

St. Johns County Consumer Traveler Qualitative Report



Conducted for



**ST. AUGUSTINE
PONTE VEDRA
& THE BEACHES, FLORIDA**

January 2009
09-10064



**The
Marketing
Workshop, Inc.**

Marketing Intelligence Through Research

3725 Da Vinci Ct., Norcross, GA 30092
main: 770-449-6767 fax: 770-449-6739

www.mwshop.com

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Foreword

- **The Convention & Visitors Bureau for St. Augustine, Ponte Vedra and The Beaches commissioned The Marketing Workshop, Inc. to conduct both qualitative and quantitative research studies to assess St. Johns County's positioning as a vacation travel destination. Based on the findings of this evaluation, the CVB will determine how best to market the St. Johns County area to the leisure travel market.**
- **The purpose of the total research project is to assess awareness and perceptions of the St. Johns County area, providing insight into why people have or have not visited, their likes and dislikes about the area, and the factors that would increase the likelihood of future visits.**
- **This multi-level evaluation began with a preliminary focus group conducted among travelers residing in the Atlanta market. The objective of this qualitative research is to explore consumers' perceptions and gain insight and guidance for the quantitative study regarding St. Johns County as a vacation destination.**

- **A single focus group, lasting approximately two hours, was conducted on January 14, 2009 with adults residing in the Atlanta area who have traveled to Florida vacation destinations within a 2 to 5 hour drive of St. Augustine, in the past five years. Participants were further screened to meet the following criteria:**
 - Either sole decision maker or share responsibility for choosing vacation destination
 - Ages 21 and older
 - Mix of gender, ethnicity and household incomes of \$40,000+
 - Mix of households with and without children
 - Married, divorced or widowed
 - Have not participated in any other market research within the past 6 months
 - No household or immediate family member is employed in the fields of: marketing or marketing research, advertising or public relations, Media (TV, newspaper, radio) or the travel industry (travel agency, airline, tour bus company or hotel.)

Limitations

- **The results contained in this the report are based on qualitative discussions with a limited number of respondents. Because of this, it is important to note these perceptions and beliefs, and information should not be taken as fact, but rather, as a representation of what respondents believe or perceive to be true.**
- **As with all qualitative research, focus group findings are indicative, not projectable, nor are they definitive nor conclusive. If a participant makes a particular statement, it is understood that the attitude exists; however, it is not known if it exists among 10% or 90% of the target population. Accordingly, there should not be an attempt to project results based on the qualitative results alone. Instead, the information from all qualitative research should be used as a guide or a tool in formulating future research or planning.**

The background of the slide is a light gray technical drawing or architectural blueprint. It features various geometric shapes, lines, and curves, typical of a mechanical or structural drawing. The drawing is centered on a dark blue horizontal band that contains the title.

Management Highlights

St. Augustine / St. Johns County Identity

- **"St. Augustine and the beaches" have a relatively low unaided awareness, or prominence, among Atlanta area residents who have been to one or more 'close by' destinations, such as Jacksonville or Orlando (clearly seen to be the 'best known' part of Florida to visit, young and old alike,) or further away locations, such as Ft. Walton Beach, Ft. Lauderdale, or the Keys. Thus, even though all participants had been asked in the screening process about the area (St. Augustine, the area beaches, etc.,) not a single participant unaidedly mentioned the area either as a place they thought of, had been to, or would like to go to.**
- **Participants know of St. Augustine (when specifically asked) and generally know of its historic significance as the "oldest city", "oldest houses", etc. but no single descriptor defines the area as a whole. The historical background is in contrast to any identity such as the beaches that some recall, thus giving the area a dual identity in which neither one has anything in common with the other. This dual identify also speaks to the different target markets for the two areas. Few parents think their children would be interested in the historic nature of St. Augustine, while older adults like that identity as well as the peace and quiet they associate with an historical area.**

