PALM COAST AND THE FLAGLER BEACHES

FY2020 Economic Impact & Visitor Tracking Report

Palm Coast
AND THE
Coast
FLAGLER BEACHES

DS downs & st. germain
RESEARCH

INTRODUCTION

STUDY OBJECTIVES: VISITOR JOURNEY

Pre-Visit
- Planning cycle
- Planning sources
- Reasons for visiting
- Transportation

Traveler Profile
- Visitor origin
- Party size
- Party composition
- Demographics
- Previous visits

Trip Experience
- Length of stay
- Accommodations
- Apps used in market
- In-market activities
- Areas visited

Post-Trip Evaluation
- Future visits
- Visitor satisfaction
- Perceptions of Flagler

Economic Impact
- Number of visitors
- Expenditures
- Economic impact
- Room nights
- Tourism metrics

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EXECUTIVE SUMMARY

VISITOR JOURNEY: ECONOMIC IMPACT

Pre-Visit

Traveler Profile

Trip Experience

Post-Trip Evaluation

Economic Impact

ECONOMIC IMPACT

Visitor spending in FY2020 generated

$454,639,800

in economic impact to Flagler County

DIRECT SPENDING

Visitors who took a trip to Flagler County in FY2020 spent

$309,278,800

in the county on accommodations, restaurants, groceries, transportation, attractions, entertainment, and shopping

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R E S E A R C H

Flagler County attracted

572,400

visitors in FY2020

Visitors to Flagler County generated

382,700

room nights in paid accommodations in FY2020

The total economic impact of tourism in Flagler County supported

5,814

jobs in FY2020

WAGES GENERATED

Tourism in Flagler County supported

$149,902,100

in wages and salaries in FY2020

VISITORS CREATE JOBS

A Flagler County job is supported by every

99

visitors

TOURIST DEVELOPMENT TAX

Visitors to Flagler County staying in paid accommodations such as hotels and vacation rentals generated

$2,378,400

in TDT collected by the county in FY2020

Visitors to Flagler County saved local residents

$756

in taxes per household in FY2020

MARKETING SPENDING

Every dollar spent by Palm Coast & the Flagler Beaches on marketing is associated with

$402

in visitor spending in Flagler County

VISITOR JOURNEY: PRE - VISIT

Pre-Visit | Traveler Profile | Trip Experience | Post-Trip Evaluation | Economic Impact

TRIP PLANNING CYCLE

» Visitors to Flagler County had short planning windows in FY2020, as **2 in 5** planned their trip less than a month in advance

TOP TRIP PLANNING SOURCES*

45% Search on Google

31% Talk to friends

25% Destination social media

*Multiple responses permitted.

TOP REASONS FOR VISITING

24% Vacation

21% Visit friends/family

11% Beach

» **29%** of visitors noticed advertising for Flagler County prior to their trip

TOP ADVERTISING MEDIUMS*

53% Social Media

27% Travel/ Visitor Guide

26% Radio

23% Billboard

20% Internet

*Multiple responses permitted.

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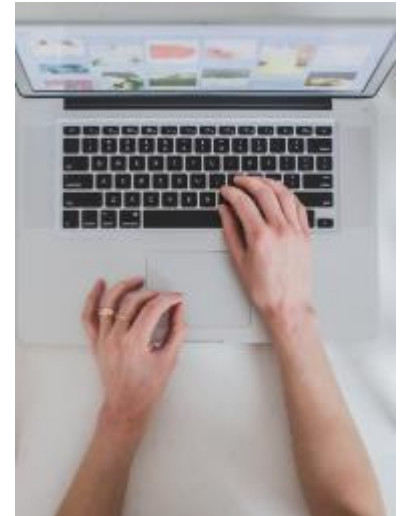
INFLUENCE OF ADVERTISING

» **67%** of visitors exposed to advertising were influenced to come to Flagler County

» Therefore, **1 of every 5** visitors came to Flagler County because they were influenced by advertising

» **4 in 5** visitors drove to Flagler County for their trip

» Visitors who flew primarily traveled through airports in **Orlando**, **Jacksonville**, or **Daytona Beach**

TRIP DESTINATIONS*

Other destinations visited:

3 in 4 visitors traveled to areas outside of Flagler County during their trip

47% St. Augustine/ Ponte Vedra

30% Daytona Beach

21% Orlando

*Multiple responses permitted.

