

Visit Jacksonville Market Perception Study

May 2025

OBJECTIVES & METHODOLOGY

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OBJECTIVES:

To assess the market potential for Jacksonville by examining awareness and perceptions of Jacksonville, perceived strengths and weaknesses, and to document knowledge about the destination to inform future marketing strategies and tactics.

METHODOLOGY:

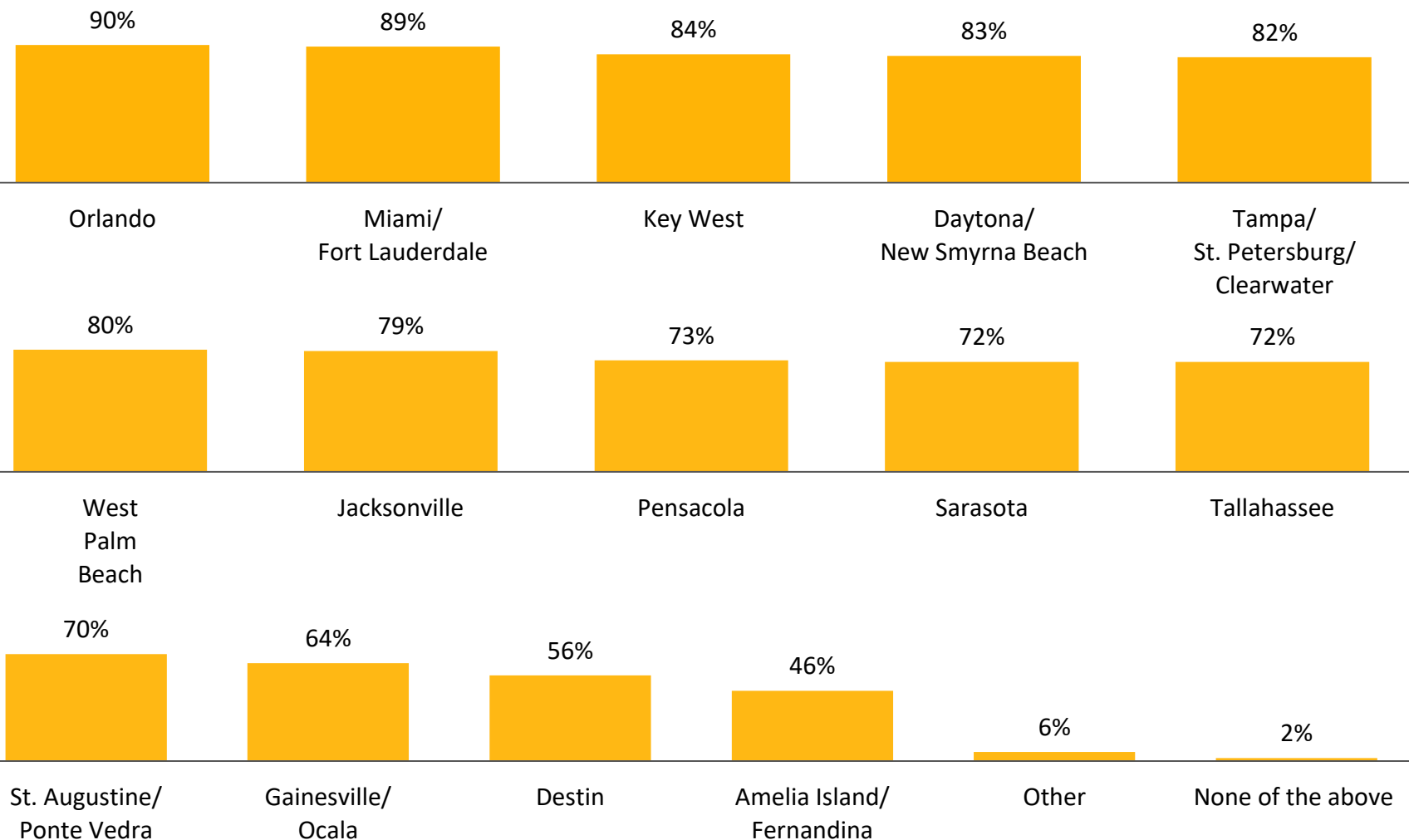
An internet survey of 450 potential visitors in the following 13 key markets was conducted to examine their awareness and perceptions of Jacksonville as a vacation destination.

- New York City
- Philadelphia
- Detroit
- Washington DC – Baltimore
- Atlanta
- Miami – Ft. Lauderdale
- Orlando-Daytona-Melbourne
- Tampa-St. Petersburg-Clearwater
- Norfolk-Portsmouth-Newport
- Raleigh-Durham
- Houston
- Dallas-Ft. Worth
- Los Angeles

AWARENESS

AWARENESS OF FLORIDA DESTINATIONS

Which of the following Florida destinations have you heard of?¹

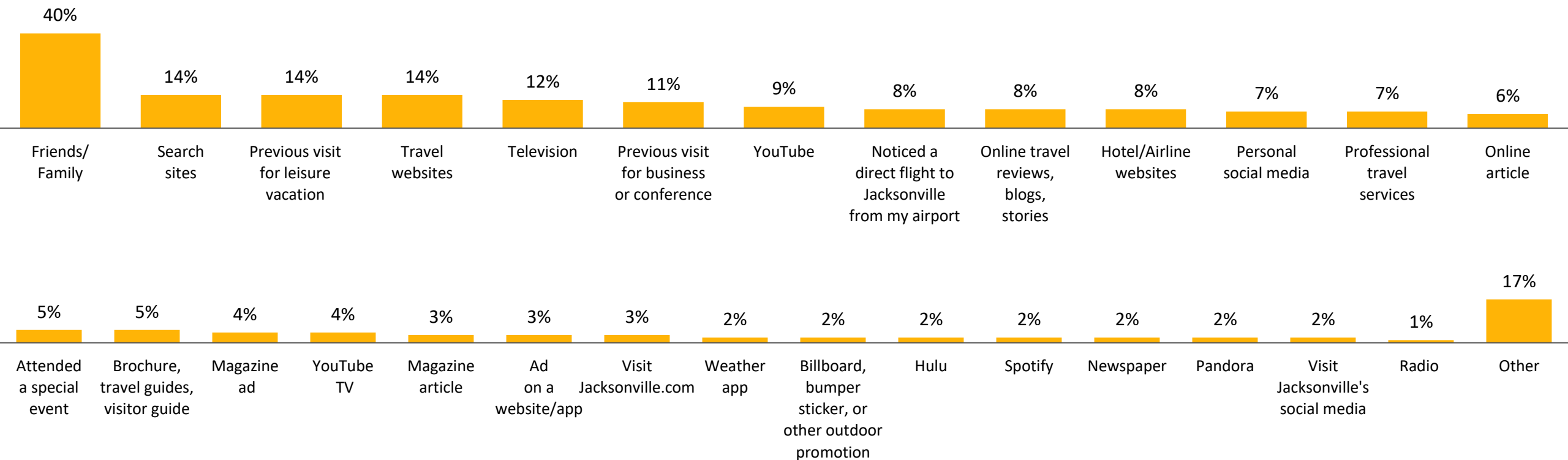


- Nearly **4 in 5** potential visitors have heard of Jacksonville
- Most potential visitors, about **9 in 10**, have heard of Orlando and Miami/Fort Lauderdale

AWARENESS SOURCES

How did you become aware of Jacksonville?¹

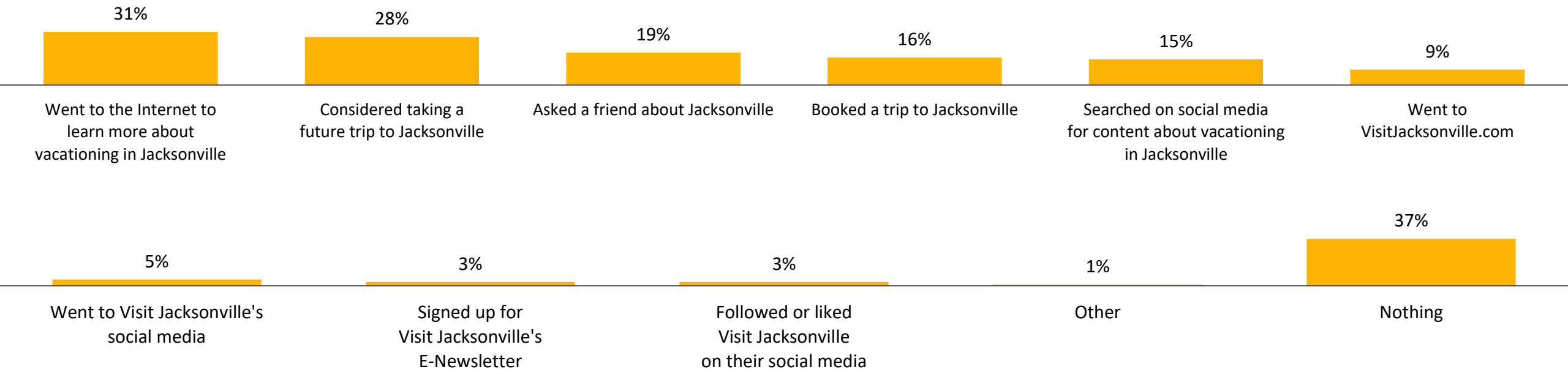
- **2 in 5** potential visitors became aware of Jacksonville through **recommendations from friends/family**



AWARENESS RESPONSE

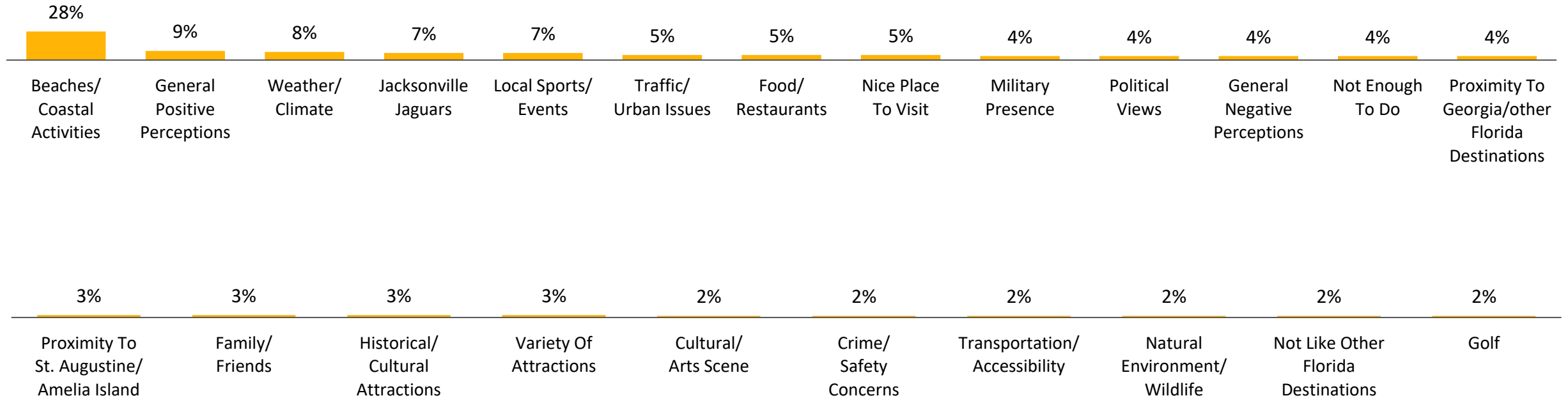
After seeing this information about Jacksonville, which of the following did you do? ¹

- After becoming aware of Jacksonville, about **3 in 10** potential visitors **went to the Internet to learn more** and **considered taking a future trip to the area**
- Nearly **2 in 5** potential visitors did **nothing** after becoming aware of Jacksonville