Management Highlights

- **St. Johns County, as a descriptor, is non-existent and does not resonate as a way to tie together the various activities. However, this is not surprising since we don't think such an identity has been tried in the past. References are always, or almost always, related to St. Augustine and/or the beaches (and primarily for St. Augustine.)**
- **Importantly, we heard no insurmountable NEGATIVES about the area. This is not always the case in tourism research, where many destinations have weaknesses to overcome. Orlando is a good example: even though Orlando (meaning Disneyworld) was so prominently mentioned, 'standing in lines' was a significant negative among some of the participants. No negative perception or attitude surfaced when talking about St Augustine.**

Activity Review

- When reviewing the various materials available on St. Johns tourism (such as from the CVB), participants express a lot of interest in the various activities: dining, the beaches, the historic nature of downtown, the Fort, etc. While this diversity is important, and generates interest among many participants, it does serve to make a holistic identity more difficult. Because of the many different activities, there seems to be no overriding event or activity that causes one to say : "I really want to go to (however they describe the area) because_____."
- Many respondents state that there are not enough child oriented activities to keep their children enthusiastic and busy during a family vacation, thus, they see it as a couples destination or girls get-a-way. After reviewing the provided flyers, which highlight area attractions, parents in the group express their surprise in the selection and variety of activities that do exist in the area and that their children would enjoy. However, they stick to the summation that the destination is more appropriate for a couples weekend or a girls get-a-way.
- With the one group and myriad of attractions, we did not have enough comment on World Golf Village (although the golfer liked it), Ripley's, Marineland, the Fort, or other key attractions for any observations here.

Recommendations

- **Although many in the group had previous experiences vacationing or driving through the St. Augustine area, low unaided awareness of the destination was a prominent finding from the focus group. Like many older areas, there is a feeling that St. Augustine has not changed over the years, giving those who have been there no special reason to return to see 'what's new.' Therefore, building an awareness of the area as a vacation destination will be an important first step. To entice the family vacation planners this focus should include activities for children of all ages, including adults.**

We did see some concern, among older participants in particular, about changing the area, such as adding attractions. This might well increase tourism attendance and revenue, but lessen the appeal of the area among guests who enjoy the quiet nature of the area that currently exists. We expect that such comments might be even more pronounced among area residents. Therefore, MWI suggests efforts be made for any Master Plan to take into account such residents' expected feelings with 'development.'

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Detailed Findings

Snapshot of a Great Vacation

Snapshot of a Great Vacation

- **Friends and family, past experiences, and the Internet are the most frequently used avenues by the participants for decisions regarding vacation destinations and planning. Whether it's a couples romantic weekend, a girls get-away or the yearly family vacation, participants take their vacation plans very seriously, sometimes taking many months or a year to plan for them. The destinations vary, and the travelers themselves have different needs but the objectives are very similar. Respondents want a break from their day-to-day routine and they pay attention to price, convenience and the activities that are available.**

"Now that we have a child, we look for 'kid things' to do, family activities but things that are geared for his age."

"Price...some places offer free breakfasts. I love the free breakfast."

"Price and convenience – like if we're going to the beach I want a beach front property; if we're going skiing we want a place with easy access to the lifts."

"Mainly looking for the activities. Most of the time we go to Disney."

"You go there and figure it out that it's a good place to go. So you keep going back there."

Awareness of St. Augustine and St. Johns County

Awareness of St. Augustine and St. Johns County

- Although many of the group participants are aware of St. Augustine, Ponte Vedra and the beaches, there is minimal unaided awareness of the area. When asked, the respondents are familiar with St. Augustine mainly for its historical value, and a few mention the beaches. When asked awareness of St. Johns County, even some who have had past vacation experiences in the area, need to refer to the map provided to verify what sites are located in the area. Most of the descriptions participants provide, focus on St. Augustine as the most widely known site in the county.

"Because it's an old city. It's got the oldest of almost anything you can think of – like everything was created there. The oldest this, the oldest that, the oldest everything."

"The beaches are beautiful."

"I haven't been there but we are big fans of Savannah and Charleston, and I get the impression there are some similarities (carriage rides, historical, beaches.)"

