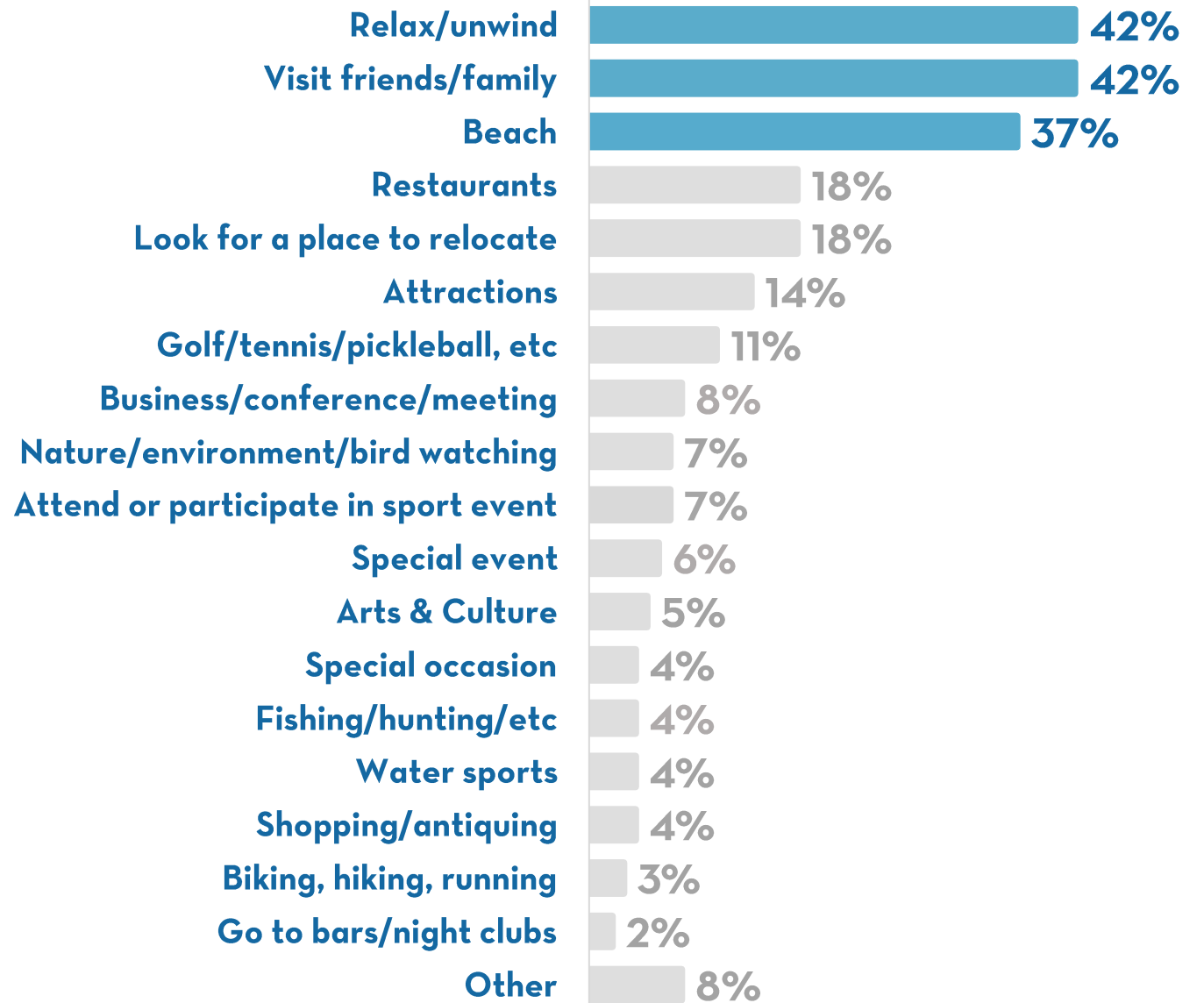
- **Over 1 in 10** of all visitors also considered **Stuart** or **Orlando**
- **Over 1 in 13** of all visitors also considered **Vero Beach** or **Jensen Beach**
- **Over 1 in 15** mentioned **West Palm Beach**



*Multiple responses permitted.
**Represents all visitors.

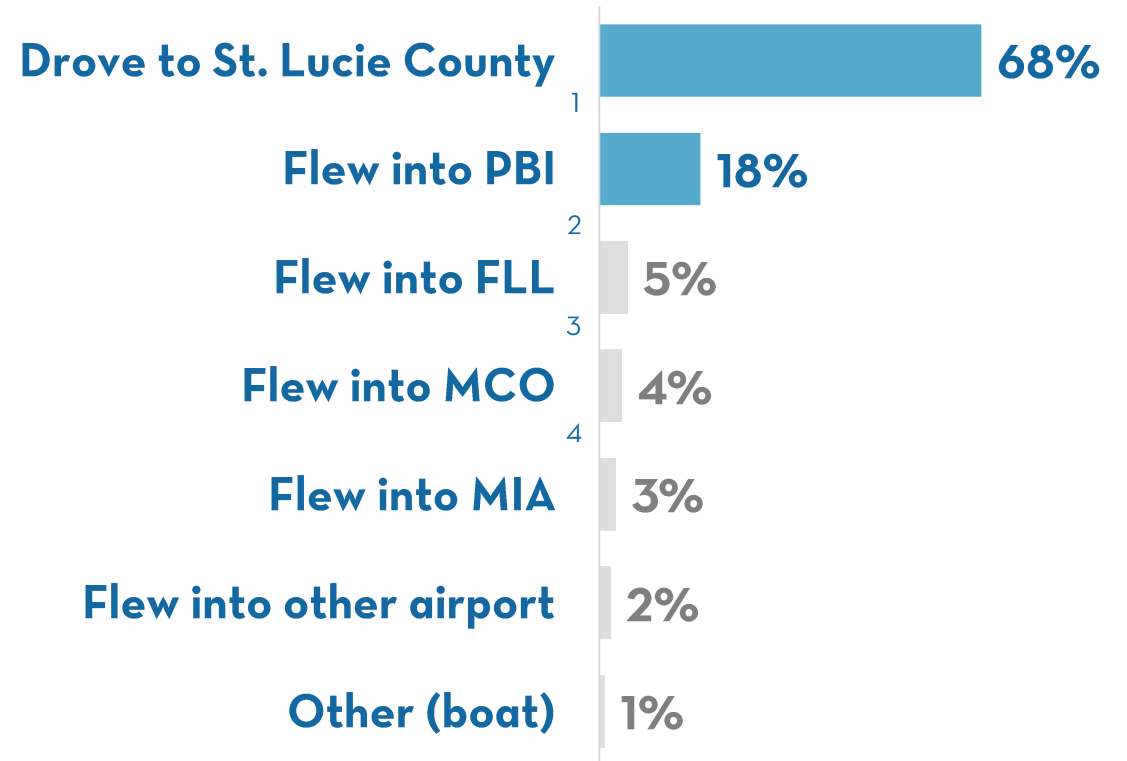
REASONS FOR VISITING

- Over **2 in 5** visitors traveled to St. Lucie County for **relaxing/unwinding** or **visiting friends and family**
- Over **1 in 3** came to **enjoy the beaches**