WHAT COMES TO MIND

What comes to mind when you think of Jacksonville, Florida?¹

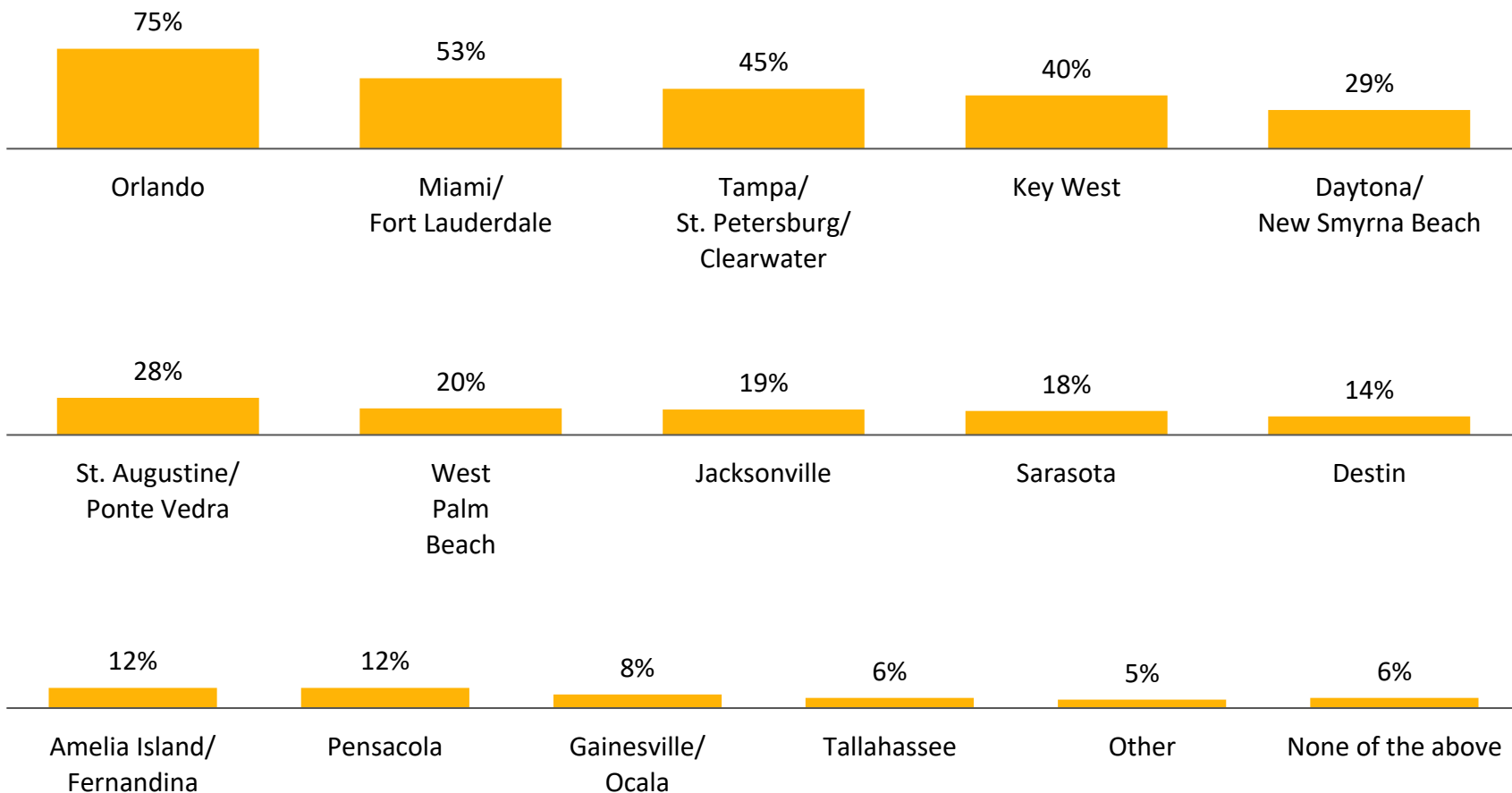


PREVIOUS VACATION EXPERIENCE

PREVIOUS FLORIDA VACATION DESTINATIONS

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Which of these destinations have you ever vacationed in?¹

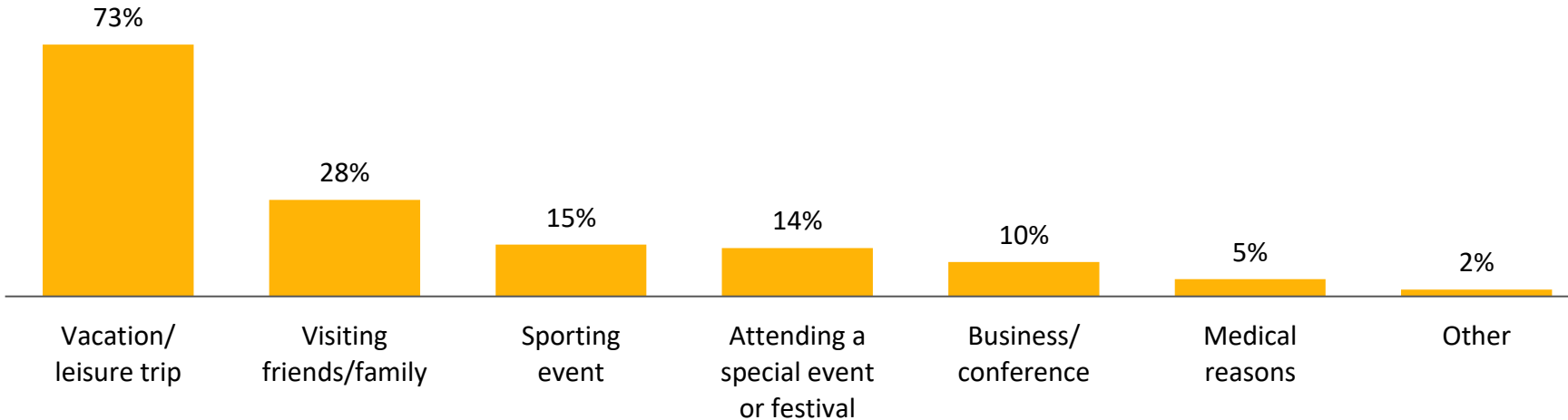


- Nearly **1 in 5** potential visitors have **previously vacationed in Jacksonville**
- **3 in 4** potential visitors have previously vacationed in **Orlando**

MAIN REASON FOR JACKSONVILLE TRIP

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You mentioned you vacationed in the Jacksonville area. What was the main reason for each of those vacations? ¹

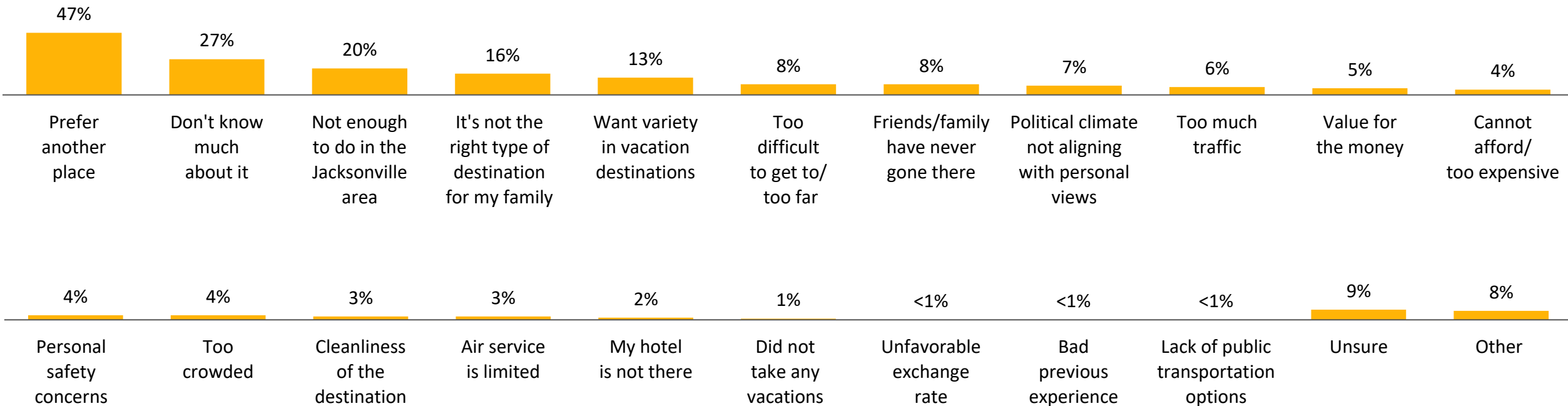


- Of those who have previously visited Jacksonville, nearly **3 in 4** traveled to the area for a **vacation/leisure trip**

REASONS FOR NOT VACATIONING IN JACKSONVILLE

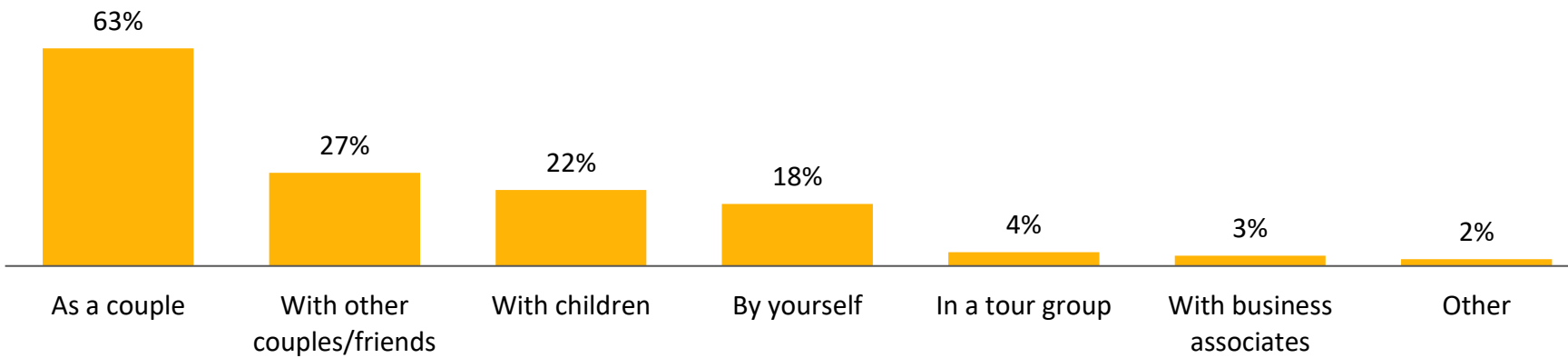
Why haven't you vacationed in Jacksonville before?¹

- Nearly **half** of potential visitors have not vacationed in Jacksonville because **they prefer another place**
- Over **1 in 4** potential visitors have not vacationed in Jacksonville because they **don't know much about it**