Awareness of St. Augustine and St. Johns County

- **Part of the group consisted of visitors who have never vacationed in St. Johns County. Before reviewing the travel brochures provided by the CVB, these participants demonstrate minimal awareness and a lack of knowledge towards the area.**

"Hadn't heard anything about it. The other places we've been to before are 'sure bets'."

"We've heard of it as historical, and my wife and I like the beach. Never considered it a beach destination."

- **Others feel that for a vacation, the area is more appropriate for adults and not a destination for children to enjoy.**

"There's nothing exciting about it to me and I have a teenage daughter, and a 15 year old doesn't really care about history. She wants to go to more exciting places, and there are more exciting places to go, if you're going to be in Florida."

"See it as a couples week, a romantic place – wouldn't bring the kids. Friends go for a week every year for 20 years -- they leave the kids at home!"

"...just doesn't excite me. My children like theme parks, rides, and a whole bunch of excitement. My kids would not have any fun."

Activities of Interest

- **Midway through the discussion participants are provided with a variety of travel brochures, pamphlets and flyers to review. From this they are given the task to list any activities they find that they would likely select if they were planning a vacation. It is interesting to note that respondents who previously thought there was little for their children to do in the area, express surprise at the selection and variety of activities they do find. Following is the list of sites and activities respondents selected and the number of participants that agree.**

Nights of Lights/Christmas events (5)

Potters Wax museum (2)

Marineland (4)

Ripley's (2)

Fall/Spring arts and crafts festival (3)

Winery (2)

Alligator Farm (3)

Flagler College (1)

Beaches (3)

Ghost tours (1)

Shops (in downtown area) (3)

Carousel (1)

Resorts/ Ponte Vedra Inn/Sawgrass (3)

Art galleries (1)

Schooner Freedom Tour(2)

World Golf Village/ Hall of fame (1)

Activities of Interest

- While sharing as a group the activities they each would select, participants come to a general conclusion that they view St. Augustine and the beaches as an ideal place for a girls get-away. Once mentioned, this perception took hold and many of the women agreed. Activities such as the shops downtown, art galleries, wineries, art festivals and tours provided the primary support for this designation; include a spa treatment at a resort and the weekend is complete.

"I see it as a girl's getaway - the winery and the resort."

"Would have been nice, since it does seem more like such a girls get-a-way, to see more spa/resort information ...wines tour, facial, get everything done."

*"It's kind of a laid back and **kid** of artsy and cultural, it's not a macho kind of place, unless it's a golf or fishing weekend – the guys aren't going to go down there and do the art galleries."*

"I think it would be a great place for a guy's weekend now because that's where all the women will go! It would be a natural fit."

Alternative Names

- As a last activity, respondents are asked to review all that they have just discussed and learned during the group, to come up with a name to reference the area. Following are their suggestions and their reasons:
 - St. Augustine Beach - *because it's the major attraction of St Johns County.*
 - St Augustine, Ponte Vedra, the Beaches and Golf – *more of a draw for men. You could have couples go and you could have your girl's time and the guys would do their thing.*
 - St. Johns County, Florida's new beginning - *use St. Johns County in the name and because historically they have the oldest city in America and they could utilize that beginning of the Americas and Florida's new beginning to make it a new cultural city.*
 - St Augustine's and St Johns Beaches – *most people know where St Augustine is, I don't think many people know about St. Johns.*
 - Beaches and Golf at St. Augustine – (no reason given)
 - The Fort on the Beach and Culture on the Street – *because there's two different things there.*
 - St Augustine's and the Beaches - *I like it the way it was, that's good*

- **One respondent mention that 'Ponte Vedra' seemed too much of a mouth full for her and suggests shortening it to 'PV'. Others disagree and feel that this adds a cultural spice that actually attracts their attention more.**

"To me, that in the name would peak my curiosity more so than a county or anything like that – Ponte Vedra sounds at least more exciting."

- **A couple of respondents still feel that a draw for children is missing, or at least not prominent enough and needs to be emphasized.**

"If they're going to attract the young people they have to keep the beaches in there, 'cause they've got no other draw for young people – 'cause the city is for old folks."