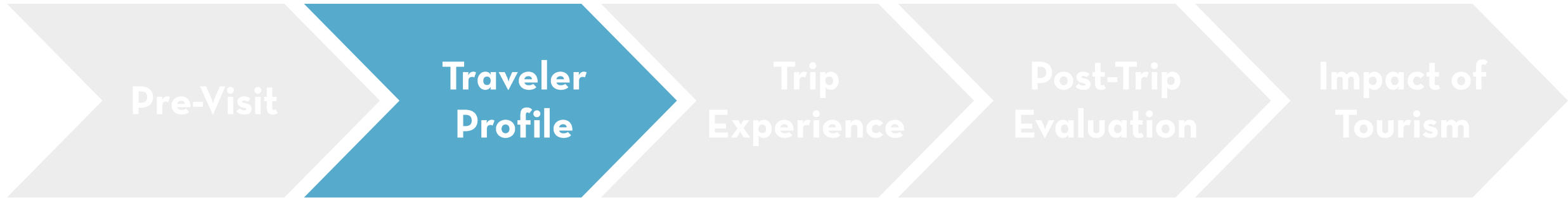
TRANSPORTATION

- **Over 2 in 3** visitors drove to St. Lucie County
- Visitors who flew to St. Lucie County primarily arrived at **Palm Beach International Airport**

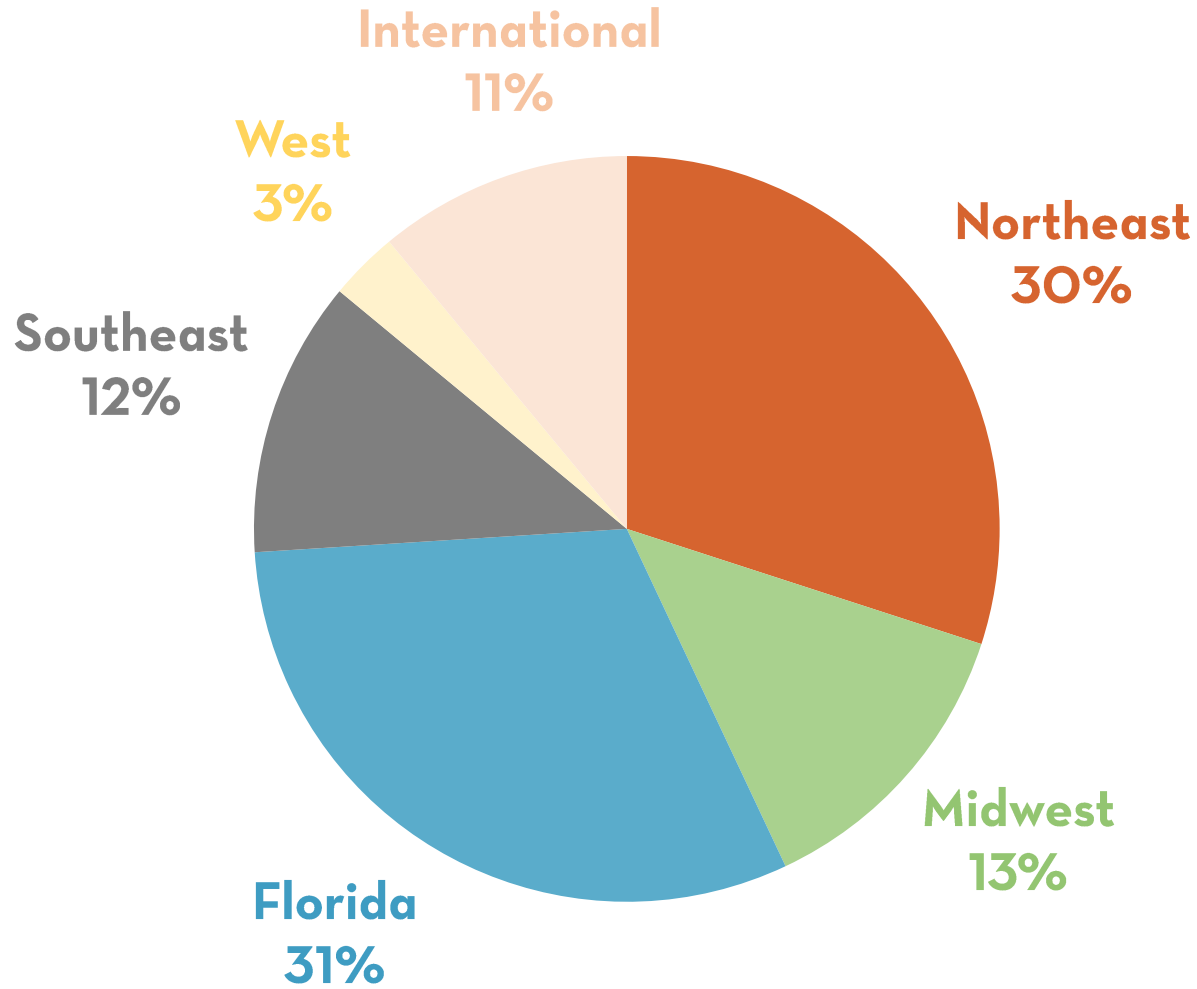


¹ Palm Beach International Airport
² Fort Lauderdale International Airport
³ Orlando International Airport
⁴ Miami International Airport

VISITOR JOURNEY: TRAVELER PROFILE



REGIONS OF ORIGIN



Region (International)	Percent
Canada	6%
Europe	2%
South America	1%
Caribbean	1%
Other	1%
Total	11%

TOP STATES OF ORIGIN

- **75%** of visitors lived in **15** U.S. states
- **Florida** and **New York** are the top origin states for visitors to St. Lucie County, followed by **New Jersey** and **Pennsylvania**

State	Percent
Florida	31%
New York	10%
New Jersey	5%
Pennsylvania	4%
Michigan	3%
Ohio	3%
Massachusetts	3%
Georgia	2%
Connecticut	2%
Delaware	2%
Illinois	2%
New Hampshire	2%
North Carolina	2%
Virginia	2%
Texas	2%

TOP MARKETS OF ORIGIN

- **58%** of St. Lucie County visitors came from **12** U.S. markets
- Over **1 in 6** visitors traveled from **West Palm Beach-Ft. Pierce** market
- Over **1 in 10** visitors traveled to St. Lucie County from the **New York City metropolitan** market

Market	Percent
West Palm Beach-Ft. Pierce	17%
New York City ¹	11%
Orlando-Daytona Beach-Melbourne	5%
Philadelphia ²	5%
Miami-Fort Lauderdale	4%
Boston	3%
Tampa-St. Petersburg	3%
Albany-Schenectady-Troy	2%
Atlanta	2%
Chicago ³	2%
Cleveland-Akron	2%
Detroit	2%