TYPICAL TRAVEL PARTY

How do you typically travel? ¹

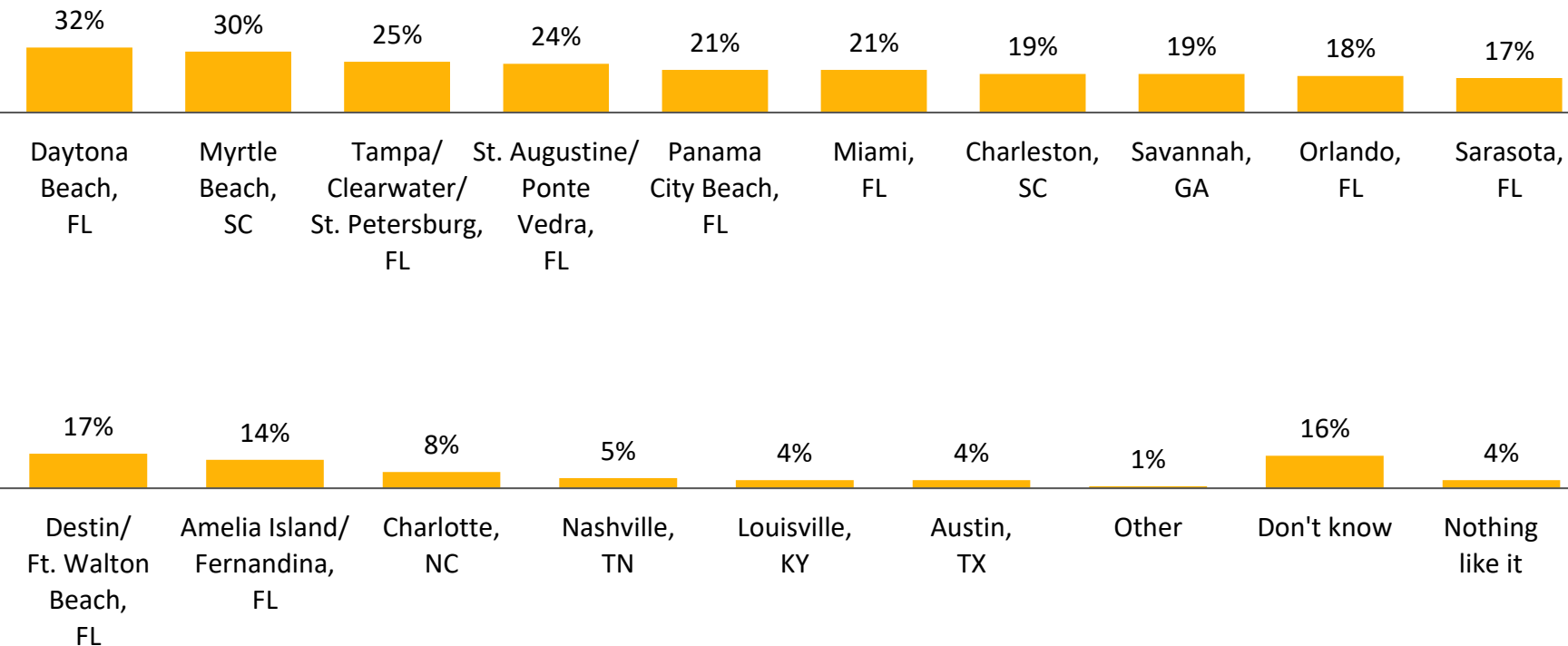


- Over **3 in 5** potential visitors **travel as a couple**

DESTINATION PERCEPTIONS

SIMILAR VACATION EXPERIENCES

Based on what you know or have heard, do any of the following destinations provide a similar vacation experience to Jacksonville?¹

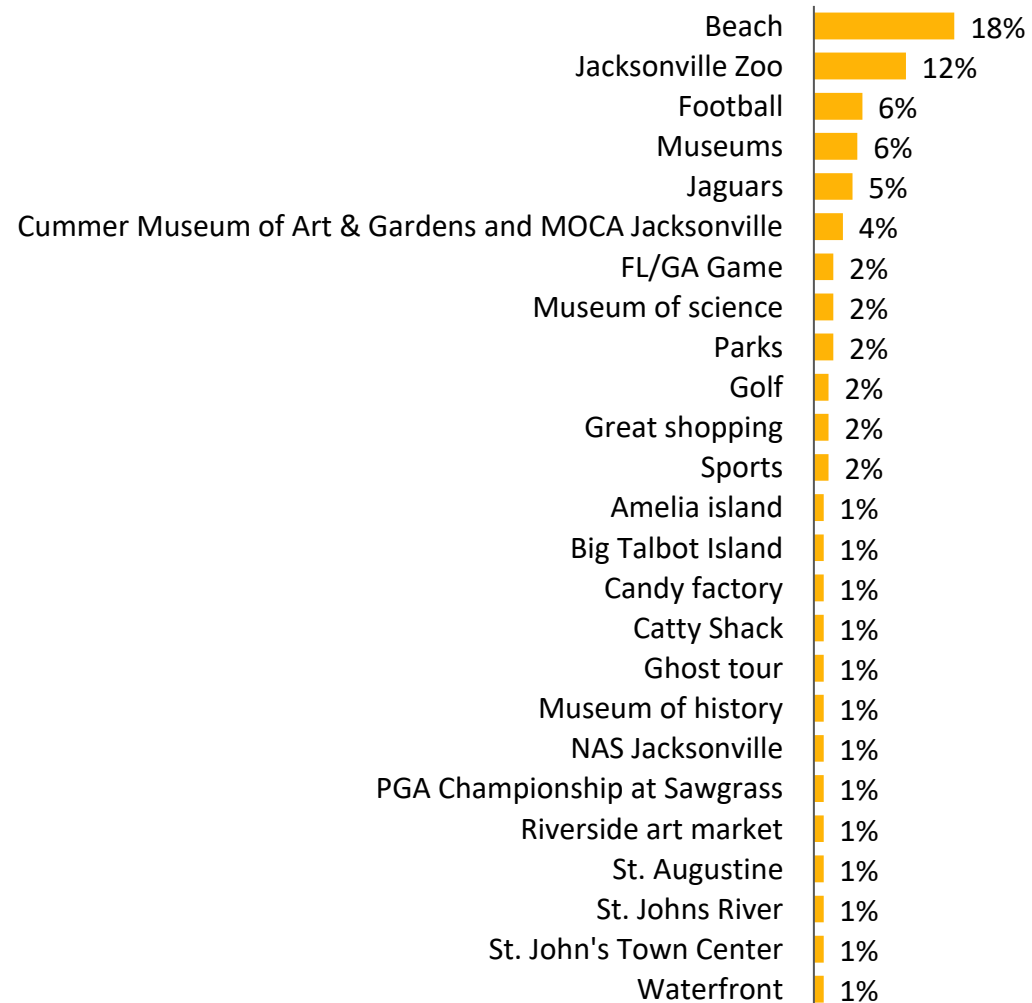


- Nearly **1 in 3** potential visitors equate a Jacksonville vacation experience to **Daytona Beach, FL**
- **3 in 10** potential visitors feel **Myrtle Beach, SC** is a similar vacation experience to Jacksonville

ATTRACTION/EXPERIENCE AWARENESS

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Which specific attractions or experiences available in Jacksonville, FL have you heard about?

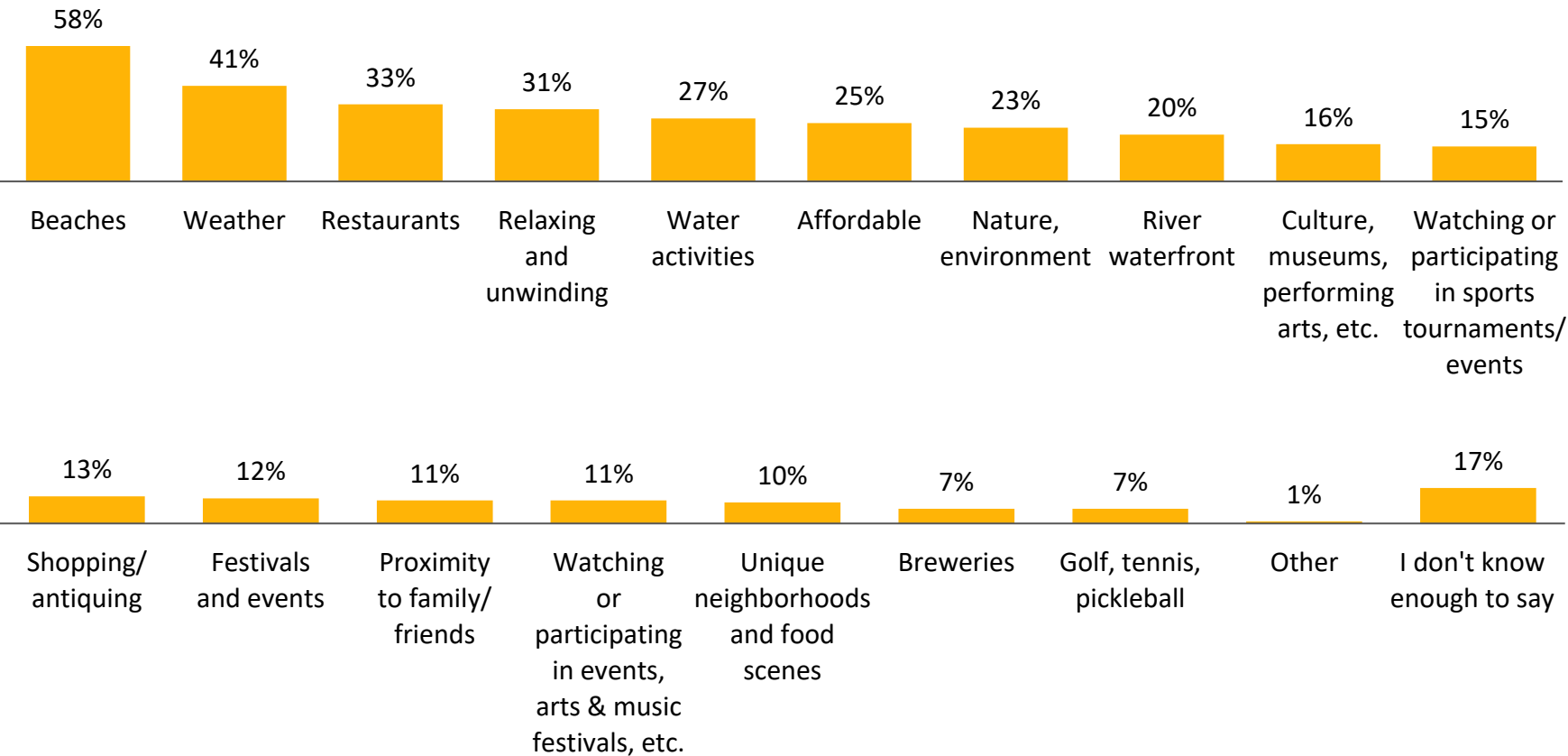


- **25% of** potential visitors have heard about specific attractions or experiences in Jacksonville

WHY VACATION IN JACKSONVILLE

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Based on what you know or have heard, what makes Jacksonville appealing as a vacation destination?¹

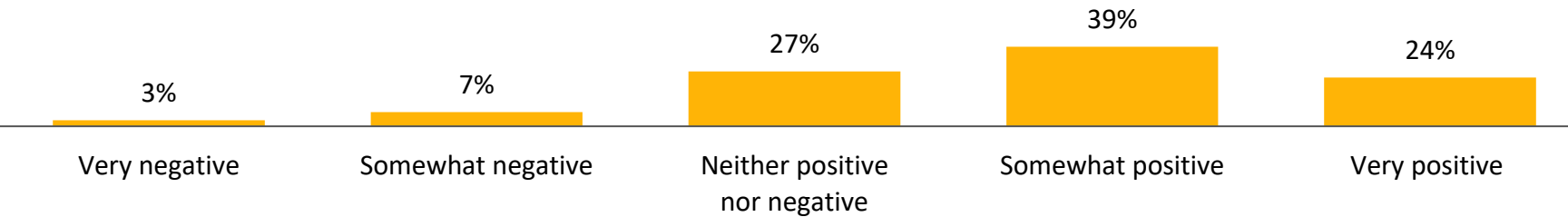


- Potential visitors feel Jacksonville is appealing as a vacation destination because of the **beaches, weather, restaurants, and relaxing atmosphere**
- Those who had previously visited Jacksonville were more likely to find its **affordability** (47%) and **riverfront waterfront** (37%) appealing, compared to non-visitors