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REGIONS OF ORIGIN

2%

13%

18%

26%

38%

3% of visitors were from areas outside the U.S.

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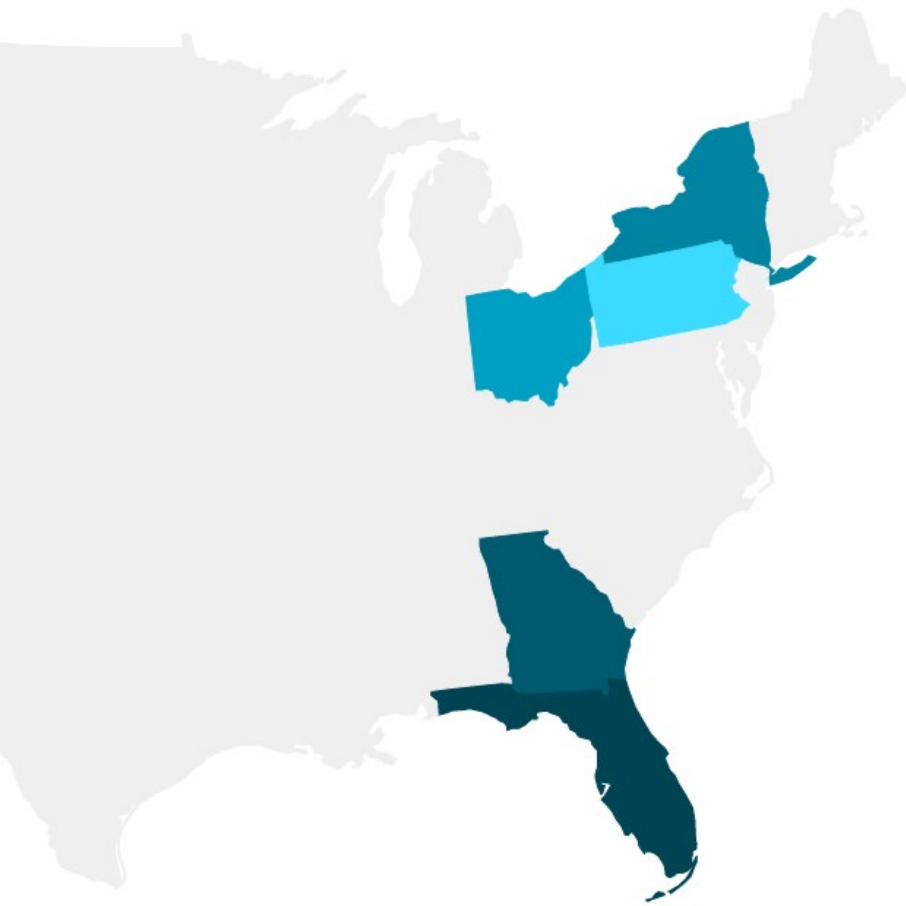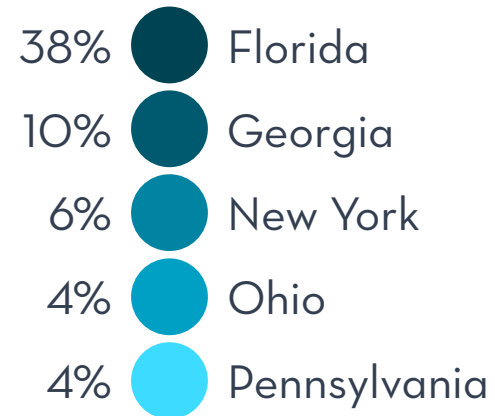
TOP MARKETS OF ORIGIN

12% Orlando   **10%** Jacksonville   **8%** Atlanta   **6%** Ocala   **5%** New York City[1]

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

TRAVEL PARTIES

The typical visitor traveled in a party composed of **3.0** people

27% of visitors traveled with at least one person under the age of 20 in their travel party