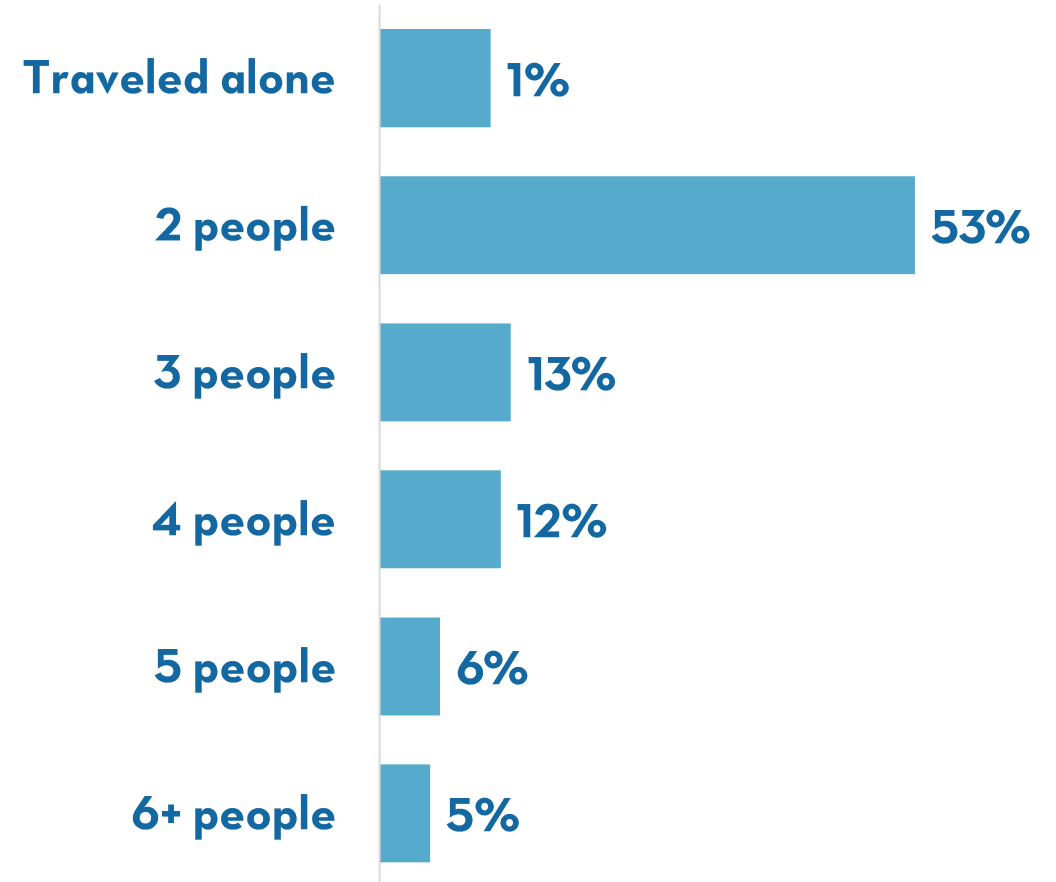
¹ Metro area includes counties in New Jersey, Pennsylvania, and Connecticut.

² Philadelphia DMA includes parts of New Jersey and much of Delaware.

³ Chicago DMA includes counties in Illinois and part of Indiana.

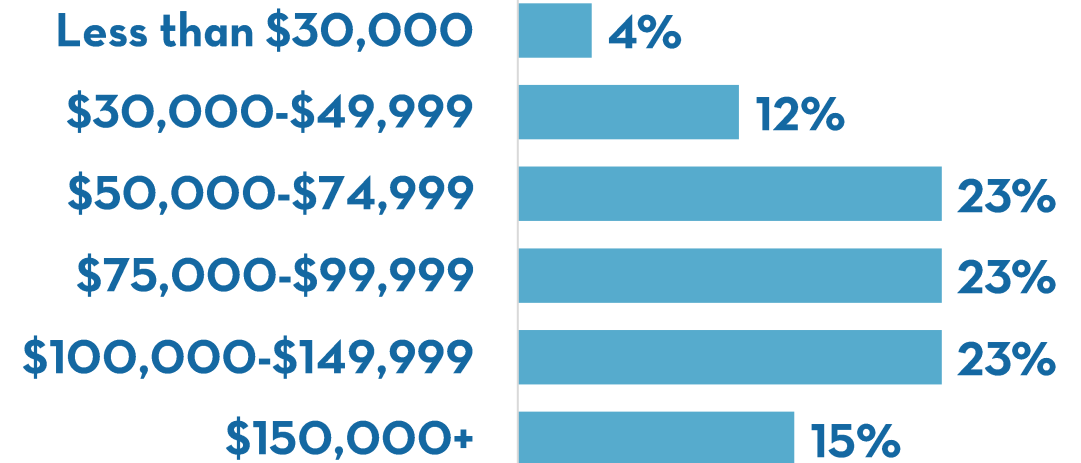
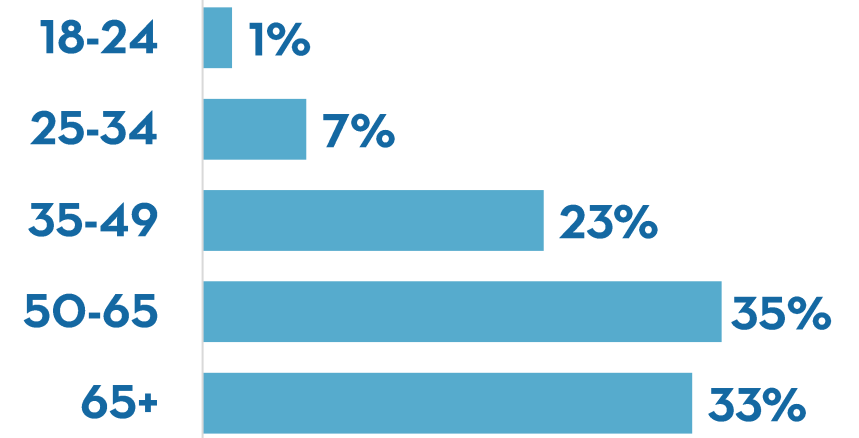
TRAVEL PARTIES

- The average travel party size was **2.9** people
- **25%** of all visitors traveled with one or more children