JACKSONVILLE AS A VACATION DESTINATION

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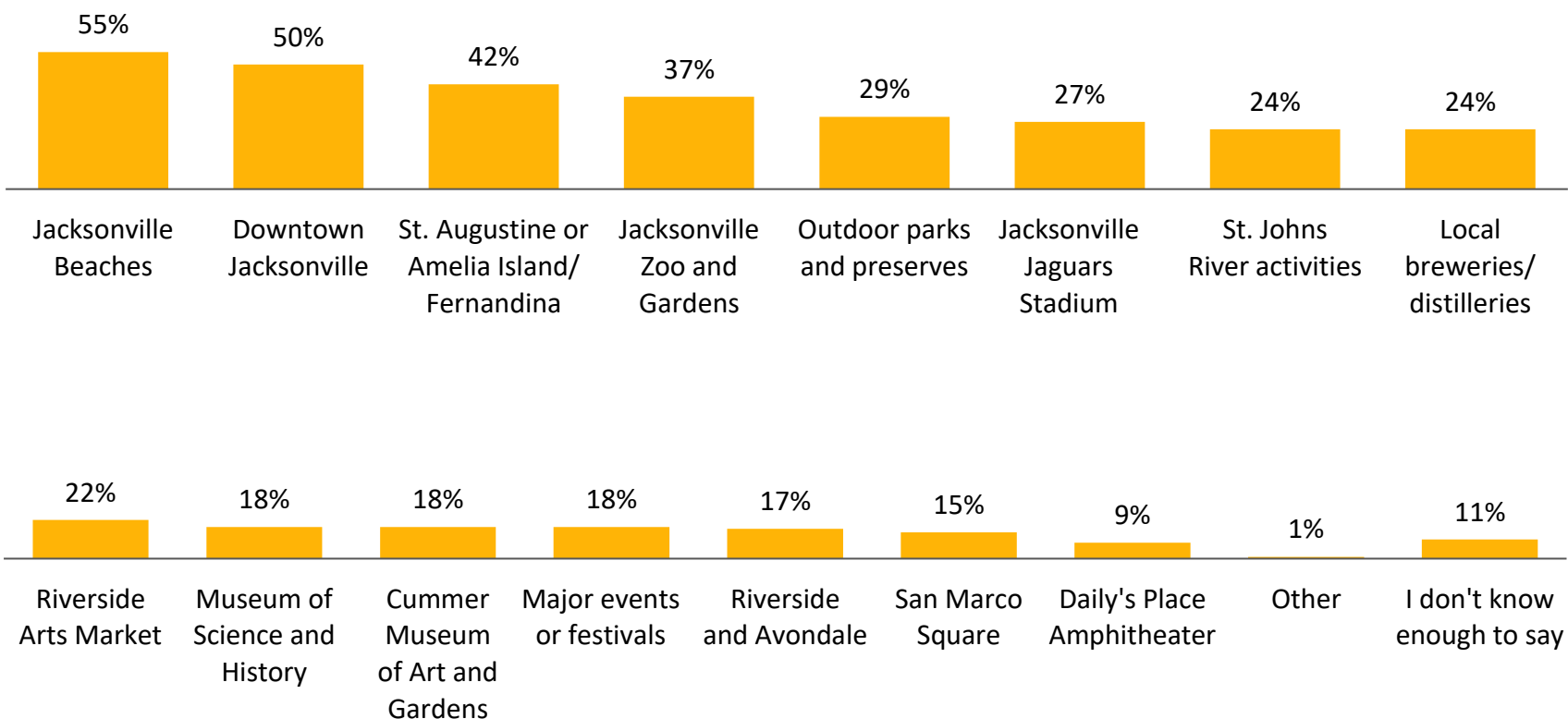
Based on what you know and have heard, how would you rate Jacksonville as a vacation destination?



- Nearly **2 in 3** potential visitors feel **positively** about Jacksonville as a vacation destination
- Of those who had previously visited Jacksonville, nearly **9 in 10** feel **positively** about Jacksonville as a vacation destination

JACKSONVILLE ATTRACTIONS

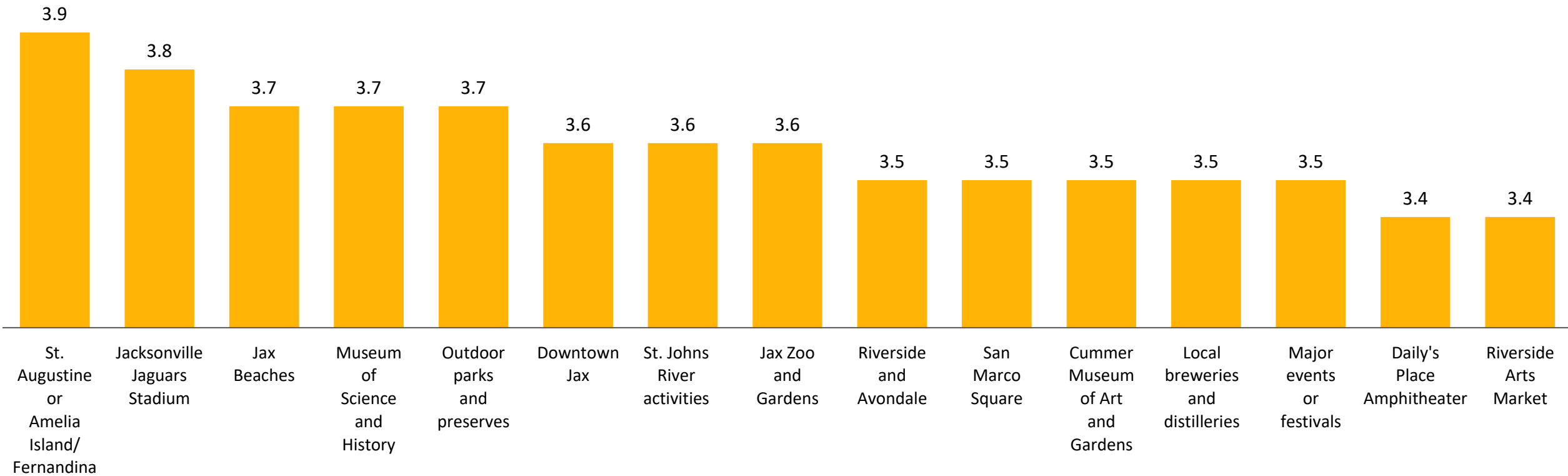
Which of the following attractions, activities, or areas have you visited or would be interested in visiting during a trip to Jacksonville?¹



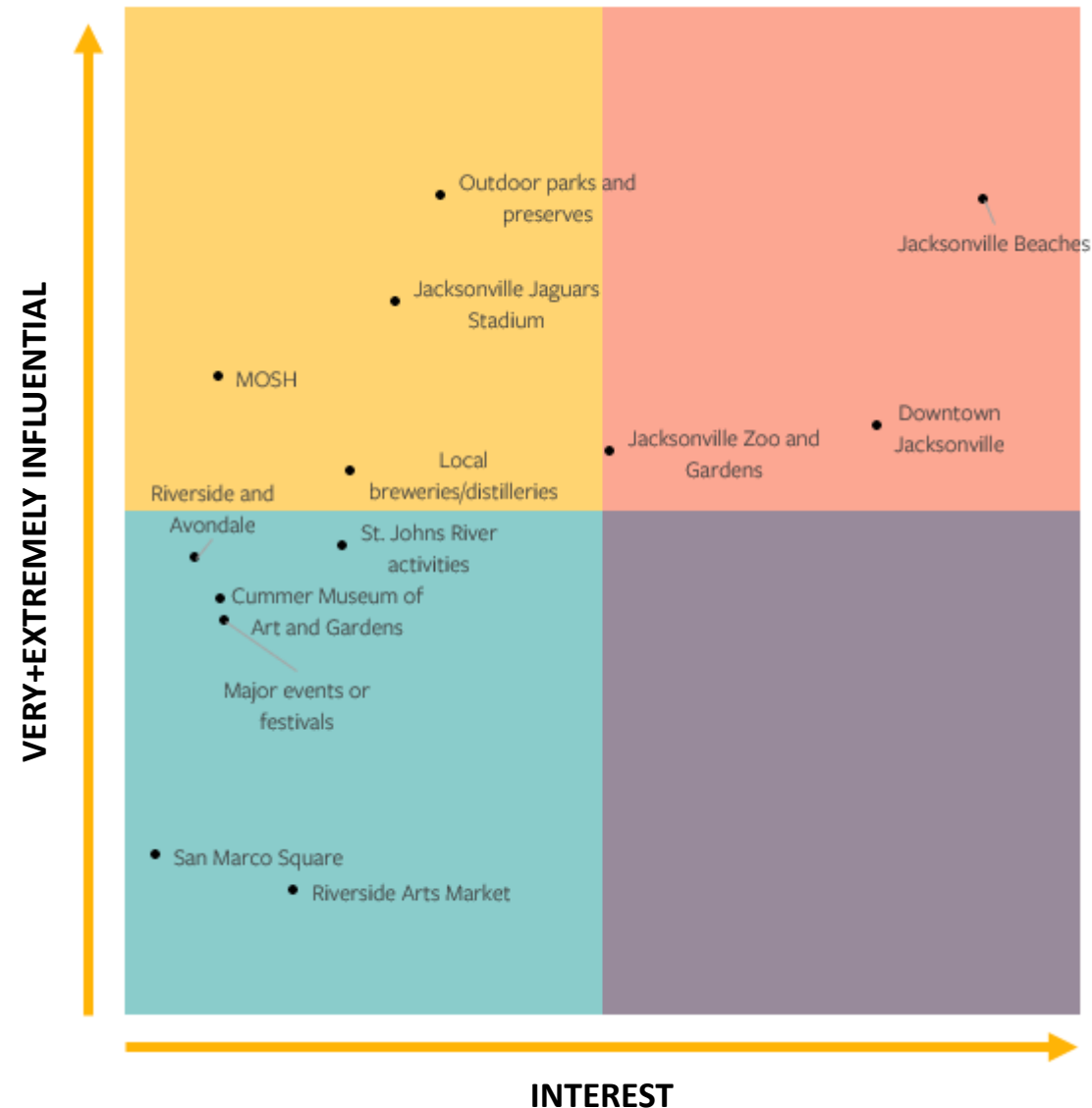
- **Jacksonville's beaches** are the top attraction for **over half** of potential visitors
- **Half** of potential visitors are interested in the **Downtown Jacksonville area**
- About **2 in 5** potential visitors would drive to St. Augustine or Amelia Island
- Nearly **2 in 5** potential visitors are interested in exploring the **Jacksonville Zoo and Gardens**
- In addition to the attractions above, those who had previously visited Jacksonville were interested in/visited the **Jacksonville Jaguars Stadium** (49%) and **local breweries/distilleries** (38%)

ATTRACTIONS INFLUENCE ON VISITATION

To what extent did/would the attractions or activities you selected influence your decision to visit the Jacksonville area? ¹



ATTRACTIONS INFLUENCE MATRIX: ALL POTENTIAL VISITORS

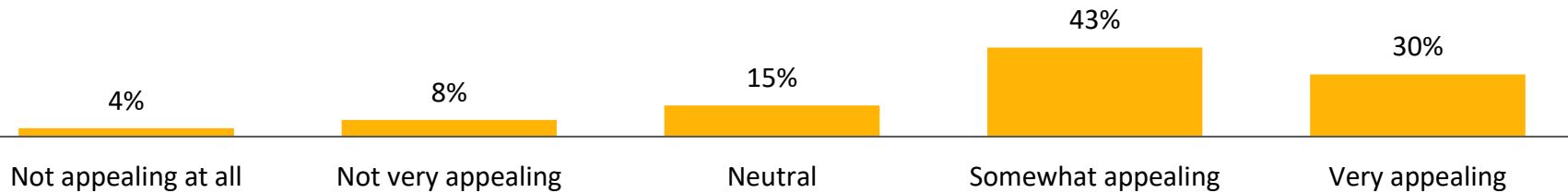


ATTRACTIONS INFLUENCE MATRIX: PREVIOUS VISITORS



RIVERFRONT ACTIVITIES

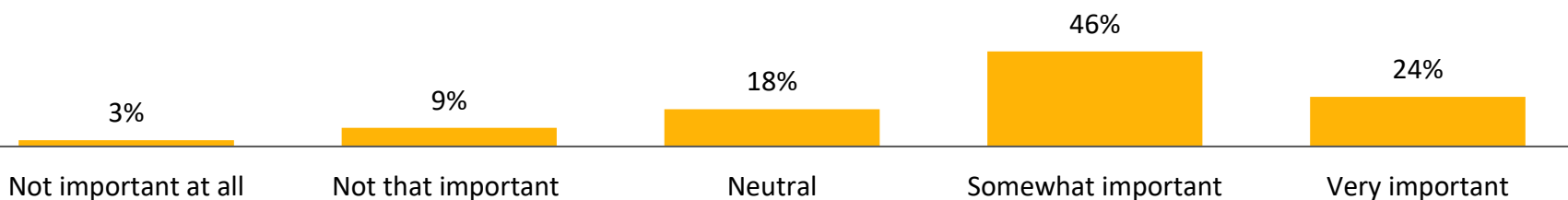
How appealing are riverfront activities (e.g., boat tours, water taxis, riverfront dining, festivals) as a part of Jacksonville?