"The impression St. Augustine always gave me was that it was so tired – there's no youthful attractions there."

- **A few of the participants express words of caution towards promoting activities for children and towards growth in general for the area.**

"I'm not necessarily sure they want to market it to the young people. Right now they have this beautiful, historic area, with culture and all kinds of stuff."

"Just want it to stay exactly the way it is."

"Now I'm getting mad at you 'cause your informing too many people about it....It's very underdeveloped, Very beautiful, not a whole lot of people, very low crime, very low interruptions in your life. "

"The reason most of these people haven't been there, is the one reason that draws me down there."

"Very nice city, very cultural, beautiful beaches - property values probably 80% less than in Seaside/Destin" – "Wonderful area, not overcrowded, not a lot of garbage there or excitement."

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Appendix

Certification Statement

Job Number: 09-10064

Job Name: St. Johns County Qualitative Report

Standards

We hereby certify that the research reported herein was designed, conducted, analyzed, and reported following "*generally accepted research procedures*" as defined by The CASRO (Council of American Survey Research Organizations) Code of Standards and Code of Business Practices with regard to confidentiality, privacy, disclosure, data collection, data processing, reporting, data ownership, and storage.

CASRO's Data Collection Guidelines and Data Processing Guidelines are an integral part of our quality control process. We follow these guidelines on all MWI projects.

Objectivity

This report fairly, accurately, and objectively reflects the complete results of our research. Nothing has been omitted from the methodology, tabulations, or analytical report which would change the analysis or interpretation of the reported findings.

Use of This Research

MWI offers this research, including its Conclusions and Recommendations, as our professional judgment in understanding the marketing environment facing the client, and what we conclude and recommend based on our knowledge of the situation at hand in relation to our experience and judgment. Acceptance of this research, and action or results of actions based thereon, are the sole responsibility of the client.

This research is for the sole and exclusive proprietary use of our clients and its agents. Any use of this research in advertising, promotion, or publicity should be reviewed by The Marketing Workshop, Inc. prior to such use.

Additional Information

Additional information on any aspect of this research, in accordance with CASRO guidelines, will be provided upon request.

Submitted by:



Jim Nelems, President
The Marketing Workshop, Inc.
January 2009

Moderators Discussion Guide

The Marketing Workshop, Inc.
Norcross, GA 30092
Job #10064
Revised

Atlanta: Jan. 14, 2009
@ 5:30 pm

Florida Vacation Focus Group Moderator's Outline

Introduction

(5 minutes)

Moderator Introduction:

- Name
- Company name
- Independent research firm
- No stake in results

Purpose (*not to be read to respondents*):

- To explore consumers' perceptions regarding St. Johns County as a vacation destination

Explanation of format of group:

- Open discussion, informal, no cell phones
- No wrong answers, would like honest opinions and ideas
- Stand up for your opinions – do not let the group sway you
- Probing questions for in-depth answers, don't want to make assumptions
- Have a number of issues to cover

Respondent Introduction:

- Name
- Individuals in the household
- If children in the household, what ages
- How often do you take vacations, for at least a weekend or more?

Moderators Discussion Guide (Cont'd.)

I. Past Florida Vacations

(10 minutes)

Thank you so much for coming out to talk to me tonight. Based on the questions you were asked when they first contacted you about this research, you probably realize that we are going to be talking about a favorite subject for most people – vacations! To start of with,

- Who in the household does most of the planning?
- Do you plan a single point destination or many stops along the way?
- What type of research do you (or other family member) typically do in the planning stage? What sources do you use?
 - **Probe:** How, if at all, do you use the Internet to identify and select vacation destinations or activities?
 - What types of information do you look for? **Probe:** activities, history, golf, hotel / resorts, general ambience: beaches / water sports, exciting vs. restful, “touristy” vs. sparsely populated
- What, if any, differences are there with planning a 3 night stay vacation vs. the week / longer vacation?

Now, I'd like to narrow our discussion to Florida vacations. I'd like for you to describe just a 'snap-shot' of your favorite place in Florida to take a vacation – some place you have been to before.