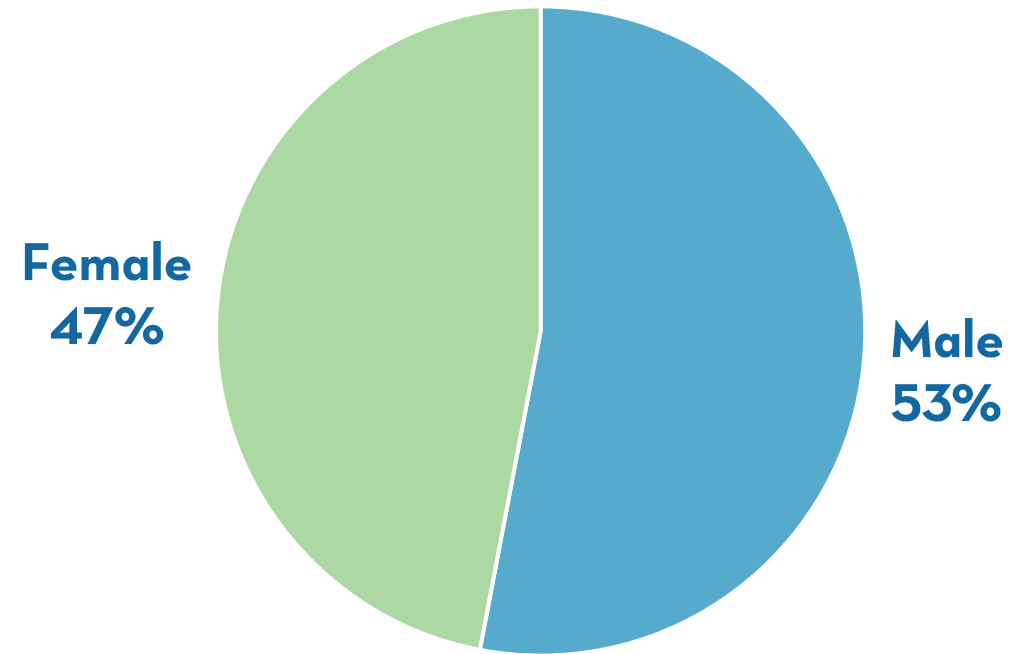
AGE & INCOME

- Typical visitors to St. Lucie County were **57** years old
- Typical visitors to St. Lucie County earned **\$87,100** per year



GENDER

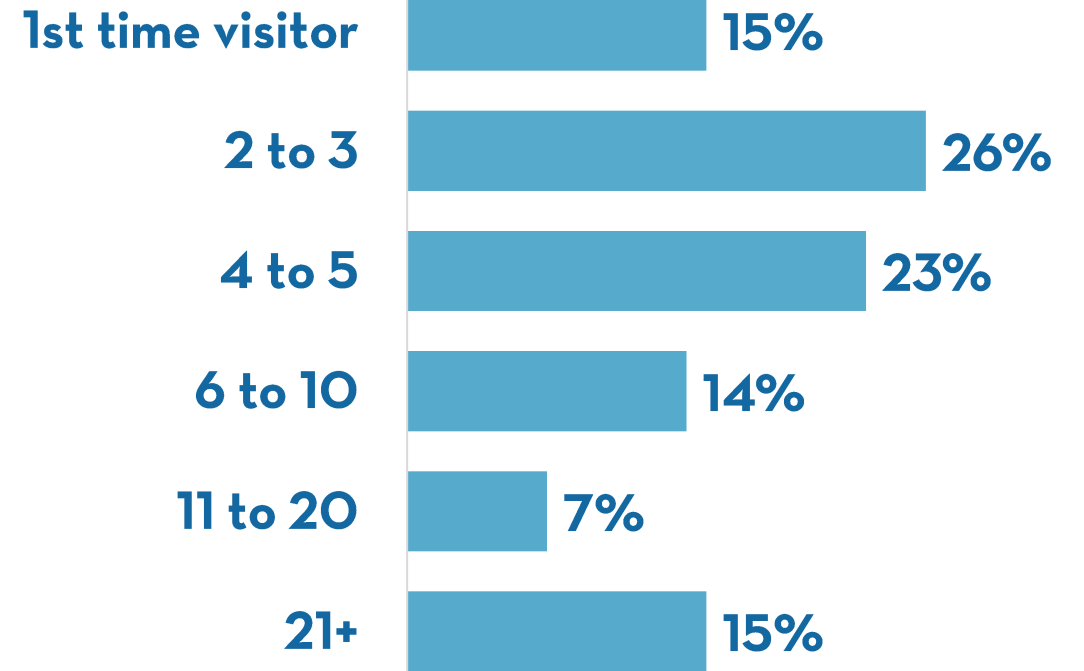
- Visitors were equally likely to be male or female¹



¹ Percent who agreed to be interviewed.

VISITS TO ST. LUCIE COUNTY

- Over **1 in 7** of visitors were first time visitors to St. Lucie County
- Nearly **1 in 4** visitors had previously visited St. Lucie County 4 to 5 times