- Nearly **3 in 4 potential visitors** find riverfront activities in Jacksonville **appealing**
- Over **4 in 5 previous visitors** find riverfront activities in Jacksonville **appealing**

DOWNTOWN JACKSONVILLE

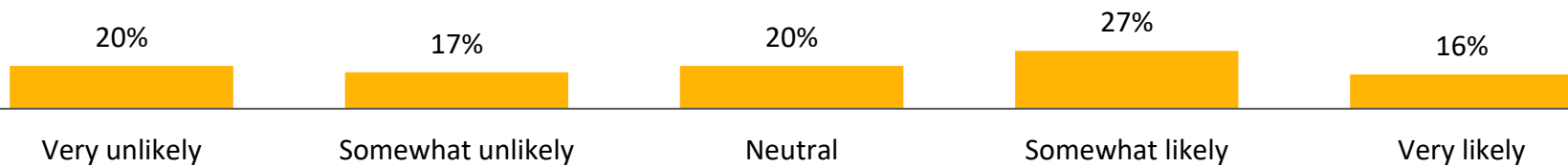
When thinking about a city to visit, how important is the downtown area in shaping your perception of the destination?



- **7 in 10 potential visitors'** perceptions of a destination is shaped by the downtown area
- Over **4 in 5 previous visitors'** perceptions of a destination is shaped by the downtown area

LIKELIHOOD TO VISIT FOR MAJOR EVENT

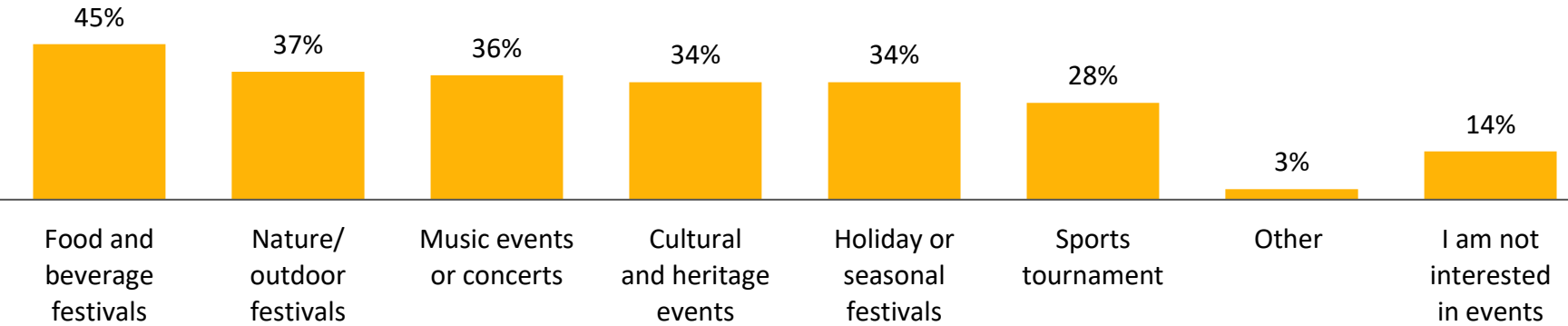
How likely would you be to visit Jacksonville for a major event (sports, music, food, arts)?



- Slightly more potential visitors are likely (43%) to visit Jacksonville for a major event compared to those who are unlikely (37%)

EVENTS OF INTEREST

What types of events would most interest you? ¹



- Over **4 in 5** potential visitors are interested in events
- Nearly **half** of potential visitors are interested in food and beverage festivals

DESTINATION CONSIDERATION

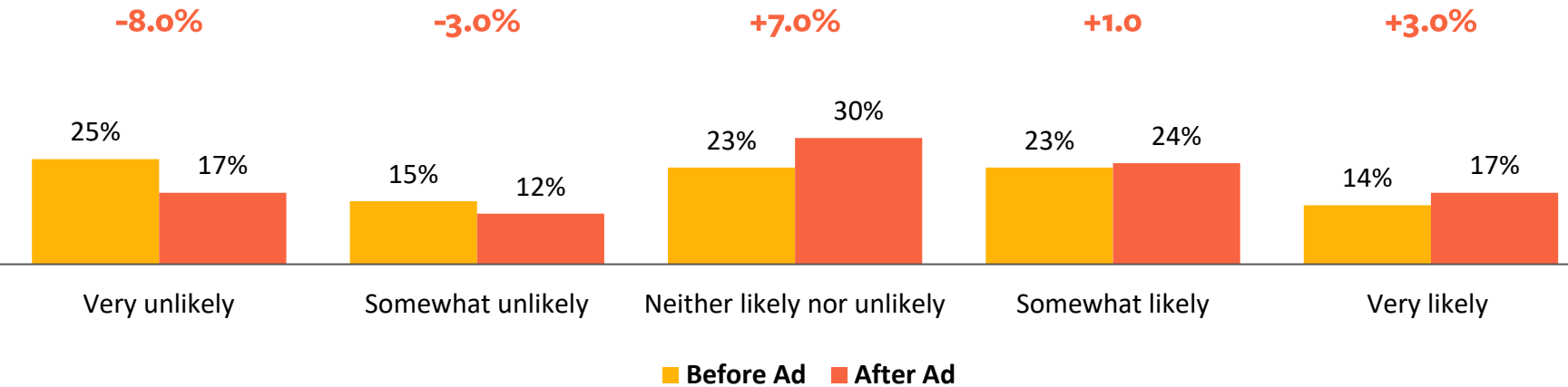
PROMOTIONAL VIDEO

All respondents viewed the following promotional video.



LIKELIHOOD TO VACATION IN JACKSONVILLE

After seeing this video, how likely are you to vacation to Jacksonville in the next year or so?

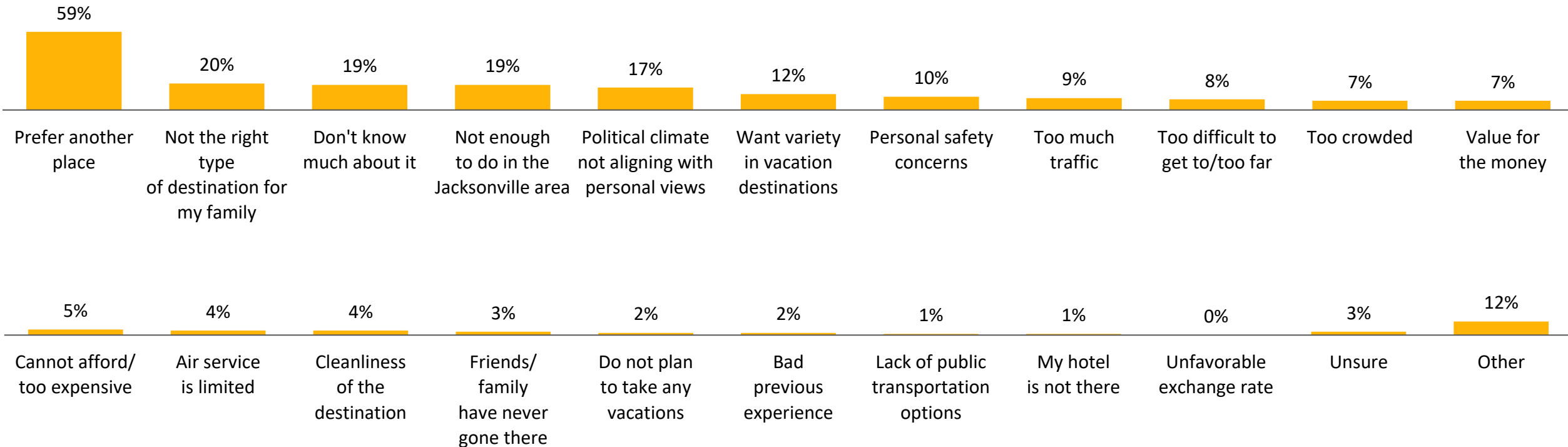


- Before seeing the ad, nearly **4 in 10** potential visitors indicated they are **likely to vacation** in Jacksonville in the next year
- After seeing the ad, potential visitors likelihood of vacationing in Jacksonville **increased slightly**
- After seeing the ad, there was a shift from potential visitors who were unlikely to vacation in Jacksonville to those who were neutral or likely to vacation in the area
- Before seeing the ad, 47% of **previous visitors** indicated they are likely to vacation in Jacksonville in the next year
- After seeing the ad, 52% of **previous visitors** indicated they are likely to vacation in Jacksonville in the next year (+5% pts from before the ad)

REASONS FOR NOT VACATIONING IN JACKSONVILLE IN THE FUTURE

Why are you unlikely to vacation in Jacksonville in the next year or so? ¹

- Of those who indicated they are “Somewhat unlikely” or “Very unlikely” to vacation in Jacksonville in the next year BEFORE seeing the ad, nearly **6 in 10 prefer another place to vacation**



¹ Multiple responses accepted.
Only asked to those who said they were “Somewhat unlikely” or “Very unlikely” to vacation in Jacksonville in the next year BEFORE seeing the ad.

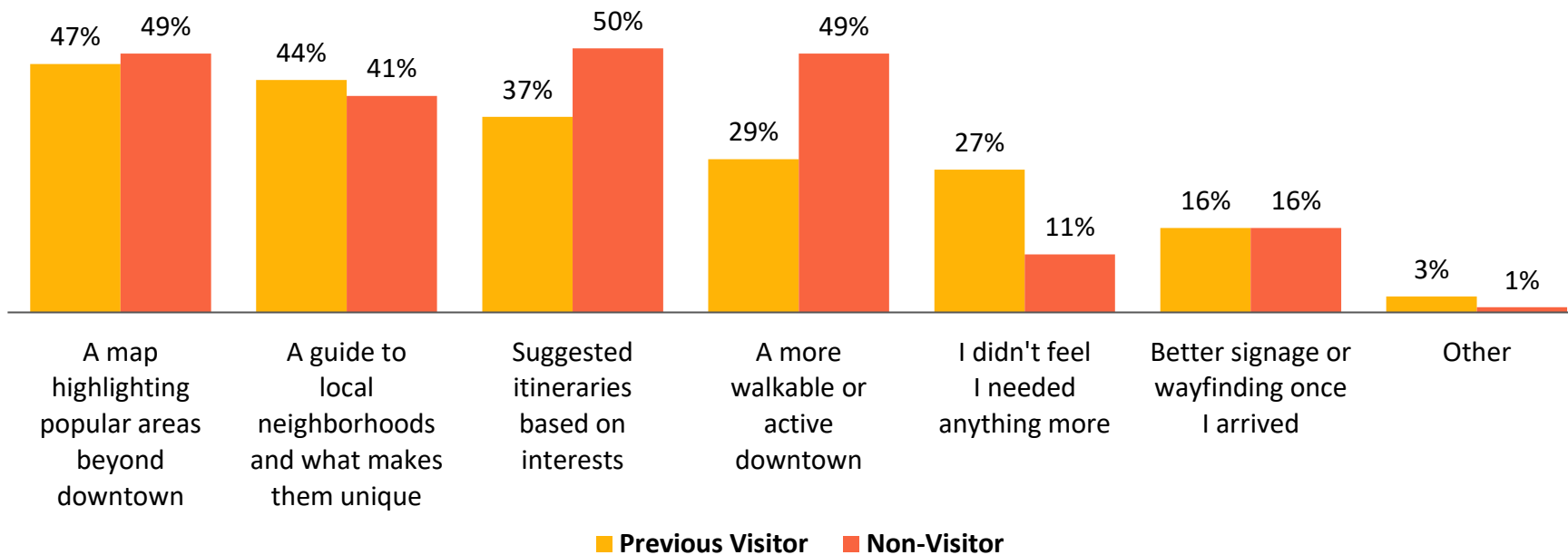
Jacksonville
THE FLIP SIDE
OF FLORIDA

IMPROVEMENTS FOR TRIP PLANNING

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Previous Visitor: Which of the following would have helped you plan a better trip in Jacksonville? ¹