- Where was it?
- How long were you there?
- Who was with you?
- What made it so memorable?
- What makes a great vacation “great?”
- How did you find out about your favorite destination?
- What places in Florida would you like to go, but have never been to? Why?

Moderators Discussion Guide (Cont'd.)

I. Destination Evaluations

(15 minutes)

Now there are some specific locations in Florida I'd like to get your individual feedback on. It's alright if you have not been there – just base your answers on your impressions. The locations I want to zero in on are Orlando, Daytona Beach, Jacksonville, St. Augustine, World Golf Village, Ponte Vedra and the beaches (south of Jacksonville.)

Moderator will pass out sheets of paper with each location printed at the top. Respondents will record answers to the following questions independently before sharing as a group.

- Have you been to this location?
- Using a 5-point scale, where “5” is “very appealing” and “1” is “not at all appealing.” Please write down how you would rate each of these areas and we'll discuss it after we've gotten through all of the sites.
 - a) Overall as a vacation destination
 - b) As a side trip (a stop along the way to somewhere else)
 - c) For the variety of activities
 - d) For the availability of activities you like or look for

II. St. Johns Vacation Destination

(50 minutes)

Moderator will show map of St. Johns County and indicate the area to be covered in group discussion. I have map to show you that indicates St. Johns County in Florida. If you will notice it includes Ponte Vedra Beach (and the beaches south of Jacksonville) at the north end of the county, it includes St. Augustine at about the middle of the county, and runs south to about Marineland, FL.

- With a show of hands – how many of you have visited any of this area before – spent the night? versus just driving through?
- How would you describe this area? If you were telling someone who hadn't been to St. Johns County what would you say to them? (history, romantic, family destination vs. couples or both, small-town charm, exciting vs. restful, general ambience, “touristy”?)
- What highlights do you remember about this area? **Probe for general and specific mentions and record on flip chart:** activities, history, golf, fishing, hotel / resorts, beaches, food, shopping.
- For those of you who haven't visited there – why haven't you?

Moderators Discussion Guide (Cont'd.)

- What would encourage a visit to this area (a repeat visit or a new experience)?
- What information would you need/want to know?
- What are your impressions about the beaches in the area? How do they compare with others along the same coast in FL? Better/worse and why?

Now I'd like to hand out some tourist information or vacation planning materials for St. Johns County, which someone such as yourself, might get if you were to contact the Chamber of Commerce or CVB (Convention and Visitors Bureau.) Put yourself in the frame of mind of planning a vacation. I'd like for you to look through these materials and look for anything that stands out to you that would be of interest to you/ your family and would draw you to this destination. Write these down on paper. Put a "!" by anything that you would definitely like to do (even if you have already); a "+" by any thing that would be of interest if you could. We'll share them as a group afterward.

- What are the !'s, the definite activities that you chose? **Record on flip chart, take hand count.**
- What are the +'s? **Record on flip chart, take hand count.**

If not mentioned above ask:

What are your impressions about: Have you or would you go to....

- World Golf Village / World Golf Hall of Fame
- Flagler College
- Marineland
- Ponte Vedra
- Ripley's Believe It or Not!
- Ghost Tours
- Castillo de San Marcos National Park ("The Fort")
- Shopping (Outlets)
- Art Galleries
- Ft. Matanzas National Monument
- Lightner Museum
- Tours: Trolley or Eco

Moderators Discussion Guide (Cont'd.)

- How long of a vacation did you plan for?
- Who would join you on this vacation?
- Would you expect the visit to be a side trip to another destination or as its own destination?
- Do you think you would add other locations before or after your visit to St. Johns County? **If yes, ask:** Where?
- Were there any other activities that you considered but did not select? **If yes, ask:** what activities and why not?
- Were there any selections that you feel you would need more information? **If yes, ask:** what would you normally do in that situation? How would you find out more information?
- Is there an activity you would have liked to do, or expected to have available, but didn't see any mention of it in the materials? **If yes, ask:** What?