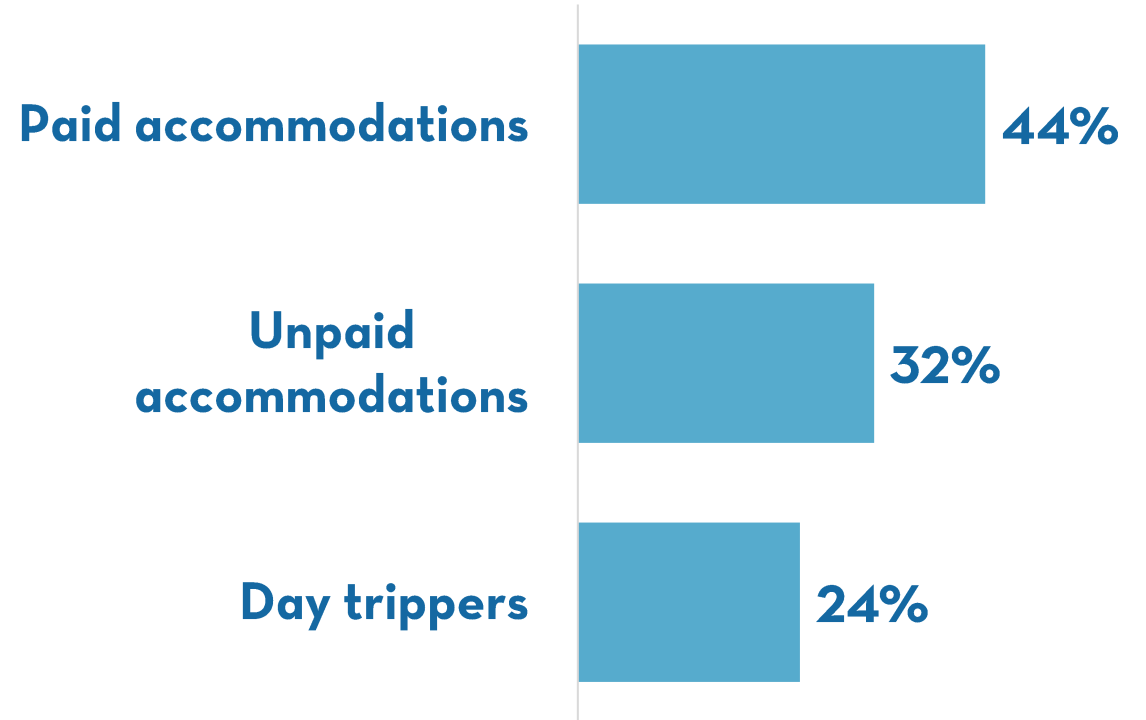


VISITOR JOURNEY: TRIP EXPERIENCE



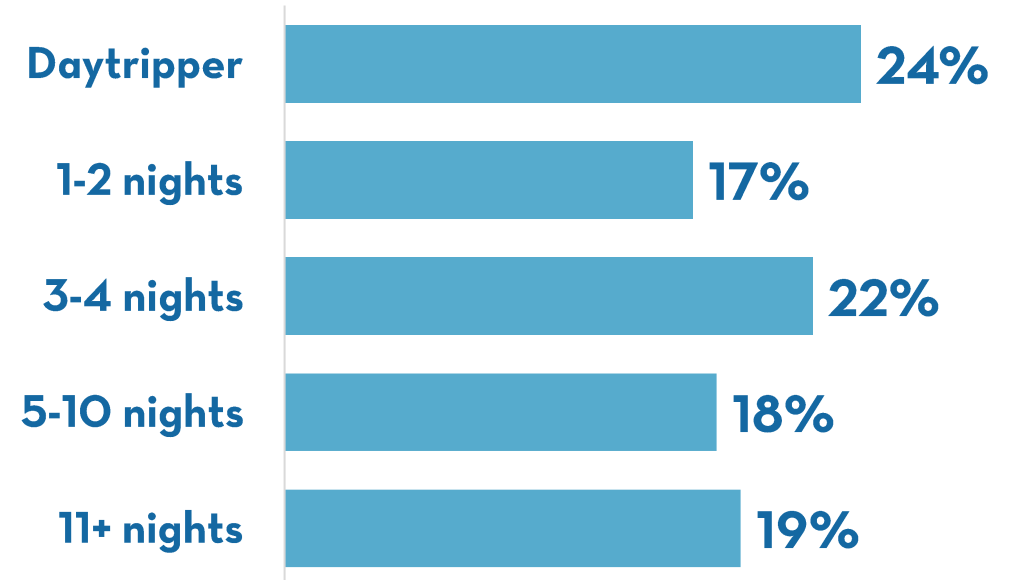
OVERNIGHT VISITORS

- **76%** of visitors stayed overnight while visiting St. Lucie County
- Over **2 in 5** visitors stayed in paid accommodations
- Nearly **1 in 3** visitors stayed in unpaid accommodations



NIGHTS STAYED

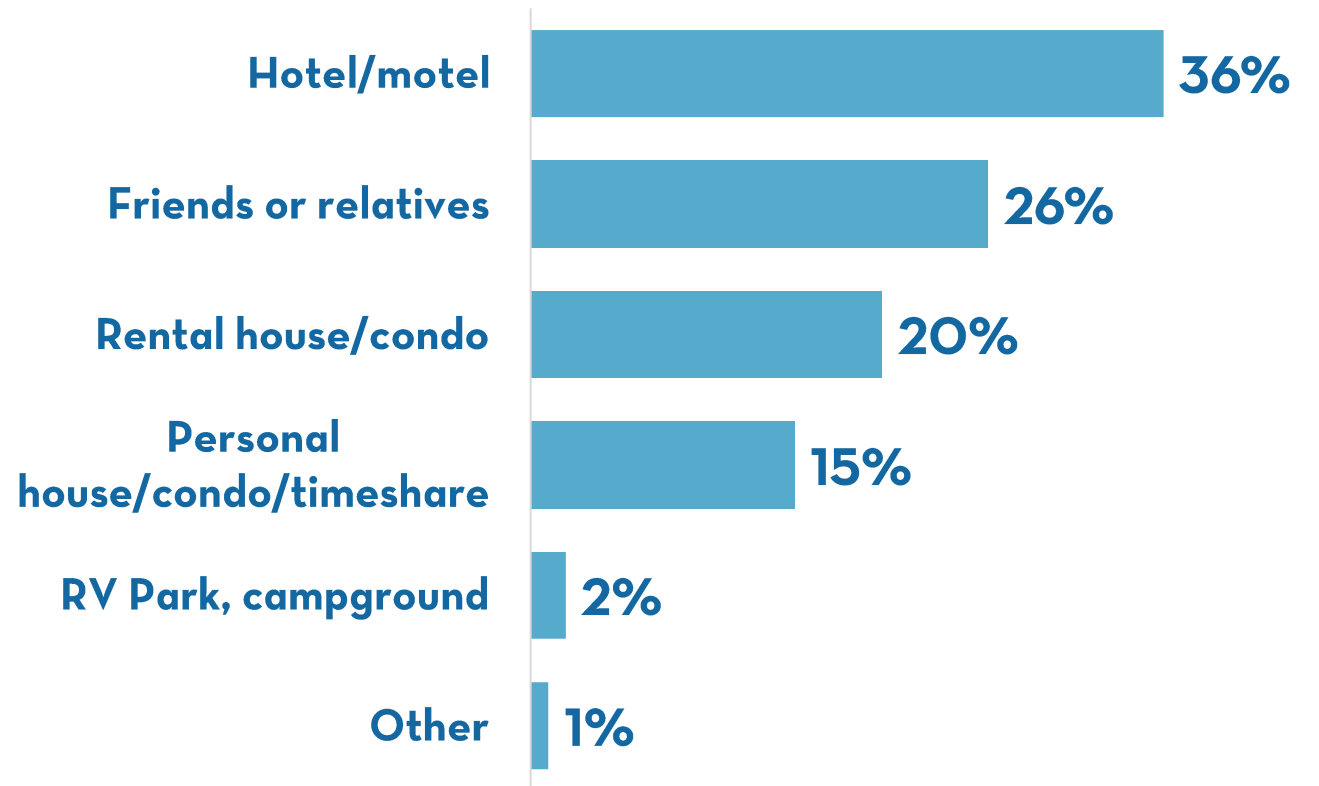
- Typical visitors stayed **5.8** nights* in St. Lucie County



*Long-term visitors' number of nights capped at 30.
This data includes paid accommodations, unpaid accommodations, and day trippers.