Potential Visitor: Which of the following would have helped you plan a better trip in a destination? ¹



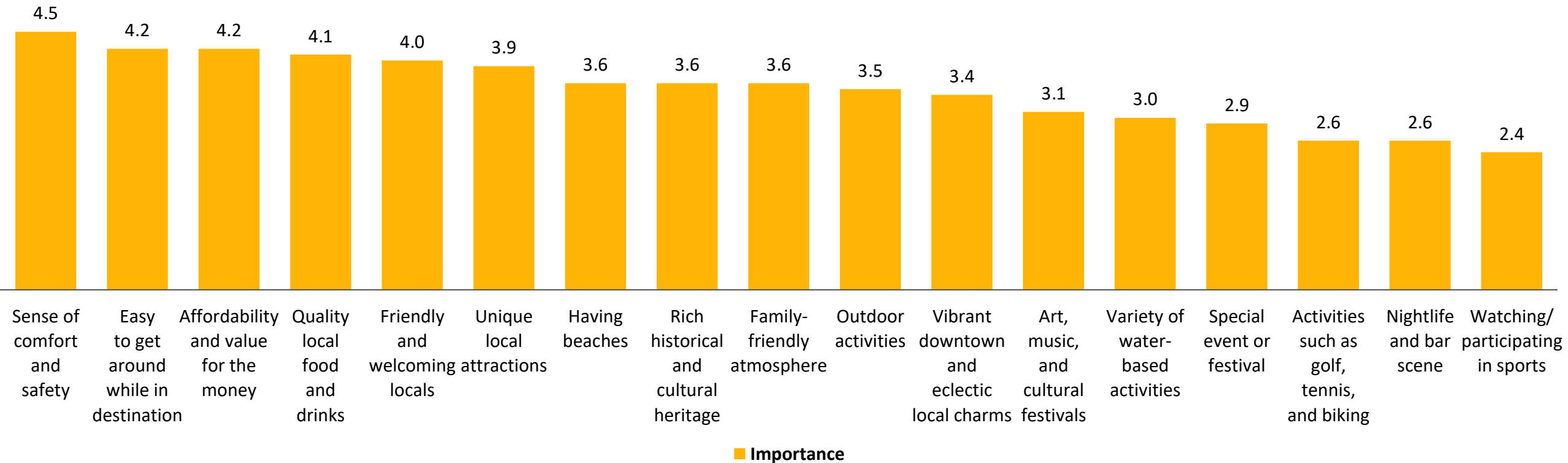
- **Half of potential visitors** felt **itineraries based on interests, a map highlighting popular areas downtowns, and a more walkable downtown** would have helped their trip planning
- Those who had never visited the Jacksonville area before were more likely to say **itineraries based on interests** and **a more walkable or active downtown** would have help their planning process

VACATION ATTRIBUTES

IMPORTANCE OF DESTINATION ATTRIBUTES

When you plan a vacation, how important are the following in deciding where to go?¹

- When planning a vacation, potential visitors place **considerable importance** on a destinations **sense of comfort and safety**
- Potential visitors say **activities such as golf, tennis, and biking, nightlife, and watching/participating in sports** are **least important** to them when planning a vacation



RATING OF ATTRIBUTES IN JACKSONVILLE

Based on what you know or have heard, how would you rate Jacksonville as a place to vacation on each of the following benefits?¹

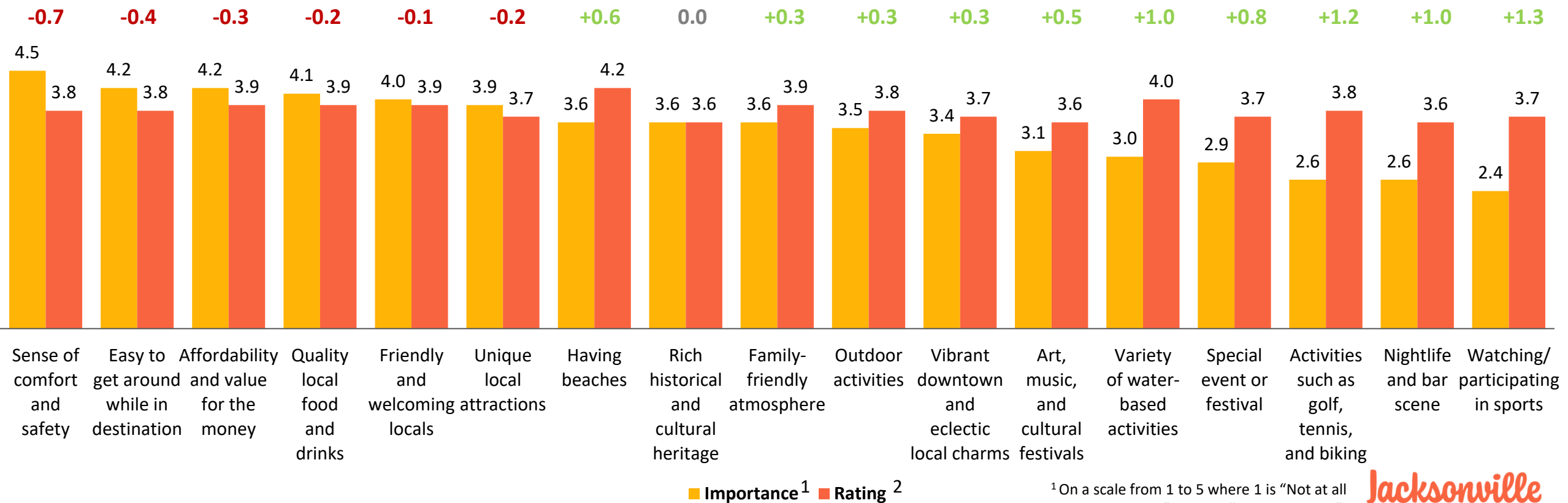
- Based on what they know or have heard, potential visitors rate Jacksonville highly for the area’s **beaches**
- Potential visitors rated Jacksonville’s **history/culture, art/music festivals, and nightlife** the lowest



¹ On a scale from 1 to 5 where 1 is “Very negative” and 5 is “Very positive”.

DESTINATION ATTRIBUTES: GAP ANALYSIS

- **Comfort and safety** is the most important attribute for potential visitors when selecting a destination, however, Jacksonville’s rating is lower than the importance potential visitors attach to it
- Also important to potential visitors are **destinations that are easy to get around and affordable**, both of which Jacksonville has a lower rating than the importance attached to it
- On average, potential visitors who have visited Jacksonville previously assign a higher rating to all attributes



¹ On a scale from 1 to 5 where 1 is “Not at all important” and 5 is “Very important”.
² On a scale from 1 to 5 where 1 is “Very negative” and 5 is “Very positive”.

DESTINATION ATTRIBUTES: PREVIOUS VISITORS

	IMPORTANCE	RATING	GAP
Sense of comfort and safety	4.6	4.3	-0.3
Affordability and value for the money	4.3	4.3	0.0
Easy to get around while in destination	4.2	4.1	-0.1
Quality local food and drinks	4.0	4.1	+0.1
Friendly and welcoming locals	4.0	4.2	+0.2
Having beaches	3.9	4.5	+0.6
Unique local attractions	3.8	4.0	+0.2
Rich historical and cultural heritage	3.7	3.9	+0.2
Family-friendly atmosphere	3.7	4.3	+0.6
Outdoor activities (Nature walks, hiking, camping, etc.)	3.7	4.2	+0.5
Vibrant downtown and eclectic local charms	3.6	3.9	+0.3
Art, music, and cultural festivals	3.3	4.0	+0.7
Special event or festival	3.3	4.0	+0.7
Activities such as golf, tennis, and biking	3.2	4.2	+1.0
Watching or participating in sports	3.2	4.3	+1.1
Variety of water-based activities (Boating, fishing, etc.)	3.2	4.1	+0.9
Nightlife and bar scene	3.0	4.0	+1.0

DESTINATION ATTRIBUTES: NON-VISITORS

	IMPORTANCE	RATING	GAP
Sense of comfort and safety	4.5	3.7	-0.8
Affordability and value for the money	4.2	3.8	-0.4
Easy to get around while in destination	4.2	3.7	-0.5
Quality local food and drinks	4.1	3.8	-0.3
Friendly and welcoming locals	4.1	3.8	-0.3
Unique local attractions	3.9	3.6	-0.3
Rich historical and cultural heritage	3.6	3.6	0.0
Having beaches	3.6	4.2	+0.6
Family-friendly atmosphere	3.6	3.8	+0.2
Outdoor activities (Nature walks, hiking, camping, etc.)	3.5	3.7	+0.2
Vibrant downtown and eclectic local charms	3.4	3.6	+0.2
Art, music, and cultural festivals	3.1	3.5	+0.4
Variety of water-based activities (Boating, fishing, etc.)	3.0	3.9	+0.9
Special event or festival	2.8	3.6	+0.8
Nightlife and bar scene	2.5	3.5	+1.0
Activities such as golf, tennis, and biking	2.4	3.7	+1.3
Watching or participating in sports	2.3	3.6	+1.3