VISITOR PROFILE

52 years old

Earned **$77,900** per year

Female **(58%)**

» **23%** were first-time visitors to Flagler County

» **3 in 10** had visited Flagler County more than 10 times

» Typical visitors spent **4.2** nights in Flagler County

ACCOMMODATIONS

26% Friends/family home

24% Hotel/motel/resort

30% Did not stay overnight

BOOKING METHODS

38% of visitors who stayed in paid accommodations booked them through an online travel agency

32% of visitors who stayed in paid accommodations booked them directly with the hotel/condo

TOP VISITOR ACTIVITIES*
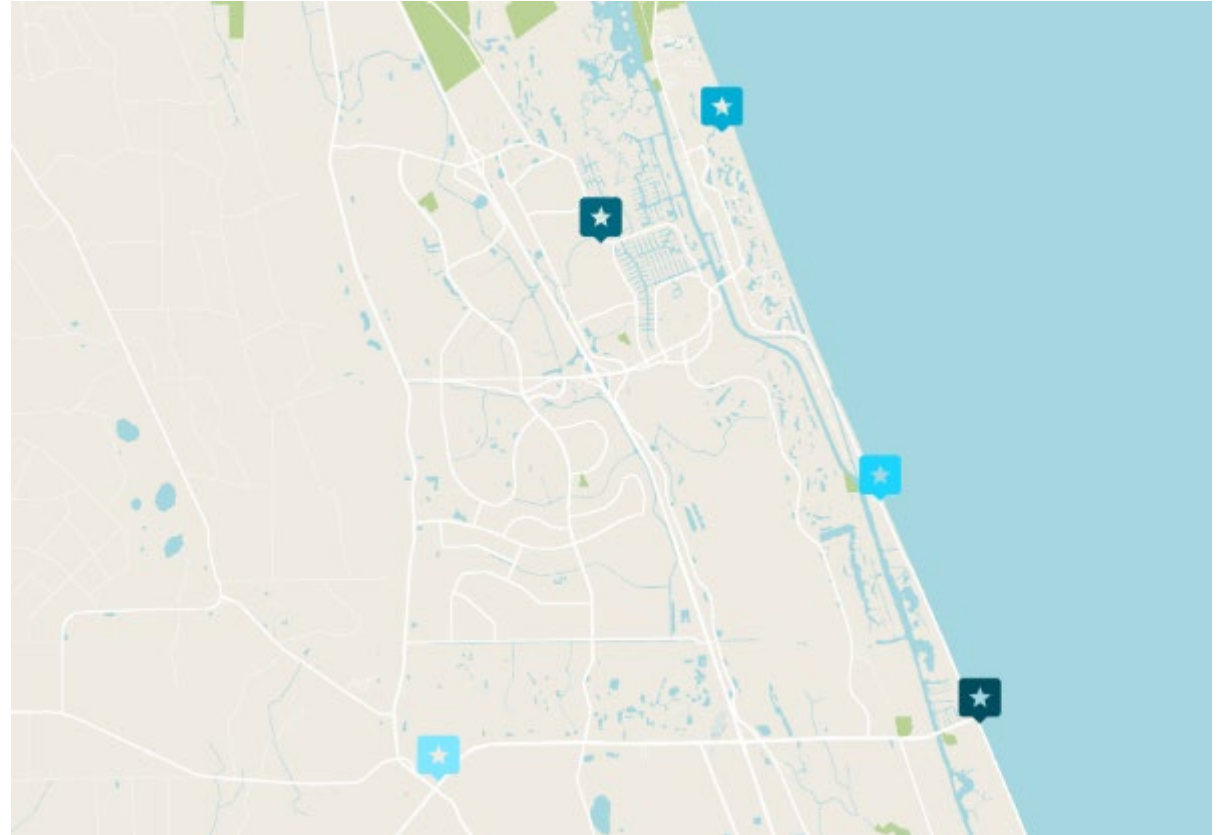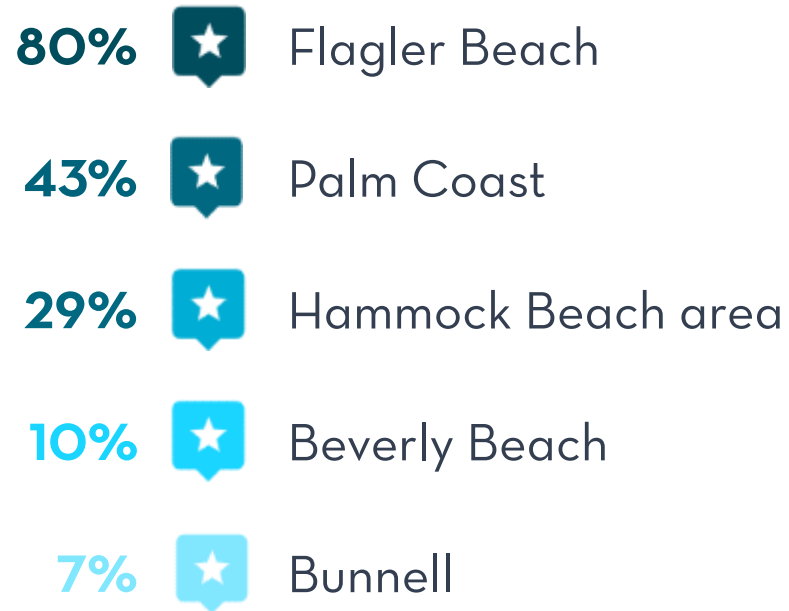