ACCOMMODATIONS*

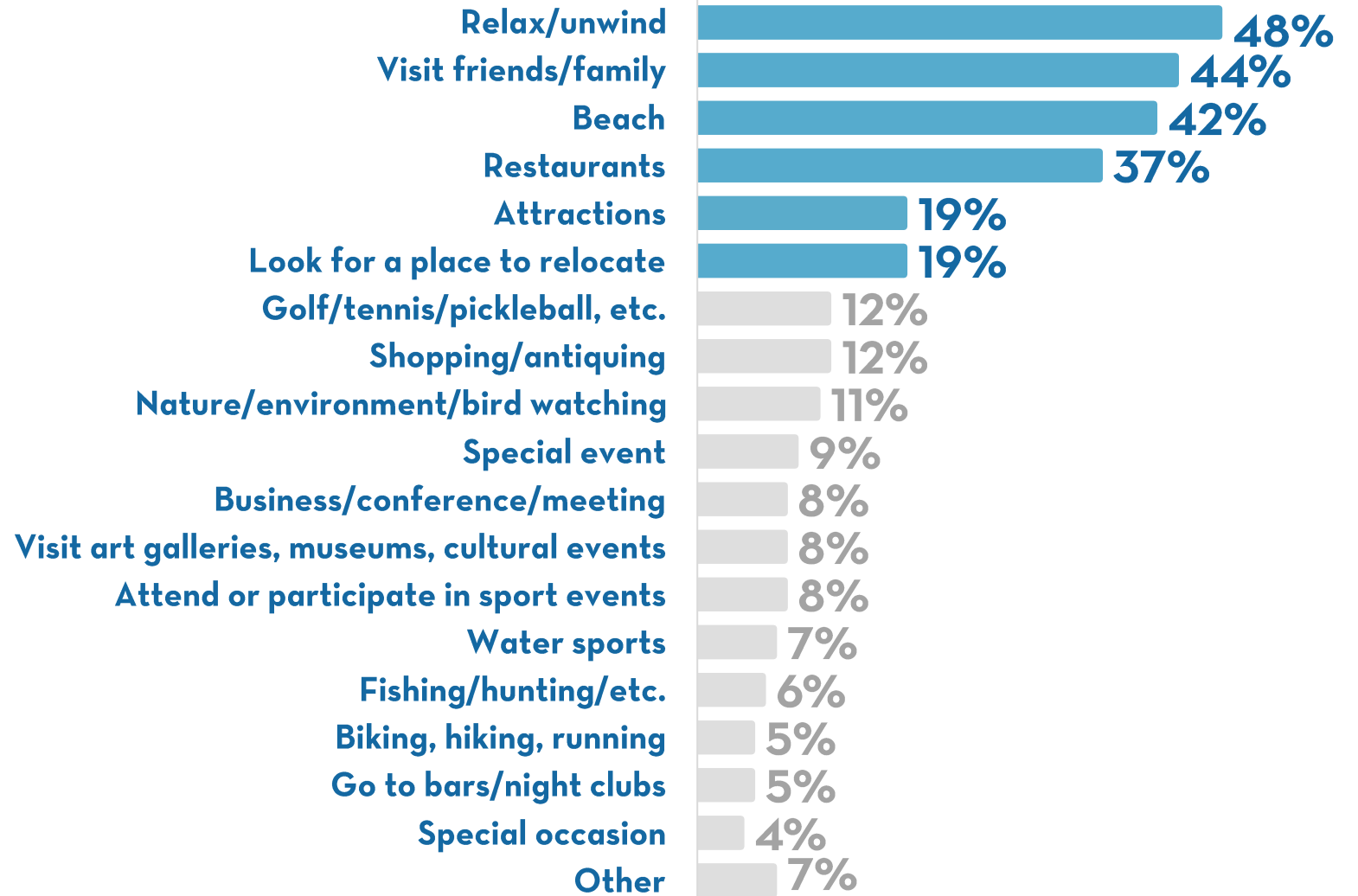
- Over **1 in 4** visitors stayed with **friends and relatives** during their trips to St. Lucie County
- Over **1 in 3** of St. Lucie County visitors stayed in a **hotel/motel**



*This data does not include Day Trippers.

VISITOR ACTIVITIES*

➤ Over **2 in 5** visitors **relaxed, visited friends/family, and went to the beach** while in St. Lucie County

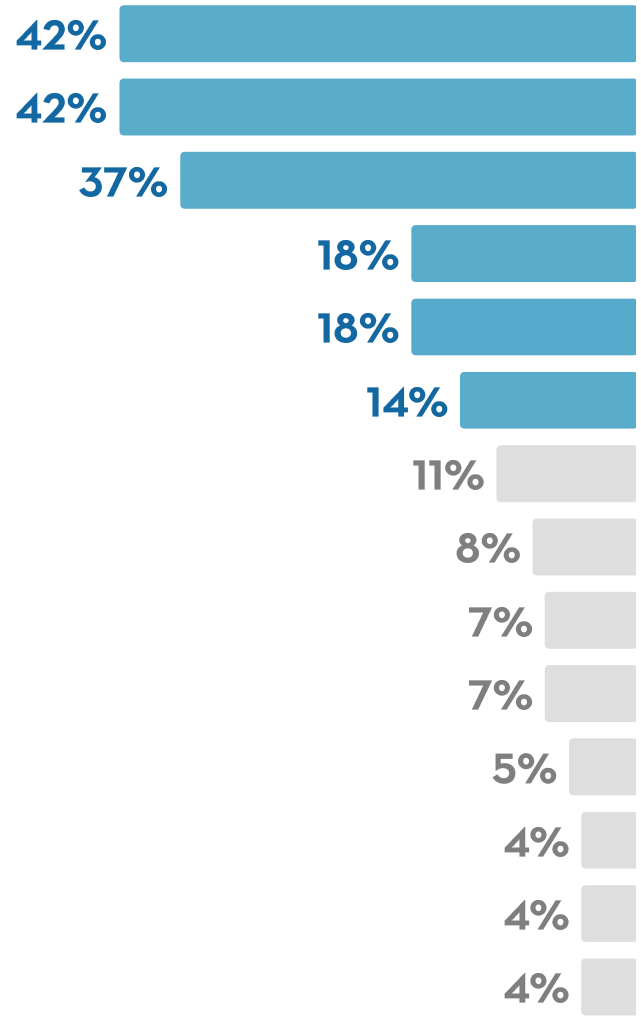


*Multiple responses permitted.