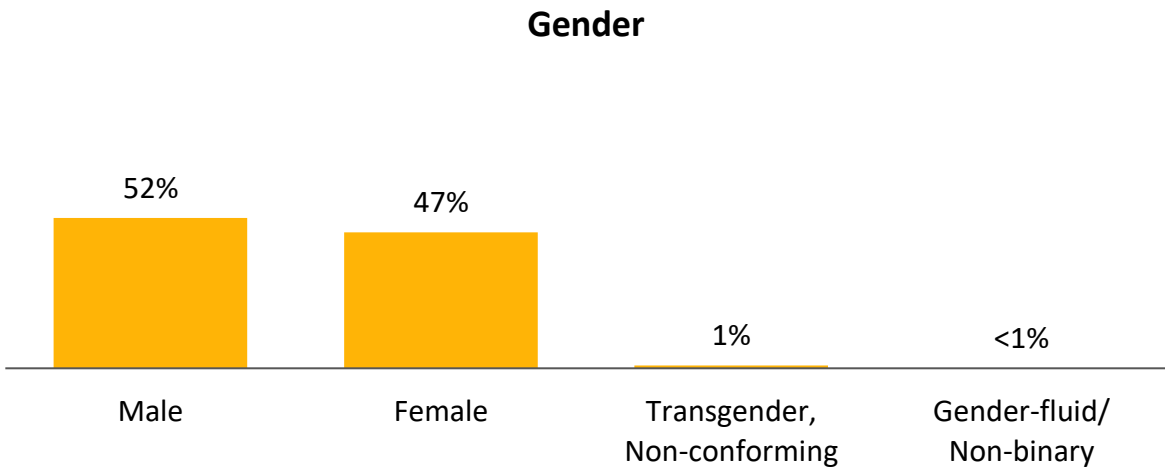
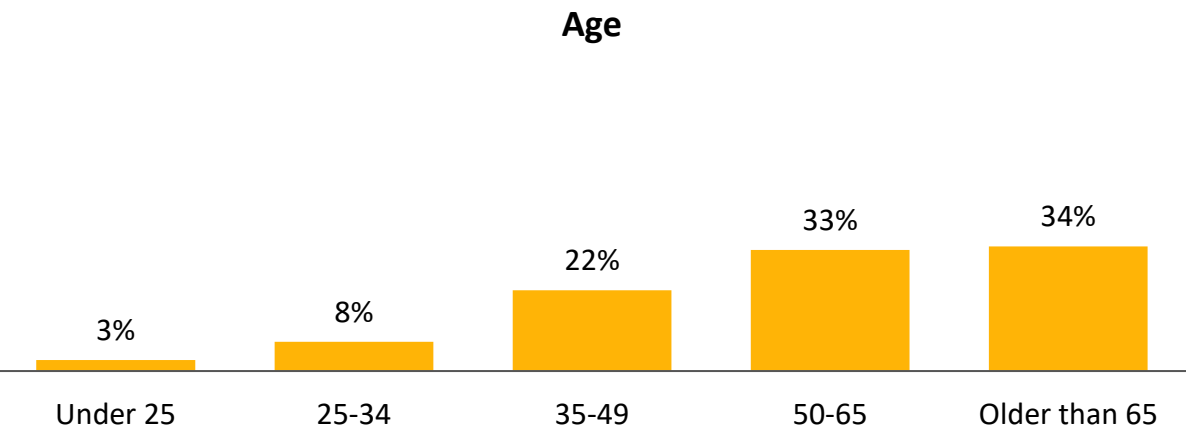
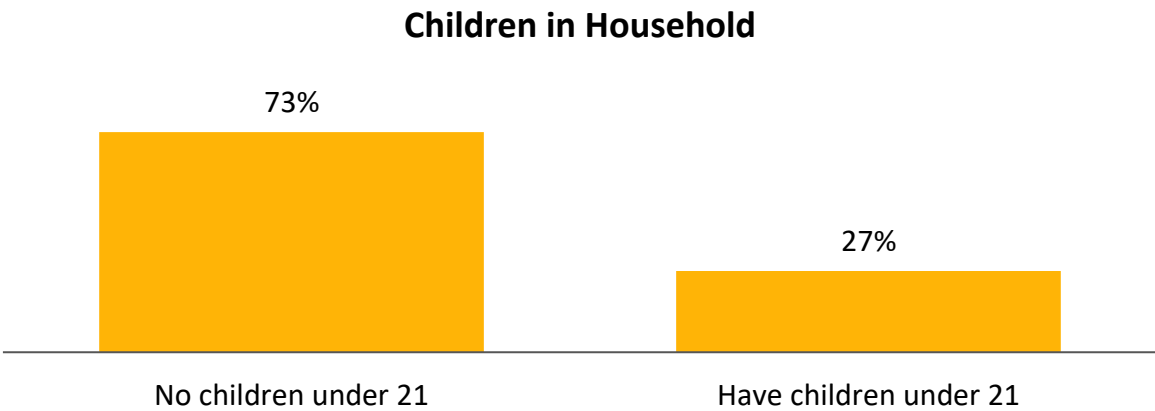
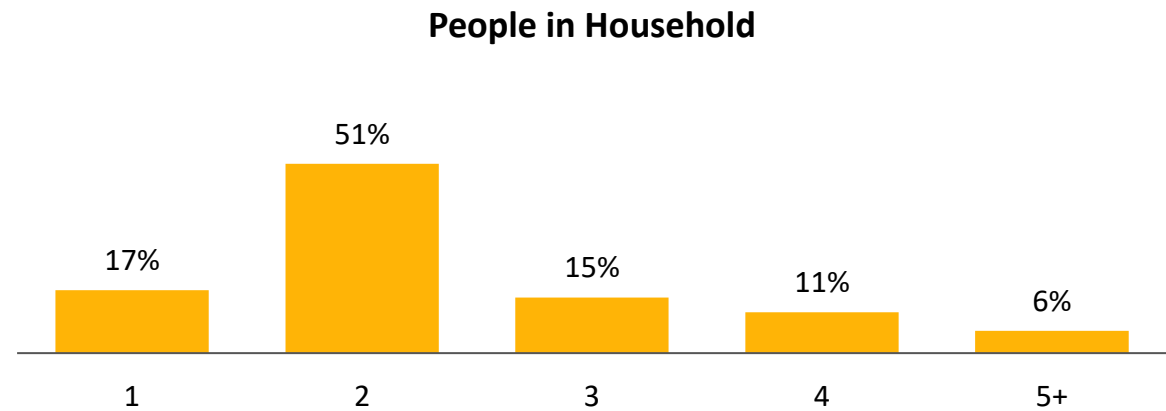
POTENTIAL VISITOR PROFILE

POTENTIAL VISITOR PROFILE

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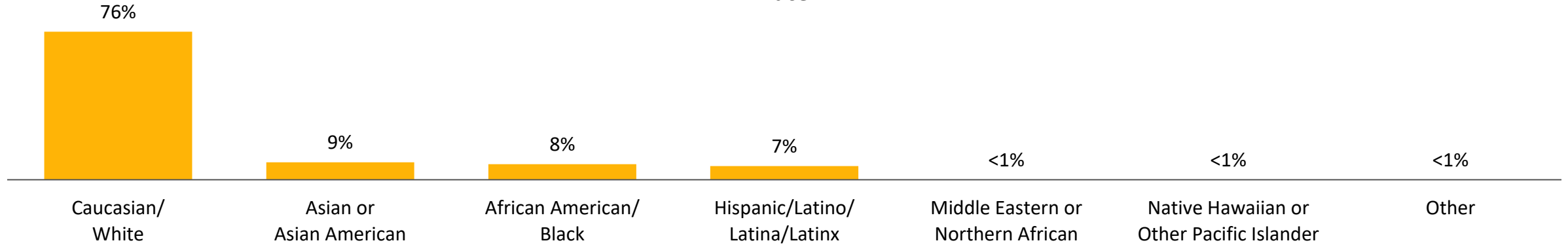
Average People in Household	2.4
People with Children in Household	27%
Average Age	58
Gender	Male (52%)
Race/ethnicity	Caucasian/White (76%)
Average Household Income	\$119,230

POTENTIAL VISITOR PROFILE

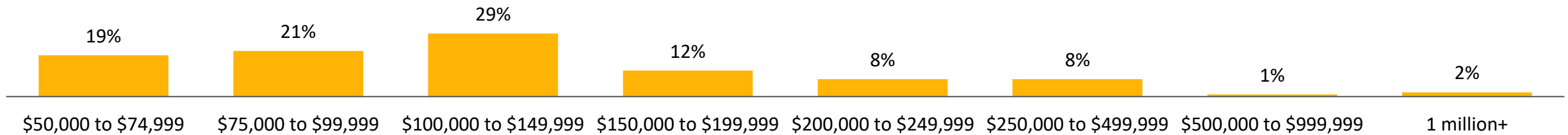


POTENTIAL VISITOR PROFILE

Race



Income



PREVIOUS VS NON-VISITOR CROSSTABS

AWARENESS OF FLORIDA DESTINATIONS

WHICH OF THE FOLLOWING FLORIDA DESTINATIONS HAVE YOU HEARD OF? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Orlando, FL	95%	89%	90%
Miami/Fort Lauderdale, FL	92%	88%	89%
Key West, FL	91%	82%	84%
Daytona Beach/New Smyrna Beach, FL	95%	80%	83%
Tampa/St. Petersburg/Clearwater, FL	94%	79%	82%
West Palm Beach, FL	92%	77%	80%
Jacksonville, FL	100%	75%	79%
Pensacola, FL	89%	69%	73%
Sarasota, FL	87%	69%	72%
Tallahassee, FL	91%	69%	72%
St. Augustine/Ponte Vedra, FL	84%	67%	70%
Gainesville/Ocala, FL	79%	61%	64%
Destin, FL	70%	53%	56%
Amelia Island/Fernandina, FL	67%	42%	46%
Other	9%	5%	6%
None of the above	0%	2%	2%

AWARENESS SOURCES

HOW DID YOU BECOME AWARE OF JACKSONVILLE? SELECT ALL THAT APPLY.	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Recommendations from friends and family	53%	36%	40%
Search sites	19%	12%	14%
Visited previously for leisure vacation with friends/family	24%	12%	14%
Travel websites	21%	12%	14%
Television	14%	11%	12%
Visited previously for business or conference	16%	10%	11%
YouTube	13%	8%	9%
Noticed there was a direct flight to Jacksonville from my airport	8%	8%	8%
Online travel reviews, blogs, stories	12%	7%	8%
Hotel/Airline websites	14%	7%	8%
Personal social media	10%	7%	7%
Professional travel services	9%	6%	7%
Online article	14%	4%	6%
Attended a special event	11%	4%	5%
Brochure, travel guides, visitor guide	8%	4%	5%
Magazine ad	8%	3%	4%
YouTube TV	9%	2%	4%
Magazine article	5%	2%	3%
Ad on a website/app	5%	2%	3%
VisitJacksonville.com	8%	2%	3%
Weather app	0%	2%	2%
Billboard, bumper sticker, or other outdoor promotion	3%	2%	2%
Hulu	6%	1%	2%
Spotify	6%	1%	2%
Newspaper	6%	1%	2%
Pandora	5%	1%	2%
Visit Jacksonville's social media	6%	1%	2%
Radio	1%	1%	1%
Other	6%	19%	17%

AWARENESS RESPONSE

AFTER SEEING THIS INFORMATION ABOUT JACKSONVILLE, FL, WHICH OF THE FOLLOWING DID YOU DO? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Went to the Internet to learn more about vacationing in Jacksonville, FL	49%	27%	31%
Considered taking a future trip to Jacksonville, FL	44%	24%	28%
Asked a friend about Jacksonville, FL	24%	17%	19%
Booked a trip to Jacksonville, FL	48%	8%	16%
Search on social media for content about vacationing in Jacksonville, FL	17%	15%	15%
Went to VisitJacksonville.com	13%	8%	9%
Went to Visit Jacksonville's social media	12%	3%	5%
Signed up for Visit Jacksonville's E-Newsletter	8%	2%	3%
Followed or liked Visit Jacksonville on their social media	6%	2%	3%
Other	0%	2%	1%
Nothing	10%	44%	37%

PREVIOUS FLORIDA VACATION DESTINATIONS

WHICH OF THESE DESTINATIONS HAVE YOU EVER VACATIONED IN? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Orlando, FL	89%	72%	75%
Miami/Fort Lauderdale, FL	66%	50%	53%
Tampa/St. Petersburg/Clearwater, FL	68%	40%	45%
Key West, FL	48%	38%	40%
Daytona Beach/New Smyrna Beach, FL	52%	24%	29%
St. Augustine/Ponte Vedra, FL	48%	23%	28%
West Palm Beach, FL	35%	17%	20%
Jacksonville, FL	100%	3%	19%
Sarasota, FL	25%	17%	18%
Destin, FL	32%	10%	14%
Amelia Island/Fernandina, FL	24%	9%	12%
Pensacola, FL	24%	10%	12%
Gainesville/Ocala, FL	13%	6%	8%
Tallahassee, FL	16%	4%	6%
Other	8%	4%	5%
None of the above	0%	8%	6%

MAIN REASON FOR JACKSONVILLE TRIP

WHAT WAS THE MAIN REASON FOR EACH OF THOSE VACATIONS?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Vacation/leisure trip	68%	79%	73%
Visiting friends/family	33%	21%	28%
Sporting event	16%	14%	15%
Attending a special event or festival	14%	14%	14%
Business/conference	9%	10%	10%
Medical reasons	5%	6%	5%
Other	1%	2%	2%