I. Wrap Up

(10 minutes)

- *(RESPONDENT WILL COMPLETE THIS TASK AS A GROUP WHILE MODERATOR CONFERS WITH CLIENT IN BACK ROOM)*
(Refer to publications) Keeping in mind that St Johns County would like to develop their own identity as a vacation destination – and keeping in mind all that we've talked about tonight -What name would you suggest they use to represent this area? What name would encompass all the activities and sites we've covered in the county? Is "St. Augustine Pointe Vedra & the beaches, Florida" all right? Does it work? Are there any other suggestions you might have to capture this area?

THANK YOU FOR YOUR TIME AND INPUT!

Moderators Discussion Guide (Cont'd.)

Orlando

- Have you been to this location? _____

**Not at all
Appealing**

Very Appealing

| | | | | | |
|---|---|---|---|---|---|
| Overall as a vacation destination | 1 | 2 | 3 | 4 | 5 |
| As a side trip (a stop along the way to somewhere else) | 1 | 2 | 3 | 4 | 5 |
| For the variety of activities | 1 | 2 | 3 | 4 | 5 |
| For the availability of activities you like or look for | 1 | 2 | 3 | 4 | 5 |

Daytona

- Have you been to this location? _____

**Not at all
Appealing**

Very Appealing

| | | | | | |
|---|---|---|---|---|---|
| Overall as a vacation destination | 1 | 2 | 3 | 4 | 5 |
| As a side trip (a stop along the way to somewhere else) | 1 | 2 | 3 | 4 | 5 |
| For the variety of activities | 1 | 2 | 3 | 4 | 5 |
| For the availability of activities you like or look for | 1 | 2 | 3 | 4 | 5 |

Moderators Discussion Guide (Cont'd.)

Jacksonville

- Have you been to this location? _____

| | <u>Not at all Appealing</u> | | | | <u>Very Appealing</u> |
|--|---------------------------------|---|---|---|-----------------------|
| Overall as a vacation destination | 1 | 2 | 3 | 4 | 5 |
| As a side trip (a stop along the way to somewhere else) | 1 | 2 | 3 | 4 | 5 |
| For the variety of activities | 1 | 2 | 3 | 4 | 5 |
| For the availability of activities you like or look for | 1 | 2 | 3 | 4 | 5 |

St. Augustine

- Have you been to this location? _____

| | <u>Not at all Appealing</u> | | | | <u>Very Appealing</u> |
|--|---------------------------------|---|---|---|-----------------------|
| Overall as a vacation destination | 1 | 2 | 3 | 4 | 5 |
| As a side trip (a stop along the way to somewhere else) | 1 | 2 | 3 | 4 | 5 |
| For the variety of activities | 1 | 2 | 3 | 4 | 5 |
| For the availability of activities you like or look for | 1 | 2 | 3 | 4 | 5 |

Moderators Discussion Guide (Cont'd.)

World Golf Village

- Have you been to this location? _____

| | <u>Not at all Appealing</u> | | | | <u>Very Appealing</u> |
|--|---------------------------------|---|---|---|-----------------------|
| Overall as a vacation destination | 1 | 2 | 3 | 4 | 5 |
| As a side trip (a stop along the way to somewhere else) | 1 | 2 | 3 | 4 | 5 |
| For the variety of activities | 1 | 2 | 3 | 4 | 5 |
| For the availability of activities you like or look for | 1 | 2 | 3 | 4 | 5 |

Ponte Vedra and the Beaches

- Have you been to this location? _____

| | <u>Not at all Appealing</u> | | | | <u>Very Appealing</u> |
|--|---------------------------------|---|---|---|-----------------------|
| Overall as a vacation destination | 1 | 2 | 3 | 4 | 5 |
| As a side trip (a stop along the way to somewhere else) | 1 | 2 | 3 | 4 | 5 |
| For the variety of activities | 1 | 2 | 3 | 4 | 5 |
| For the availability of activities you like or look for | 1 | 2 | 3 | 4 | 5 |

Map of St. Johns County