VISITOR ACTIVITIES VS. REASONS FOR VISITING

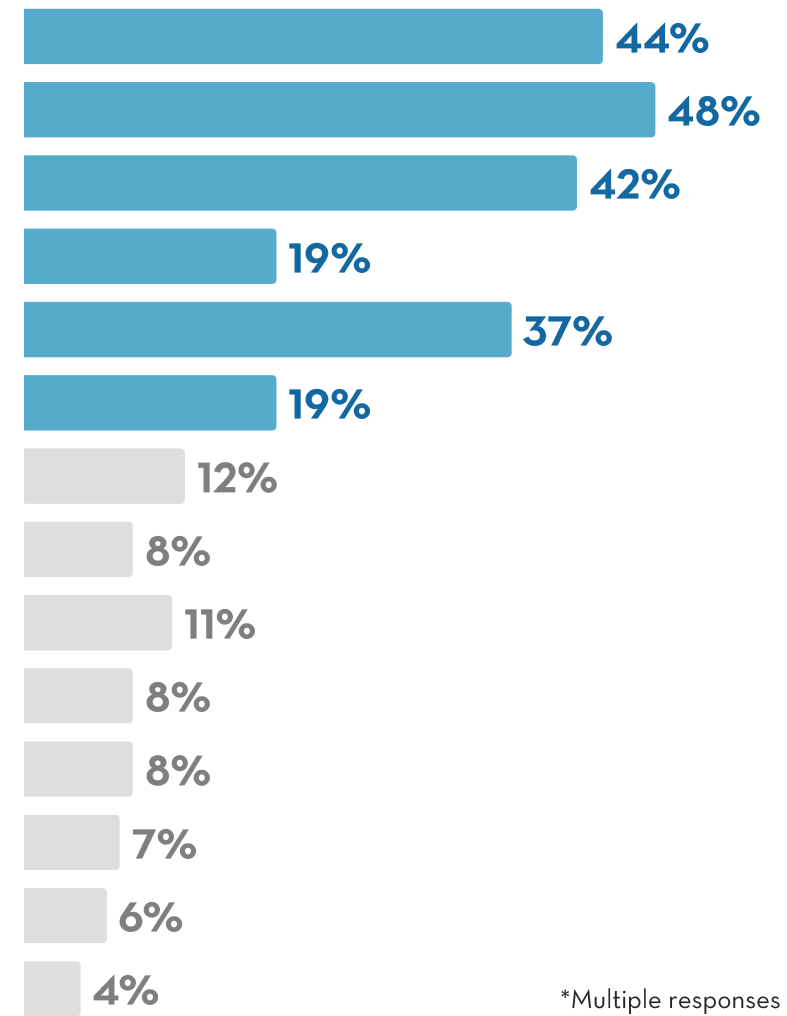


Reasons for Visiting*



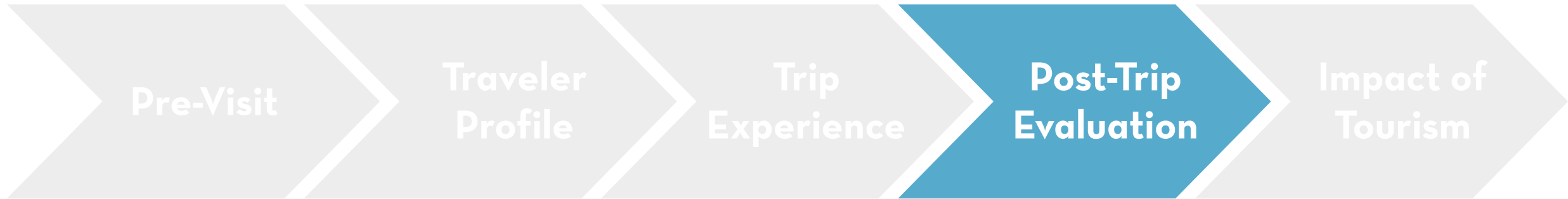
- Visit friends/family
- Relax/unwind
- Beach
- Look for a place to relocate
- Restaurants
- Attractions
- Golf/tennis/pickleball, etc.
- Business/conference/meeting
- Nature/environment/bird watching
- Attend/participate in sporting events
- Art galleries, museums, cultural events
- Water sports
- Fishing/hunting/etc.
- Special occasion

Visitor Activities*



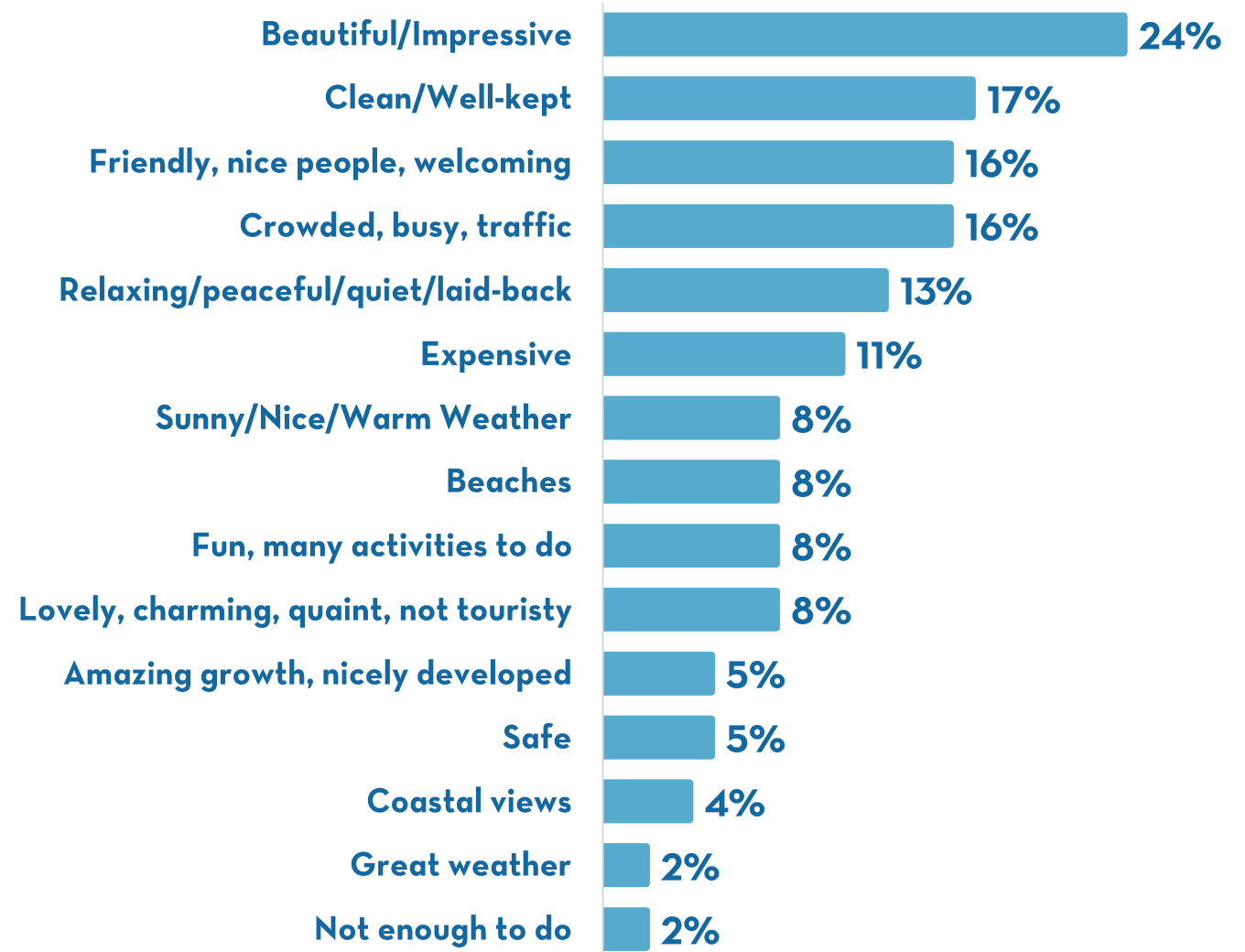
*Multiple responses permitted.

VISITOR JOURNEY: POST-TRIP EVALUATION



WORDS USED TO DESCRIBE ST. LUCIE COUNTY*

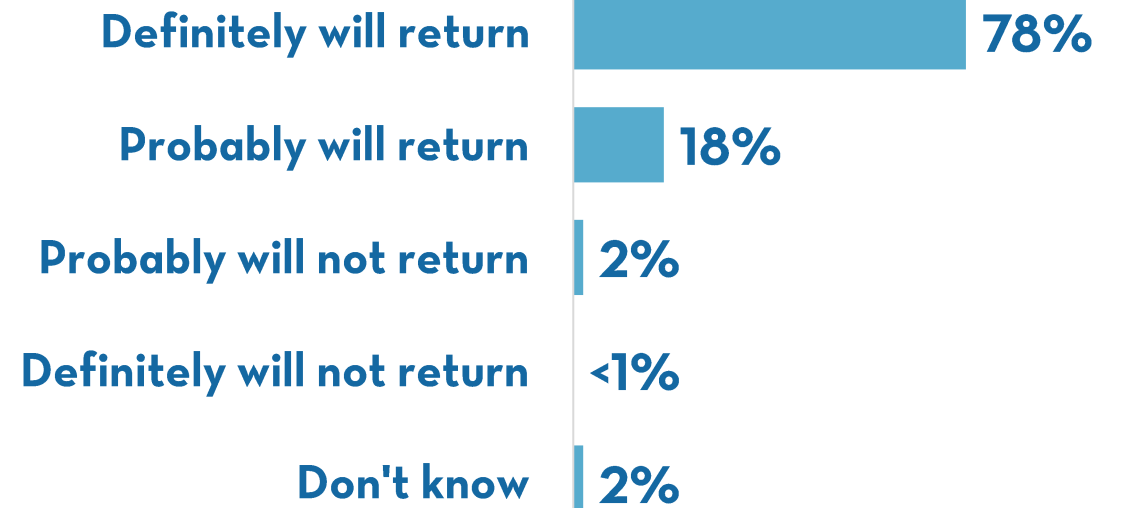
- Visitors most often mention **beautiful, impressive (24%)** when describing St. Lucie County
- **Nearly 1 in 6** visitors mention **clean and well-kept** when describing St. Lucie County