REASONS FOR NOT VACATIONING IN JACKSONVILLE

WHY HAVEN'T YOU VACATIONED IN JACKSONVILLE, FL BEFORE? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Prefer another place	NA	47%	47%
Don't know much about it	NA	27%	27%
Not enough to do in the Jacksonville area	NA	20%	20%
It's not the right type of destination for my family	NA	16%	16%
Want variety in vacation destinations	NA	13%	13%
Too difficult to get to/too far	NA	8%	8%
Friends/family have never gone there	NA	8%	8%
Political climate not aligning with personal views	NA	7%	7%
Too much traffic	NA	6%	6%
Value for the money	NA	5%	5%
Money - Cannot afford/too expensive	NA	4%	4%
Personal safety concerns	NA	4%	4%
Too crowded	NA	4%	4%
Cleanliness of the destination	NA	3%	3%
Air service is limited	NA	3%	3%
My hotel is not there	NA	2%	2%
Did not take any vacations	NA	1%	1%
Unfavorable exchange rate	NA	0%	0%
Bad previous experience	NA	0%	0%
Lack of public transportation options	NA	0%	0%
Unsure	NA	9%	9%
Other	NA	8%	8%

TYPICAL TRAVEL PARTY

HOW DO YOU TYPICALLY TRAVEL? SELECT UP TO TWO	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
As a couple	61%	64%	63%
With other couples/friends	28%	27%	27%
With children	19%	22%	22%
By yourself	26%	16%	18%
In a tour group	8%	3%	4%
With business associates	3%	2%	3%
Other	0%	3%	2%

SIMILAR VACATION EXPERIENCES

BASED ON WHAT YOU KNOW OR HAVE HEARD, DO ANY OF THE FOLLOWING DESTINATIONS PROVIDE A SIMILAR VACATION EXPERIENCE TO JACKSONVILLE, FL? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Daytona Beach, FL	40%	30%	32%
Myrtle Beach, SC	40%	28%	30%
Tampa, FL/Clearwater/St. Petersburg, FL	25%	25%	25%
St. Augustine/Ponte Vedra, FL	36%	22%	24%
Panama City Beach, FL	22%	20%	21%
Miami, FL	26%	20%	21%
Charleston, SC	21%	19%	19%
Savannah, GA	26%	18%	19%
Orlando, FL	25%	17%	18%
Sarasota, FL	21%	17%	17%
Destin/Ft. Walton Beach, FL	25%	16%	17%
Amelia Island/Fernandina, FL	23%	12%	14%
Charlotte, NC	8%	8%	8%
Nashville, TN	7%	5%	5%
Louisville, KY	3%	4%	4%
Austin, TX	8%	4%	4%
Other	2%	1%	1%
Don't know	4%	19%	16%
Nothing like it	6%	4%	4%

WHY VACATION IN JACKSONVILLE

BASED ON WHAT YOU KNOW OR HAVE HEARD, WHAT MAKES JACKSONVILLE, FL APPEALING AS A VACATION DESTINATION? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Beaches	74%	55%	58%
Weather	52%	39%	41%
Restaurants	54%	28%	33%
Relaxing and unwinding	46%	28%	31%
Water activities	28%	27%	27%
Affordable	47%	21%	25%
Nature, environment	34%	21%	23%
River waterfront	37%	17%	20%
Culture, museums, performing arts, etc.	22%	15%	16%
Watching or participating in sports tournaments/events	31%	12%	15%
Shopping/antiquing	20%	11%	13%
Festivals and events	21%	10%	12%
Proximity to family/friends	21%	9%	11%
Watching or participating in events, arts & music festivals, etc.	26%	8%	11%
Unique neighborhoods and food scenes	22%	8%	10%
Breweries	8%	7%	7%
Golf/tennis/pickleball	10%	7%	7%
Other	0%	2%	1%
I don't know enough to say	2%	20%	17%

JACKSONVILLE AS A VACATION DESTINATION

BASED ON WHAT YOU KNOW AND HAVE HEARD, HOW WOULD YOU RATE JACKSONVILLE, FL AS A VACATION DESTINATION?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Very negative	3%	3%	3%
Somewhat negative	2%	8%	7%
Neither positive nor negative	8%	31%	27%
Somewhat positive	42%	39%	39%
Very positive	45%	19%	24%
SOMEWHAT+VERY POSITIVE	87%	58%	63%

JACKSONVILLE ATTRACTIONS

WHICH OF THE FOLLOWING ATTRACTIONS, ACTIVITIES, OR AREAS HAVE YOU VISITED OR WOULD BE INTERESTED IN VISITING DURING A TRIP TO JACKSONVILLE, FL? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Jacksonville Beaches	68%	53%	55%
Downtown Jacksonville	57%	49%	50%
St. Augustine or Amelia Island/Fernandina	53%	40%	42%
Jacksonville Zoo and Gardens	41%	36%	37%
Outdoor parks and preserves	29%	29%	29%
Jacksonville Jaguars Stadium	49%	22%	27%
St. Johns River activities	31%	23%	24%
Local breweries/distilleries	38%	22%	24%
Riverside Arts Market	25%	21%	22%
MOSH (Museum of Science and History)	27%	16%	18%
Cummer Museum of Art and Gardens	15%	19%	18%
Major events or festivals	27%	16%	18%
Riverside and Avondale	27%	15%	17%
San Marco Square	19%	14%	15%
Daily's Place Amphitheater	14%	8%	9%
Other	2%	1%	1%
I don't know enough to say	3%	12%	11%

RIVERFRONT ACTIVITIES/DOWNTOWN JACKSONVILLE

HOW APPEALING ARE RIVERFRONT ACTIVITIES (E G , BOAT TOURS, WATER TAXIS, RIVERFRONT DINING, FESTIVALS) AS PART OF A JACKSONVILLE, FL VISIT?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Very appealing	47%	26%	30%
Somewhat appealing	39%	44%	43%
Neutral	8%	16%	15%
Not very appealing	5%	9%	8%
Not appealing at all	2%	5%	4%
SOMEWHAT+VERY APPEALING	86%	71%	73%

WHEN THINKING ABOUT A CITY TO VISIT, HOW IMPORTANT IS THE DOWNTOWN AREA IN SHAPING YOUR PERCEPTION OF THE DESTINATION?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Very important	32%	23%	24%
Somewhat important	54%	44%	46%
Neutral	10%	20%	18%
Not that important	5%	10%	9%
Not important at all	0%	4%	3%
SOMEWHAT+VERY IMPORTANT	86%	67%	70%

LIKELIHOOD TO VISIT FOR MAJOR EVENT

HOW LIKELY WOULD YOU BE TO VISIT JACKSONVILLE, FL FOR A MAJOR EVENT (SPORTS, MUSIC, FOOD, ARTS)?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Very likely	21%	16%	16%
Somewhat likely	41%	24%	27%
Neutral	16%	20%	20%
Somewhat unlikely	11%	18%	17%
Very unlikely	10%	22%	20%
SOMEWHAT+VERY LIKELY	62%	40%	43%

WHAT TYPES OF EVENTS WOULD MOST INTEREST YOU? SELECT ALL THAT APPLY	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Food and beverage festivals	55%	43%	45%
Nature/outdoor festivals	42%	37%	37%
Music events or concerts	46%	34%	36%
Cultural and heritage events	44%	32%	34%
Holiday or seasonal festivals	40%	33%	34%
Sports tournaments	41%	26%	28%
Other	2%	3%	3%
I am not interested in events	5%	16%	14%

LIKELIHOOD TO VACATION IN JACKSONVILLE

HOW LIKELY ARE YOU TO VACATION IN JACKSONVILLE, FL IN THE NEXT YEAR?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Very unlikely	16%	27%	25%
Somewhat unlikely	16%	15%	15%
Neither likely nor unlikely	21%	23%	23%
Somewhat likely	21%	24%	23%
Very likely	26%	12%	14%
SOMEWHAT+VERY LIKELY	47%	36%	37%

AFTER SEEING THIS VIDEO, HOW LIKELY ARE YOU TO VACATION IN JACKSONVILLE, FL IN THE NEXT YEAR OR SO?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Very unlikely	6%	20%	17%
Somewhat unlikely	2%	13%	12%
Neither likely nor unlikely	40%	28%	30%
Somewhat likely	28%	24%	24%
Very likely	24%	16%	17%
SOMEWHAT+VERY LIKELY	52%	39%	41%
DIFFERENCE FROM BEFORE VIDEO	+5%	+3%	+4%

REASONS FOR NOT VACATIONING IN JACKSONVILLE IN THE FUTURE

WHY ARE YOU UNLIKELY TO VACATION IN JACKSONVILLE, FL IN THE NEXT YEAR OR SO?	PREVIOUS VISITOR	NON-VISITOR	ALL POTENTIAL VISITORS
Prefer another place	50%	60%	59%
It's not the right type of destination for my family	0%	23%	20%
Don't know much about it	5%	21%	19%
Not enough to do in the Jacksonville area	14%	20%	19%
Political climate not aligning with personal views	21%	16%	17%
Want variety in vacation destinations	34%	8%	12%
Personal safety concerns	10%	10%	10%
Too much traffic	10%	8%	9%
Too difficult to get to/too far	6%	8%	8%
Too crowded	0%	8%	7%
Value for the money	5%	7%	7%
Money - Cannot afford/too expensive	5%	5%	5%
Air service is limited	10%	3%	4%
Cleanliness of the destination	6%	3%	4%
Friends/family have never gone there	0%	3%	3%
Did not take any vacations	5%	1%	2%
Bad previous experience	10%	1%	2%
Lack of public transportation options	0%	1%	1%
My hotel is not there	0%	1%	1%
Unfavorable exchange rate	0%	0%	0%
Unsure	5%	2%	3%
Other	15%	11%	12%

DESTINATION ATTRIBUTES: PREVIOUS VISITORS

	IMPORTANCE	RATING	GAP
Sense of comfort and safety	4.6	4.3	-0.3
Affordability and value for the money	4.3	4.3	0.0
Easy to get around while in destination	4.2	4.1	-0.1
Quality local food and drinks	4.0	4.1	+0.1
Friendly and welcoming locals	4.0	4.2	+0.2
Having beaches	3.9	4.5	+0.6
Unique local attractions	3.8	4.0	+0.2
Rich historical and cultural heritage	3.7	3.9	+0.2
Family-friendly atmosphere	3.7	4.3	+0.6
Outdoor activities (Nature walks, hiking, camping, etc.)	3.7	4.2	+0.5
Vibrant downtown and eclectic local charms	3.6	3.9	+0.3
Art, music, and cultural festivals	3.3	4.0	+0.7
Special event or festival	3.3	4.0	+0.7
Activities such as golf, tennis, and biking	3.2	4.2	+1.0
Watching or participating in sports	3.2	4.3	+1.1
Variety of water-based activities (Boating, fishing, etc.)	3.2	4.1	+0.9
Nightlife and bar scene	3.0	4.0	+1.0

DESTINATION ATTRIBUTES: NON-VISITORS

	IMPORTANCE	RATING	GAP
Sense of comfort and safety	4.5	3.7	-0.8
Affordability and value for the money	4.2	3.8	-0.4
Easy to get around while in destination	4.2	3.7	-0.5
Quality local food and drinks	4.1	3.8	-0.3
Friendly and welcoming locals	4.1	3.8	-0.3
Unique local attractions	3.9	3.6	-0.3
Rich historical and cultural heritage	3.6	3.6	0.0
Having beaches	3.6	4.2	+0.6
Family-friendly atmosphere	3.6	3.8	+0.2
Outdoor activities (Nature walks, hiking, camping, etc.)	3.5	3.7	+0.2
Vibrant downtown and eclectic local charms	3.4	3.6	+0.2
Art, music, and cultural festivals	3.1	3.5	+0.4
Variety of water-based activities (Boating, fishing, etc.)	3.0	3.9	+0.9
Special event or festival	2.8	3.6	+0.8
Nightlife and bar scene	2.5	3.5	+1.0
Activities such as golf, tennis, and biking	2.4	3.7	+1.3
Watching or participating in sports	2.3	3.6	+1.3

Visit Jacksonville Market Perception Study

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Downs & St. Germain Research

contact@dsg-research.com

850.906.3111 | www.dsg-research.com