82% Beach

75% Dine at locally-owned restaurants

62% Outdoor recreation

37% Water recreation

*Multiple responses permitted.

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TOP AREAS VISITED*

80% ⭐ Flagler Beach

43% ⭐ Palm Coast

29% ⭐ Hammock Beach area

10% ⭐ Beverly Beach

7% ⭐ Bunnell

*Multiple responses permitted.

VISITOR SATISFACTION

» Visitors gave Flagler County a rating of **9.1*** as a place to visit or vacation

*10 = Excellent ; 1 = Poor

94% of visitors would recommend that their friends and family visit Flagler County

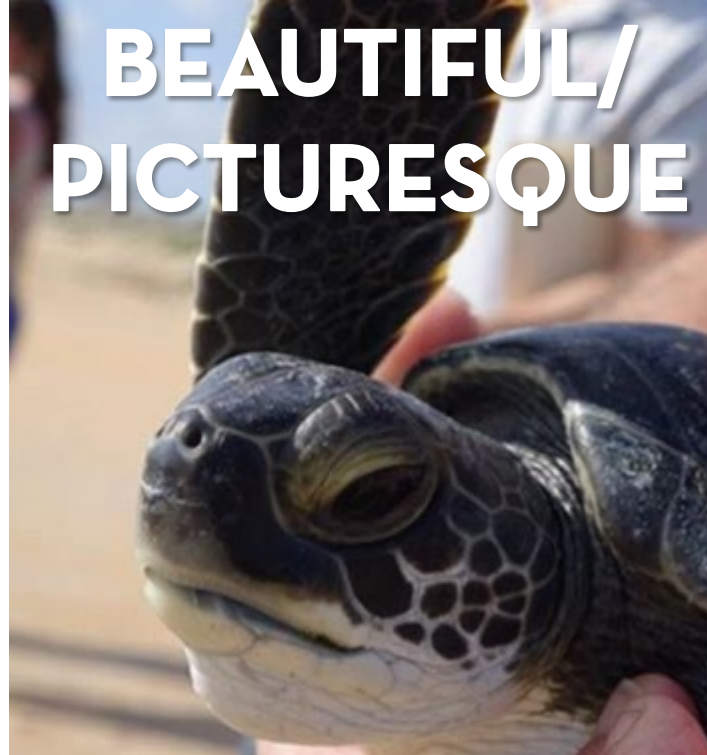**96%** of visitors plan to return to Flagler County for a future visit or vacation

PERCEPTIONS OF FLAGLER COUNTY

QUAINT/ RELAXING

BEAUTIFUL/ PICTURESQUE

AMAZING BEACHES

"The most peaceful beach in the sunshine state. We love the small-town feel."

"It's absolutely beautiful. The beaches are perfect, and the weather is always cool and breezy."

"Beautiful beaches and fun restaurants right on the beach. I am considering moving here permanently."

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