*Open-ended question

RETURN VISITATION

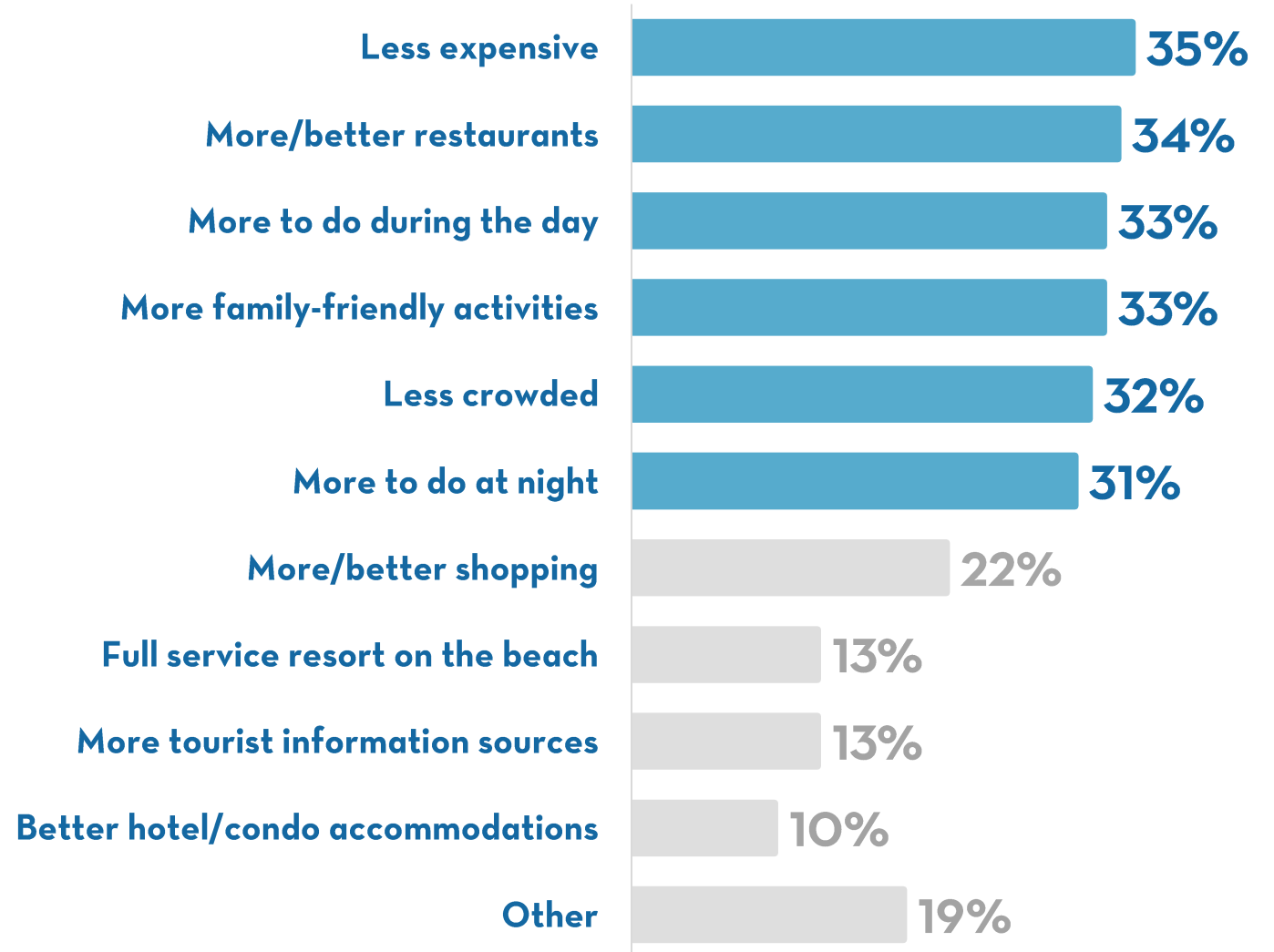
- Visitors gave St. Lucie County a rating of **8.3*** as a place to visit
- **96%** of visitors will return to St. Lucie County for a future visit (nearly **4 in 5** will **definitely** return)



*On a 10-point scale where 10 means “excellent” and 1 means “poor”.

VISITOR SUGGESTED IMPROVEMENTS*

- Over **1 in 3** visitors mentioned they would like St. Lucie County to be **more affordable/less expensive**
- **1 in 3** visitors would like St. Lucie County to have **more/better restaurant options, more to do during the day**, especially **family-friendly activities**



*Multiple responses permitted.
Small sample size.

REQUESTED CROSSTABS

This section denotes differences between certain types of visitors and the typical visitor.



VISITORS STAYING IN HOTELS

➤ **Compared to all visitors, those staying in hotels:**

- Were younger and had a higher annual household income
- Had a longer trip planning cycle
- Were less likely to rely on friends and family for information when planning their trip
- Were less likely to recall seeing advertising about the area before their trip
- Were more likely to be first-time visitors to the area
- Were more likely to fly to the area instead of drive
- Were less likely to travel to the area to visit friends and family or for business
- Spent more nights in the area
- Were more likely to say St. Lucie would be a better place to visit if it was less expensive
- Were less certain if they would return to the area

VISITORS STAYING IN VACATION RENTALS

➤ Compared to all visitors, those staying in vacation rentals:

- Had a higher annual household income
- Had visited the area fewer times
- Had a longer trip planning cycle
- Were more likely to visit the area for the beach
- Spent more time in the area
- Were more likely to spend time at the beach, dining at restaurants, or fishing/hunting during their stay
- Were less likely to say that St. Lucie County needed more to do at night

INTERNATIONAL VISITORS

➤ **Compared to all visitors, international visitors:**

- Had a higher annual household income
- Had a longer trip planning cycle
- Were less likely to recall seeing advertising about the area before their trip
- Were more likely to consider visiting other destinations
- Were more likely to come to the area to relax and unwind and less likely to do so to visit friends and family
- Spent more time in the area
- Were more likely to go to the beach and visit local attractions during their stay
- Were more likely to say St. Lucie would be a better place to visit if it was less expensive

METHODOLOGY





Visitor Tracking

1,486 interviews were completed with St. Lucie County visitors online and by in-person interviews at local beaches, downtown areas, and attractions between January 1st and December 31st, 2023.

VISIT ST. LUCIE

Visitor Tracking Annual Report 2023

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